Definitions

- Skills: we have used definitions from the UK Commission for Funding and Skills: National Employer Skills Survey when defining skills.

- Skills shortage vacancies: are a subset of job vacancies where a role is hard to fill due to a lack of required basic or specialist skills, qualifications or experience in the applicants.

- Skills gaps: exist where employers report having employees who are not fully proficient at their job.

- Small charities: in the context of this survey a small charity refers to charities, community groups and other organisations working in the field of social change who deliver their services locally, regionally, nationally or internationally. We have surveyed charities with an annual turnover of less than £1.5 million.
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Foreword

As previously reported, skills gaps still present a major barrier for small local charities and community organisations across the UK, with more training still cited as a solution to the problem. However as one size will not fit all, the challenge for umbrella support bodies who provide training is to flex their delivery models to meet the needs of small and local charities and community groups. We must come together to offer a blended learning experience, meeting the needs of those who live in well-connected urban centres to those who live and work in rural settings, to respond to the requirements of paid staff and the differing requirements of volunteers, and to those who prefer or require distance learning to those who seek face to face support.

Most recently we have announced our Strategic Partnership with NCVO. We hope through this partnership to make more skills development support available to more small and local charities and community groups. We want to work as collaboratively as we can with all infrastructure organisations and in the last two years have taken advantage of funding from DCMS to work more collaboratively and deliver more services through local CVS organisations who are able to reach small local charities and community organisations in their local communities.

In addition to this we have expanded our menu of learning experiences to include more on-line content through 30 and 90 minute webinars and video content. In late 2018 we launched the first e-learning module for small and local charities and community groups on how to develop their Fundraising Strategy. We donated 97 courses to charities with turnovers of under 50K per annum. We are seeing significant interest in this model of learning and at the time of launching this report, will launch the e-learning Legacy Fundraising course, an area identified as most needed in the skills survey.

We would like to work with other sector and non-sector organisations to develop content in Business Infrastructure to support skills development in all areas covered in this report.

This year’s respondents continued to call for increased training provision, not only for paid staff but also for volunteers. With respondents citing volunteers as one of the solutions to address skills gaps, it is increasingly important that training opportunities are opened up to volunteers.

We must continue to focus on delivering the highest quality support to our beneficiaries, even at a time when many charities are being asked to take on an ever expanding role in the delivery of public services. If we are to meet these challenges and remain focused on our beneficiaries, we need to ensure that both staff and volunteers are well equipped. When staff and volunteers are trained, supported and have access to advice, they are able to do their jobs well; they feel confident and that in itself improves the way they support the charity's beneficiaries.

We hope that this survey continues to leverage and influence the government and other funders to support the development of skills across the sector. A skilled workforce, both staff and volunteers, ensures the long-term self-sustainability of our irreplacable, vibrant and diverse sector.
Executive Summary

- Skills areas with the poorest performance ratings include lobbying (57%), government relations (54%) and the latest HR laws (52%).
- Skills areas which respondents rated strongly include basic IT skills (76%), organisational skills (76%) and people management (72%).
- Fundraisers remain the most challenging vacancy to recruit for, according to 23% of small charities.
- Salary is the most commonly cited barrier to why vacancies are hard to fill, identified by 18% of respondents.
- In fundraising, legacy fundraising (72%), online fundraising (70%) and major donor fundraising (69%) were the top three categories in need of most upskilling by small charities.
- Trustee governance (28%) was selected as the area that most needed upskilling amongst trustees.
- 75% of small charities believe trustees ought to play an active role in fundraising, while only 46% actually do play an active role.
- Within financial management, 36% believed fundraising required the most development.
- Business planning (28%) was identified as the area requiring most upskilling by management specialists.
- Within the field of public policy, 57% indicated lobbying as requiring the greatest upskilling.
- Website development (43%) was selected as needing further upskilling the most within IT.
- First aid was indicated by 27% of respondents as requiring further upskilling within Health and Safety.
- In marketing and communications, structuring communication plans was identified by 50% of respondents as needing upskilling.
- Securing resources (36%), such as sponsorship and income, was selected as the area requiring greatest upskilling by respondents in project management roles.
- Lack of funding for training and development (64%) and lack of time available for employees to attend training (51%) remain as the primary causes for skills gaps within their small charity.
- The main impacts of skills gaps identified were an increased workload for colleagues (48%), increased time to deliver work (45%) and decreased ability to take on new work (42%).
- The most common action believed to be the best solution, and also taken to address skills gaps, was further training provision (47%).
- Only 16% perceived using volunteers instead of paid employees as a solution, yet 36% took this as an action to address skills gaps.
- The majority (69%) reported having a formal business plan, but only 15% have an annual training plan linked to the business plan.
Introduction

The survey was first conducted with our members in 2010/11, and is conducted biennially. The 2018/19 survey represents the fifth edition in the series.

This survey identifies and explores key skills issues facing small charities, focussing on significant skills gaps and shortages and discusses approaches to dealing with them. The survey has been conducted by the FSI as part of our work to promote the skills, knowledge and sustainability of small charities.

Aims and Objectives

This is the fifth edition of our biennial Small Charity Sector Skills Survey, which aims to explore and examine the nature and scope of skills shortages and gaps in the paid workforce in order to provide reliable measures to:

- Analyse skills gaps in the existing workforce
- Identify hard to fill vacancies and contributing factors
- Identify correlations and differences between current and earlier surveys
- Consider measures and approaches to deal with skills gaps

The findings of the survey are based on valid responses from individuals working in registered charitable organisations with an annual turnover of less than £1.5 million. The majority of the respondents were in leadership roles or governance positions within these organisations. However due to the limited workforce in many small charities, a greater number of respondents had multiple roles within their organisations. Accordingly the survey focused on specific skills utilised by individuals within the sector as opposed to specific job roles.

The survey highlights the need for skills development within the Small Charity Sector. It is intended to inform both the development of FSI services and be used to leverage and influence skills development in the sector as a whole.

Methodology

The research was conducted via an online survey which was designed to be consistent with the approach taken in the FSI’s five previous Small Charity Sector Skills Surveys in order to provide continuity in the results. The survey was distributed to the FSI’s member database of over 7,000 small charities. In 2018/19, we have changed the structure of how we collect data for our Skills Survey. Each of the seven topics we focused on were split into shorter, individual surveys to make it quicker and easier for small charities to take part. The demographics and data in this first section refer to the following six surveys where 952 small charities responded:

- Causes and impacts of skills gaps
- Governance and management
- Finance and IT
- HR, health and safety and project management
- Marketing, communications and public policy
- Recruitment and training.

Our fundraising section of the survey is in Section 2 of this report, where 1,625 small charities took part.
Responding Charities by Annual Turnover

All of the responding small charities in this study have an annual turnover of less than £1.5 million. Significantly, over two fifths of respondents represented charities with an annual turnover of £250,000 or less. This reflects results of previous surveys (2010/11, 2012/13, 2014/15 and 2016/17), however the percentage has decreased from 67% in 2010/11 to 43% in 2018/19.

Responding Charities by Cause Type

The charities featured in this survey represent a wide range of cause types. The three most commonly represented charities are children and young people (23%), community (19%) and health (14%).

Responding Charities by Location

Respondents were asked where they deliver their support. 45% of respondents said their charity delivers support locally (an increase of 2% from 2014/15), 24% nationally, 17% internationally and 14% regionally.
Skills Ratings

Skills areas with strong performance ratings are where 50% or more respondents rated it to be excellent or very good, and skills with poor performance ratings are where 40% or more respondents rated skills areas to need some upskilling or significant upskilling.

Strong Performance Ratings

The strongest areas where small charities report their skills as excellent or very good were in basic IT skills and organisational skills (76%). Other strong areas continue to include people management (72% - up 6% from 2016/17), budgeting (72%) and managing deadlines (71%). New areas rated as strong include appraisal skills (60%), and strategic business management (53%).

Skills with strong performance ratings

Performance ratings

**Strong**
- Basic IT skills
- Organisational skills
- People management
- Budgeting amongst all staff
- Managing deadlines
- Staff/volunteer management
- Leadership
- Skills in effective supervision and appraisal of staff
- Project design and planning
- Team building and motivation

**Neither**
- Copywriting
- First aid
- Business planning
- Social media
- Direct communications
- Research
- Health & safety procedures and policies
- Managing difficult staff behaviour
- Health & safety knowledge
- Recruitment practices and policies

**Poor**
- Lobbying
- Government relations
- Latest HR laws and practices
- Structuring communication plans
- Marketing planning
- Website development
- Website management
Poor Performance Ratings

Skills with the poorest ratings have changed since 2016/17, where the top three were engaging with businesses, strategic use of IT and impact reporting. This time, lobbying (57%), government relations (54%) and the latest HR laws (52%) were the three areas requiring the most upskilling.

![Skills with poor performance ratings](image)

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Recruitment Problems

Vacancies and Barriers

Priority areas

- Fundraisers continue to be the most challenging vacancy to recruit for, selected by almost a quarter (23%) of small charities.
- Whilst volunteering levels in the UK remain stable, Volunteer Manager remains the second most difficult position to fill (9%).

> “The only recruitment I’ve carried out in the last year has been for volunteer fundraisers, marketers and trustees - all unsuccessful.”

> “We are a small charity and we have struggled to recruit staff at the level needed, due to breadth of role responsibilities and part time opportunity.”

- Salary is the most commonly cited barrier to recruitment (18%). Few or no applications (17%) and not enough funds (16%) are also barriers to recruitment, taking second and third positions respectively.

> “Would be great if we could pay more - not able to do a pay rise for many years as quite often we have not been able to uplift our service costs as not been allowed by local borough.”

Key changes

- Compared to previous survey results, the percentage of organisations identifying fundraising vacancies as difficult to fill has continued to fall from a peak of 57% in 2012/13. This continued fall could be attributed to the rise in the number of affordable fundraising training opportunities through organisations like the FSI and Small Charities Coalition, and to the investment made in the Small Charities Training Programme by the government.
- The barriers faced appear to be similar to those observed in previous surveys. Salary being chosen as a barrier has remained relatively static at 18%, declining each year from a peak of 58% in 2012/13.

Themes

- A recurring theme that came up from respondents was also that it is difficult to find volunteers, and particularly difficult to find those who are willing to commit. This comes as no surprise following recent statistics which showed that less than a third (30%) of those wanting to volunteer within the next year are willing to make it a regular commitment.

> “We do find that volunteers bring their own work and life experiences to our charity, but it isn’t always easy to find volunteers, including trustees with the skill sets we don’t already have. Only a small number of our volunteers have volunteered before. It is becoming increasingly hard to attract any volunteers.”

> “When recruiting for specialist volunteer roles, such as a treasurer, people seem less willing to commit.”

> “All our roles are volunteers - finding expertise for free is hard, especially when it’s outside our skill set/contacts network.”

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2 NCVO (2019), Time Well Spent
Which vacancies do you find hardest to fill?

Reasons for hard to fill vacancies

Not enough funds to advertise widely enough: 16%
Job only temporary or short-term contract: 11%
Competition from other orgs: 7%
Terms & conditions: 2%
Salary: 18%
Applicants’ lack of qualifications: 3%
Few or no applicants: 17%
Applicants’ lack of experience: 11%
Applicants’ lack of basic skills: 4%
Applicants’ lack of specialist skills: 12%

Year-on-year comparison of those citing salary as a barrier to recruitment.
Key Skills Issues

Governance

Priority areas
- Trustee governance was indicated as the area which requires the most upskilling (28%).
- This was closely followed by formal board management skills where 27% reported they needed upskilling.

Key changes
- In 2018/19 trustee governance overtook leadership as the area where small charities felt the greatest need for upskilling (28%)
- 0% of respondents felt their leadership needed significant upskilling, down from 2% in 2016/17.
- Those reporting excellent or very good skills in formal board management has decreased from 57% in 2016/17 down to 50% in 2018/19 (level with 2014/15).

Themes
- When asked about what skills small charity’s trustee boards could benefit from developing, the top 3 themes that emerged were ‘financial skills’, ‘business skills’ and ‘legal skills’.

“We need to draw in additional trustees and volunteers who have skills we don’t already have. We just don’t really know how to do this in a way that isn’t piecemeal.”

In the Fundraising section of the surveys, we asked small charities about the role their trustees play in fundraising. There was a stark difference between the percentages of respondents who felt trustees should play an active role in fundraising, compared to the percentage whose trustees actually did so.
Management

Priority areas
• Business planning was identified as the area requiring most upskilling for the third survey in a row (28% in 2018/19, 29% in 2016/17 and 27% in 2014/15)

Key changes
• Managing a diverse workforce has risen to the second strongest skill area (60%, up 6% since 2016/17).
• Those rating their people management skills as excellent (16%) has increased by 8% since 2016/17.

Themes
• People management (72%) remained the top skills area.
• Other strong areas included other aspects of people management, such as appraisals (60% rated their skills as strong) and team building (59%).

Financial Management

Priority areas
• Amongst those responsible for the finances of their charity, the majority felt that fundraising required the most upskilling (36%, similar to 37% in 2016/17)

Key changes
• 40% rated their fundraising skills as very good or excellent, up from 35% in 2016/17.
• The percentage of respondents reporting budgeting amongst staff as an area for improvement increased by 2% since 2016/17 to 27%.

Themes
• Despite budgeting amongst staff being the second most in need skills area, the best rated area from financial management and budgeting skills, where 64% reported that their skills were strong in this area.
• The next top rated area was financial accountability (61%).
The greatest need for upskilling continued to be in website development (43% compared to 37% in 2016/17). 33% reported a need for upskilling in specialist IT skills. This mirrors recent research where 40% of charities rated their trustees’ IT knowledge as below average.

No respondents responsible for their organisation’s IT felt they needed significant upskilling in basic IT skills, with 76% feeling confident in this area (compared to 69% in 2016/17).

Those requiring upskilling in social media skills has risen again to 39% (compared to 35% in 2016/17, where it had dropped from 45% in 2014/15).

Responses to this section identified website development as an area for development, rating it the area 6th most in need of upskilling out of the whole survey.

Other responses acknowledged that IT skills needed improving, but time to develop them was limited: “(I don’t have the time to be CEO and an IT engineer)”
Project Management

Priority areas
• Securing resources was by far the weakest area for respondents, with 36% identifying this as an area in need of upskilling.

Key changes
• Those requiring upskilling in their organisational skills has decreased from 13% in 2016/17 to just 6% in 2018/19.
• Those feeling confident in their budgeting skills has increased by 11% (61% in 2016/17 up to 72%).

Themes
• The majority of respondents with responsibility for their small charity’s project management were confident in their skills, with over 60% feeling their skills were very good or excellent in all areas, except from securing resources.

HR and Health & Safety

Priority areas
• Latest HR laws and practices (52%) was by far the area most in need of upskilling.
• Over a quarter of respondents (27%) reported a need for upskilling in their first aid skills.

Key changes
• Over half (52%) of respondents reported that they needed upskilling in the latest HR laws and practices. This has dramatically increased from 35% in 2016/17 and 27% in 2014/15.
• First aid overtook health and safety procedures and policies as the area requiring most upskilling amongst respondents (27%).

Themes
• This area had the most neutral responses - most respondents felt their skills here were neither very good nor weak.
HR

Recruitment practices & policies

Latest HR laws & practices

Payroll management

Benefits administration

Talent management

Health and Safety

Health & safety knowledge

Health & safety procedure & policies

First aid

Marketing & Communications and Public Policy

Priority areas

• Structuring communication plans remains the area within marketing and communications identified by respondents as needing most upskilling.

• Once again, within the field of public policy, respondents indicated lobbying as the area requiring most upskilling (57%), closely followed by government relations (54%).

Key changes

• The percentage of respondents indicating that they needed upskilling in structuring communication plans has increased by 9% (50% compared to 41% in 2016/17)

• Similarly, those citing lobbying as needing upskilling has increased by 10% (now 57% in 2018/19).
Themes

- Five of the seven weakest skills areas across the whole survey are from marketing and communications, and public policy, showing a huge need for upskilling in this area.

Public Policy

- Government relations
- Lobbying
- Research

Marketing & Communications

- Social media
- Membership / supporter retention
- Website management
- Direct communications
- Structuring communication plans
- Marketing planning
- Copywriting
Section 2

Fundraising Skills Gaps

1,625 small charity staff responded to the Fundraising section of the Skills Survey. The demographics of these respondents are outlined here.

### Annual Turnover

- Up to £50k: 22%
- £51k - £250k: 32%
- £251k - £500k: 21%
- £501k - £1m: 17%
- £1m - £1.5m: 7%
- £1.5m - £5m: 2%

### Cause Type

- Welfare, advocacy & rights: 8%
- Sport: 1%
- Religion: 2%
- Homelessness: 3%
- Health: 13%
- Grant making & third sector capacity building: 3%
- Environment: 2%
- Education & training: 13%
- Disability: 9%
- Community: 13%
- Children & young people: 25%
- Arts & culture: 6%
- Animals: 1%

### Location

- Regional: 11%
- National: 23%
- Local: 53%
- International: 13%
Priority areas

- For the first time, respondents were given the choice of legacy fundraising, which is indicated as the area most in need of support (72%). This may come as no surprise, with Legacy Trends\(^4\) showing legacy income to have reached its highest ever level in 2017, now estimated at between £2.8 and 2.9 billion, meaning many small charities are keen to develop this income stream.

- Online (70%), major donor (69%) and corporate (67%) fundraising are all still hugely in need of upskilling, with all of these being indicated by over two thirds of respondents.

Key changes

- For the first time since we began collecting the Skills Survey in 2010, the top three areas requiring most upskilling have changed slightly. Legacy fundraising is indicated as the area most in need of support, followed by online fundraising (70%) and major donor (69%).

- This has knocked corporate fundraising to the area that is fourth most in need of upskilling, although the percentage of respondents indicating they need upskilling (64%) in this area has increased by 3% since 2016/17.

“We want to bring in more skills from people involved in client recruitment and management so that we can improve our income generation - the skills and experience in creating a new business within a corporate context would be useful transferred across the charity sector.”

\(^4\) Smee and Ford 2019, Legacy Trends 2018
Themes

• Small charities would hugely benefit from improving their skills in all areas of fundraising. Of the 13 areas examined, over 50% of respondents reported a need for upskilling in 9 skills areas.

• Presentation skills were the top rated area, with 32% of respondents feeling confident in this area.

• This year legacy fundraising is indicated as the area most in need; the previous top three (Major Donor, Online and Corporate) remain high, with online, major donor and corporate fundraising remaining weak skills areas. The graph below shows a comparison of skills areas since 2010/11.
Perceived skills gaps

Causes of perceived skills gaps

Priority areas
• Lack of funding for training and development (64%) and lack of time available for employees to attend training (51%) have consistently been cited as the biggest causes for skills gaps within small charities.
• A lack of locally available training was also identified by a quarter of respondents, suggesting it is difficult for them to access providers, even if they have the capacity to.

Key changes
• Lack of funding for training and development (64%) has increased 3% since 2016/17.
• Lack of time available for employees to attend training (51%) has decreased by 7% since 2016/17.
• A lack of locally available training was also identified as a cause for skills gaps by 25% (up 4% from 2016/17 and 2% from 2014/15).

Themes
• Themes that emerged were around the pressures that small charities face, more often than not, with a small or non-existent staff team. This mirrors our Small Charity Index which shows consistently that small charities are faced with static incomes, pared with an overwhelming increase in demand for services.

“We’re a small charity with 2 staff taking care of all areas of work. It’s impossible to keep up with training in all of those areas due to time and cost pressures.”
Impacts of skills gaps

Priority areas

- The main impact of skills gaps identified by respondents was an increased workload for colleagues (48%), followed by increased time to deliver work (45%), and a decreased ability to take on new work (42%).

Key changes

- Although the main impact of skills gaps identified continued to be an increased workload, this has decreased by 11% since 2016/17, when 59% reported this.
- The top three impacts of skills gaps have remained the same since the survey began in 2010/11.

Themes

- In a sector where innovation and the ability to adapt to the needs of beneficiaries is important, it is worrying that skills gaps have resulted in no room for the development of services (39%). Respondents stated that the impact of skills gaps for their organisation meant they were “slipping behind in terms of development, e.g. uptake of digital”. Similarly, another respondent commented that “opportunities may not be acted on as successfully as we would like.”
Actions to address skills gaps

Priority areas

- The most common action for a small charity to take to address existing skills gaps was using resources and training from voluntary sector umbrella and other infrastructure bodies (42%), followed by using volunteers instead of paid employees (36%), and further training provision (33%).
- The most common reasons for not providing or participating in training were due to cost – external training is too expensive (39%) followed by time issues – difficult to take time out of the office (29%).
- When asked what actions respondents believed to be the most effective solution to addressing skills gaps, further training provision was ranked first (47%) and visits to other organisations delivering similar activities became the second most popular solution (40%).
- Other popular solutions included using resources and training from voluntary sector umbrella and other infrastructure bodies (40%) and connecting with a business and using their skills and experience (40%).

Key changes

- Further training provision had previously been the most common action taken but decreased by 19% against 2016/17 as small charities face increased demand versus lower resources.
- The percentage of respondents citing the expense of external training as a barrier has reduced by over a third (73% reported not providing training due to cost in 2016/17, compared to 39% in 18/19). This shows that organisations such as ourselves, as well as government investment in training for small charities, are providing more small charities with the training they need at prices they can afford.

Themes

- The most pronounced difference between actions taken versus perceived was using volunteers instead of paid employees: 16% perceived this to be a solution, whilst 36% took this as an action to address skills gaps. This is similar to in 2016/17 when 15% perceived it to be a solution while 40% took this as an action to address skills gaps.
- Connecting with a business and using their skills and experience was perceived as a solution by two fifths of small charities, yet this was only taken up by 13% of respondents.

“As a charity without paid staff we do find it challenging to draw in volunteers with the skills we don’t already have. But, we find it challenging to use our limited time to train up volunteers rather than doing the tasks ourselves. It’s a catch 22.”

“We have highly skilled staff, but have had to cut back due to a fall in funding. Now we have to rely on untrained volunteers to do basic tasks.”
Training

One solution to addressing skills gaps is training staff and volunteers.

Priority areas

- The majority of respondents (69%) have a formal business plan, however, only 15% have an annual training plan linked to this.

Key changes

- The percentage who have an annual training plan linked to a business plan continues to drop to 15% (down from 17% in 2016/17, and 72% in 2014/15).
- 54% reported that they do have a training budget (up 2% since 2016/17).

Key changes

- Despite the above, 54% do have a training budget, and 36% formally assess their organisation’s skills gaps.
- Although the percentage of respondents citing expense of external training as a barrier reducing by 34% since 2016/17, almost two fifths (39%) still stated the cost of external training can be a barrier, demonstrating that more investment into affordable training for small charities is vital.
"As we are all volunteers with no paid staff, we do try to help each other. We have had days together to build our business plan, for example, which double up as a mentoring/training session."

"We have attempted to find funding to restart training programmes that we ran until about 3 years ago. We have the money, but we are now not sure we have the skills to do the training, it’s a vicious circle downwards!"

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Recommendations

Small, local charities and community groups are vital in the delivery of local, regional, national and international services. Indeed, as we have moved towards Brexit many of these charities are supporting the Home Office to deliver the resettlement scheme to the most vulnerable in our society, demonstrating yet again how connected small but vital charities are not only to their local communities but to those who wish to communicate with them.

As previously stated, they support those most in need and so must be supported themselves to continue to carry out the services they deliver. Both government and other public funders should take action to ensure that they give these charities the opportunity to be self sustaining through investment in building their capacity to thrive, part of which is the development of skills across the sector.

1. Government and other public funders to take the lead by demonstrating long-term commitment to affordable skills development and capacity building.

   It has been proven time and time again that smaller charities and community groups are a clear route to accessing and supporting the needs of the most vulnerable in our society. Government and other funders, especially the vital Trusts, Foundations, Livery Companies and other private funders, play a vital role in ensuring the health of civil society and their ability to make long-term funding commitments is therefore crucial. We ask Government and private funders to invest in developing the skills of smaller charities to ensure their future.

2. Infrastructure organisations to come together to work collaboratively to ensure that the support they offer is connected, easily identified and accessible tailored to meet the diverse needs of smaller organisations. This should include a blend of face to face and remote learning so that smaller organisations who are not able to access face to face learning are also afforded opportunities to develop skills.

   Together infrastructure bodies can offer so much more and can ensure that more small charities are aware of the support that is available to them. We urge all infrastructure organisations to come together to share their programmes to ensure that as many small charities as possible are offered the opportunity to participate in skills development.

3. Trustees of smaller charities make a commitment to the organisational and personal development of both staff and volunteers within their charities.

   We cannot expect others to invest in us if we do not take every opportunity to invest in ourselves. We urge trustees to lead their organisation by making budgets available for trustee, staff and volunteer training. We urge those working in small charities to use all opportunities whether that be formal training or skills sharing between organisations, to increase their knowledge and skills.
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