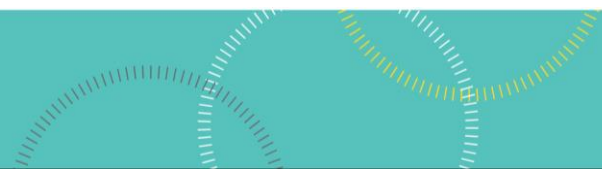


COVID-19 SECTOR SURVEY

Summary of key findings



About the research...

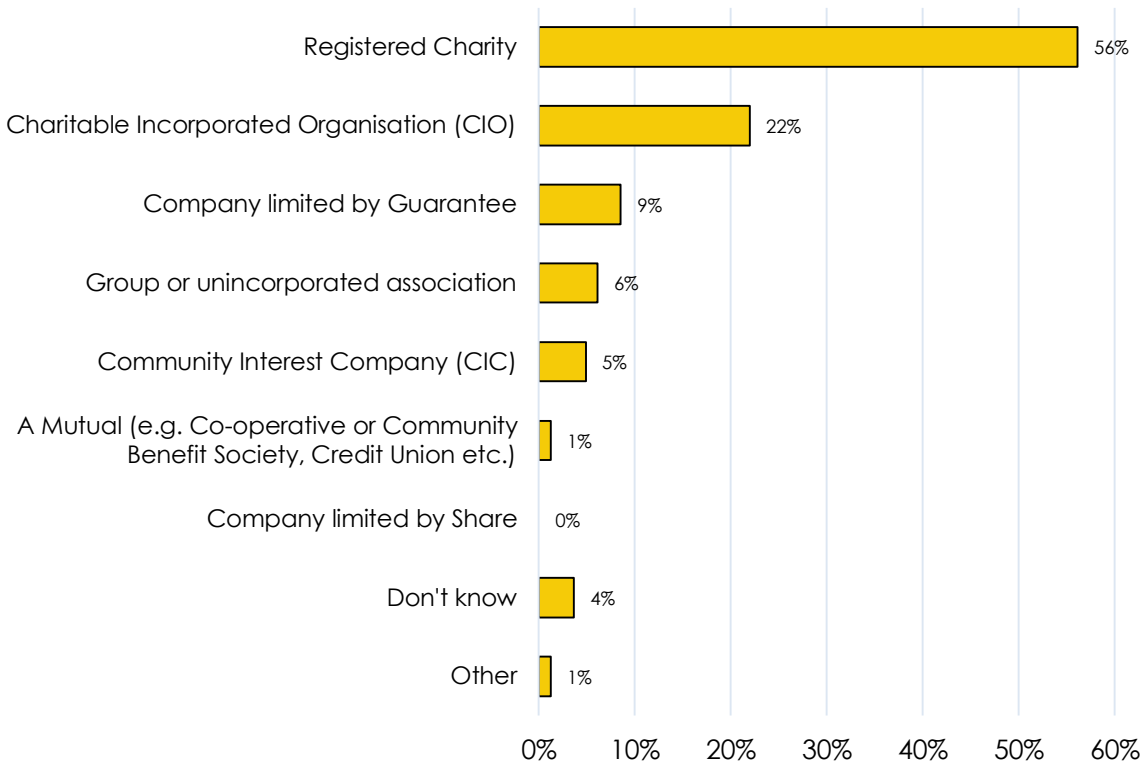
About York CVS

York CVS is a social action organisation; supporting and championing York's voluntary, community and social enterprise (VCSE) sector to make positive change, challenge issues and grow new ideas for the future in order to strengthen communities.

About the research

This research by York CVS looks at the impacts that the Covid-19 outbreak has had on York's VCSE sector. The research consists of responses from 82 different organisations in York. It was collected during April through an online survey.

Legal structure of organisation



About the organisations...

Organisations legal structure

Over half of the organisations [56%] were Registered Charities.

Almost a quarter of the organisations [22%] were Charitable Interest Organisations [CIOs].

One in ten organisations [9%] were companies limited by guarantee.

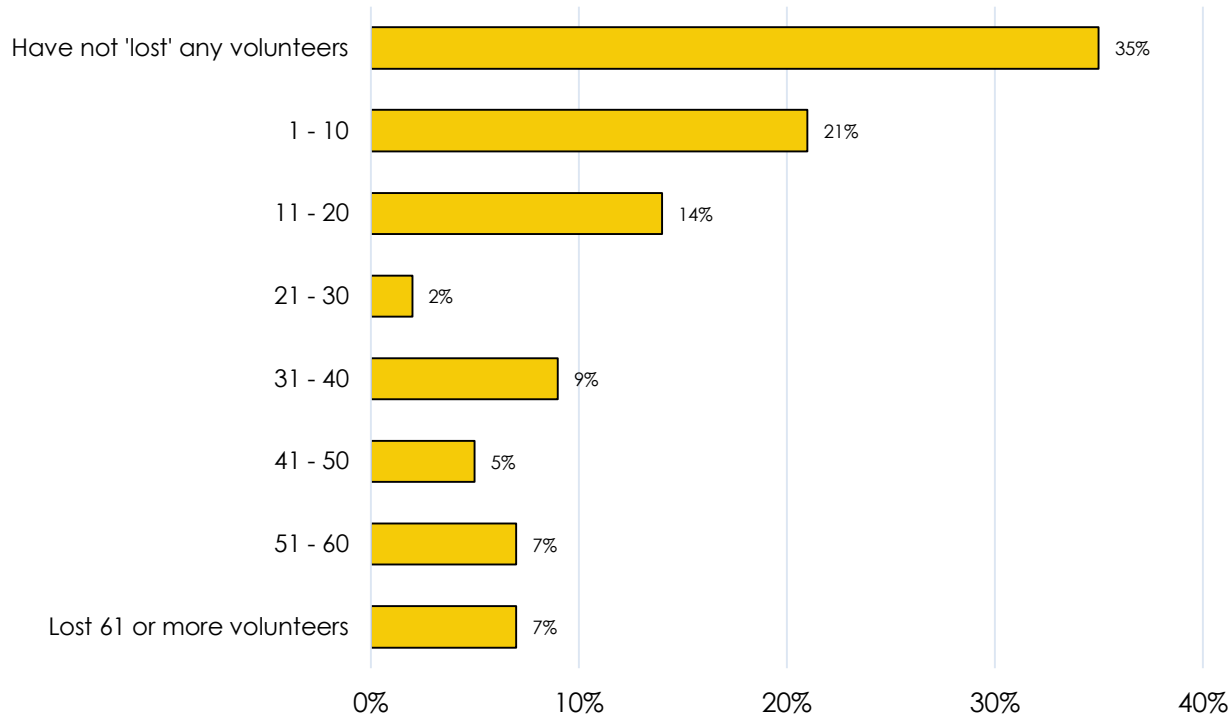
Number of employees

Almost half of organisations [46%] had between one and 10 employees.

Three in 10 organisations [30%] had more than 10 employees.

One quarter of organisations [24%] had no employees at all.

How many volunteers have been 'lost' since January 2020



About their volunteers...

Number of volunteers

In January, half of organisations [51%] had more than 20 volunteers. Now, only a quarter of organisations [24%] have more than 20 of these volunteers still volunteering.

Two thirds of organisations [65%] had fewer volunteers currently volunteering in April than in January, 2020.

More than one in four organisations [28%] had at least 30 fewer volunteers currently volunteering.

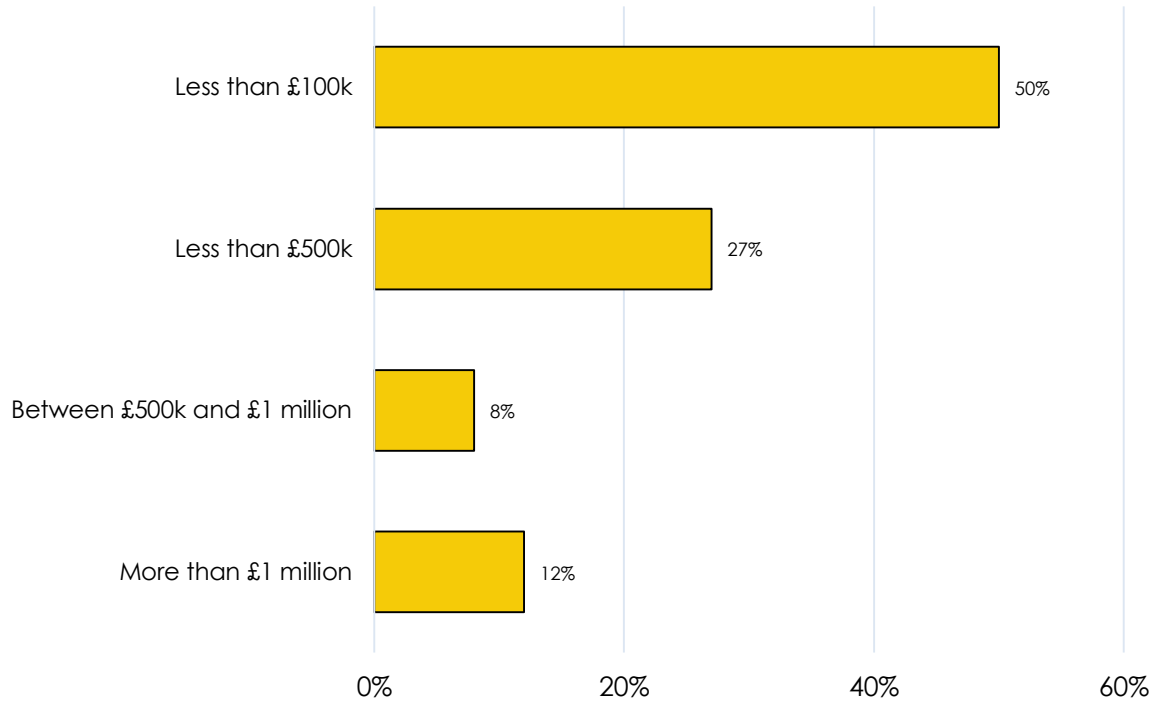
14% of organisations had at least 50 fewer volunteers currently volunteering.

Volunteer Programmes

Four in five organisations [82%] are **not** linking with a volunteer programme such as York CVS or the local council.

About their finances...

Organisations annual turnover



Annual turnover

Half of organisations [50%] had an annual turnover which was less than £100,000.

One quarter of organisations [27%] had an annual turnover which was less than £500,000.

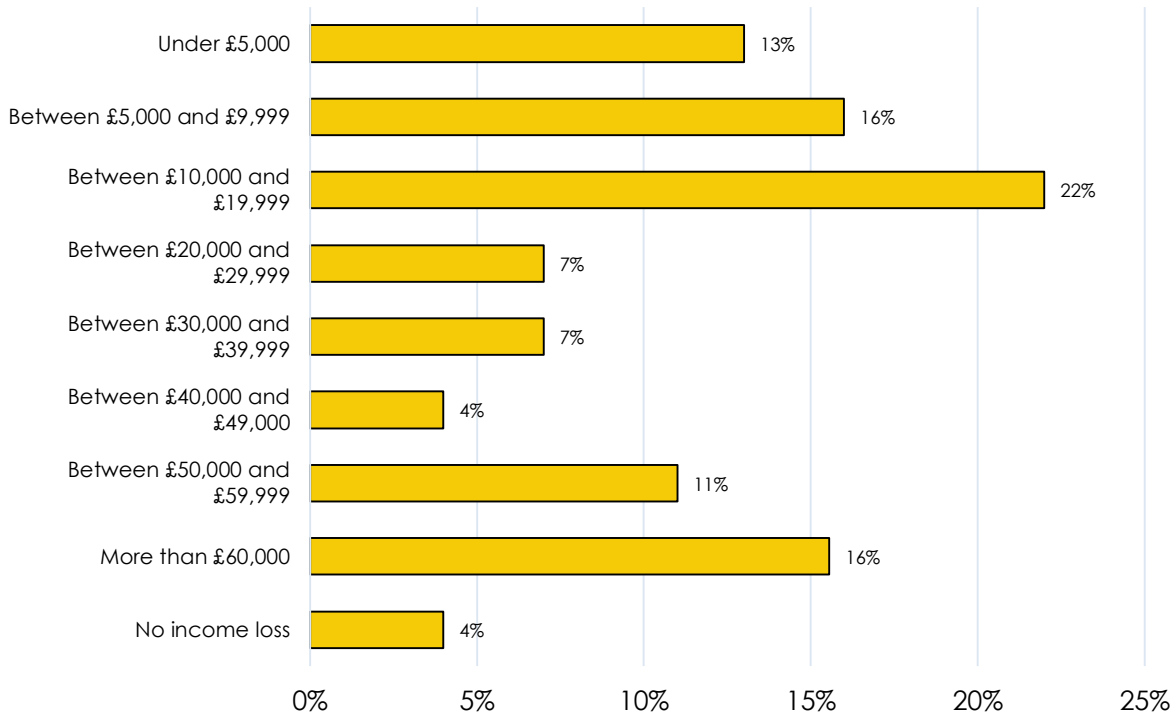
One in 12 organisations [8%] had an annual turnover of between £500,000 and £1,000,000.

One in 8 organisations [12%] had an annual turnover of more than £1,000,000.

Trading

One quarter of organisations [26%] say that more than half of their organisation's income is from trading.

Amount of income expected to be lost due to the Covid-19 outbreak



About their losses...

Project income loss

Only one in 25 organisations [4%] don't expect to lose any income as a result of the Covid-19 outbreak.

Two in three organisations [67%] expect to lose £10,000 or more.

More than one in five organisations [22%] expect to lose between £10,000 and £20,000.

One in 9 organisations [11%] expect to lose more than £100,000.

What they said about their financial situation...

What are the top three challenges for your organisations expenditure / cash flow?

“We have no income at all right now as 100% of our income comes from room hire, events and activities. We have reserves which will last for about 6 months maximum, assuming support such as furloughing is forthcoming”

“Securing funding to replace earned income and community fundraising lost through pandemic. Covering staffing costs where it is not practical to furlough because needed for on line delivery. Covering rent and utilities if no reduction can be agreed”

“Replacing trading income (unrestricted monies). Grant providers putting a pause on applications until October, meaning the cashflow and project issues will hit later in the year. With a reduction in trading income and grant projects we will experience a deficit month on month for the rest of the year and will have dipped into reserves, using 70% of them by the end of the year”

Of your organisations income streams, what will be most affected or is the most at risk now?

“Trading income”

“Functions and regular groups”

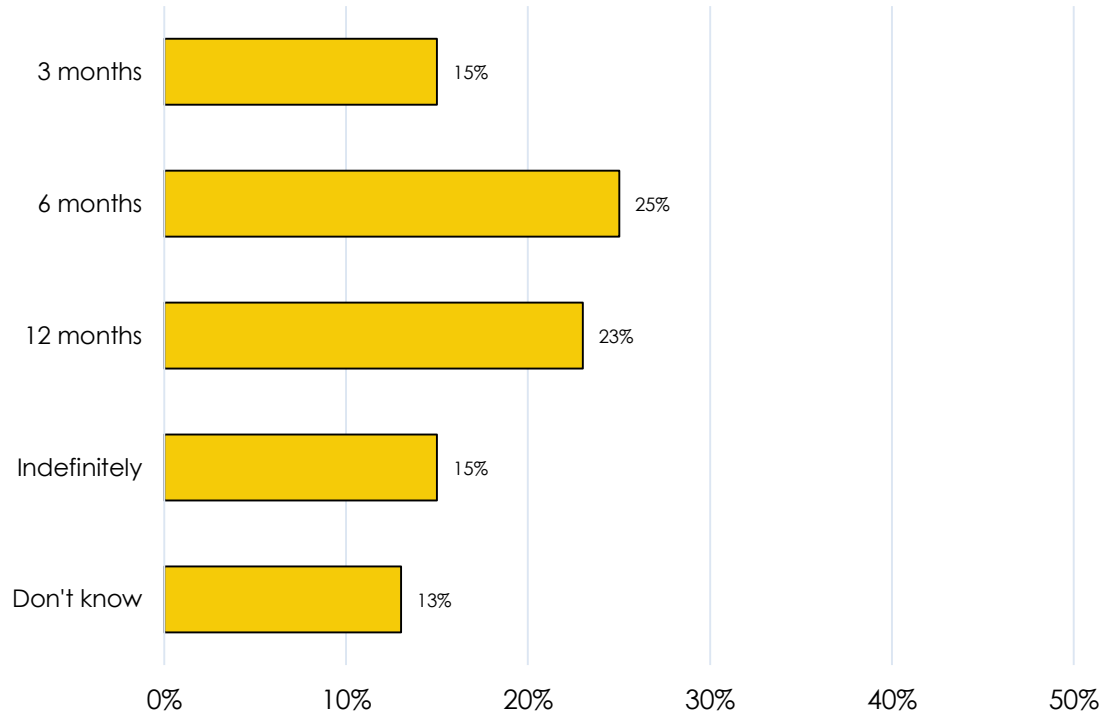
“Earned income and community fundraising, and potentially grant funding if lockdown continues beyond September”

“Community fundraising”

“Membership, and how many will renew”

“Room hire – the building is currently closed to the public”

Length of time organisations expect to be financially sustainable if current situation continues



About their sustainability...

Length of sustainability

15% of organisations expect to be financially unsustainable after three months if the current situation continues.

One in four organisations [25%] expect to be financially unsustainable after six months if the current situation continues.

Almost one in four organisations [23%] expect to be financially unsustainable after 12 months if the current situation continues.

15% of organisations expect to be financially sustainable indefinitely.

Two in three organisations [63%] expect to be financially unsustainable within 12 months or less if the current situation continues.

Two in five organisations [40%] expect to be financially unsustainable within six months or less if the current situation continues.

What they said about their risk areas...

Have your risk areas changed as a result of the Covid-19 outbreak?

“We are currently unable to deliver all our programmes and therefore employers may no longer want to pay membership fees (or may be unable to) as this is not classed as business critical spending”

“No public fundraising events can take place now, and possibly not at all in 2020. Maintaining income from trusts is difficult because a) our activities are largely paused and we don't know when we will be able to restart them, and b) many trusts are diverting funds to deal with the emergency”

“A large percentage of our income was from room/building hire . . . With many working people furloughed we are not sure how this will affect our income in the coming months”

“Approximately 10% of our income comes from providing specialist training. We have been unable to run our courses in the first quarter and it is unclear when we will be able to re-start”

What are the possible risks to your income in the medium-term?

“We are already working to a deficit budget and loss of training income impacts on overall financial management”

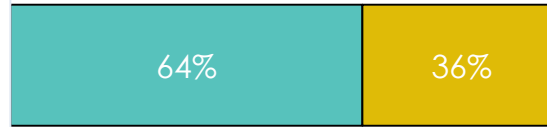
“We close”

“Reserves will need to be spent and services would have to be reduced. Less activities and possible redundancies of unfunded job roles or reduction of hours”

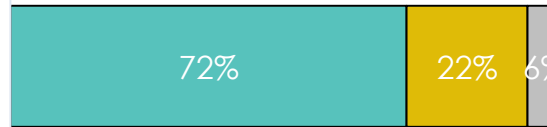
“If the lockdown goes on beyond the summer, we may have to consider redundancies or closure”

About their services...

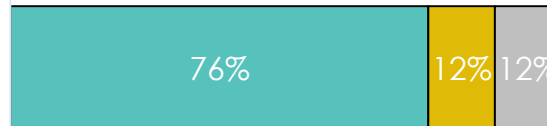
Are you finding digital exclusion an issue for people you work with?



Have you had to close / put on hold all or part of your organisations services?



Have you maintained your service with modified delivery?



■ Yes ■ No ■ Other

Digital exclusion

Two in three organisations [64%] are finding digital exclusion to be an issue for people they work with.

When asked what groups were facing digital exclusion, 82% of respondents answers included older people.

Other groups mentioned in answers were homeless people [12%], people with a physical impairment [12%], and people with a learning disability [12%].

Service delivery

Almost three in four organisations [72%] said they have had to close or put on hold at least some of their services.

When asked how they were addressing this, organisations had started various strategies to maintain themselves, such as moving services online [25%], and furloughing staff [19%].

Three in four organisations [76%] are maintaining their service, but with modified delivery.

One in ten organisations [12%] have not been able to maintain their service even with a modified delivery.

How has your service changed since the Covid-19 outbreak?

“The majority of our activity has been suspended unless it can be delivered remotely. We have been signposting volunteers to [City of York Council] and through [York] CVS”

“We have had to modify how we offer our services. There is an increase in electronic contact and adaptations have been put in to ensure where face to face contact is needed social distancing and other measures have been implemented”

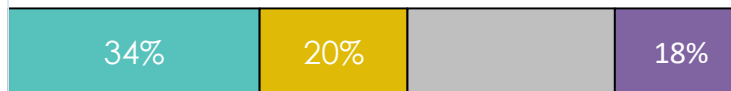
“Renegotiating contracts to reduce overheads, furloughing staff. Migrating info online”

What are the top three areas of delivery most at risk?

“Business trading, green space management, outreach”

“Keeping our accommodation services safe if an outbreak. Keeping services staffed 24/7 if increase of staff cases. Concerns around staff anxiety working frontline”

Has demand for your organisations services changed?



- Increased
- Stayed the same
- Decreased
- Other

About the response...

Have you noticed or experienced new/additional pressures on your organisation or on individuals?

51%

Have you noticed or experienced groups of individuals who are being missed by the general emergency response to the crisis?

35%

Have you noticed or experienced new groups of people who are now 'vulnerable' and previously were not?

46%

■ Yes

Additional activities

Almost three in four organisations undertaking additional activities as a result of Covid-19 [72%] did so through their own initiative.

More than a quarter [28%] did so because of a request from the City of York Council [11%], York CVS [6%] or another organisation [11%].

Service delivery and funding

Seven out of 10 organisations [69%] were not receiving additional support to fulfil additional activities related to Covid-19.

One in four organisations [25%] were receiving additional funding support to fulfil these activities.

Those organisations receiving additional funding support are receiving them from the City of York Council [22%], the Coronavirus Community Fund by the Two Ridings Community Foundation [22%], and other sources [56%].

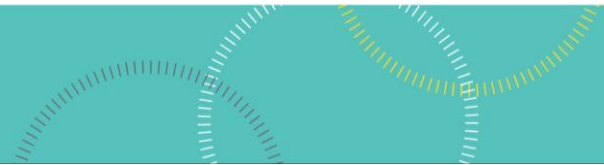
Summary of recommendations...

The Impact of COVID-19 on York's VCSE Sector survey is showing that the sector in York is facing a potential crisis. Concerted and rapid action is required to reduce risks for the sector and the wider implications this will have on York and its citizens.

The following recommendations summarise a range of responses that York CVS and York partners could take. In the coming weeks York CVS will work with partners to shape these recommendations and identify short and medium-term priorities to take forward.

Partners should work together to:

- direct any available resources including funding and other capacity towards the third sector to ensure that it can remain resilient in the short and medium term;
- develop and promote business advice for VCSE sector organisations to enable them to diversify/manage reduced traded income;
- provide direct funding advice towards organisations identified as 'at risk';
- clarify how transition to post COVID-19 grant approaches will be managed enabling the sector to plan for delivering essential services;
- seek to influence national government to provide support for a wider range of VCSE sector organisation's core costs until post COVID-19 arrangements are established;
- advocate for partners to engage with the VCSE sector as a distinctive sector when developing business resilience approaches.



Summary of recommendations...

York CVS will:

- share the learning from this survey and continue to co-ordinate the collation of intelligence about sector resilience;
- encourage and support collaboration and partnership working across VCSE sector organisations (and other sectors) for the ultimate benefit of vulnerable citizens;
- develop a fundraising campaign to raise funds for smaller groups and organisations;
- Seek funds to develop a volunteering hub to match potential volunteers who currently do not have roles, with VCSE sector organisations who need support;
- support the re-establishment of face-to-face services; a critical part of the VCSE sector offer;
- continue to support the VCSE sector in York by expanding online resources and services;
- further engage with existing lobbying efforts at national level and make this work visible to VCSE sector organisations.