Small learning interventions delivering a big impact
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Our Values

Empathy
“We were given time to write our own fundraising materials. As every charity worker knows, being given time to focus on something, free from distraction, is incredibly valuable and being able to begin writing and putting into practice what we had learnt straight away was excellent”.

Excellence
“I just wanted to say a big thank you for all the help and support you provide to small charities. Your training is of the highest standard, very practical, relevant and financially accessible. (My organisation) has certainly benefited from your support over many years. The FSI team have always been very supportive and committed to helping - not just through training, but through events and through promoting the cause of small charities. Thank you FSI!”

Respect
“(Your courses) are proving to be a phenomenal help to our tiny charity. To be honest, when you get started with a new charity everything is new. It’s bamboozling and shiny and you’re so focused on doing the right thing that it’s hard to steer a straight course. However, you folks are all you purport to be and that has been a huge help; I cannot thank you enough.”

Persistence
“Really tiny charities like us with no staff or admin support can so easily get bogged down in just keeping going. This quality training has given us another burst of energy and, with continuing FSI support, we will get moving faster.”

Sense of the possible
“My colleague and I thought the conference was one of the most rewarding, informative and relevant gigs we’ve attended since forming our new charity. The sessions were all brilliant, well delivered and excitingly ‘out of the box’ thinking. We would recommend all charities commit to join the FSI and get access to this fabulous resource, insight and value for money events. Thank you for the opportunity to attend.”

Energy
“I was so impressed by the course! The facilitator was so knowledgeable and her delivery style was professional as well as fun and approachable. She answered all questions patiently and throughly, and provided us with additional resources alongside the excellent booklet the FSI provides participants on their courses with.”
What our members say

“Our involvement with the FSI has had such a positive impact on MS-UK. As a small charity it is essential we make the most of our resources, and that includes our staff. The training and opportunities provided to small charities is truly remarkable and would be out of our reach without the FSI’s support. Our fundraising and our marketing has improved remarkably due to their help. MS-UK works hard to change the world for those living with multiple sclerosis and with the FSI’s help we are making a bigger difference.”

- MS-UK

Why we do what we do

The UK has a vibrant, creative and effective small charity and community group sector, with over 168,000 registered groups and potentially up to 400,000 unregistered community organisations. Each day they work tirelessly to provide vital services to those facing multiple and complex disadvantages, including domestic abuse, child poverty, complex health issues, homelessness and much more, including campaigning to ensure a healthier environment and equal access to justice for all.

In almost all cases, our members are both physically and financially resource poor, but are rich in the passion, creativity, determination and skills needed to solve the many challenges their beneficiaries face. At the FSI, we believe it is our place to offer you, our members, learning opportunities that will add value to what you do, that will enable you to be more sustainable and, therefore, better placed to continue to deliver your services.

A decade of support

We have been supporting you now for over a decade. We learn more each year about what you really value from us and that is why we are focussing our efforts on delivering our learning programme through more varied and accessible means. This will ensure that as many small and local charities and community groups as possible are able to access our services, whether online or face to face.

We believe from speaking with you that this is what you value from the FSI and, therefore, this is what we will continue to do for you. We do what we do because we know that by supporting you we are part of ensuring that the world we all live in is a safer and more equal place for all, and we are proud to play a small part in making it so.
Welcome from Emma and Pauline

Welcome to the FSI’s Annual Impact Report 2017/18. This year saw you, our members, facing uncertainty and change as the sector faced increased scrutiny and significant changes in legislation and reporting requirements.

However, like all small and local charities and community groups across the country, you showed amazing levels of resilience and creativity, adapting to the challenges and implementing the changes necessary to continue to deliver your services and flourish. Those working for small and local charities and community groups, as well as the huge numbers of volunteers who support them, have ensured that in a time of diminishing resources, both physical and financial, they continue to make a big difference to people’s lives across the UK and beyond.

Brexit continues to overshadow the political agenda and it has been difficult to move other areas, which are of vital importance to our members, forward. We have tracked the confidence you all feel in the Brexit process and you to continue to report that your confidence in the process is diminishing quarter on quarter.

Your thirst for knowledge never diminished and we saw record numbers of you attending training both online and face to face. This year we delivered over 9,000 learning interventions with a value of over £3 million to you.

It was, as always, inspiring to meet with you all, to understand your issues and concerns, share your insights and opportunities, as well as celebrating with you your successes. We know how important it is that the FSI continue to do all we can to support you. Our commitment is that we will continue to take your needs into account as we plan our learning activities, ensuring that when we are not able to meet your needs, we signpost you to the services you require so that you are able to be the best you can be for those who desperately need your support.
Learning programme

Face to face training in 17/18

2,245 delegates supported with full and half day training and workshops, plus 4,864 online learning interventions across the entire UK!
What we do and what we have achieved

Training

We deliver high-quality training in fundraising, governance, leadership, strategy and impact measurement to our small charity members. Our learning programme is delivered across the whole of the UK and is heavily subsidised so that as many of our members as possible can take advantage of it.

We said we would expand the blend of learning opportunities on offer to our members in 17/18. We would improve the FSI learning experience by launching the Learning Management System, improving the booking experience for our members.

We also aimed to grow our membership numbers to 6,500, as well as increasing the number of face-to-face learning opportunities available to them. We also aimed to add at least three new destinations where face-to-face services would be delivered, and work in partnership with other infrastructure organisations.

We wanted to add more online resources such as short videos, as well as introducing a new programme of 1.5 hour webinars available to members. We also aimed to improve access to fundraising and general resources through our website, signposting to a variety of specialists.

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"I think your training courses are a godsend for the small charity sector - other organisations charge a fortune for courses that may or may not be relevant. I really enjoyed meeting other organisations there. Keep up the good work!"

- Tany Alexander, Climate Outreach
Advice Hub

One to one advice is invaluable to our members, but often outside of their stretched budgets. We deliver monthly Advice Clinics, matching our members to a range of expert advisors who volunteer their time to our Small Charity Advice Hub. These advisors give tailored advice on topics that our members request support on.

Following our successful pilot during Small Charity Week 2017, we wanted to increase the number of members accessing this service which is free for them to use. We also aimed to ensure that a wider range of topics would be on offer.
Conferences

Skills
The Skills Conference provides our members a chance to learn from expert speakers on areas that are vital to the effective running of a small charity, including those highlighted in our Skills Gap Survey such as leadership, financial management and using social media.
We committed to addressing each of these issues by increasing the number of places on our Skills Conference available to our members.

Fundraising
Our Fundraising Conferences bring together a wide range of experts in fundraising approaches. Our annual conferences give members from across the UK the chance to engage with and learn from passionate and insightful experts from across the sector.
The FSI Fundraising Conference, held during Small Charity Week, is one of our most popular events. We said we would increase the number of places available to our members, as well as running a Northern Fundraising Conference in Leeds.

Conferences in 17/18 supported 458 participants in 3 locations

Northern Fundraising Conference October 2017
86% improvement in knowledge
87% improvement in skills
88% improvement in confidence
99% would recommend to a friend
95% rated the overall experience as good or excellent

Skills Conference March 2018
79% improvement in knowledge
78% improvement in skills
79% improvement in confidence
99% would recommend to a friend
99% rated the overall experience as good or excellent

Fundraising Conference June 2018
77% improvement in knowledge
81% improvement in skills
80% improvement in confidence
99% would recommend to a friend
96% rated the overall experience as good or excellent
Influencing and advocacy on behalf of our members

What we do

Small Charity Index

The Small Charity Index is the FSI’s quarterly ‘Pulse of the Sector’ report and has been collecting data from our small charity members every three months since June 2013. The report looks at income, service delivery, workforce and governance - allowing us to track the trends, challenges and opportunities emerging across the sector. The Index provides information on the sector that can be used to influence policymakers, and it helps small charity trustees and staff to better understand the wider environment in which they operate.

We wanted to continue to build the number and diversity of our members contributing to the Index in order to ensure continued robustness of the data. We also said that we would continue to publish annual trends data from the Small Charity Index on our website.

What we have achieved

Small Charity Index

We continue to have a number of members routinely completing the Index and we have used the data collected to influence those who are able to instigate change. We also continue to provide regional infographics for members to share on social media, and for use in funding applications.

The FSI uses the data to demonstrate the need for our services in individual regions, as well as nationally.

What we do

Research

Every year we conduct research into the small charity sector, examining the challenges and trends which impact our members and their ability to deliver their charitable missions. Our research aims to inform our learning programme, as well as raising awareness with policymakers to ensure small charities receive the support they need. We said that in 2017/18 we would publish research on how our members are meeting this demand.

We also said that we would strive to work collaboratively with other infrastructure organisations, delivering co-branded research to highlight the concerns of our members across the UK.

We are committed to continuing the delivery of our biennial Small Charity Skills Survey, with a publishing date of Spring 2019.

What we have achieved

Research

In 2017/18 we have increased our collaborative working with other infrastructure organisations. This has manifested itself in the co-release of reports; for example, Lloyds Bank Foundation coincided the release of their ‘Value of Small’ report with Small Charity Week.

This year we have also been preparing for the collection of the 2018/19 Small Charity Skills Survey. This is our biennial report which examines the areas where skills gaps exist for small charities. This year we have prepared to change the format of the survey collection to make the report more accessible and convenient for small charities to complete. We will publish the full report in Spring 2019.
What we do

Influencing

We continue to collect and accurately represent the views of our members to various government departments, the Charity Commission and other sector groups. In 2017/18 we aimed to broaden our collaboration activities, seeking to **develop meaningful partnerships** with other infrastructure bodies where we could both add value to support the small charity sector together.

We also said that we would continue to **accurately represent the opinions** of our members in forums where we are able to influence change. We wanted to **build awareness** of the huge impact that our small charity members deliver.

What we have achieved

Influencing

We continued to represent the views of our members across a **number of forums** during 2017/18 including the Team London advisory board, the APPG on Charities and Volunteering and the CAF Resilience Programme, as well as being part of the VCSE Crown Representative’s Advisory Panel.

We are still working closely with the Charity Commission on several projects including Trustees Week and the Charities Against Fraud working group, as well as sitting on the Fraud and Risk Resilience Group. These groups have allowed us to **learn and distribute information to our members**, continuing to protect them against fraud.

We also continue to work together with the Department for Digital, Civil Society, Media and Sport (DCMS) on initiatives including Local Charities Day. In 2017, we ran **ten 30 minute webinars to celebrate Local Charities Day** which were free for small charities to attend. This online provision meant local charities from all over the UK were able to access our support to become more sustainable and efficient.
Raising awareness on behalf of our members

What we do

Small Charity Week

We are also the small charity behind the largest celebration of our members in the UK. Small Charity Week is an awareness-raising initiative, celebrating the essential work of the UK’s Small Charity Sector who make an invaluable contribution to the lives of millions of beneficiaries. Running annually since 2009, the week is themed into six days of celebratory activity: I Love Small Charities Day, Big Advice Day, Policy Day, Fundraising Day, Small Charity Big Impact Day and Celebration Day.

We said that in 2018 we would use the week to take the message that our members are crucial to society to as wide an audience as possible, engaging with the public, local and central Government, other infrastructure bodies, business partnerships and the media.

“Absolutely brilliant. Keep them coming! An inspiration for us to organise something similar on a smaller scale locally.”
- Fundraising Conference, 2018

Cyber Security: Small Charity Guide

To access the Guide, Summary & Infographic and the Threat Assessment go to the General Resources page on the website or http://www.thefsi.org/general-resources/cyber/
What we have achieved: Small Charity Week

<table>
<thead>
<tr>
<th>Small Charity Week 2018</th>
<th>over 1,700 participants in over 50 events!</th>
</tr>
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<tbody>
<tr>
<td>I Love Small Charities Day</td>
<td>#SmallCharityWeek trended on Twitter for over 11 hours! (Up from 7 hours in 2017).</td>
</tr>
<tr>
<td>300+ sign ups to ThunderClap, with a social media reach of over 2.14 million.</td>
<td></td>
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<tr>
<td>3 social media campaigns, with 294 charities getting involved and 1,888 messages of support delivered to them.</td>
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<tr>
<td>Big Advice Day</td>
<td>Our National Big Advice Day event was hosted by Team London in City Hall</td>
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<tr>
<td>456 hours of advice given to 79 small charities.</td>
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<tr>
<td>7 other events were held across the country, with a total of 650 hours of advice given to 179 small charities.</td>
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<tr>
<td>Policy Day</td>
<td>32 small charities working in international development attended a Roundtable in the House of Lords focused on collaboration.</td>
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<tr>
<td>70 small charity Trustees and CEOs attended a Reception event in Churchill Rooms, London, engaging with policymakers and government officials.</td>
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<tr>
<td>6 events run by local authorities for small charities in their areas.</td>
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<tr>
<td>Fundraising Day</td>
<td>210 delegates at our Fundraising Conference.</td>
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<tr>
<td>In partnership with the PayPal Giving Fund and eBay for Charity, the Give @ Checkout competition meant 4 charities were featured on the checkout page of eBay. This raised £6,138!</td>
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<tr>
<td>A SCW leaderboard competition was run by LocalGiving offering 220 charities the chance to win £4,000 in prizes. Fundraising efforts through the competition raised over £65,000.</td>
<td></td>
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<tr>
<td>Small Charity Big Impact Day</td>
<td>362 small charities applied to the Small Charity Big Impact Awards</td>
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<tr>
<td>5 Winners</td>
<td>5 Runners up</td>
</tr>
<tr>
<td>Each of the 15 won a prize package, including a professional film to promote their charity.</td>
<td></td>
</tr>
<tr>
<td>Celebration Day</td>
<td>Small Charity Week 2018 closed with Celebration Day.</td>
</tr>
<tr>
<td>Small charities across the country registered their own events to celebrate the vital work undertaken across the UK.</td>
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</tbody>
</table>

“This was a brilliant hour well spent! The advisor had looked in detail at our website so was really prepared for the session which was hugely helpful. He gave me some great advice, helped me understand topics I had no clue about and has left me feeling clear about the next stages, pitfalls and ideas for improvements. Thanks so much, what a great service!”

- Big Advice Day 2018
What we do
Demonstrating the impact of our members
Small charities have a phenomenal impact on daily life in the UK and across the world, which must be highlighted at all levels. The FSI support our members to demonstrate their impact to as wide an audience as possible. We do this by equipping our members with the skills they need to demonstrate their own impact, as well as by advocating for them through our research, Small Charity Week and our annual Small Charity Big Impact Awards. We said that we would continue to run our Small Charity Big Impact Awards which celebrate the huge impact that small charities have. We said that there would be five winners and ten runners up in the 2018 Awards.

What we have achieved
Demonstrating the impact of our members
We ran the second ever Small Charity Big Impact Awards in 2018, building on the success of the 2017 Awards. This year, we had 5 categories which each had one winner, one runner up, one runner up and one highly commended charity.

Winners announced in June 2018 were: Two Pennies Money Advice, the Listening Place, the Children’s Sleep Charity, Sue Lambert Trust and Teach A Man To Fish. 5 runners up and 5 highly commended charities also received prizes.

Following Small Charity Week, we held a Small Charity Big Impact Awards Ceremony at the Leathersellers’ Hall, London. The night celebrated each charity, presenting them with their award and showing their charity prize video, followed by drinks and canapés.

“We felt truly privileged to be up there with such inspirational organisations, all working so hard to support the most vulnerable people in our society. Life in small charities is really tough right now and the work that you are all doing at the FSI is so incredibly important.”

- The Children’s Sleep Charity, Winner, FSI Impact Awards 2018
Case Study: Cyber Crime

This report marks a year since the National Cyber Security Centre (NCSC), in partnership with the FSI launched the first ever cyber security guidance for small charities. Since launching this partnership at The FSI Skills Conference in London, the NCSC have presented this crucial guidance to over 1,800 charity representatives at workshops spanning the country, webinars, blogs and 121 advice sessions.

The NCSC is encouraging small charities to focus on 5 areas which will significantly increase their resilience to cyber crime;

- Making sure your data is backed up
- Ensure you’re protected against malicious software
- Keeping your smartphones and tablets safe
- Using passwords sensibly and effectively
- Help your team know how to avoid phishing (spam email) attacks

Cyber security is often thought of as being very technical, however the case study below details how simple these attacks sometimes are.

The CEO of a charity that delivered music lessons and events in their local community had their email hacked. The perpetrator then sent out a fraudulent message to the charity’s financial manager, instructing them to release funds to pay for new equipment. The financial manager used Faster Payments to transfer the cash.

The breach was identified the next day, when another fraudulent email was sent asking for the release of more funds. The charity could not recover the funds and ultimately lost £13,000.

As a result of the breach the charity revised their policies on authorising payments, with at least two members of staff and the CEO subsequently having to sign off any payments.

The NCSC and The FSI are proud to be partnering again in 2019 in order to ensure as many charities as possible are equipped with the knowledge and tools to protect themselves online. This year will see the launch of new e-learning modules, training sessions and focus groups to ensure that small charities are getting the support they need.
The Learning Programme

Training
In the coming year we will explore with other organisations supporting small charities and local community groups how we can work together to ensure that by combining our efforts we can complement each other and deliver a more seamless offer to our members. Our aim is to have developed at least three strategic partnerships that add value to what we and they offer by the end of the year.

We know from talking with very small charities that they are not able, either because of geography, resources or other obstacles, to attend our face to face training and so we aim to increase the scope of training available through online learning, adding e-learning to our offer.

Specifically, we will:

Membership
- Improve the user journey by further adapting and improving our Learning Management System.
- Increase our membership through reaching out to more small and local charities and community groups, through more collaborative working with other infrastructure organisations and through our marketing activities. Our aim will be to increase our membership by 15% to approximately 7,450 by the end of 2018/19.

Learning
- Significantly increase the number of online learning opportunities, increasing the number of Webinar30s and Webinar90s and offering three e-learning courses.
- We will work more closely with local infrastructure organisations to reach local small charities and community groups, offering a workshop programme of short learning modules.
- Continue to deliver the London and Northern Fundraising Conferences and the Skills Conference held in London.

Advice Hub
- Increase the number of volunteers supporting the Small Charity Advice Hub.
- Increase the number of advice hours delivered through Big Advice Day specifically by working more closely with local infrastructure organisations.

The Advocacy Programme

Small Charity Index
We will continue to build on the number and diversity of members contributing to the Small Charity Index, ensuring the data collected continues to be robust and reliable.

We will ensure that the Small Charity Index remains to be seen as the most robust survey of the sector in the UK. To increase the visibility and use of the Index data, we will change the format in 2018/19, publishing a series of infographics tracking the key trends each quarter. We will also publish a short ‘Perceptions’ blog, examining a different topic each quarter. We
will publish an annual report summarising the year’s Index data, replacing our quarterly reports. The first of these reports will be published during Small Charity Week 2019. We will continue to publish annual trends data from the Small Charity Index.

Research
In 2018/19 we will deliver our biennial Small Charity Skills Survey, focussing on skills gaps identified in 2018/19. We will collect this data through a series of short online surveys focusing on seven different areas where small charities may/ may not have strong skills in. This report will be published in March 2019 and provide the data for us to shape our learning programme topics for 2019/20.

We will also continue to work on our aim of working more collaboratively with other infrastructure organisations. This will include delivering co-branded research to amplify the voices of our members and small charities across the UK.

Influencing
We will continue to build awareness of our wonderful small charity members, and the huge impact that they have on society. We will do this by continuing to accurately voice the opinions of our members in change-making forums. We also aim to broaden our collaborative activities during 2018/19, seeking to form partnerships with other infrastructure bodies. By working together, these partnerships will add value to one another’s programmes, strengthening the support that we can give to the small charity sector. We have announced our strategic partnership with sector leaders, NCVO, in October 2018 and will build on strengthening this throughout 2018/19.

Small Charity Week
In June 2019 we will celebrate the 10th anniversary of Small Charity Week, showcasing the vital work of small charities to the public, influencers, policy makers, media and other stakeholders. We will also hold a number of themed days aiming to upskill and support small charities, including Fundraising Day, Policy Day, Big Advice Day, and more.

Demonstrating the impact of our members
This year we look forward to celebrating 15 small charities who are making a real difference through our Small Charity Big Impact Awards. Charities can apply through an open application process and winners and runners up will receive prizes, as well as invitations to our Awards event in July.

Supporting our Members
Members at the heart of the FSI
We will continue to follow the direction set by our Trustees of delivering support to small charities to increase their ability to be the best they can be for those who they serve. Therefore, our focus will continue to be firmly on increasing the scope of our learning programme and ensuring that as many small charities and local community groups as possible are aware of the support being offered.

We will continue to amplify the voice of our members both through our own activities and by supporting the activities of other national infrastructure organisations ensuring that the voice of small charities is louder through closer collaboration.

Above all we will ensure that the FSI continues to listen to its members, continues to provide accessible quality services and continues to put small charities at the heart of all decision making.
Building a sustainable organisation

At the FSI our aim continues to be to enable small charities to be more effective, efficient, accountable and self-sustaining. We continue to advocate that our members secure income from a ‘mixed economy’, using the sources that are most appropriate to the aims and skills of their organisations. We continue to follow this standard at the FSI and have identified three key sources of income, which are:

Mission based earned income

Consultancy

We worked with 38 consultancy clients supporting them in a range of ways, from in-house governance training to developing strategies and business planning, developing impact measurement frameworks and devising fundraising strategies. We were delighted to be selected by funders to deliver consultancy support to their grantees, including Lloyds Bank Foundation and the Charities Aid Foundation. We continued to deliver a range of training packages to funders and other membership organisations including the People’s Health Trust, a variety of Councils for Voluntary Service and the Association of Chairs. We had two new corporate partners join our Emerging Executives programme, which offers a year-long development programme for leaders and emerging leaders within businesses, matching their skills and interests to one of our small charity members.

In addition, our team once again offered pro bono consultancy support to the five winners of the FSI Small Charity Big Impact Awards.

Partners and sponsors

This year we partnered with a number of organisations who provide specific services to meet the needs of small charities across the UK. Their support is much appreciated and the expertise and advice they are able to offer our members at events is invaluable. Thank you to UK Charity Insurance, Blackbaud, Liberty Accounts, M&G Investments, PolicyBee and National Cyber Security Centre for their support.

We would also like to thank the following organisations who sponsored with us throughout the year: Ansvar Insurance, the Fundraising Regulator, TLL Accountants, Premier Charity Solutions, Premier Choice Telecom, JW Hinks, WhatCharity, Donorfex, Kreston Reeves, Veal Wasbrough Vizards LLP, Unity Bank, Buzzacott, Gallery Partnership, Good Things Foundation, Vibrant Colour, Civil Society, Givergy and Whitehill Publishing.
Voluntary funding

Funders

We continue to accept generous support from Trusts, Foundations and Livery Companies who have supported the FSI for many years. These include Leathersellers’ Company, Westminster Foundation and City Bridge Trust. Like us, these organisations are committed to improving the skills within the small charity sector. This year we have also received support from Garfield Weston Foundation, the JTH Charitable Trust and the York Common Good Trust.

Thank you to our supporters

We are grateful to the many organisations who worked with us to support the delivery of our programmes and activities. We would like to thank the following for all of their support for small charities; Team London, Leathersellers’, LocalGiving, Small Charities Coalition, Charities Finance Group, PayPal Giving Fund and eBay for Charity, Remember a Charity, Media Trust and Civil Society, in addition to all of those CVS and local authorities across the UK who ran their own events during Small Charity Week 2018. Not forgetting the volunteers who have supported us by sharing their expertise with our members throughout the year.

Statutory Funding

In 2018/19 we delivered the Small Local Charities and Community Groups Training Programme contracted by the Department for Digital, Culture, Media and Sport.

Expert Risk & Insurance advice for small charities from the FSI’s preferred charity risk partner.

Maybe the professional hand-hold, guidance and peace of mind you’ve been looking for?

Simply call 01424 205063 for a free, no-obligation conversation.