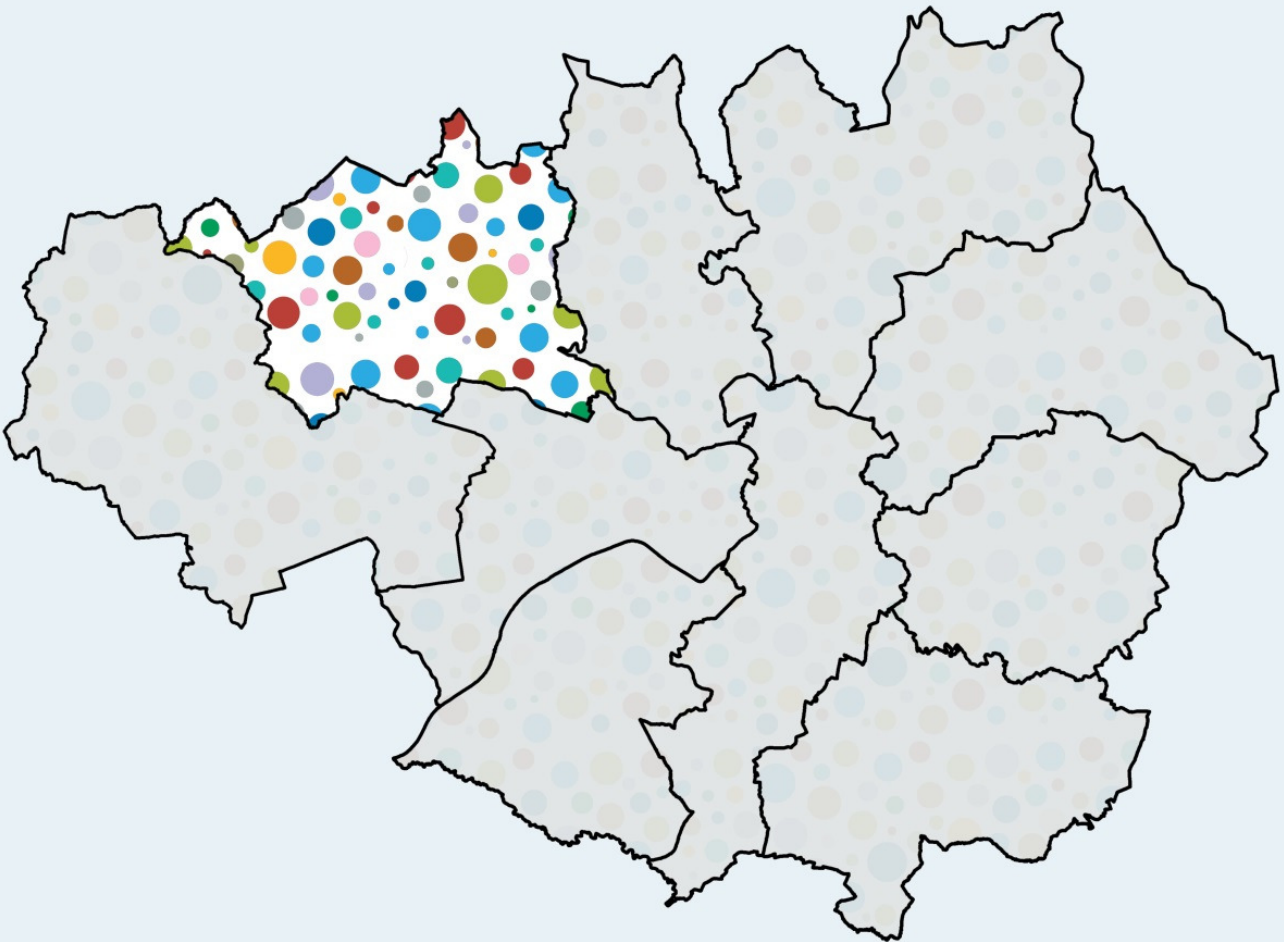


Bolton State of the Voluntary, Community and Social Enterprise Sector 2017

*A report on social and
economic impact*



Bolton State of the Voluntary, Community and Social Enterprise Sector 2017

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In completing the report we are particularly grateful to members of the Research Steering Group³ and the Bolton Community and Voluntary Services (CVS) team for their support in developing and administering the survey and for their input into earlier drafts of the report. We are also grateful to the many employees and volunteers from across the voluntary, community and social enterprise sector who took the time to complete a questionnaire or participate in a focus group, as without their dedicated time and effort, this essential report would not have been possible.

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¹ 10GM is a joint venture by the Greater Manchester Voluntary Sector Infrastructure Organisations (Action Together in Oldham and Tameside, Bolton CVS, CVS Rochdale, Macc, Salford CVS, VCAT, Wigan & Leigh CVS)

² The other areas are: Manchester, Oldham, Rochdale, Salford, Stockport, Tameside and Wigan.

³ The following organisations were represented on the Research Steering Group: CRESR, Salford CVS (lead partner), Greater Manchester Centre for Voluntary Organisation (GMCVO), Bolton CVS, Macc, Action Together in Oldham and Tameside and CVS Rochdale.

Definitions

This report is about the 'state of the voluntary, community and social enterprise sector in Bolton'. At various times the voluntary sector has been known as the 'voluntary and community sector' or the 'third sector' whilst the current Government talks a lot about 'civil society'. In this report, when we talk about the voluntary sector in Bolton, we mean **voluntary organisations, community groups, the community work of faith groups, and those social enterprises** where there is a wider accountability to the public via a board of trustees or a membership and all profits will be reinvested in their social purpose.

Foreword

This comprehensive State of the Sector report for Bolton outlines the impressive size, the diverse scope and the amazing breadth of voluntary and community action and activity across the borough. It clearly highlights the significant contribution that the voluntary and community sector makes to the local economy, to people's health, their wellbeing and to local lives.

It tells us a story about how Bolton's voluntary and community sector continues to reach those who require help, support, information and guidance through delivering 2.3 million interventions. The data tells us that more than 46,000 people are actively involved through volunteering in neighbourhoods and communities across Bolton. This massive contribution through volunteering has a positive impact on people's lives and we must ensure that volunteering opportunities continue to be quality, positive and accessible to all.

Whilst there are many positives in this report, it also serves as a reminder of how very fragile the local voluntary and community sector is in Bolton. The data tells us that small and micro organisations make up the vast majority (88 per cent) of the sector, yet receive less than 10 per cent of the income. Income continues to fluctuate across the sector and sources are volatile, with support around fundraising, navigating the commissioning landscape and access to grants essential for the on-going and future development of the sector.

Of significant concern and a call to action for Bolton CVS is the fact that sustainability for many groups and organisations continues to be a major challenge, with more groups and organisations using their reserves to ensure that services run, that people are supported and that change happens in communities.

There is a clear financial benefit that has to be recognised from the research, with a significant £94 million contribution to the local economy from those working in the sector. Added to that, the 113,500 volunteering hours each week provides the bedrock for such incredible social value which can continue to be maximised through the local commitment to the 'Bolton pound'.

Relationships are incredibly important in these changing times and it is reassuring to see an increase in the way that the sector feels able to positively influence the public sector. It is important that we continue working together to develop a diverse, strong and effective voluntary and community sector in Bolton. It's also important that we enable voluntary and community groups and organisations to build on their established links and continue to harness the positive contribution and engage all stakeholders including the private sector, education and housing organisations through promoting social action, increasing employee and community participation and investing in grants programmes.

However, times are changing and we have the impact of significant changes to welfare, changes in health, social care, new and emerging technology and ever-evolving local and national government policy that significantly impacts the work of the voluntary and community sector.

Please use the evidence from this report to develop your grants, tender submissions and project proposals, to inform strategy, to influence policy, strengthen and equip volunteers and to engage people in communities. More importantly please use it to build on the dedication, passion, enthusiasm and creativity that the combined force of all aspects of the voluntary, community and social enterprise sector creates in Bolton – it's special and we must continue to enable it to thrive.

Darren Knight

Chief Executive

Bolton CVS

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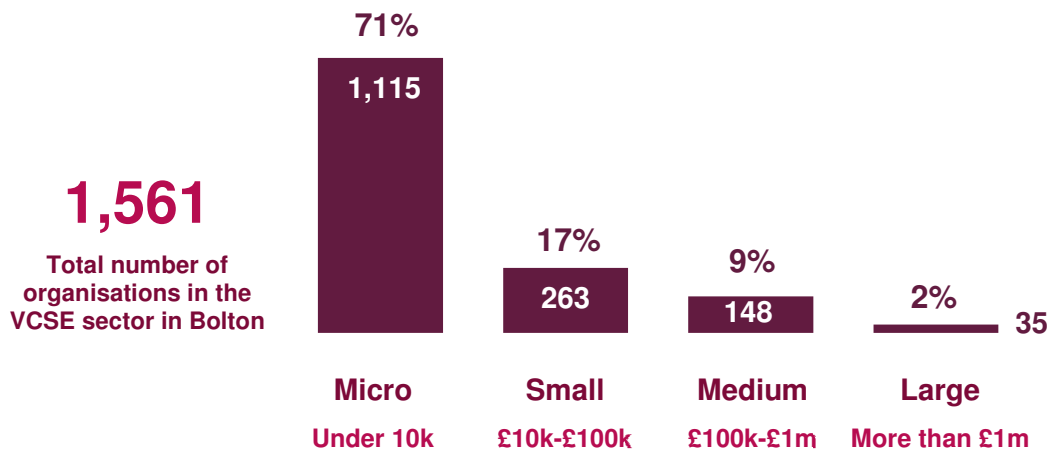
Executive Summary

This report provides the main findings of research aimed at improving the understanding of the social and economic impact of the voluntary, community and social enterprise (VCSE) sector in Bolton. The key objective of the research was to provide a comprehensive overview of the sector in Bolton at the start of 2017.

In this summary we answer eleven key questions about the sector and its role across Bolton.

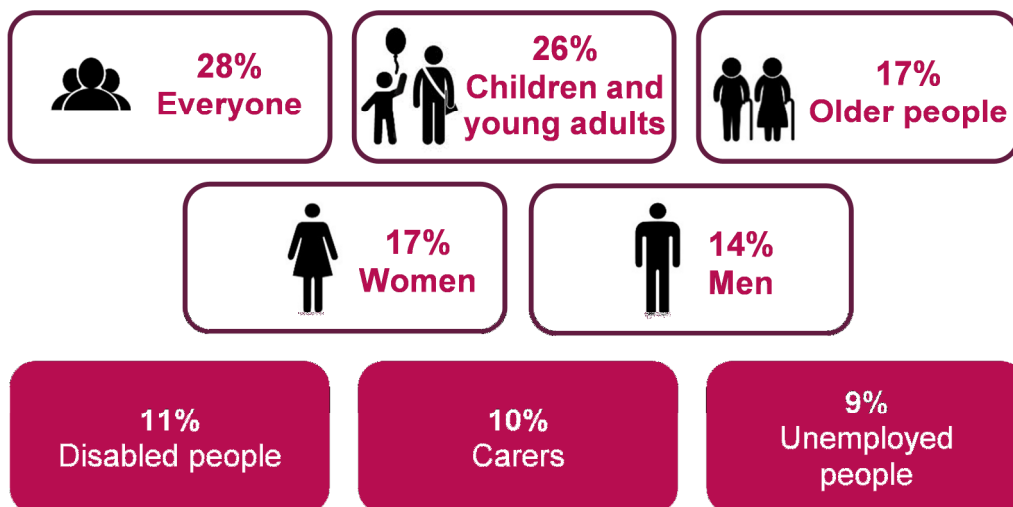
Q1. How many organisations are there?

There are an estimated **1,561 organisations** working in the VCSE sector in Bolton and the vast majority of organisations are micro or small (88 per cent less than £100,000):



Q2. Who benefits from their work?

The client groups served by the largest proportions of organisations can be broadly characterised as being demographic. Over one quarter of organisations surveyed identified 'everyone' as their main clients, users or beneficiaries.



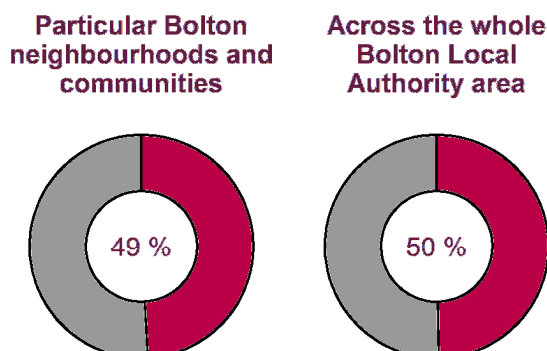
MAIN CLIENT GROUPS IN 2012/13:

WOMEN - 29%
 CHILDREN - 28%
 MEN - 27%
 EVERYONE - 25%
 YOUNG PEOPLE - 25%
 OLDER PEOPLE - 25%

It is estimated that the VCSE sector in Bolton made:

2.3 million interventions with clients, users or beneficiaries in the past year

The VCSE sector works at a range of different geographical levels: both across and beyond Bolton; the local authority area, and specific communities and neighbourhoods within it, are the main focus for a majority of organisations:



Q3. What does the VCSE sector in Bolton do?

The areas with the greatest proportion of organisations working in them are:



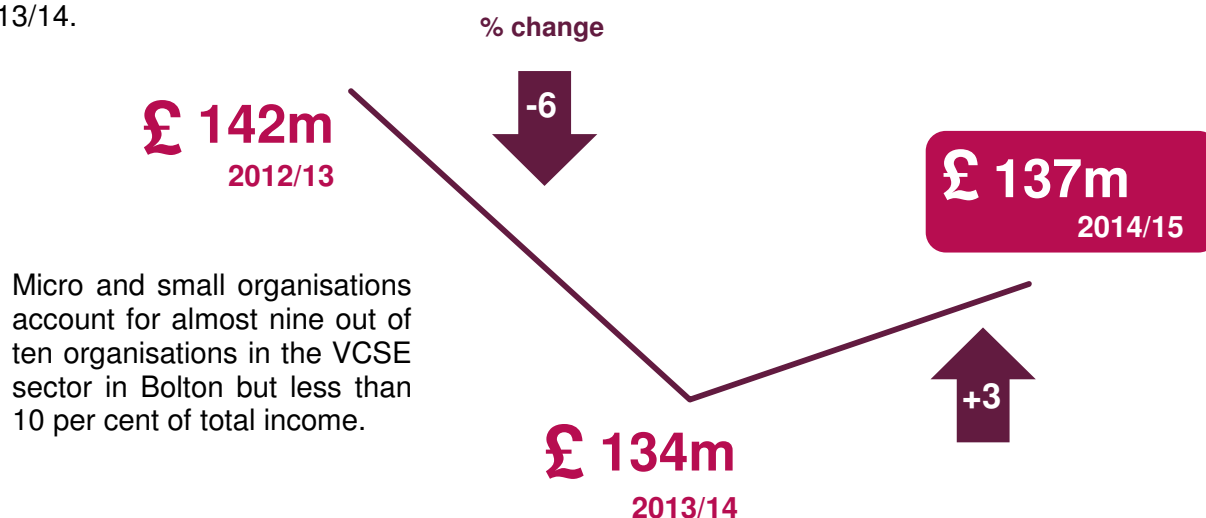
MAIN AREAS IN 2012/13:

SPORT & LEISURE - 36%
HEALTH & WELLBEING - 35%

COMMUNITY DEVELOPMENT - 34%
EDUCATION, TRAINING & RESEARCH - 28%

Q4. What is the income of the VCSE sector in Bolton?

Total income in 2014/15 is estimated to be **£137m**, an increase of three per cent compared to 2013/14.



Micro and small organisations account for almost nine out of ten organisations in the VCSE sector in Bolton but less than 10 per cent of total income.

Across Greater Manchester **micro and small organisations** experienced **year on year reductions** in total income between 2012/13 and 2014/15.

By contrast medium and **large organisations** saw a reduction in total income between 2012/13 and 2013/14 but then **an increase** between 2013/14 and 2014/15. But income is still below 2012/13 levels.

Q5. Where does the VCSE sector in Bolton receive its funding from?

86% have at least one source of **non-public sector funds**

70% IN 2012/13

INCLUDING:

Fundraising (received by 53 per cent of respondents)

Grants from charitable trusts and foundations (49 per cent)

Grants from National Lottery distributors (34 per cent)

MAIN SOURCES OF FUNDING IN 2012/13:

FUNDRAISING - 34%

GRANTS FROM CHARITABLE TRUSTS & FOUNDATIONS - 28%

MEMBERSHIPS FEES & SUBSCRIPTIONS- 26%

77% have at least one source of **public sector funds**

37% IN 2012/13

INCLUDING:

Bolton Council (received by 45 per cent of respondents)

Grant funding administered by Bolton CVS (which includes grants on behalf of public sector bodies) (32 per cent)

MAIN SOURCES OF FUNDING IN 2012/13:

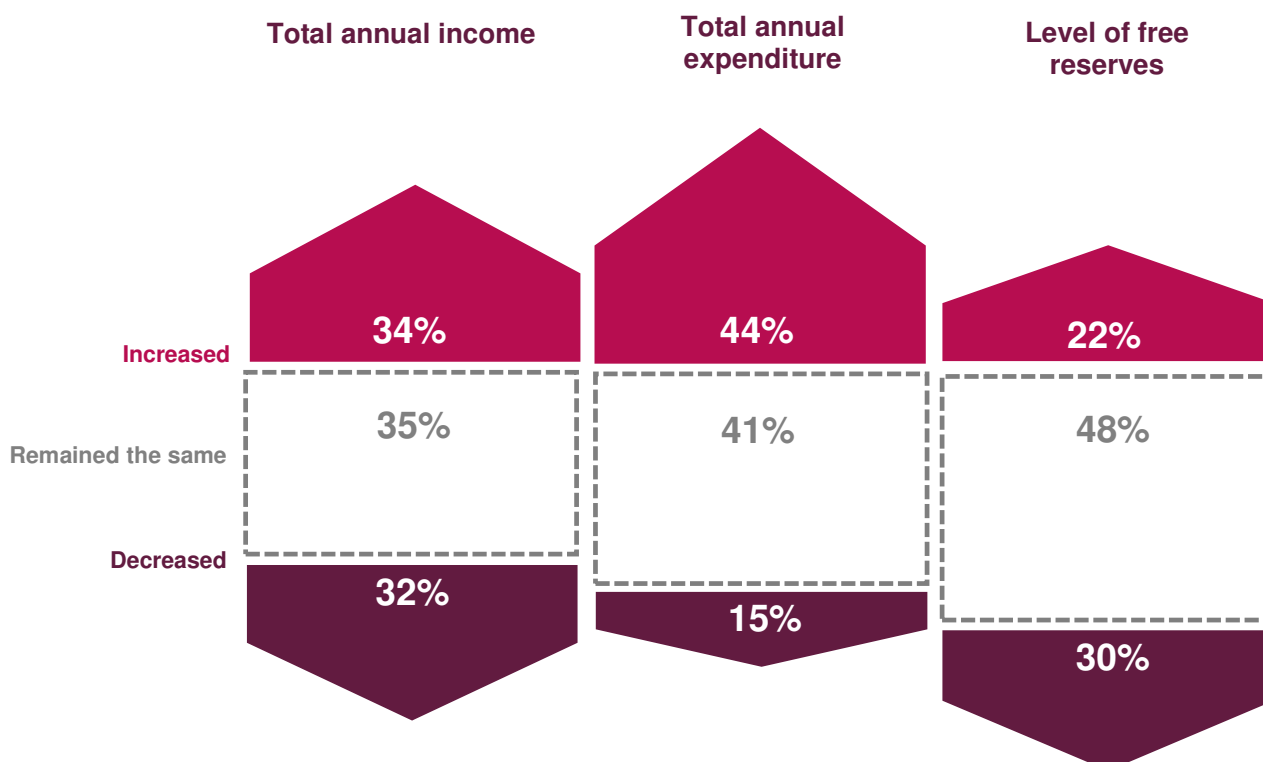
BOLTON COUNCIL - 32%

NHS BOLTON - 6%

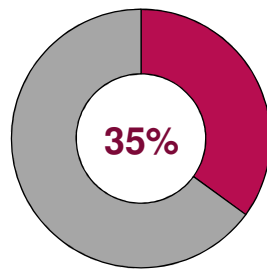
Q6. How sustainable is the VCSE sector in Bolton?

The survey highlights some areas for concern and action:

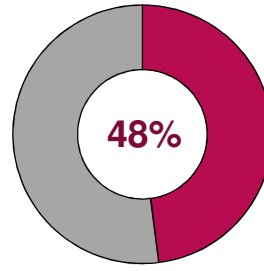
- **44 per cent** of respondents reported increasing their expenditure but only **34 per cent** had experienced an increase in income
- **32 per cent** of respondents reported a decrease in income but only **15 per cent** reduced their expenditure
- **30 per cent** reported a reduction in their financial reserves compared to **22 per cent** reporting an increase.



The precarious financial situation of some organisations is further emphasised by the state of their reserves:



Proportion of organisations with reserves less than one month's expenditure



Proportion of organisations with reserves less than 25 per cent of annual expenditure

Q7. Who works and volunteers in the VCSE sector?

The sector is supported by:

46,900 volunteers & committee/
board members (36,300 volunteers
and 10,600 committee/board members)



who donated
113,500 hours
of their time per week



£102.7 million per annum
= estimated economic contribution
of volunteers



The VCSE sector is also a significant employer. There are an estimated:

3,000 FTE paid staff
employed in the VCSE sector in Bolton

£ 94.4 million per annum
contributed to the economy by paid employees of Bolton
VCSE sector organisations

Q8. How good are relationships with public sector bodies?

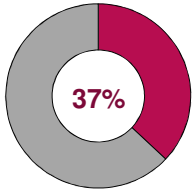
Survey respondents had dealings with a range of local public sector bodies:

86% had some dealings with **Bolton Council**

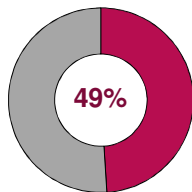
57% had some dealings with **Greater Manchester Police**

45% had some dealings with **Bolton University**

37% had some dealings with **NHS Bolton Clinical Commissioning Group**



...of VCSE organisations are satisfied with their ability to influence Bolton Council, up from **25 per cent** in 2012/13; and identical to the proportion satisfied with their ability to influence their most frequent other public sector contact

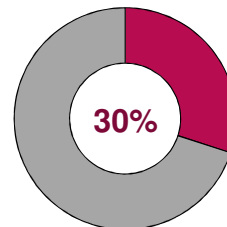


...of VCSE organisations felt Bolton Council is a positive influence on their success, **an increase** in the proportion since 2012/13 (36 per cent). The same percentage felt their most frequent other public sector contact was a positive influence on their success

Q9. How well does the VCSE sector work with private businesses?

60% had some dealings with **local private businesses**

... **30 per cent** of respondents felt that the private business community in Bolton was a positive influence on their organisation's success - this is an increase of 16 percentage points since 2012/13



Agree private businesses a positive influence

0% are members of a **private sector-led consortium**

Q10. How well does the VCSE sector work together?

64% had a 'great' or 'fair amount' of contact with **other VCSE organisations** in Bolton (27 per cent with VCSE organisations in Greater Manchester)

49%

...satisfied with opportunities to network with other VCSEs

44%

...satisfied with opportunities to work together to deliver services

50% IN 2012/13

47%

...satisfied with opportunities to work together to influence decisions

51% IN 2012/13

21% are members of a **formal VCSE consortium**

Q11. What are the key issues facing the VCSE sector in the future?

Respondents were asked about the strategies they are actively pursuing or planning to pursue. Over 55 per cent of respondents were already doing or planning to do the following:

64% work more closely with another voluntary/not-for-profit organisation
59% change the way they run services or activities
56% increase individual donations

Respondents were also asked to consider the factors they anticipated assisting or constraining their organisation over the next 12 months:

Assisting

TOP FACTORS:

Engagement with other VCSE organisations (52 per cent assisting or greatly assisting)

Ability to recruit volunteers with sufficient skills (46 per cent)

Engagement with public sector bodies (46 per cent)

Constraining

TOP FACTORS:

The local economy (37 per cent constraining or seriously constraining)

Ability to employ staff with sufficient skills (32 per cent)

Ability to retain volunteers/volunteer turnover (32 per cent)

Introduction

This report provides the main findings of research aimed at improving the understanding of the social and economic impact of the voluntary, community and social enterprise (VCSE) sector in Bolton.

The research was commissioned by Bolton CVS as part of 10GM⁴ with GMCVO and undertaken by the Centre for Regional Economic and Social Research (CRESR) at Sheffield Hallam University.

The key objective of the research was to provide a comprehensive overview of the sector in Bolton at the start of 2017.

The research involved a web-based survey of organisations supporting the people and communities of Bolton and focus groups with VCSE organisations. The research took place between September 2016 and January 2017.

A series of focus groups were also undertaken in December 2016 to support the research. These focus groups enabled VCSE organisations to explore their relationships with public, private and VCSE sector partners and their experience of recruiting and supporting volunteers.

Appendix 1 provides further detail on the research methodology.

⁴ 10GM is a joint venture by the Greater Manchester Voluntary Sector Infrastructure Organisations including Salford CVS (lead partner on this research), Action Together in Oldham and Tameside, Bolton CVS, CVS Rochdale, Macc and Wigan and Leigh CVS.

Context for the Research

2

This research comes during both a period of slow economic recovery following the recent long-term economic downturn and a rapidly changing political backdrop as the UK prepares to exit the European Union and the devolution agenda gains pace.

NCVO report that between 2012/13 and 2013/14 the income and spending of the voluntary and community sector in the UK increased, the first notable net growth since the peaks of 2007/08 and 2009/10 respectively.⁵ Total income has increased by just over £2.4bn to £43.8bn and now exceeds the 'peak income' seen in 2007/08 (£43.2bn). NCVO also report that following a decrease in income from government after 2009/10, income from government increased between 2012/13 and 2013/14 by around £0.5bn, although this remains below 2009/10 levels. The majority of this increase was in the largest charities which means the impact might not be felt as keenly at a local level. Income from individuals has also increased by just over £1bn between 2012/13 and 2013/14 and is now at its highest ever level.

While these figures provide reasons to be optimistic there is still need for caution. With the election of the Conservative Government in May 2015, austerity measures are set to continue for the foreseeable future and VCSE organisations are likely to feel the impact of these measures. This includes the Government's commitment to a continuing programme of welfare reform which is likely to result in increasing demand for some services as benefits are restricted or withdrawn. The total anticipated reduction by 2020/21, from both pre and post-2015 welfare reforms in Bolton, is predicted to be £150m per year or equivalent to £860 per working age adult per year.^{6,7} These reforms are likely to continue to put pressure on VCSE organisations both in terms of their financial health and the need to meet greater levels of need from existing and new beneficiaries.

Locally, the reductions in public expenditure have been felt acutely in Bolton. As part of the Coalition Government's plan to reduce the deficit, it reduced funding for local government in England. Across Greater Manchester local authorities have experienced, and are continuing to experience, a decline in Government funding. With regards to grants, there has been an overall decline in local grant opportunities and the small grants programme that Bolton CVS delivers with Bolton Council funding has reduced from £150,000 to £70,000.

⁵ UK Civil Society Almanac (2016) NCVO.

⁶ Beatty and Fothergill (2016) *The Uneven Impact of Welfare Reform: The financial losses to places and people*.

⁷ Note: These figures are based on HMRC Budgets and Autumn Statements from between 2010 and 2015. In the 2016 Autumn statement the Pay-to-stay measure was scrapped and so this has been taken account of in the figures. The estimate of cuts due to the LHA Cap in social housing was increased by a further £160m p.a. which is not taken account of in the figures. The Universal Credit Taper was also increased by 2p in the pound, an increase in funding of £570m p.a., which is not included in the figures presented here.

At a local level there have also been significant changes which have impacted on the environment in which the sector operates. Bolton CVS has seen significant changes across the borough over the last three years, particularly over the last 18 months with the pace of devolution increasing. However as this report highlights, this isn't necessarily well understood by the VCSE sector. Greater Manchester's devolved powers and responsibilities, however, present Bolton with a unique opportunity to influence decision-making and the provision of a range of business support, skills and welfare services.

Bolton CVS has seen an increased demand to support the wind up of groups and distribute assets, support to help develop partnerships and partnership agreements. More support in general has been required to help small groups gain charitable status and more support to help groups be ready for either asset transfer or transfer of management for council owned buildings.

Against this background this research provides in depth data about the 'state of the VCSE sector' in Bolton at the start of 2017. The research provides a comprehensive overview of the sector in Bolton for partners to draw upon and help harness the potential of the sector.

What the Voluntary Community and Social Enterprise Sector in Bolton does

This chapter develops a picture of the core features of the voluntary, community and social enterprise (VCSE) sector in Bolton. It focuses on a series of general questions in which respondents were asked about their group or organisation: what it is and what it does.

3.1. How many VCSE organisations are there in Bolton?

Estimating the number of organisations represents a major challenge. This is because a large proportion of organisations are small, local and **not formally registered** as charities, limited companies or other recognised forms which require registration (e.g. industrial and provident societies). As a result they do not appear on formal central records such as those held by the Charity Commission or Companies House so are considered '**below the radar**' (BTR). Any estimate of the total number of organisations in an area therefore requires information on the numbers of registered and unregistered (i.e. BTR) organisations.

In estimating the total number of organisations in Bolton we drew on information from the following sources:

- The Register of Charities in England and Wales, which indicated **403** registered charities with postcodes in Bolton.
- The ratio of charities to non-charities provided in the 'National Survey of Charities and Social Enterprises' (NSCSE), undertaken by Ipsos MORI for the Cabinet Office in 2010. This was used to gross the estimate upwards to a total of **530** registered organisations, to take account of non-charitable social enterprises.
- Research by NCVO and the University of Southampton,⁸ which found that on average there are 3.66 BTR organisations per 1,000 population. If this figure is applied to Bolton⁹, it can be estimated that there are **1,031** BTR organisations in the borough.¹⁰

⁸ Mohan, J et al (2010). *Beyond 'flat-earth' maps of the third sector: enhancing our understanding of the contribution of 'below-the-radar' organisations*. Northern Rock Foundation Briefing Paper

⁹ Based on Office for National Statistics 2015 population estimates

¹⁰ It is important to note that the BTR figure is an estimate based on an average across 46 local authorities. The BTR research found significant variability, with some local authorities reaching over seven BTR organisations per 1,000 population, and in one case exceeding 10.

Summing the estimated numbers for both registered and BTR organisations produces an estimated figure of:

1,561 groups and organisations in total operating in the VCSE sector in Bolton.

This is higher than the estimate produced for the 2013 report (1,418). Whilst this may reflect a genuine increase in the number of voluntary organisations between the two surveys this could also in part be due to unavoidable differences in the estimation methodology.

For the 2013 report, the sampling frame for the NSCSE was used to provide the estimates for the number of formally registered organisations. Unfortunately this survey was subsequently cancelled and has not been repeated. As such, only the ratio of charities to non-charities was taken from this data source and combined with the number of charities from the charity register.

3.2. What size are organisations in Bolton?

The size of organisations is traditionally measured using their annual income¹¹. When the distribution of organisations across Bolton was explored by size category based on income for 2014/15, it showed that **the majority of organisations were either micro or small**. But the survey was under-representative of BTR organisations (only 38 per cent of survey respondents were identified as BTR), so this did not present an accurate picture of the actual distribution. The figures were therefore adjusted based on the assumption that the estimated 500 organisations not included in the survey sample were BTR and micro in size¹².

Exploring the distribution by size category based on income for 2014/15 across Greater Manchester also showed some inconsistency with the distribution found in 2013. Therefore, in order to provide the most robust estimate of the distribution of organisations in the VCSE sector by size, data from both waves of the survey have been used to calculate the proportion of organisations estimated to be in each size category.

The outcome of this process is shown in figure 3.1, which demonstrates that an estimated 71 per cent of the VCSE sector (1,115 organisations) are micro in size, 17 per cent are small (263 organisations), nine per cent are medium (148 organisations), and two per cent are large (35 organisations).

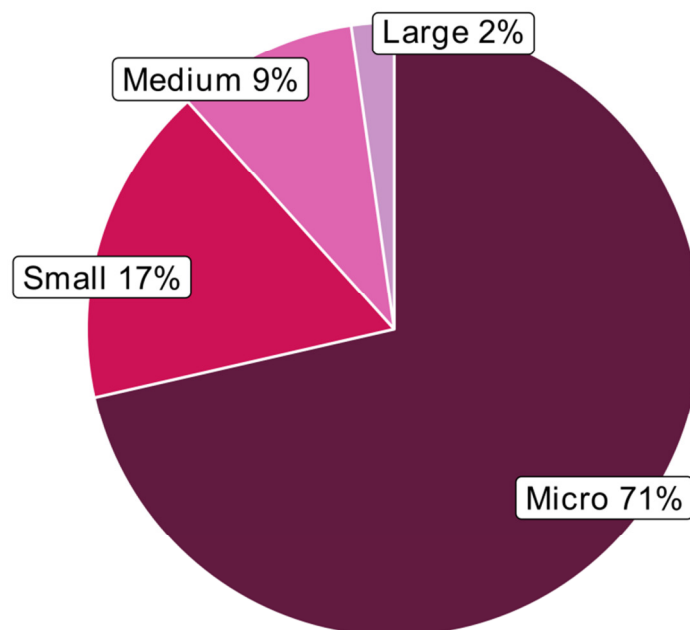
Introducing the BTR figure produces a much higher estimate for the number and proportion of micro organisations and emphasises the finding that a large proportion of organisations in the VCSE sector in Bolton are very small (88 per cent micro or small). This is similar to the national picture: NCVO¹³ estimate that 83 per cent of the VCSE sector is made up of micro or small organisations, 14 per cent are medium, and three per cent are large. Results are also largely consistent with the pattern across Greater Manchester as whole, where 90 per cent of organisations are micro or small, eight per cent are medium and two per cent are large.

¹¹ In exploring organisation size we used the categories developed by NCVO for use in their Almanac series (see e.g. Clark, J *et al.*, 2010)

¹² The basis for these assumptions is discussed in more detail in the methodological annex

¹³ UK Civil Society Almanac (2016) NCVO.

Figure 3.1: Proportion of Bolton VCSE organisations by size (estimated)



Source: Bolton State of the VCSE sector survey 2016/17
Base: 100

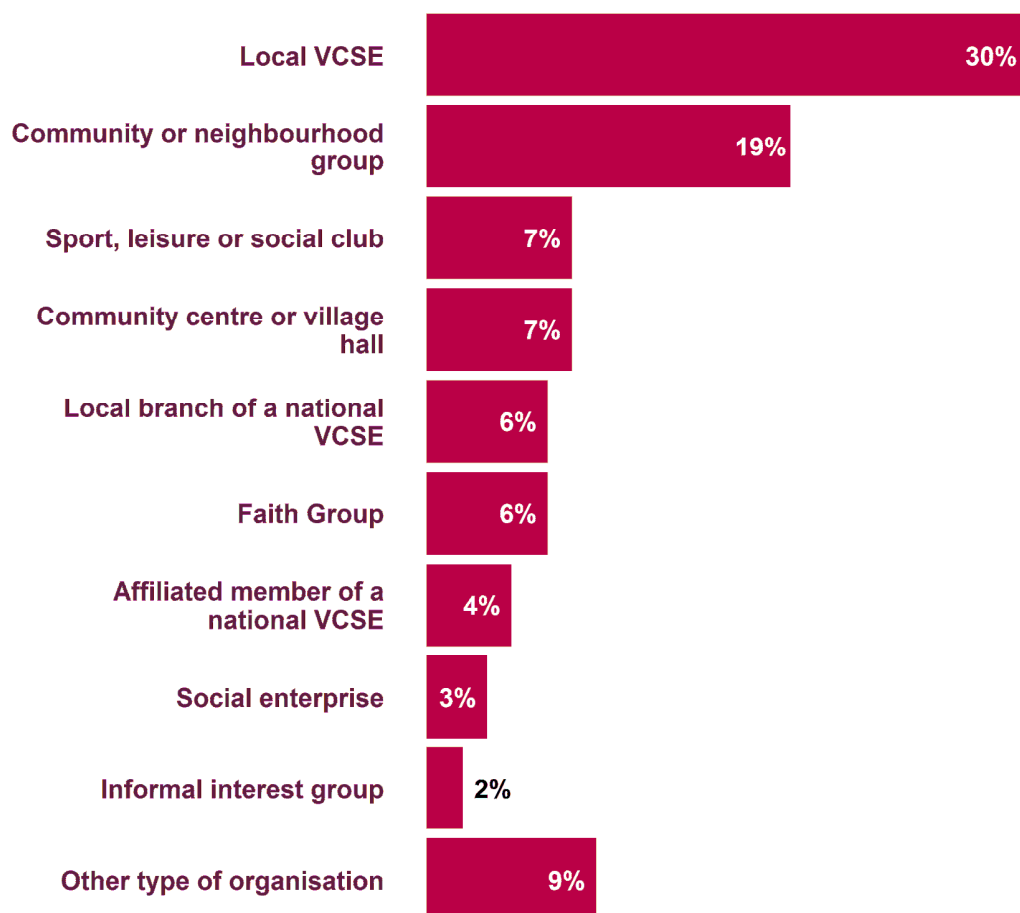
3.3. What types of organisations operate in the VCSE sector in Bolton?

Respondents to the questionnaire were asked to identify which category from a list of 'organisation types' best described their organisation. The results indicate that many organisations in the VCSE sector are likely to have a local focus. Figure 3.2 shows that the largest proportion, **30 per cent, identified their organisation as being a local voluntary organisation**. A further 19 per cent identified themselves as a community or neighbourhood group. National organisations were less common: just over one in ten organisations stated they were either a national voluntary organisation (one per cent), a branch of a national voluntary organisation (six per cent) or an affiliated member of a national voluntary organisation (four per cent).

In 2012/13 almost one third (29 per cent) of respondents indicated their organisation was a local voluntary organisation and 16 per cent a community or neighbourhood group. National organisations were also less common in 2012/13.

The analysis across Greater Manchester found a similar picture with local voluntary organisations (22 per cent) and community or neighbourhood groups (15 per cent) accounting for 38 per cent of respondents, although this figure was greater among Bolton respondents. Only 13 per cent of respondents stated they were either a national voluntary organisation (two per cent), a branch of a national voluntary organisation (six per cent) or an affiliated member of a national voluntary organisation (four per cent).

Figure 3.2: Type of organisations



Source: Bolton State of the VCSE sector survey 2016/17
Base: 162

3.4. How long have organisations in the VCSE sector been operating?

The questionnaire asked respondents to indicate when their organisation was formed. Assessment of organisations by the year in which they were formed provides an indication of how established the VCSE sector is in Bolton.

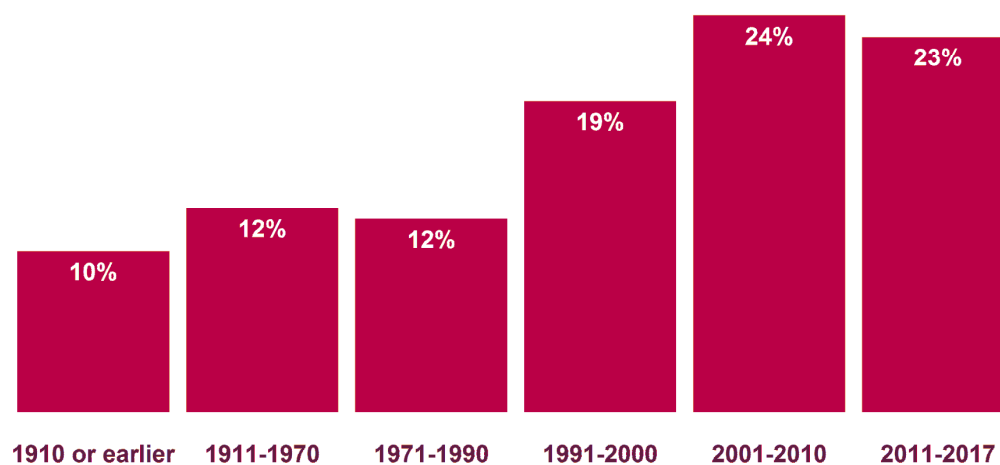
The responses received build a picture of a VCSE sector that has a fairly well established core. However, the VCSE sector in Bolton has also seen the formation of many new organisations since 2001. Figure 3.3 shows that 47 per cent of organisations responding to the survey had been formed since 2001, including 36 per cent in the past 10 years (i.e. since 2006). Furthermore, an additional 19 per cent were formed between 1991 and 2000; this means **two-thirds (66 per cent) of organisations were formed in the last 25 years**. At the other end of the spectrum 22 per cent of organisations had been formed before 1971, including 10 per cent formed in 1910 or before.

In the 2012/13 survey, 48 per cent of organisations were formed since 2001, including 37 per cent, which had been formed in the past 10 years.

The pattern for organisations responding to all of the Greater Manchester surveys was broadly similar. 43 per cent of respondents had been formed in the past 10

years. Six per cent of Greater Manchester organisations had been formed before 1911.

Figure 3.3: Year in which organisations were formed



Source: Bolton State of the VCSE sector survey 2016/17
Base: 153

It is important to conclude this section by drawing an important qualification. Although the results suggest that it is likely that the VCSE sector in Bolton has experienced growth in the number of organisations established in the last 20 years or so, it may not be as dramatic as the figures suggest. By definition, the survey is of organisations still operating in Bolton in 2016/17, not those which have closed down or ceased operations. Of the organisations which have survived through to 2016/17, the results suggest that a high proportion were established in the last 20 years. But some of the organisations established before, and since, may have subsequently closed down. Because we do not know the rate of closure over time we cannot be certain that the aggregate number of organisations being established or surviving is increasing.

3.5. What does the VCSE sector in Bolton do?

To elicit a picture of what the VCSE sector in Bolton does, the survey asked respondents to identify up to three main areas in which their organisation operates. Figure 3.4 presents the top ten main areas selected and confirms the message that the VCSE sector in Bolton works in a diverse range of thematic service areas. However, the proportion of responding organisations working in each area varies. This is most likely dependent on need and funding opportunities.

Figure 3.4 shows:

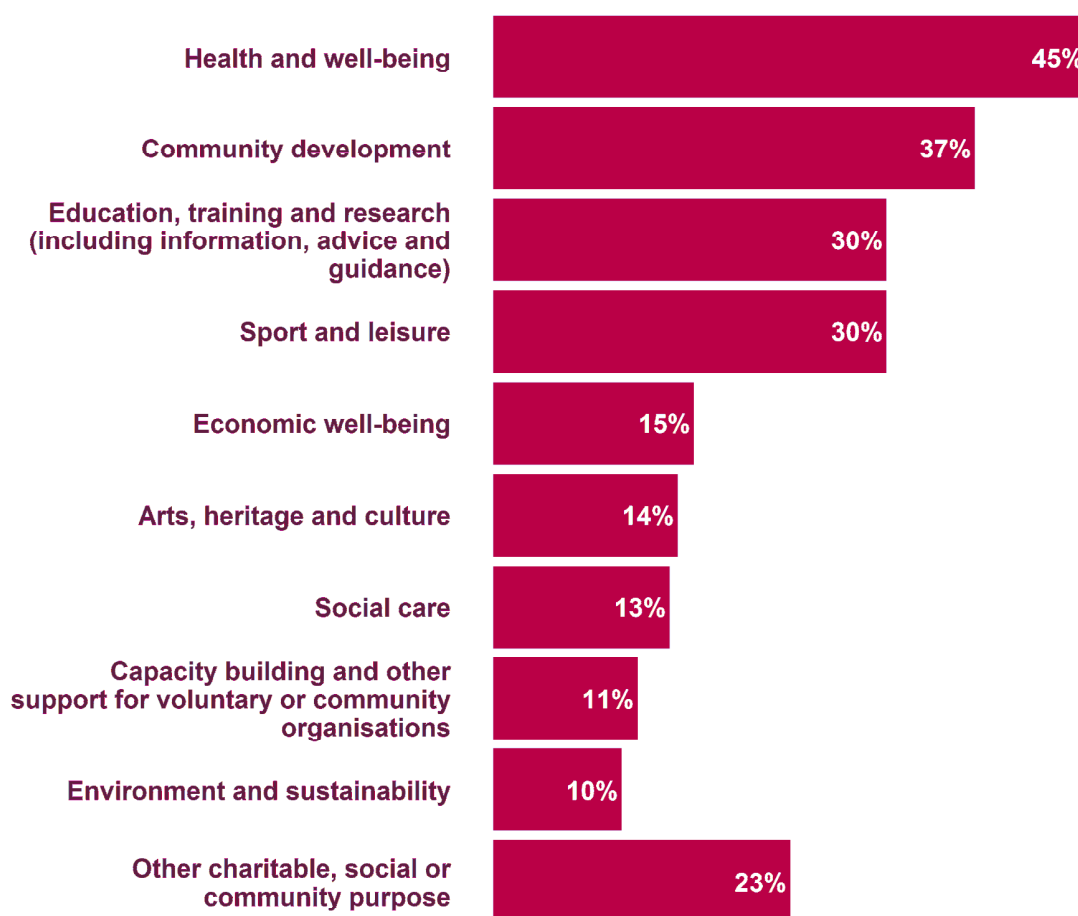
- 45 per cent **of organisations worked in the area of health and well-being**; up from 35 per cent in 2012/13
- 37 per cent worked in community development, similar to the 2012/13 survey (34 per cent)
- almost one third of organisations worked in each of the following themes:
 - sport and leisure (30 per cent; slightly lower than the 2012/13 proportion of 36 per cent)

- education, training and research (30 per cent compared to 28 per cent in 2012/13).

Across Greater Manchester as a whole the same four areas of work were reported as being the most common to work within:

- health and well-being (46 per cent)
- community development (39 per cent)
- education, training and research (26 per cent)
- and sport and leisure (25 per cent).

Figure 3.4: Top 10 main areas in which organisations work



Source: Bolton State of the VCSE sector survey 2016/17
Base: 163

In the latest survey respondents who indicated they worked in the area of health and well-being were asked to specify the specific areas in which they operate. Three-quarters (75 per cent) stated they worked in health and well-being in general. Over two-fifths (44 per cent) indicated they worked in mental health and 36 per cent said they worked in healthy living (food & lifestyle, sexual health). Responses were similar for Greater Manchester overall.

In a similar vein, respondents who identified education, training and research as a main area of work were asked to specify the areas they worked within this theme. Of the 46 respondents who answered this question, 32 (70 per cent) stated they worked

in education, 25 (54 per cent) said they worked in information, advice and guidance and the same number (25 respondents) said they worked in employability skills. Responses were again similar at the Greater Manchester level.

The two per cent of organisations responding to the survey who indicated that equalities and civil rights was a main area of their work were also asked to identify the specific areas within this category in which they operate. Three-quarters (three respondents) stated they worked in the areas of disability or gender. The areas of disability, age and gender were the most common responses across Greater Manchester.

4

Who the Voluntary Community and Social Enterprise Sector in Bolton works with

This chapter focuses on who the VCSE sector in Bolton works with and where.

4.1. Who are the clients, users or beneficiaries of the VCSE sector in Bolton?

The questionnaire asked respondents to provide the total number of individual clients, users or beneficiaries that their organisation had supported in the last year, both overall and within Bolton. Analysis of responses to this question by size and type of organisation revealed that in many cases organisations had provided the number of 'interventions' or 'contacts' that they had had with clients, users or beneficiaries. So for example an individual who visited a community centre once a week would have been counted 52 times within the year. Whilst some organisations will have provided the number of unique clients, users or beneficiaries, so as not to overestimate, in our analysis we have assumed the number provided represents the total number of interventions.

Summing across the 135 organisations that responded gives a total of 455,000 interventions overall. Doing the same for the 139 organisations who provided a figure for Bolton gives a total of 446,000 interventions in Bolton. The responses received can be extrapolated for the estimated 1,561 organisations thought to be operating in the VCSE sector in Bolton to provide an estimate of the total number of interventions by Bolton organisations. Working through the calculation it is estimated that Bolton organisations had:

2.3 million interventions with clients, users or beneficiaries in the past year overall

2 million interventions with clients, users or beneficiaries in the past year in Bolton

The 2012/13 study estimated that Bolton organisations made 1.8 million interventions with clients, users or beneficiaries overall.

The questionnaire also asked respondents to identify up to three groups that make up the main clients, users or beneficiaries of their organisation.

Figure 4.1 shows that, as might be expected, the VCSE sector in Bolton serves a diverse and wide ranging population. In many cases, client groups are served by relatively small numbers of organisations: 10 per cent of organisations or fewer serve 16 of the client groups listed.

Figure 4.1 shows that the client groups served by the largest proportions of organisations can be broadly characterised as being demographic: - children and young adults (26 per cent), women (17 per cent), older people (17 per cent) and men (14 per cent).

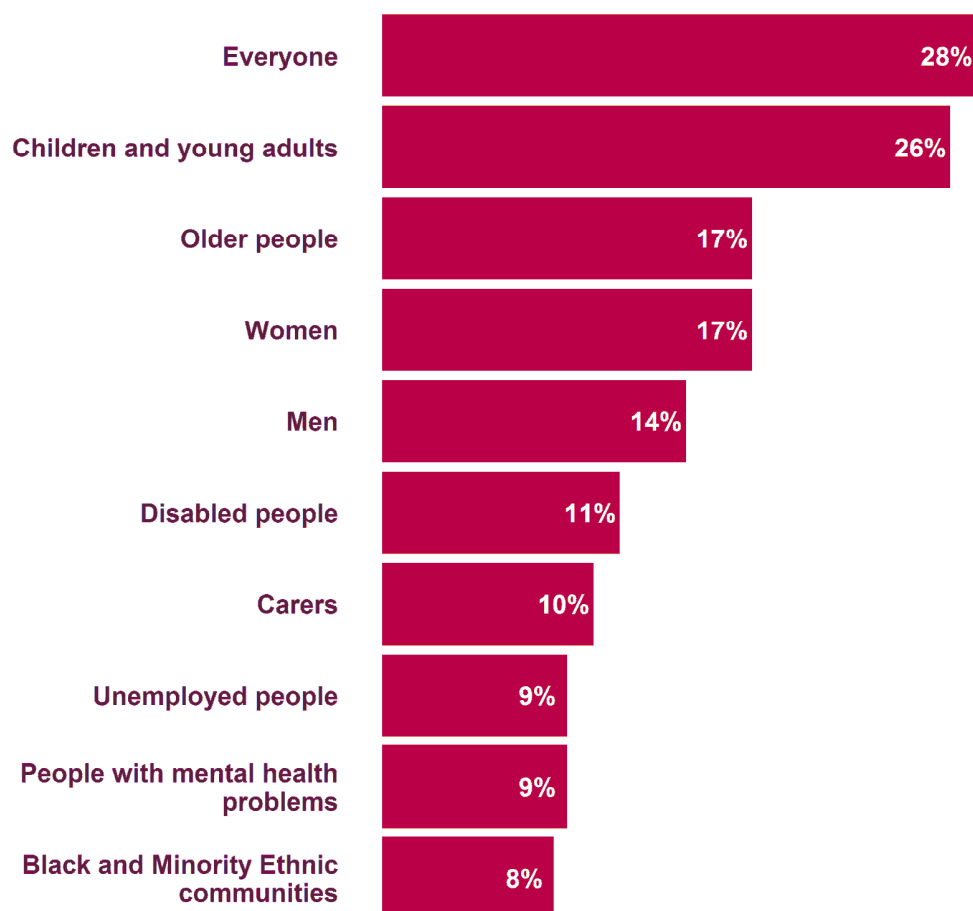
General and demographic client groups were also the most common groups identified in the 2012/13 survey. In 2012/13 the most common client groups were women (29 per cent), children (28 per cent), men (27 per cent) young people (25 per cent), and older people (25 per cent)

Over one quarter (28 per cent) of organisations identify 'everyone' as their main clients, users or beneficiaries. Disabled people are also the main client, user or beneficiary group for 11 per cent of organisations (14 per cent in 2012/13).

Analysis of responses to the Greater Manchester survey found a broadly similar pattern with general and demographic client groups also being the most common beneficiary groups identified:

- everyone: 33 per cent
- children and young adults: 23 per cent
- older people: 17 per cent
- women: 15 per cent
- men: 12 per cent.

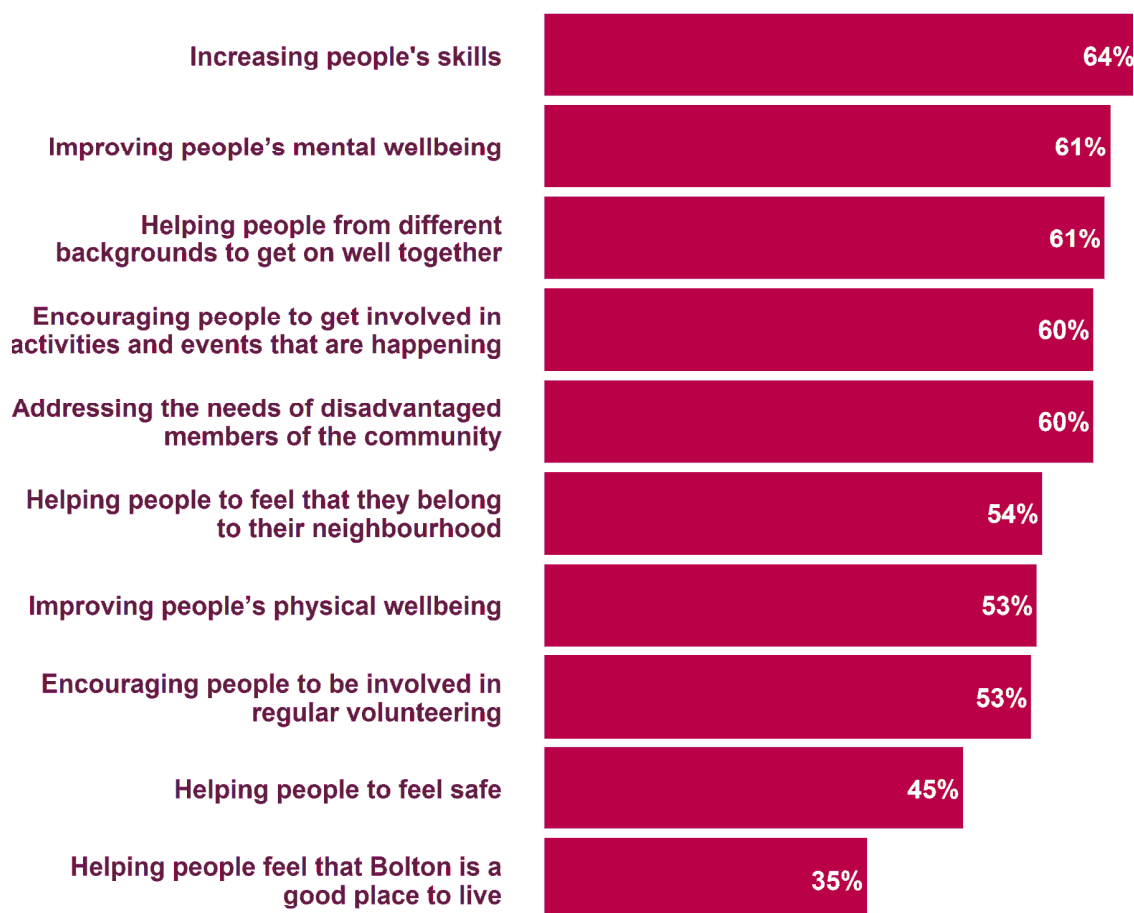
Figure 4.1: Top 10 main client groups of Bolton organisations



Source: Bolton State of the VCSE sector survey 2016/17
Base: 163

Respondents to the 2016/17 survey were asked to identify the ways in which their organisation makes a difference for its service users/client group(s). This question demonstrates the key role that the VCSE sector has in fostering strong and cohesive communities within Bolton and highlights the importance of the VCSE sector as an essential part of the social fabric of the borough. As figure 4.2 shows, over three-fifths of organisations felt they are improving people's skills (64 per cent), improving people's mental wellbeing (61 per cent) or helping people from different backgrounds to get on well together (61 per cent). These were also the three most common responses across Greater Manchester.

Figure 4.2: Top 10 ways in which organisations make a difference



Source: Bolton State of the VCSE sector survey 2016/17
Base: 163

4.2. What geographical levels does the VCSE sector operate at?

The survey asked respondents to identify the main geographical levels at which they operate – this ranged from the neighbourhood level, to those operating across England, the UK or overseas¹⁴. In this question respondents were asked to pick out up to three main geographic levels, the results of which are presented in figure 4.3. This shows that the **local area is a main focus for a majority of organisations:**

- half (50 per cent) identified the whole of the Bolton local authority area as a main focus of their work; similar to the proportion of organisations in the 2012/13 survey (52 per cent)
- a further 49 per cent identified particular Bolton neighbourhoods or communities as a main focus; a slightly higher proportion of organisations (55 per cent) identified this focus in the 2012/13 survey.

A modest proportion of organisations cited that a main geographic area at which they worked is either national (seven per cent) or international (two per cent). In many

¹⁴ This question was asked slightly differently in the latest survey compared to 2012/13. Two additional options ('Across more than one Greater Manchester Local Authority area' and 'Across the whole of Greater Manchester') were included.

cases those organisations that work internationally will reflect their main clients, users and beneficiaries.

The picture for Greater Manchester organisations shows that 44 per cent identified particular neighbourhoods and communities as a main geographic focus and 40 per cent identified the whole of their local area as a main focus. The percentage of organisations who said they worked nationally and internationally was slightly higher across Greater Manchester as a whole.

Figure 4.3: Main geographic focus



Source: Bolton State of the VCSE sector survey 2016/17
Base: 163

Using the responses to this question it is also possible to identify the highest main geographic area that an organisation carries out its activities (see figure 4.4 below). The highest geographic area that could be identified was internationally.

This analysis finds that for almost two-fifths (37 per cent) their highest main geographic focus was across the whole of the Bolton local authority area and for 36 per cent it was particular Bolton neighbourhoods and communities (both 38 per cent in 2012/13).

Across Greater Manchester as a whole 34 per cent identified particular local neighbourhoods and communities as the highest main focus, while for 27 per cent of respondents their local authority area was their highest main focus.

Figure 4.4: Highest geographic focus



Source: Bolton State of the VCSE sector survey 2016/17
Base: 163

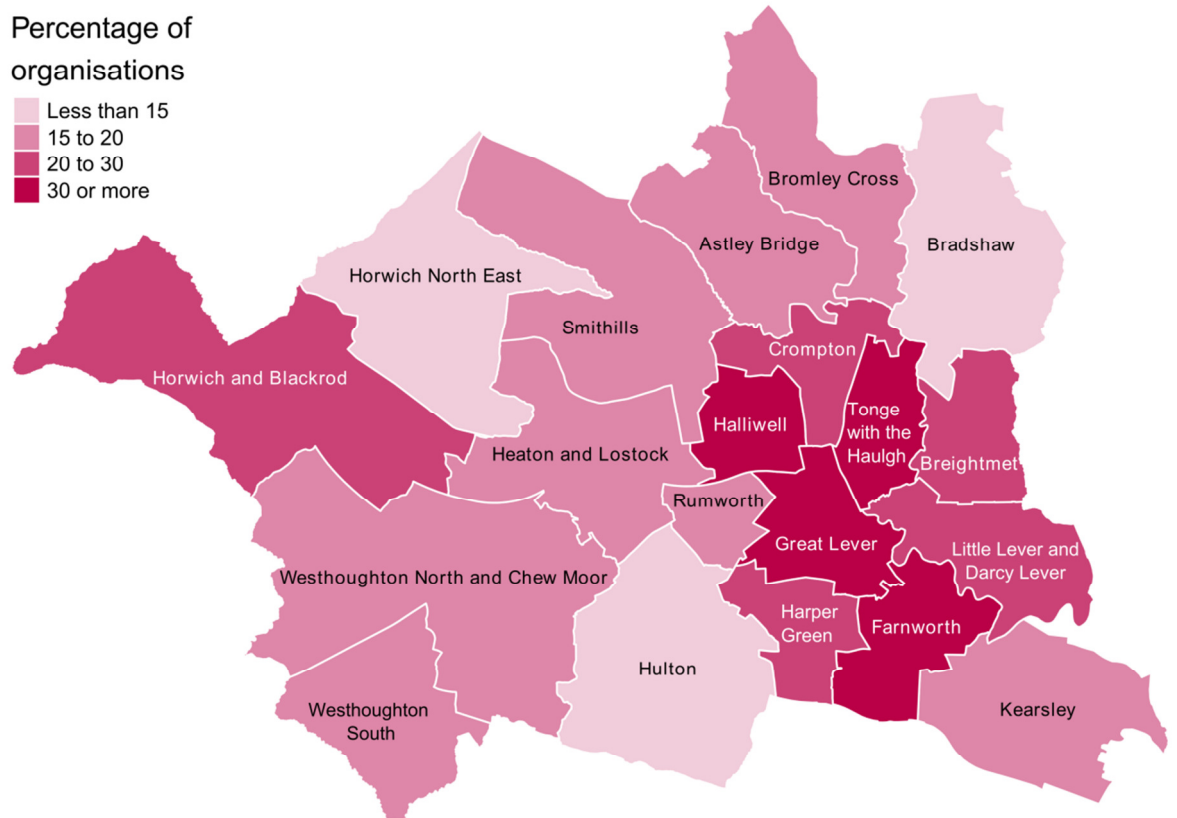
Respondents who reported that the whole Bolton local authority area or particular Bolton neighbourhoods or communities were a main geographic focus of their organisation, were asked to identify in which wards their work focused on. Map 4.1 shows the percentage of all organisations that identified each of Bolton's wards as a main focus of their work.

36 per cent of Bolton organisations identified Great Lever as a main focus of their work. In addition between 25 and 32 per cent of Bolton organisations identified Farnworth, Halliwell, Tonge with the Haulgh and Crompton as a main focus.

The three wards which were a main focus for the lowest proportions of Bolton organisations were:

- Bradshaw (12 per cent)
- Horwich North East (13 per cent)
- Hulton (15 per cent).

Map 4.1: Percentage of organisations that identify Bolton's wards as a main focus of their work



Source: Bolton State of the VCSE sector survey 2016/17
Base: 75

Finances and Income

This chapter provides an overview of the finances and income of the VCSE sector in Bolton. It includes estimates of the overall income received by the sector between 2012/13 and 2014/15, analysis of the different sources of income received (public sector and non-public sector) and their relative contribution, and an assessment of the financial sustainability of the VCSE sector.

Where possible this chapter compares results from the latest survey and the 2012/13 study. Revisions to the questionnaire and methodology between these studies, however, mean that comparisons are not always possible or appropriate and that caution should be applied when comparing across the two waves (see Appendix 1 for more detail).

5.1. Income

Based on the average (mean) income of respondents to the survey across Greater Manchester, and drawing on the assumptions used to estimate the total number of organisations in Bolton, the following is estimated¹⁵ -

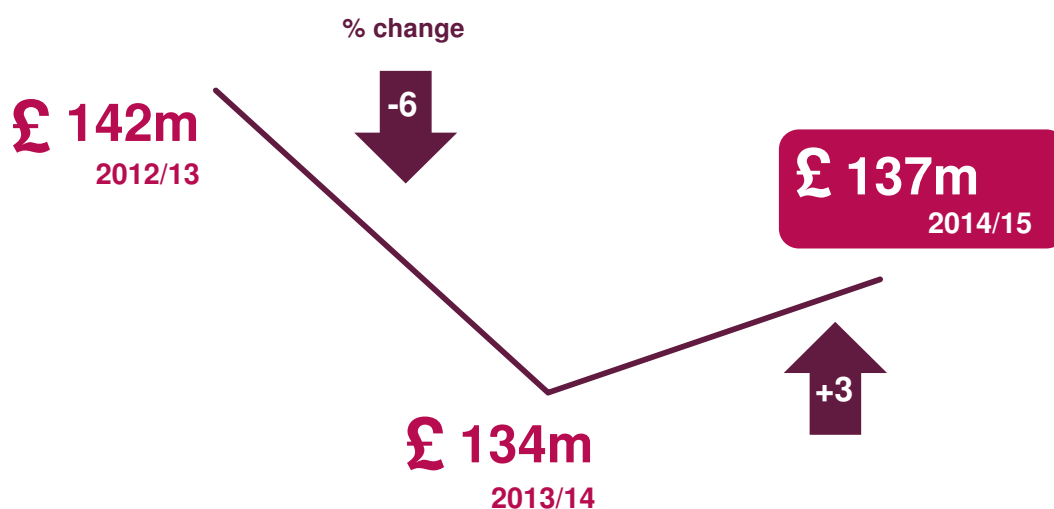
£137 million *the total income of the VCSE sector in Bolton in 2014/15*

This total income estimate is higher than the figure of £70 million estimated for the sector in 2011/12 from the 2012/13 survey. As discussed in Chapter three exploring the distribution by size category based on income for 2014/15 across Greater Manchester showed some inconsistency with the distribution found in 2013. This was quite pronounced in Bolton and helps explain the difference in the estimates above. The latest income figure provides a more robust estimate than the earlier study as it draws upon data from both waves of the survey, and therefore a more comprehensive contact list of organisations, to calculate the proportion of organisations estimated to be in each size category.

It also represents an increase of three per cent compared to 2013/14 when the total income of the VCSE sector was an estimated £134 million. This follows a reduction between 2012/13 and 2013/14 of an estimated six per cent in the total income of the sector. This data is outlined in more detail in figure 5.1.

¹⁵ This figure is based on a weighted average (mean) for each size category for respondents from across Greater Manchester. The methodology is explained in more detail in the methodological appendix.

Figure 5.1: Estimated annual income of the VCSE sector in Bolton (2012/13-2014/15)



Source: Bolton State of the VCSE sector survey 2016/17
Base: 100 All figures are in 2014/15 prices

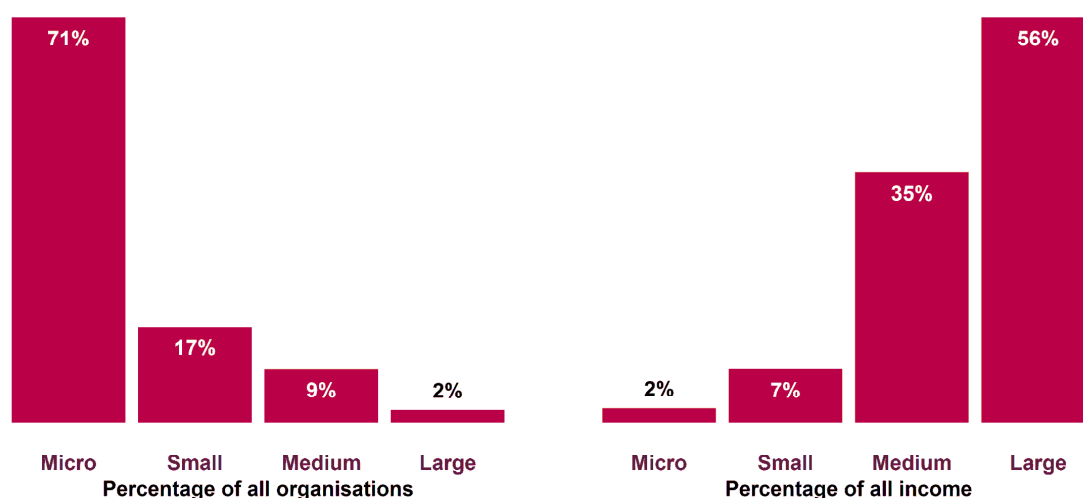
This change in income should be viewed in the wider national context discussed in Chapter two. The picture is somewhat more positive than in the previous 2012/13 study. Between 2012/13 and 2013/14 the income and spending of the VCSE sector in the UK increased, representing the first notable net growth since the peaks of 2007/08 and 2009/10 respectively. While the data above shows a decrease in Bolton between these two years results indicate a more recent upturn in the local area. However, with austerity measures set to continue for the foreseeable future and public sector funding for the sector continuing to be squeezed, there is still need for caution.

It is also worth noting the important role played by housing providers in the sector. A registered social landlord completed the latest survey and provided figures for their income and expenditure; however, these figures have not been included in the sector wide calculations made in this chapter to avoid overestimating the extrapolated figures. The income and expenditure of this organisation is substantial and it is worth highlighting the important contribution they make to the VCSE sector.

When the VCSE sector's income is explored in more detail it shows notable variations according to organisation size¹⁶. In 2014/15, the majority of income was concentrated in large and medium sized organisations even though the majority of organisations were micro or small. This is outlined in more detail in figure 5.2.

¹⁶ In exploring organisation size we used the categories developed by NCVO for use in their Almanac series (see e.g. Clark *et al.*, 2010)

Figure 5.2: Proportion of organisations and proportion of income by organisation size (2014/15)



Source: Bolton State of the VCSE sector survey 2016/17
Base: 100

This shows that **micro and small organisations account for almost nine out of ten organisations in the VCSE sector but less than 10 per cent of total income.** By contrast medium and large organisations account for just 12 per cent of the VCSE sector's organisations but receive over 90 per cent of its income. Income is concentrated particularly in the largest organisations, with over half of all income (56 per cent) into the VCSE sector received by only 35 organisations.

Analysis of income data from survey respondents across Greater Manchester¹⁷ identified further variations according to organisation size when we explored how income levels had changed between 2012/13 and 2014/15. These are summarised in table 5.1.

Table 5.1: Estimated change in annual income by organisation size (all Greater Manchester organisations: 2012/13-2014/15)

	Micro (under £10k)		Small (£10k-£100k)		Medium (£100k-£1m)		Large (more than £1m)	
	Income	% change	Income	% change	Income	% change	Income	% change
2012/13	£32.3m		£84.9m		£413.9m		£829.2m	
2013/14	£31.0m	-4	£82.4m	-3	£382.8m	-8	£785.1m	-5
2014/15	£30.0m	-3	£77.0m	-7	£391.5m	2	£822.6m	5

Source: Greater Manchester State of the VCSE sector survey 2016/17
Base: 720 All figures are in 2014/15 prices

This shows that across Greater Manchester the micro and small organisation categories experienced year on year reductions in total income between 2012/13 and 2014/15. For micro organisations this is a continuation of a trend identified in the 2012/13 survey where these organisations experienced a reduction of more than 10

¹⁷ It was not possible to undertake sufficiently robust analysis of these trends at a local authority level

per cent between 2010/11 and 2011/12. In contrast the 2012/13 survey identified a small increase in income between 2010/11 and 2011/12 for small organisations.

By contrast medium and large organisations saw a reduction in total income between 2012/13 and 2013/14 but then an increase between 2013/14 and 2014/15. For medium organisations this could indicate the start of a reversal in a trend identified in both the 2010 and 2012/13 surveys where year-on-year reductions in income were identified. This income volatility is a significant challenge in the operating context for medium and large organisations.

5.2. Sources of Income

5.2.1. Public sector income

Survey respondents were asked to identify the public sector bodies from which they received funding in their most recent financial year. Overall, **77 per cent of respondents reported having at least one source of public sector funds**. This is a noticeable increase since 2012/13 when just 37 per cent of respondents reported having at least one source of public sector funds and higher than the figure for Greater Manchester as a whole (68 per cent).

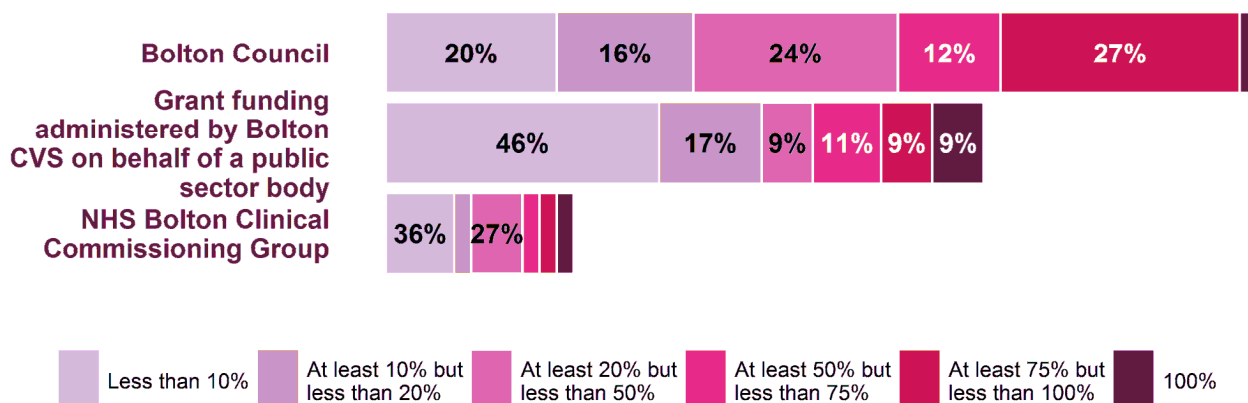
Funding from Bolton Council was the most frequently identified source of public sector funding (45 per cent), which was also the most frequently identified source in 2012/13. The second most common source of public sector funding was grant funding administered by Bolton CVS, a combination of funding from Bolton Council, Bolton CCG and Bolton CVS's own investments (32 per cent). Only ten per cent or fewer organisations stated they received public sector funding from any of the other public sector bodies listed. This pattern was reflected across Greater Manchester, where local authorities consistently emerged as the most frequent source of public sector funds.

Respondents were also asked to estimate the proportion of their group or organisation's total income that each source of public sector income represented. Figure 5.3 shows the three most common sources of public sector funding received and the estimated proportion of total income this represents.

Figure 5.3 shows that for those receiving funding from Bolton Council this represented less than 10 per cent of their total income for one fifth (20 per cent) of organisations. In contrast for 29 per cent this funding represented at least 75 per cent of income overall.

For over two-fifths (46 per cent) of those receiving grant funding administered by Bolton CVS, this funding represented less than 10 per cent of their total income. At the other end of the spectrum for 17 per cent of organisations this represented at least 75 per cent of their total income.

Figure 5.3: Public sector funds received by Bolton respondents (2014/15)

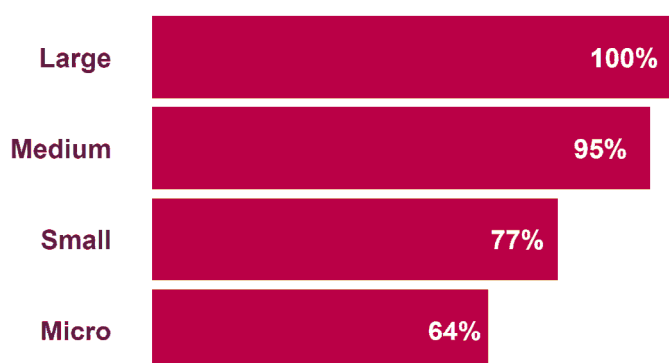


Source: Bolton State of the VCSE sector survey 2016/17
Base: 11-51

The survey also revealed notable variations in public sector income received by organisations of different sizes. Similar to 2012/13, micro organisations were less likely than small, medium and large organisations to have at least one source of public sector income. This is outlined in more detail in figure 5.4.

This shows that only 64 per cent of micro organisations that responded to the survey received public sector funding compared to 77 per cent of small organisations, 95 per cent of medium organisations and 100 per cent of large organisations. The percentage of micro organisations receiving public sector income however is 34 percentage points higher than in 2012/13, while for small organisations the figure is 36 percentage points higher.

Figure 5.4: Proportion of Bolton organisations in receipt of public sector funds by organisation size (2014/15)



Source: Bolton State of the VCSE sector survey 2016/17
Base: 94

5.2.2. Other sources of income

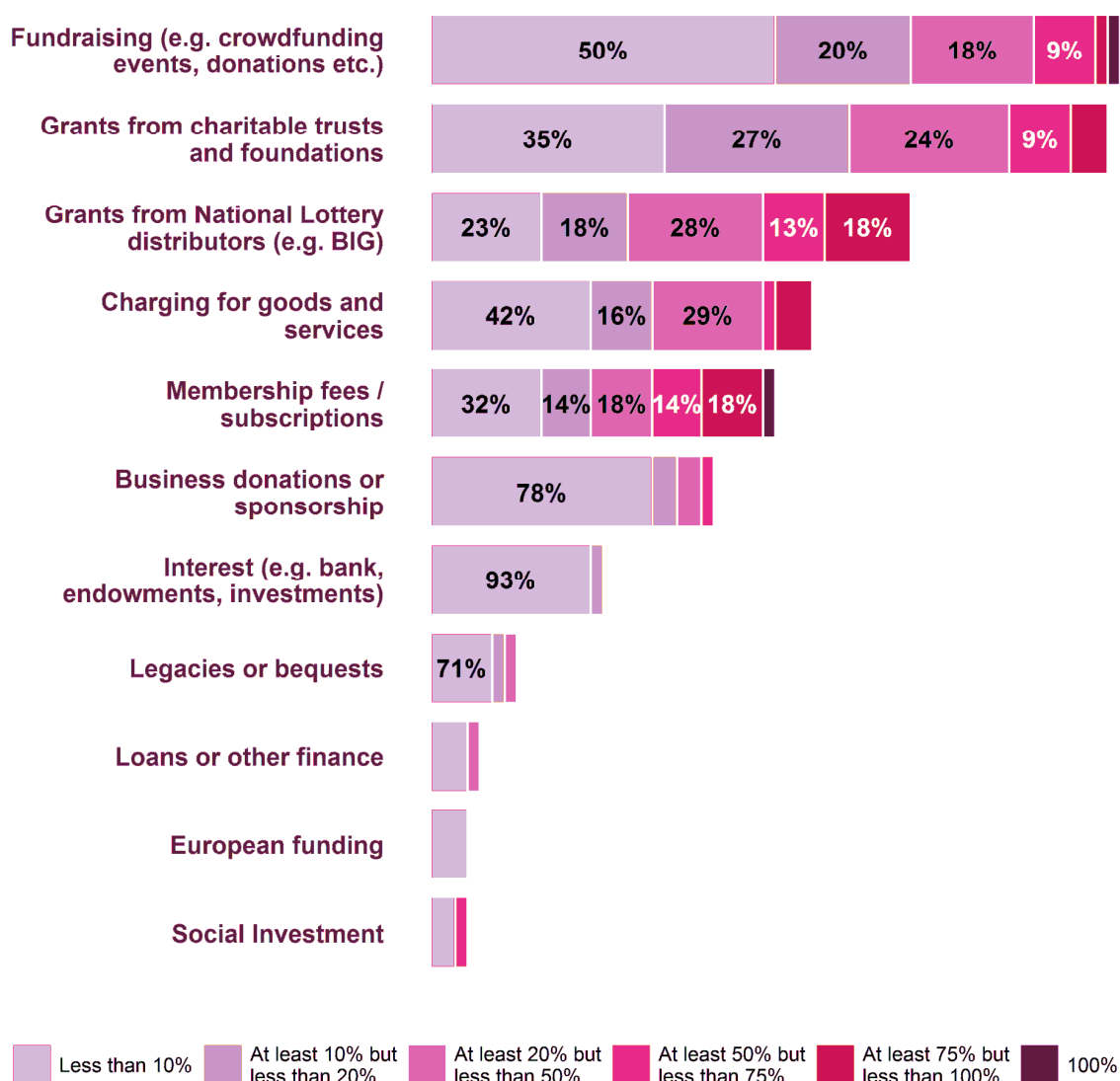
Survey respondents were also asked to identify any other sources of income (i.e. non-public sector) they received in 2014/15. Overall, **86 per cent of respondents received funds from at least one non-public sector source**. This is an increase of 16 percentage points compared to 2012/13. Across Greater Manchester 84 per cent of respondents received non-public sector income.

Fundraising was the most frequently identified source of other funds (53 per cent of respondents) followed by grants from charitable trusts and foundations (49 per cent) and grants from National Lottery distributors (34 per cent). Fundraising was also the most common type of other funding received in 2012/13 and across Greater Manchester as a whole.

Respondents were also asked to estimate the proportion of their group or organisation's total income received from each of the non-public sector funding sources. Figure 5.5 shows the most prominent sources of non-public sector funding received and the estimated proportion of total income this represents.

Figure 5.5 shows that for half (50 per cent) of those receiving income from fundraising, this funding represented less than 10 per cent of their total income. At the other end of the spectrum for 13 per cent of organisations this represented at least 50 per cent of their total income.

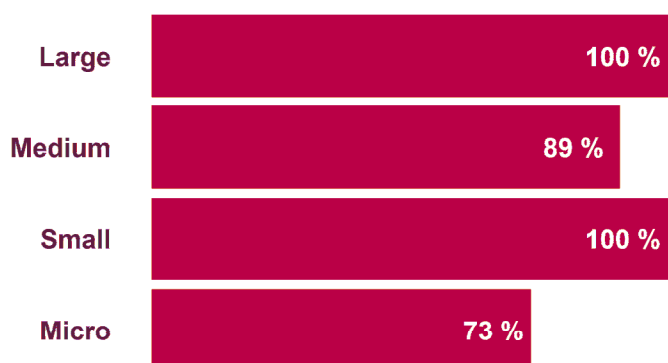
Figure 5.5: Other funds received by Bolton respondents (2014/15)



Source: Bolton State of the VCSE sector survey 2016/17
Base: 14-56

In line with results from the 2012/13 survey, micro organisations were less likely than small, medium and large organisations to have income from non-public sector sources. This is demonstrated by figure 5.6.

Figure 5.6: Proportion of organisations in receipt of other funds by organisation size (2014/15)

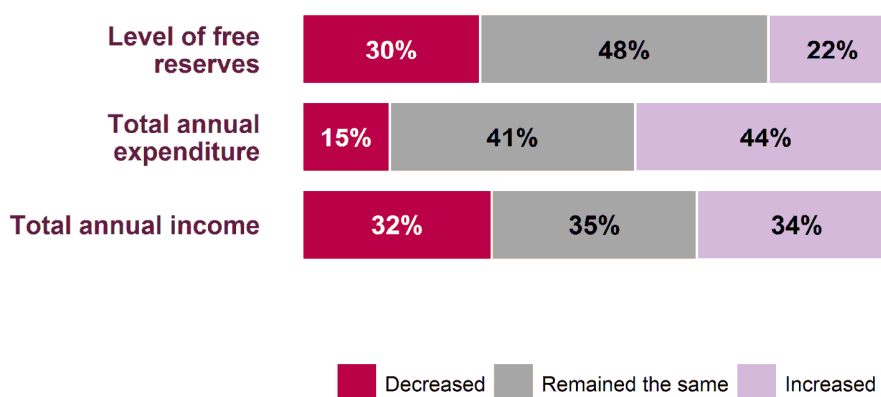


Source: Bolton State of the VCSE sector survey 2016/17
Base: 96

5.3. Financial Sustainability

The survey asked respondents about how their organisation's financial situation had changed in the past 12 months (i.e. during the current financial year). The results are outlined in figure 5.7.

Figure 5.7: Change in financial circumstances in the last 12 months



Source: Bolton State of the VCSE sector survey 2016/17
Base: 110 (income), 109 (expenditure), 97 (free reserves)
Note: 'cannot say' response has been excluded from the analysis

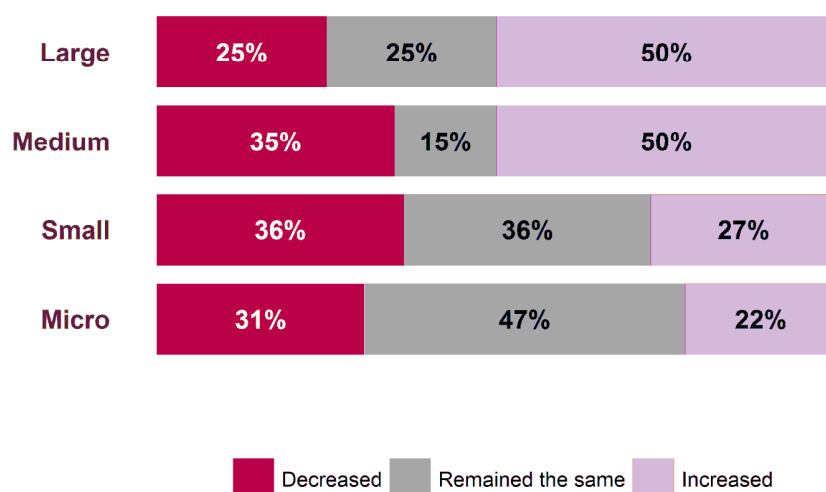
This raises some concerns: 44 per cent of respondents reported increasing their expenditure but only 34 per cent had experienced an increase in income and only 22 per cent reported an increase in reserves. In addition, 32 per cent of respondents reported a decrease in income but only 15 per cent reduced their expenditure.

26 per cent of respondents provided an expenditure figure for 2014/15 that was greater than their income. **This means that there were a notable number of organisations that spent more money than they received in the past 12 months.** This figure is lower than the 42 per cent of organisations who provided an expenditure figure in the 2013 study that was greater than their income; however it

still appears that the sustainability of a sizeable number of organisations could be under threat.

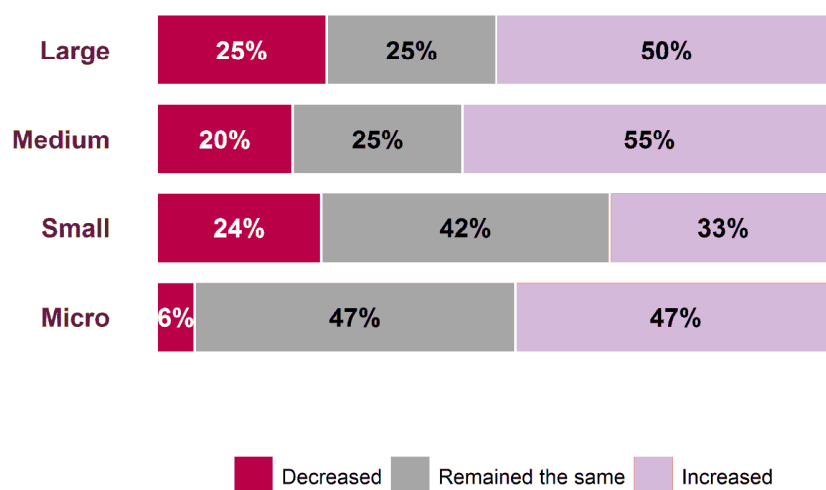
Explored by organisation size, collectively, the data indicates that the sustainability of micro organisations is of particular concern: 47 per cent of micro organisations reported increasing their expenditure in the past 12 months but only 22 per cent increased their income. This is outlined in more detail for all sizes of organisations in figures 5.8a and 5.8b below.

Figure 5.8a: Change in income in the last 12 months by organisation size



Source: Bolton State of the VCSE sector survey 2016/17
 Base: 93
 Note: 'cannot say' response has been excluded from the analysis

Figure 5.8b: Change in expenditure in the last 12 months by organisation size

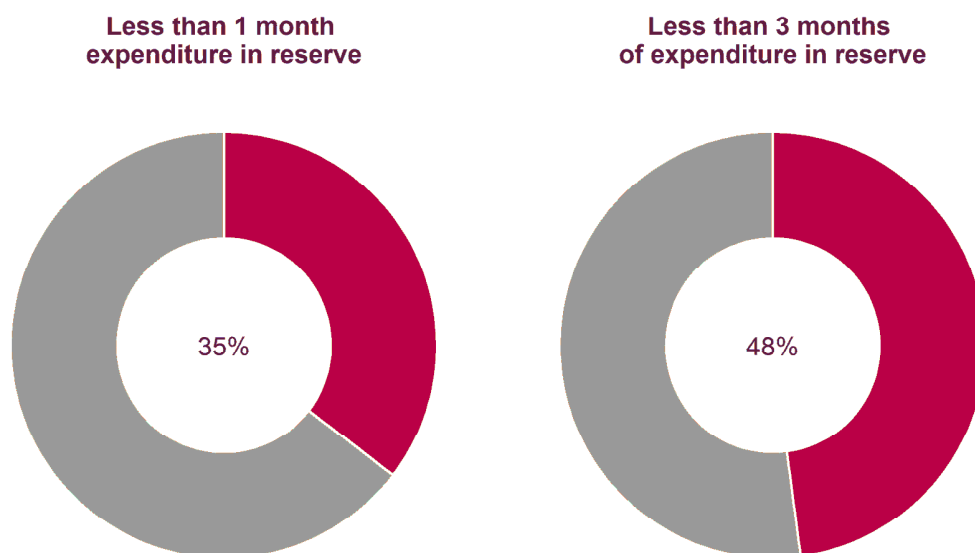


Source: Bolton State of the VCSE sector survey 2016/17
 Base: 93
 Note: 'cannot say' response has been excluded from the analysis

Further analysis of the financial reserve levels reported by respondent organisations provides an additional insight in to the financial health of the VCSE sector. Reserves are important as they provide organisations with funds to fall back on in the short term should other sources of funding reduce or be withdrawn. They also provide

organisations with the flexibility to develop new and innovative activity that might not have attracted external funding from the outset. Organisations with low reserves relative to expenditure are therefore more likely to be restricted in their ability to adapt if key external funding is lost. In order to explore this issue in more detail reserves (2014/15) were calculated as a proportion of expenditure (2014/15) for each respondent. The results are shown in figure 5.9.

Figure 5.9: Financial vulnerability of organisations in Bolton

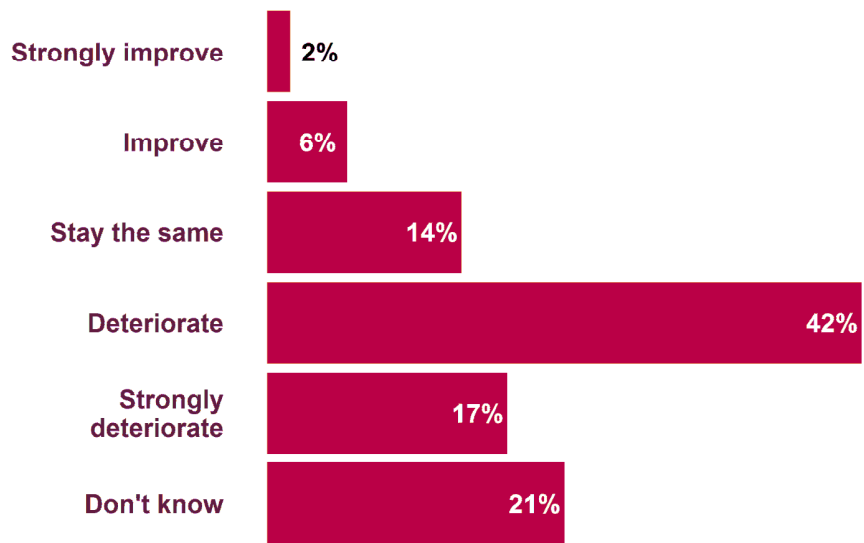


Source: Bolton State of the VCSE sector survey 2016/17
Base: 96

This shows that **35 per cent had reserve levels of less than one month's expenditure**, and a further 13 per cent had reserves that covered less than three month's expenditure. This suggests that almost half of all organisations in the VCSE sector could be vulnerable should their funds be severely reduced or withdrawn. Results are similar to the 2012/13 survey when 49 per cent of organisations reported reserves equalling less than three month's expenditure (although just 18 per cent of organisations had reserve levels of less than one month's expenditure in 2012/13). Across Greater Manchester, a similar proportion (46 per cent) of organisations had reserves that covered less than three month's expenditure.

Survey respondents were also asked how they thought the environment for funding/income for the VCSE sector will change over the next year. Figure 5.10 shows the responses received to this question. This shows that almost three-fifths (58 per cent) of organisations in Bolton thought the environment will deteriorate compared to just seven per cent who felt the environment is set to improve. 14 per cent saw the environment for funding/income staying the same. These results were similar to across Greater Manchester as a whole where 56 per cent thought the environment will deteriorate and just seven per cent saw the environment improving.

Figure 5.10: Change in the environment for funding/income in the next year



Source: Bolton State of the VCSE sector survey 2016/17
Base: 125

Paid Employees

This chapter looks at the paid workforce of the VCSE sector in Bolton.

6.1. How many FTE paid staff are employed in the VCSE sector in Bolton?

Based on the average number of FTE paid staff employed by organisations responding to the survey across Greater Manchester, and drawing on the assumptions used to estimate the total number of organisations in Bolton, it is estimated that:

3,000 FTE paid staff *were employed in the VCSE sector in Bolton in 2016/17*

This represents **4,500 employees**.

This was 10 per cent of the estimated total number of FTE paid staff working within the VCSE sector in Greater Manchester.

This is a higher figure than the 1,800 FTE paid staff estimated to work in the sector in the 2013 study.

Gross Value Added (GVA), the value of goods and services produced, is a key measure of the economic contribution of organisations or sectors. It can be estimated for paid employees working in Bolton organisations by multiplying the number of FTE paid staff by the estimated gross value added (GVA) per FTE employee¹⁸. From this calculation it is estimated:

£94.4m *contributed to the economy per annum by paid employees of Bolton VCSE sector organisations*

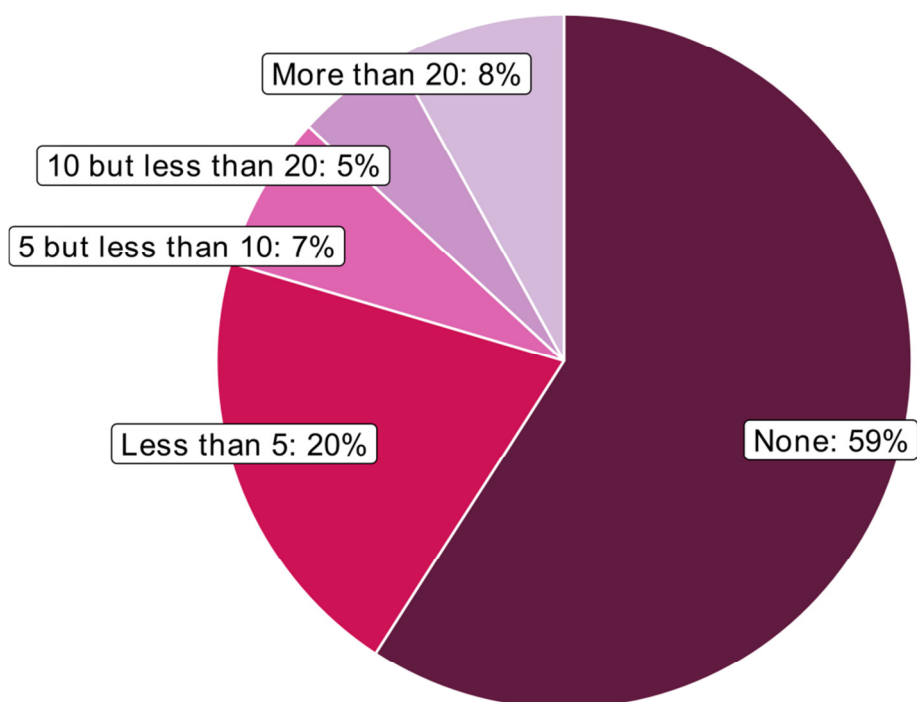
Half (50 per cent) of FTE paid staff were employed in large organisations with an income of at least one million pounds. In comparison the 1,378 micro and small organisations employed just 16 per cent of FTE paid staff. The remaining 35 per cent were employed in medium sized organisations. As in 2012/13, large and medium sized organisations especially continue to be significant employers in Bolton.

¹⁸ This study used Greater Manchester GVA per employee averaged across the following two VCSE sectors: education and human health and social work activities.

Figure 6.1 presents a breakdown of responding organisations by the number of FTE paid staff they employed. Four-fifths (80 per cent) of organisations employed less than five FTE paid staff members. Included in this figure were 59 per cent of organisations that did not employ any paid staff. Further analysis reveals that the majority of these were micro organisations with income of less than £10,000. At the other end of the spectrum eight per cent of organisations employed 20 or more FTE paid members of staff. This pattern is different to that identified in the 2012/13 survey when 82 per cent of organisations did not employ any paid staff and a further 13 per cent employed less than five FTE employees.

Compared with the Greater Manchester sample as a whole, a lower proportion of organisations within Bolton appeared to have FTE paid staff: 41 per cent in Bolton compared with 49 per cent in Greater Manchester.

Figure 6.1: Organisations by numbers of FTE paid staff



Source: Bolton State of the VCSE sector survey 2016/17
Base: 137

6.2. How has the VCSE sector's workforce changed in the last 12 months?

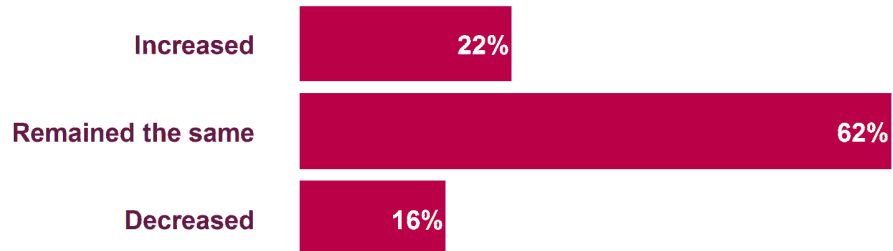
The survey asked respondents whether the number of staff in their organisation's workforce had 'increased', 'remained the same' or 'decreased' this year compared to the previous year. Figure 6.2 presents the results to this question, the key findings of which are:

Paid employees:

- 62 per cent of organisations employed a similar number of paid employees compared to a year ago
- 22 per cent reported an increase in paid staff compared to 16 per cent that reported a decrease

- more organisations in 2012/13 reported a decrease (13 per cent) than an increase (eight per cent)
- across Greater Manchester 22 per cent of organisations reported an increase in their number of paid employees; while 16 per cent reported a decrease.

Figure 6.2: Change in aspects of the workforce (paid staff) in the last 12 months



Source: Bolton State of the VCSE sector survey 2016/17

Base: 116

Note: 'cannot say' response has been excluded from the analysis

Volunteers

This chapter looks at the volunteers within the VCSE sector in Bolton.

7.1. How many volunteers are part of the VCSE sector workforce in Bolton and what is their economic contribution?

Based on responses to the survey across Greater Manchester on questions exploring the numbers of volunteers and committee/board members and the hours which they contribute, and drawing on the assumptions used to estimate the total number of organisations in Bolton, it is estimated there are:

46,900 volunteers or committee/board members *in the VCSE sector's workforce in Bolton in 2016/17⁹*

This includes:

36,300 volunteers *in the VCSE sector's workforce in Bolton in 2016/17*

10,600 committee/board members *in the VCSE sector's workforce in Bolton in 2016/17*

This figure for volunteers represents 13 per cent of Bolton's total population (281,600) and 10 per cent of the estimated total for Greater Manchester organisations.

It is also estimated that:

113,500 hours *of their time provided by these volunteers and committee/board members per week*

This represents 11 per cent of the estimated number of volunteer and committee/board member hours for all Greater Manchester organisations.

¹⁹ It is possible in cases where a person is volunteering for more than one organisation they could have been counted more than once; additionally, there will be residents from outside of Bolton volunteering within Bolton; and conversely there will be Bolton residents volunteering for organisations outside of Bolton.

The 2012/13 study estimated there were 32,300 volunteers in Bolton who provided 100,900 hours per week. The previous study did not ask for volunteers and committee/board members to be recorded separately so caution should be applied when making comparisons.

There are two broad approaches to valuing the contribution of volunteers. One method, and this study's preferred approach, is to value the output that they produce. In effect this is the value to society of the goods and services that volunteers produce.

This can be estimated by multiplying the number of FTE volunteers by the estimated gross value added (GVA) per FTE employee.²⁰ From this calculation:

£102.7 million per annum *estimated as the economic contribution of volunteers and committee/board members in Bolton organisations*

The use of estimated GVA per FTE employee to measure the value of the output produced by volunteers assumes that paid employees would not be used in the absence of volunteers to produce the same level of goods and services. In such a situation the value of output is the value of the labour input (wages and benefits) plus the value of the capital input (for example office space and computers). If paid employees would be used to produce the same level of goods and services then the value of capital input would be borne whether or not volunteers were used. Therefore the value of the output from volunteers would be just the value of the labour input. This value would be roughly equivalent to the value estimated from the input method of valuation which is outlined in the next paragraph.

In the second method, the value of the input of volunteers is used to value the contribution of volunteers²¹. This is the amount that it would cost to pay employees to do the work carried out by volunteers. As such, this can be considered to be the benefit to organisations²². However, this benefit might also be passed onto society via lower prices for goods and services due to lower costs of production. The input value of volunteers can be calculated by multiplying the number of hours that volunteers give per week by an estimate of how much it would cost to employ someone to do that work. There are a number of widely accepted hourly rates that could be used to estimate this value; these include: the national minimum wage or national living wage, the local median wage, the local mean wage and the reservation wage. The preference in this study has been to provide a range using the national living wage (low estimate) and the local median wage (high estimate). In reality the true value of the input provided by volunteers will lie between the two estimates. It is estimated that:

- assuming the national living wage for adults²³ it would cost **£42.5 million annually to employ staff to do the work provided by volunteers in Bolton organisations**
- assuming the median gross hourly wage for full time employees in Greater Manchester²⁴ it would cost **£75.9 million annually to employ staff to do the work provided by volunteers in Bolton organisations.**

²⁰ This study used Greater Manchester GVA per employee averaged across the following two VCSE sectors: education and human health and social work activities.

²¹ This is the approach recommended by Volunteering England

²² This assumes that there are no additional costs faced by organisations in using volunteers: for example extra management costs

²³ £7.20 for 25 years and older in 2016

Figure 7.1 presents a breakdown of responding organisations by the number of volunteers that they use. Three per cent of respondents indicated they had no volunteers. In the 2012/13 survey this figure was two per cent. The proportion of organisations who had 50 or more volunteers was larger in the latest survey (18 per cent compared to 12 per cent in 2012/13).

This pattern was largely representative of the picture for organisations across Greater Manchester as a whole.

Figure 7.1: Organisations by numbers of volunteers



Source: Bolton State of the VCSE sector survey 2016/17
Base: 152

7.2. How has the VCSE sector's workforce changed in the last 12 months?

The survey asked respondents whether the number of volunteers in their organisation's workforce had 'increased', 'remained the same' or 'decreased' this year compared to the previous year. Figure 7.2 presents the results to this question, the key findings of which are:

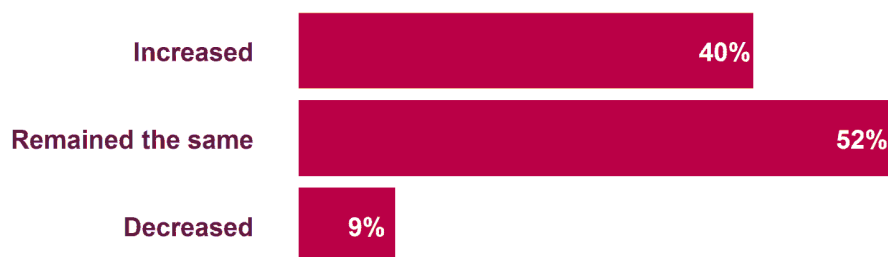
- 40 per cent of respondents reported increased numbers of volunteers now compared to a year ago
- in comparison just nine per cent of organisations reported a decrease in volunteer numbers.

The 2012/13 survey also found a greater proportion of respondents indicating volunteer numbers had increased than decreased, suggesting the number of volunteers within the VCSE sector has grown consistently over recent years:

- 37 per cent of respondents reported increased volunteer numbers
- over half (51 per cent) reported that volunteer numbers remained the same
- while 12 per cent reported that numbers of volunteers decreased.

Just over two fifths (42 per cent) of Greater Manchester organisations reported an increase in their number of volunteers over the previous year, compared with 13 per cent who reported a decrease.

Figure 7.2: Change in aspects of the workforce (volunteers) in the last 12 months



Source: Bolton State of the VCSE sector survey 2016/17

Base: 151

Note: 'cannot say' response has been excluded from the analysis

7.3. Qualitative responses on volunteering

Focus group participants from registered charities and small VCSE organisations were asked to discuss changes associated with volunteering in recent years. Registered charities reported that, while the demographics of volunteers hadn't really changed the numbers of volunteers have been rising. This increase was associated with austerity and the precarious labour market as increasing numbers of (especially young) people approach charities to gain job experience, augment their CVs and improve their employability:

"We see more people coming in and seeking opportunities from a variety of backgrounds. The 'drivers' are similar, but we just see more people coming through. There's more people seeking job experience. That's the biggest change these last 12 months."

"Yes, for us too. While before we had many people coming in just wanting to give something back, now while they are still a very significant part, this group has been kind of overtaken by people seeking work experience."

This growth in volunteering had created additional resource requirements due to the systems and number of trained staff needed to support and maintain a strong volunteer base in the longer term.

"I have seen a shift in the last year. We are required for the first time ever to report on training and supervision. This has been a challenge. We now have to keep a large database with very sensitive information, something which I don't like so much, so that commissioners can review all that. It is a huge difference in terms of volunteering."

"We have to get DBS now for all volunteers and we also have all this new paperwork to deal with; this is a big cost. We also have to sign some type of data-sharing agreement with all our volunteers now which is...if we don't sign this agreement, we stand to lose our partnership with the hospital which would be awful."

Interestingly, many of these recent volunteers were students and while there were exceptions, for most the experience has been positive and something that they wanted to encourage, by offering a variety of volunteering roles.

"Universities are now very important, as volunteering has now become this mandatory part of courses and we have also been invited to speak in universities. It has been working really well and I think the students take a lot out of that too, with the placements."

"We have support roles, supervision roles, administrative-help roles for student volunteers, really everything. Of course, some students are really committed and do what they have to do and then some and then they will come again, while others do their work and they are off, so...it depends."

In contrast to larger charities participants from smaller VCSEs, reported a mixed picture around volunteer numbers: some stated that in the last year volunteer numbers had reduced, others that they had increased and others still, that they had remained more or less stable. Regardless of whether there had been an increase or decrease in volunteering, most participants identified significant challenges associated with the funds, staff and resources to properly train, support and retain volunteers with the skill-sets their particular organisations need.

"We have plenty of volunteers coming forward, but most don't actually have the necessary skills. But we don't have the resources, time and staff to sustain their training and support, and we have to turn away people and sort of cherry pick."

"We also have many volunteers, but it is difficult to manage them and use them efficiently. It's a challenge and sometimes people may get frustrated or become bored with the organisation."

Partnership Working: the Public Sector

This chapter considers the relationship between the VCSE sector and the public sector, exploring organisations experiences of partnership working with Bolton Council and other public sector bodies.

8.1. Dealings with local public sector bodies

Survey respondents were asked about the extent of their dealings with each of the main public sector bodies covering Bolton. An overview of their responses is provided in figure 8.1, along with the local authority figure for Greater Manchester combined.

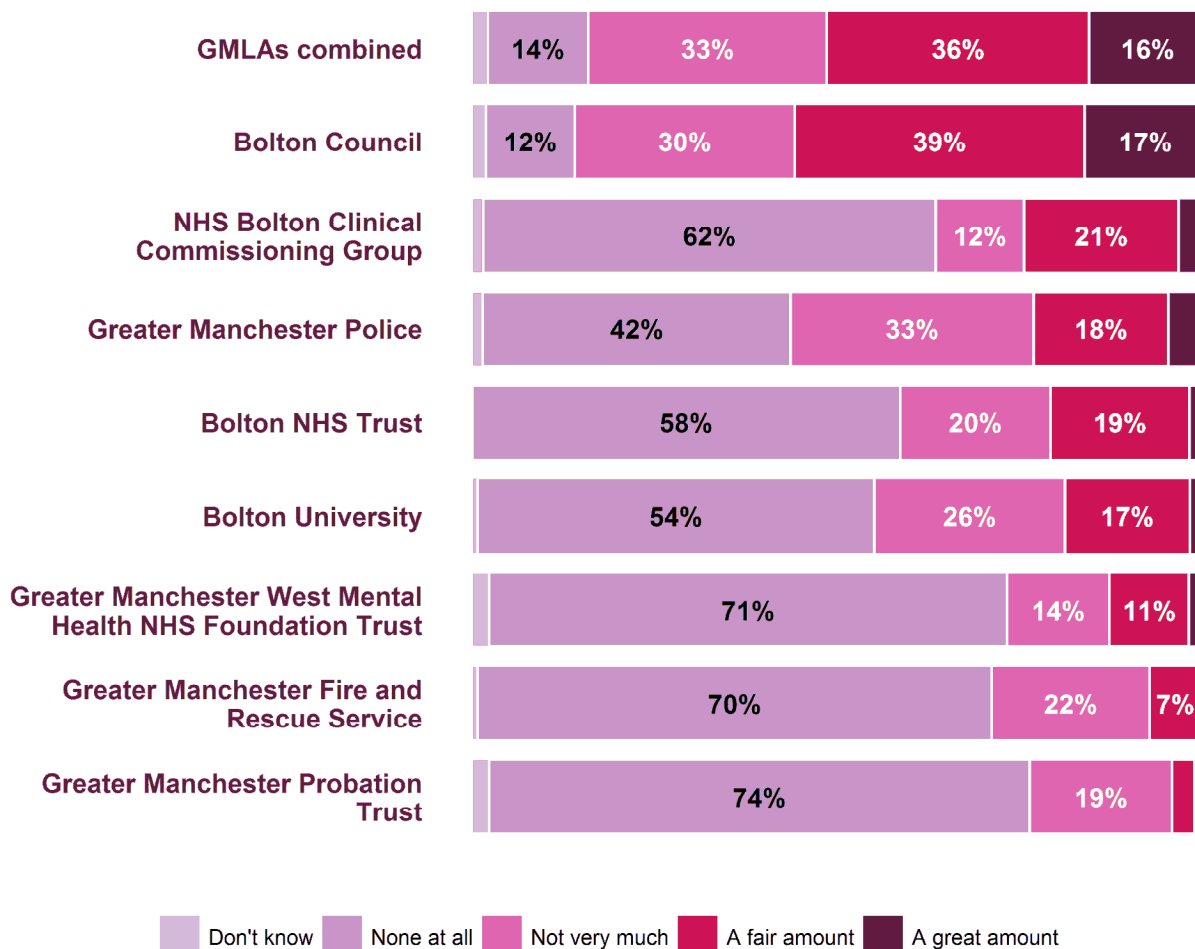
This shows that survey respondents had dealings with a range of local public sector bodies. The four most prominent were Bolton Council, Greater Manchester Police, Bolton University and NHS Bolton Clinical Commissioning Group:

- **Bolton Council:** 86 per cent had some dealings with the Council; including 17 per cent who had a 'great amount' of dealings and 39 per cent who had a 'fair amount' of dealings
- **Greater Manchester Police:** 57 per cent had some dealings with Greater Manchester Police; including five per cent who had a 'great amount' of dealings and 18 per cent who had a 'fair amount' of dealings
- **Bolton University:** 45 per cent had some dealings with Bolton University; including two per cent who had a 'great amount' of dealings and 17 per cent who had a 'fair amount' of dealings
- **NHS Bolton Clinical Commissioning Group:** 37 per cent had some dealings with NHS Bolton Clinical Commissioning Group; including four per cent who had a 'great amount' of dealings and 21 per cent who had a 'fair amount' of dealings.

Bolton Council was also the organisation respondents had the most dealings with in the 2012/13 survey (72 per cent had some dealings).

Local authorities consistently emerged as the most prominent public sector contact for respondents to this study across Greater Manchester. Overall, 16 per cent of respondents said they had a 'great amount' of dealings with their local authority and 36 per cent said they had a 'fair amount'.

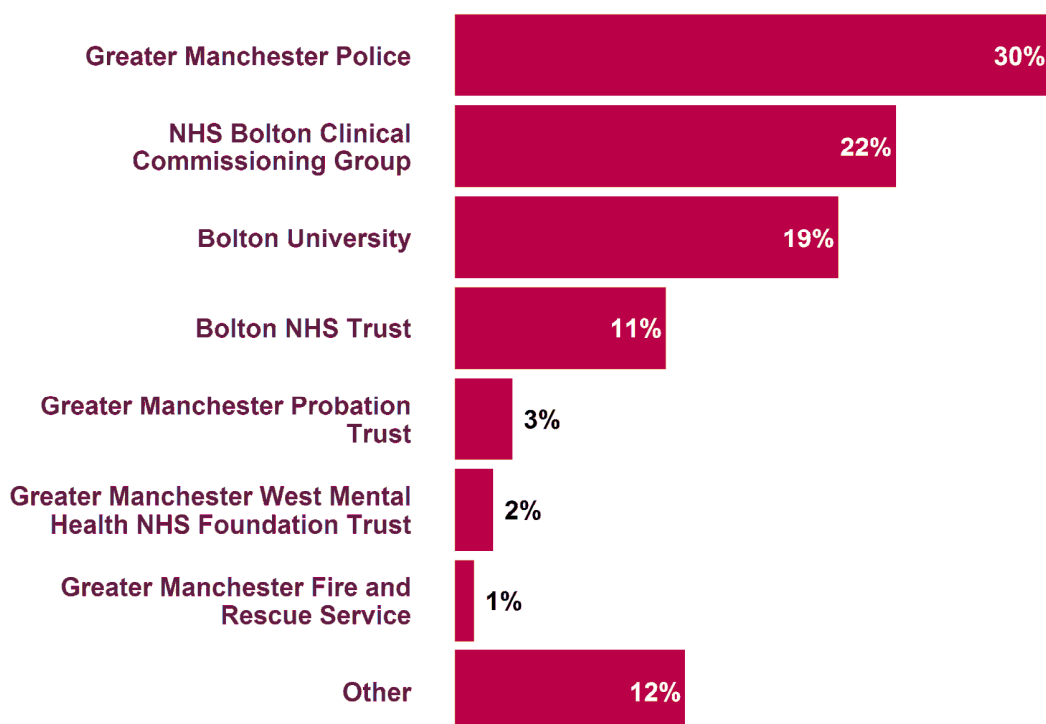
Figure 8.1: Dealings with local public sector bodies



Source: Bolton / Greater Manchester State of the VCSE sector survey 2016/17
 Base: 124-157 (Bolton), 1,080 (Greater Manchester)

Survey respondents were asked to indicate their most frequent public sector contact other than their local authority. Figure 8.2 shows the responses received to this question with Greater Manchester Police the most commonly cited followed by, NHS Bolton Clinical Commissioning Group (CCG) and Bolton University.

Figure 8.2: Most frequent public sector contact other than local authority

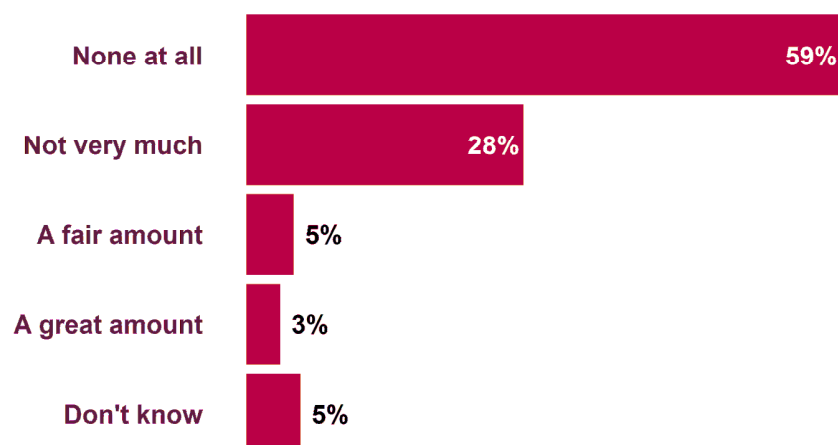


Source: Bolton State of the VCSE sector survey 2016/17
Base: 103

Respondents were also asked to consider the extent to which their organisation has direct dealings with any emerging Greater Manchester structures (e.g. Greater Manchester Combined Authority, The Office of the Police and Crime Commissioner, The Health and Social Care Devolution Team etc.). Figure 8.3 presents the results to this question.

Over one third (36 per cent) had some dealings with any of the emerging structures including just three per cent who had a 'great amount' of dealings and five per cent who had a 'fair amount' of dealings. Results were similar across Greater Manchester where 38 per cent had some dealings, including two per cent who had a 'great amount' of dealings and 10 per cent who had a 'fair amount' of dealings.

Figure 8.3: Dealings with emerging Greater Manchester structures



Source: Bolton State of the VCSE sector survey 2016/17
Base: 149

8.2. Relationships with local public sector bodies

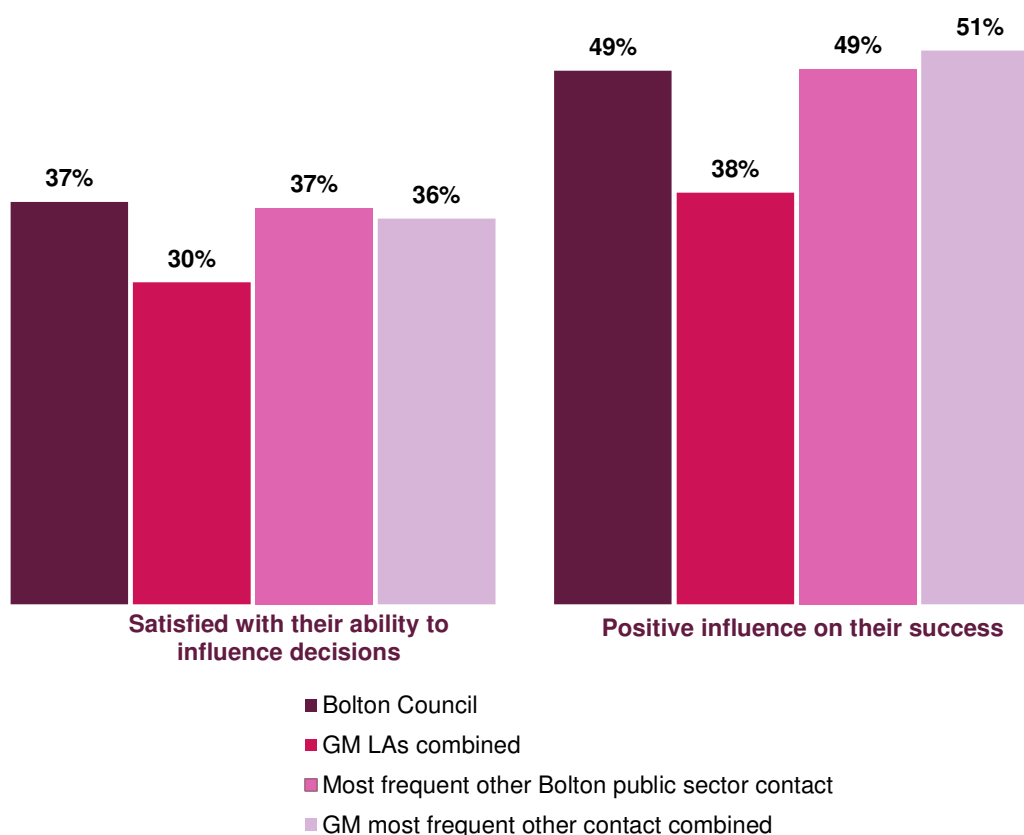
Survey respondents were also asked two further questions about the extent to which their organisations were satisfied with their ability to influence public sector decisions of relevance to their organisation and the extent to which they thought local statutory bodies influenced their success²⁵. The results of these questions are summarised in figure 8.4. A comparison with the Greater Manchester average is also provided.

Figure 8.4 shows that 37 per cent of respondents were satisfied with their ability to influence Bolton Council decisions of relevance to their organisation and 49 per cent said that the council had a positive influence on their organisation's success. Results are more positive than the Greater Manchester combined figures (30 per cent were satisfied with their ability to influence their local authority and 38 per cent agreed their local authority has a positive influence on their success). Results are more positive than in 2012/13 when 25 per cent of respondents were satisfied with their ability to influence Bolton Council decisions of relevance to their organisation and 36 per cent said that the council had a positive influence on their organisation's success.

In addition, 37 per cent of respondents said they were satisfied with their ability to influence the key decisions of their most frequent other public sector contact and 49 per cent said this contact had a positive influence on their success. These are very similar to the Greater Manchester combined figures (36 per cent and 51 per cent respectively).

²⁵ This latter measure was used in 2008 and 2010 to provide evidence of local authority performance against 'National indicator 7: the environment for a thriving third sector'.

Figure 8.4: Proportion of organisations who said they were satisfied with their ability to influence public sector decisions of relevance to their organisation and who said local public sector bodies influence their organisation's success



Source: Bolton / Greater Manchester State of the VCSE sector survey 2016/17
 Base: Bolton: 132/82 (ability to influence), 132/83 (positive influence); Greater Manchester: 897/570 (ability to influence), 889/605 (positive influence)

8.3. Funding from local public sector bodies

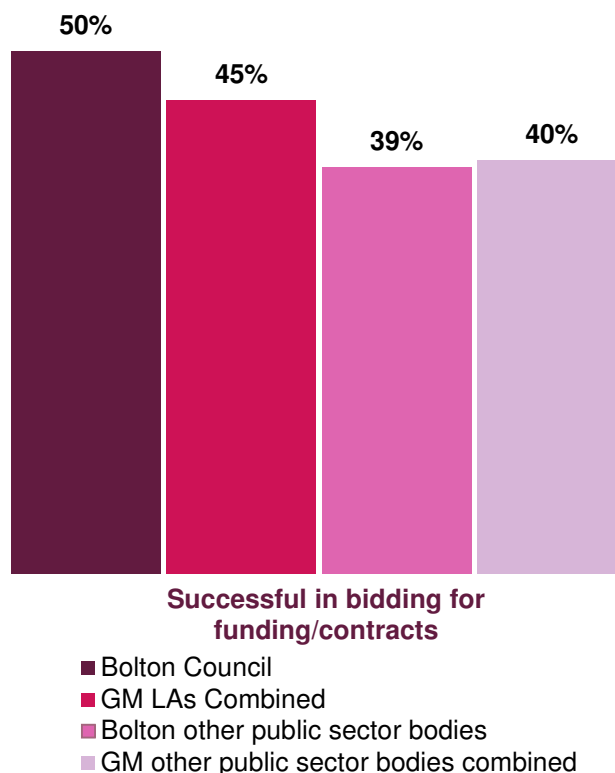
Respondents were also asked to reflect on their experiences of public sector funding in terms of how successful they had been; how satisfied they were with bidding arrangements, and how satisfied they were with the level of opportunity to bid for long-term funding.

Figure 8.5 shows responses to the question which asked organisations to consider how successful they had been in applying for funding or bidding for contracts. Results are split between perceptions of Bolton Council and of other public sector bodies. A comparison with the Greater Manchester average is also provided.

This shows that 50 per cent of respondents were successful in bidding for funding or contracts with Bolton Council compared to a 39 per cent success-rate with other public sector bodies. At the Greater Manchester level, similar proportions had been successful in bidding for funding or contracts from their local authority, and other public sector bodies (45 per cent and 40 per cent respectively).

In 2012/13 a similar proportion also indicated they had been successful in bidding for funding or contracts from both Bolton Council (48 per cent) and other public sector bodies was lower (38 per cent).

Figure 8.5: Success bidding for funding and contracts

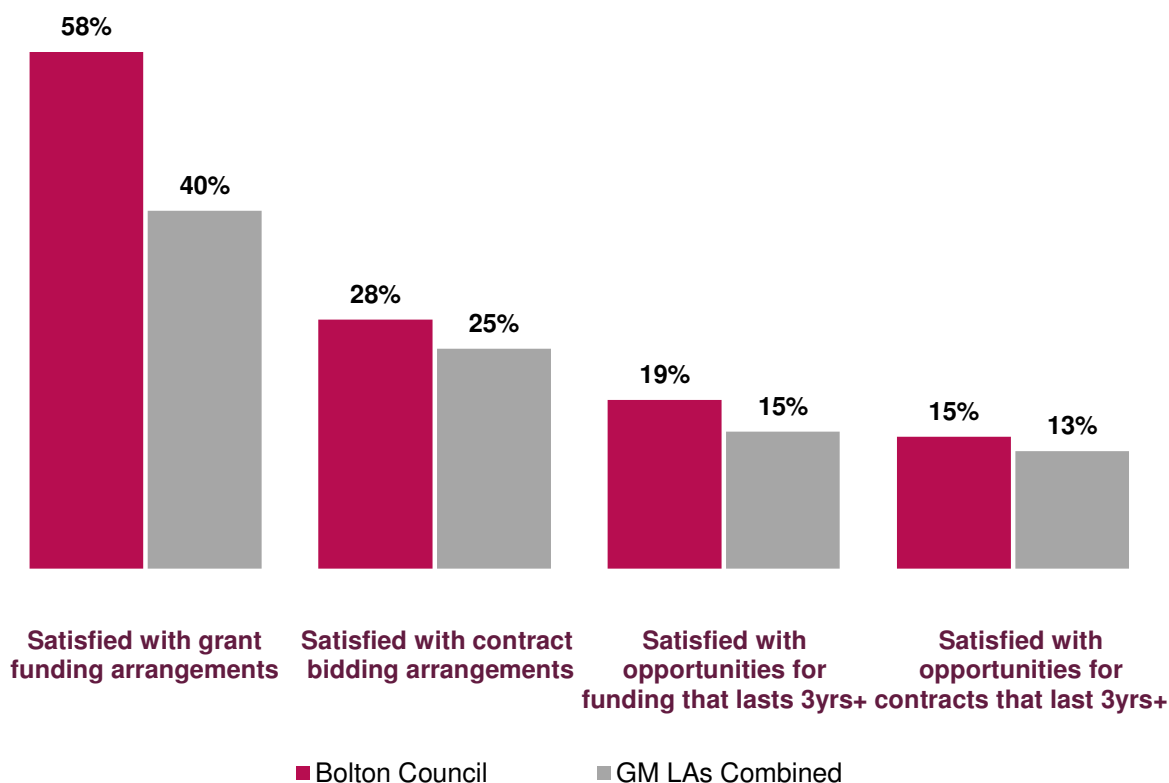


Source: Bolton / Greater Manchester State of the VCSE sector survey 2016/17
Base: Bolton: 154/149; Greater Manchester: 1,060/1,036

Respondents were asked specifically about Bolton Council and how satisfied they were with their grant funding and contract bidding arrangements and opportunities for funding and contracts lasting three years or longer. The responses are illustrated in figure 8.6. A comparison with the Greater Manchester local authority average is also provided.

Almost three-fifths (58 per cent) were satisfied with grant funding arrangements. Satisfaction with contract bidding arrangements was lower at just 28 per cent. Satisfaction with opportunities for funding lasting three years or longer was also lower at 19 per cent and lower still for opportunities for contracts lasting three years or longer (15 per cent). The pattern was similar among the Greater Manchester combined figures. In 2012/13 respondents were not asked separately about grant funding and contracts. Over two-fifths (44 per cent) of respondents were satisfied with Bolton Council's funding/bidding arrangements in 2012/13 and 17 per cent were satisfied with their opportunities for funding/contracts which lasted three years or longer.

Figure 8.6: Experiences of bidding for funding and contracts with local authorities



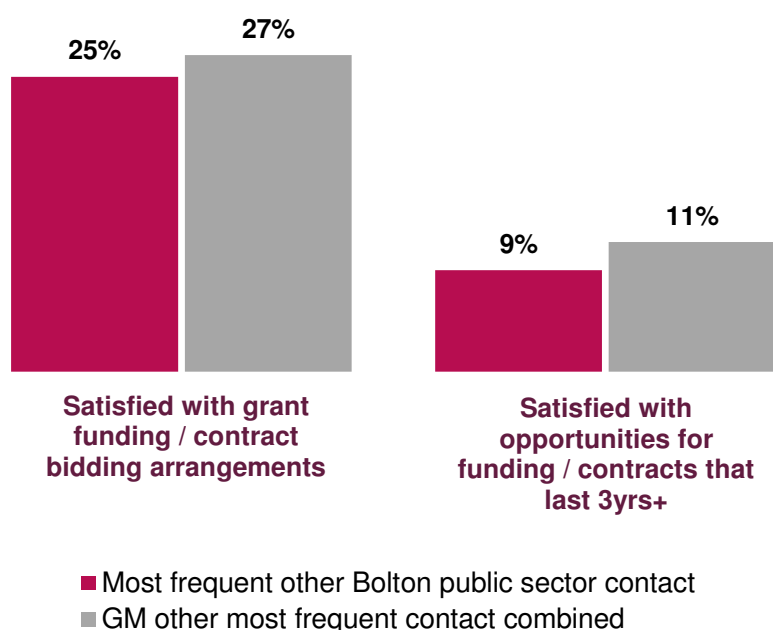
Source: Bolton / Greater Manchester State of the VCSE sector survey 2016/17

Base: Bolton: 119 (grant funding arrangements), 93 (contract bidding arrangements), 95 (opportunities for funding), 81 (opportunities for contracts); Greater Manchester: 808 (grant funding arrangements), 631 (contract bidding arrangements), 703 (opportunities for funding), 605 (opportunities for contracts)

Survey respondents were asked to consider how satisfied they were with the grant funding and contract bidding arrangements of their most frequent other public sector contact. As figure 8.7 shows, just 25 per cent indicated they were satisfied, lower than across Greater Manchester as a whole (27 per cent).

They were also asked about their satisfaction with opportunities for funding and contracts longer than three years. Just nine per cent were satisfied, slightly lower than the Greater Manchester combined figure (11 per cent).

Figure 8.7: Experiences of bidding for funding and contracts with other public sector bodies



Source: Bolton / Greater Manchester State of the VCSE sector survey 2016/17
 Base: Bolton: 95 (funding/bidding arrangements), 92 (opportunities for funding/contracts); Greater Manchester: 705 (funding/bidding arrangements), 687 (opportunities for funding/contracts)

8.4. Qualitative responses on relationships between the VCSE sector and local public sector bodies

The focus groups discussed participants' views about and experiences of working with public sector bodies in Bolton. Registered charities and smaller VCSE organisations were fairly universal in their views: all participants in both groups, stated that they work with a variety of public sector bodies and for both groups, the most frequently mentioned were universities, schools and also the CCG. For most respondents their experiences with the public sector varied: in the sense that sometimes they have been positive, and other times negative, and it tended to depend on the personal, trust-relationships VCSE organisations can build and maintain with specific people in the public sector.

"I think it works when the public sector involves the voluntary sector from the beginning. When you feel that your opinion and input are valued from the start and your involvement from start to finish is considered important."

"Yes, there are good people who want and can do something in the public sector but they are just isolated individuals."

A common criticism of the public sector was the lack of funding and their inability to effectively communicate with the VCSE sector, to properly understand its work, and to incorporate its input, reach and experience into their decision making processes.

"The public sector would rather spend thousands of pounds to the commercial sector than a hundred pounds to the voluntary sector and have the same or even better results. So sometimes our communication is good, others, not so much."

"I think the councils find it difficult to deal with such a huge number of organisations. They would really prefer to work with one large organisation in each matter and have a monopoly of sorts in that."

Finally, with regards to devolution in Greater Manchester, respondents from larger charities and smaller VCSE organisations were in agreement that they don't know enough about what it is and had received limited or contradictory information.

"Devolution is not sorted. What devolution means for us? Does it mean a collaboration, a partnership or a merger? Does it mean a merger with a local organisation or a national organisation? And it's a massive piece of work to get into. So I feel as an organisation a little bit like a rabbit caught in front of the headlight, with devolution being the headlight."

Despite this uncertainty most participants thought that devolution would probably have negative consequences for the VCSE sector in Bolton, either in terms of funding or ability to influence policies and decisions.

"Money will go to the high-tech, high-power people, so devolution is really utterly beyond any voluntary organisation's ability to influence, much less control; especially the smaller, local ones."

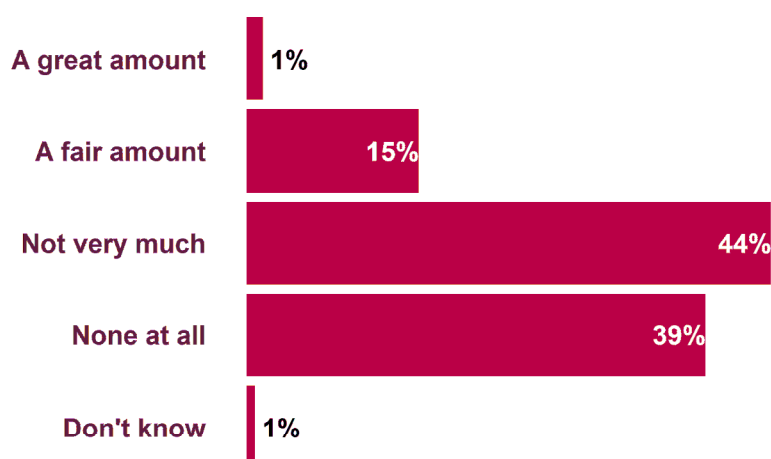
Partnership Working: the Private Sector

The previous chapter explored respondents' experiences of partnership working with public sector bodies. This chapter moves on to explore their experiences of working with private sector organisations. One fifth (21 per cent) of survey respondents received income through business donations. While this is an increase since the 2012/13 survey when just eight per cent received this type of income, this area still appears to be new territory for many VCSE organisations. Survey respondents were asked about their direct dealings and experiences of working with private businesses in Bolton.

9.1. Working with private businesses

Survey respondents were asked to indicate the extent to which they had direct dealings with private businesses in Bolton. 60 per cent reported that they had some direct dealings, with 16 per cent having a 'great' or 'fair' amount of contact (figure 9.1). This is lower than the average for Greater Manchester as a whole (21 per cent 'great' or 'fair' amount of contact). In the 2012/13 survey 45 per cent of respondents reported some direct dealings, including 12 per cent having a 'great' or 'fair' amount of contact.

Figure 9.1: Extent of direct dealings with private businesses

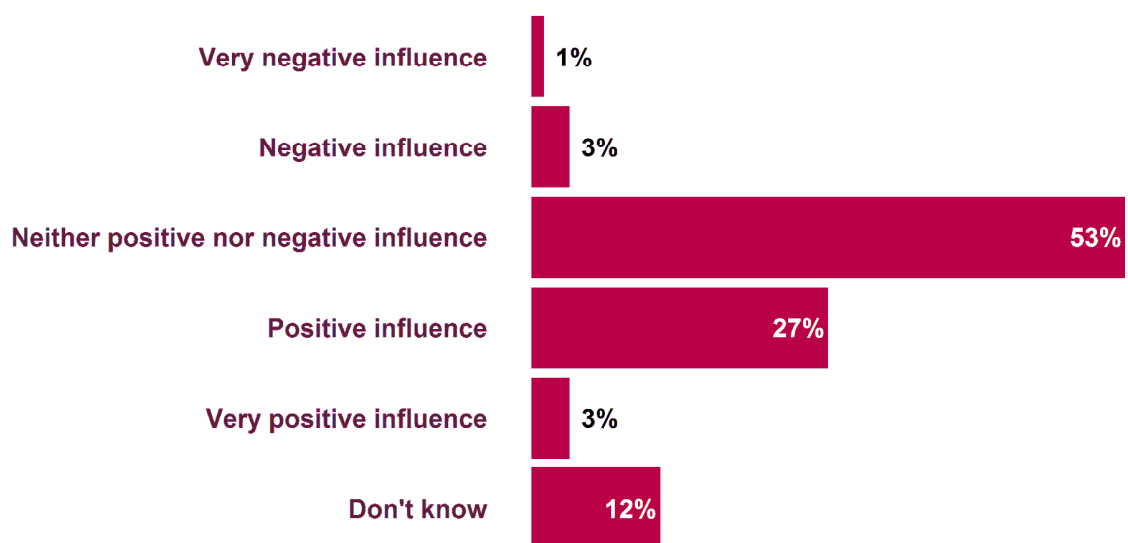


Source: Bolton State of the VCSE sector survey 2016/17
Base: 144

There were no respondents who indicated they were members of a formal private sector-led consortium (two per cent of organisations overall across Greater Manchester did so), while seven per cent of respondents said their organisation is in formal partnership with any private sector organisations, identical to the proportion across Greater Manchester as a whole.

Respondents were asked to comment on the influence private businesses have on their organisation's success. Taking all things into account, almost one third (30 per cent) of survey respondents felt that the private business community in Bolton was a positive influence on their organisation's success. This is similar to the proportion for Greater Manchester as a whole (31 per cent) and an increase since the 2012/13 survey when just 14 per cent of survey respondents felt that the private business community in Bolton was a positive influence on their organisation's success.

Figure 9.2: Private business community's influence on VCSE sector organisations' success



Source: Bolton State of the VCSE sector survey 2016/17
Base: 86

9.2. Qualitative responses on working with private sector businesses

Focus group participants discussed their views about and experiences of working with private businesses. Overall, these had been very positive, with participants stressing the importance of the 'local' component of these relationships: VCSE organisations with roots in the local area worked most effectively with businesses with similar roots or origins.

"We have a substantial benefit from these relationships. As a more locally-oriented organisation, they are important for us. They can raise their social profile and we can gain more knowledge on how to better manage things or set more realistic goals."

Similar to their relationships with the public sector, the most important component of a successful partnership was reported to be honest and open communication and realistic expectations by all parties about the goals and outcomes of any particular collaboration.

"Yeah, they wish to be as risk-free as possible, so it is very important to have some open-minded discussions with them from the beginning, to build trust and manage their expectations."

Partnership Working: Voluntary Community and Social Enterprise Organisations

The previous two chapters have explored respondents' experiences of working with organisations from the public and private sectors. This chapter discusses survey respondents' views on their work with other VCSE sector organisations.

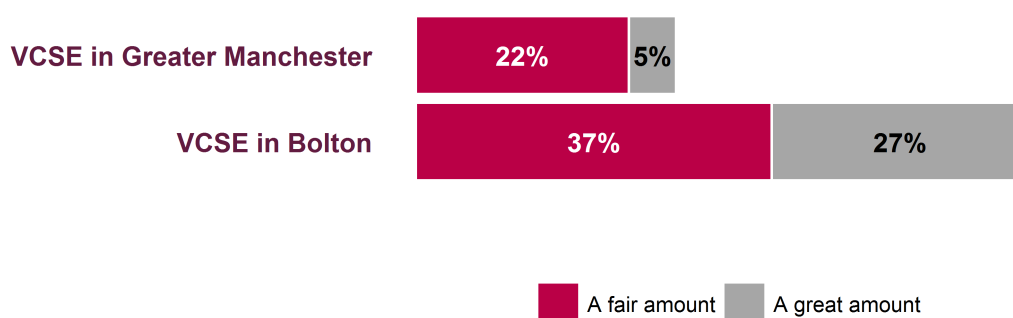
10.1. Working with other VCSE organisations

Survey respondents were asked about the extent to which they had direct dealings with other VCSE sector organisations in both Bolton and Greater Manchester.

The vast majority (90 per cent) had some direct dealings with other VCSE sector organisations in Bolton, and as figure 10.1 illustrates, 64 per cent had a 'great' or 'fair amount' of contact. Results are similar across Greater Manchester, where 90 per cent had some direct dealings with other VCSE sector organisations in their local area and 67 per cent had a 'great' or 'fair amount' of contact. The proportion reporting some direct dealings with other VCSE organisations in Bolton in 2012/13 was similar (85 per cent) along with the proportion who said they had a 'great' or 'fair amount' of contact (65 per cent).

The proportion of respondents reporting they had direct dealings with other VCSE sector organisations in Greater Manchester was lower (65 per cent), along with the proportion who had a 'great' or 'fair amount' of contact (27 per cent). The proportion reporting direct dealings across Greater Manchester as a whole was higher (70 per cent direct dealings and 37 per cent with a 'great' or 'fair amount' of contact). Survey respondents were only asked about their dealings with other VCSE organisations across Greater Manchester in 2016/17.

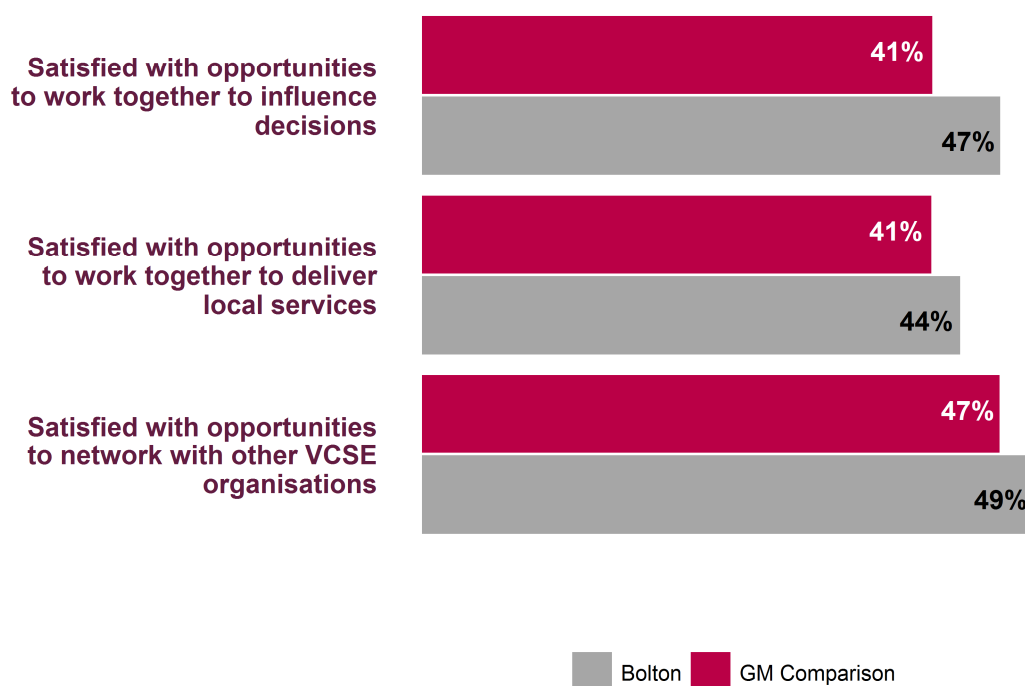
Figure 10. 1: Extent of direct dealings with VCSE organisations



Source: Bolton State of the VCSE sector survey 2016/17
 Base: 146 (Bolton) / 122 (Greater Manchester)

Respondents were asked to reflect on the opportunities they had to work with other VCSE sector organisations in terms of influencing local decisions, delivering local services and networking. Figure 10.2 summarises the responses.

Figure 10.2: Satisfaction with opportunities to work with VCSE organisations



Source: Bolton State of the VCSE sector survey 2016/17
 Base: 141 (influence decisions) / 140 (delivering services) / 140 (networking)

This shows that 47 per cent of respondents were satisfied with the availability of opportunities to influence local decisions (51 per cent in 2012/13) and that 44 per cent were satisfied with the availability of opportunities to work together to deliver local services (50 per cent in 2012/13). A smaller proportion of organisations across Greater Manchester were both satisfied with opportunities to influence local decisions (41 per cent) and with opportunities to work together to deliver local services (41 per cent). Almost half (49 per cent) of respondents were also satisfied with opportunities to network with other VCSE organisations (47 per cent across Greater Manchester as a whole). This was a new question added to the latest survey.

One fifth (21 per cent) of respondents said their organisation is a member of a formal VCSE sector consortium, similar to the 22 per cent of organisations across Greater Manchester.

Eight per cent of respondents also indicated their organisation is in another type of formal partnership with other VCSE organisations to deliver specific services (13 per cent across Greater Manchester).

10.2. Qualitative reflections on working with other VCSE organisations

The focus groups discussed participants' views about and experiences of working in partnership with other VCSE organisations in Bolton and more widely. Participants were overwhelmingly positive about the importance of working closely with other organisations in the sector. They all had some contacts and connections with other VCSEs (mostly in Bolton): building personal relationships based on trust with individuals and then taking it from there, was considered vital for successful partnerships.

"Just to have a level of trust. And actually, austerity has made partnerships even more needed."

"Yeah, just be open and have honesty; have the same values, aims and identity; have a good relationship really; simple as that."

In addition, the issue of compatibility between organisations in terms of identity, values, goals and activities was also considered crucial for effective collaborative projects and partnerships. The only barrier that had derailed partnerships in the past was misconceptions about other organisations' mission and abilities, which could lead to unrealistic expectations and misunderstandings.

"Sometimes it's a fantastic strength if you are similar organisations; if you have the same identity and aspirations. If it turns out you are not, it can get really bad, really quickly. And I guess we all want to protect what we've got, so this you know, suspicion, can be a barrier."

The Future

This chapter details the responses received to questions about the future in the survey of organisations.

11.1. Factors assisting or constraining delivery

Respondents were asked to consider the factors they anticipated assisting or constraining their organisation over the next 12 months. Figure 11.1 illustrates that over 45 per cent of respondents thought the following factors would assist their organisation over the next year:

- **engagement with other VCSE organisations:** 52 per cent anticipated this factor assisting their organisation; including 16 per cent who saw this as 'greatly assisting' and 35 per cent 'assisting'
- **ability to recruit volunteers with sufficient skills:** 46 per cent anticipated this factor assisting their organisation; including 27 per cent who saw this as 'greatly assisting' and 20 per cent 'assisting'
- **engagement with public sector bodies:** 46 per cent anticipated this factor assisting their organisation; including 13 per cent who saw this as 'greatly assisting' and 33 per cent 'assisting'.

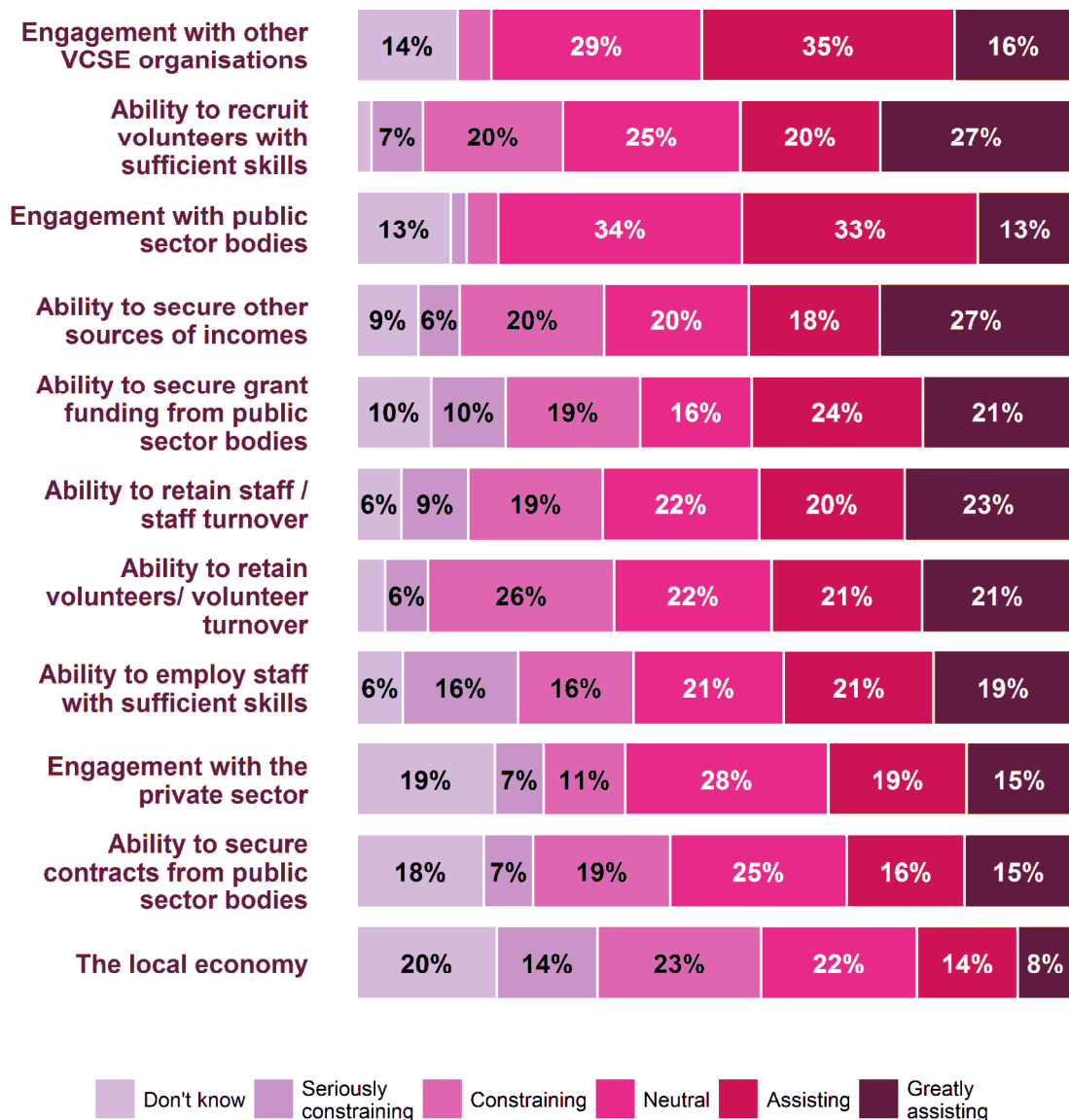
Engagement with other VCSE organisations was also the most common factor selected across Greater Manchester, with 50 per cent of organisations envisaging this factor assisting their organisation over the next 12 months.

In contrast almost one third or more saw the following factors as constraining their organisation over the next 12 months:

- **the local economy:** 37 per cent anticipated this factor constraining their organisation; including 14 per cent who saw this as 'seriously constraining' and 23 per cent 'constraining'
- **ability to employ staff with sufficient skills:** 32 per cent anticipated this factor constraining their organisation; including 16 per cent who saw this as 'seriously constraining' and 16 per cent 'constraining'
- **ability to retain volunteers/volunteer turnover:** 32 per cent anticipated this factor constraining their organisation; including six per cent who saw this as 'seriously constraining' and 26 per cent 'constraining.'

The local economy was also the most common factor selected across Greater Manchester as a whole, with 38 per cent anticipating this factor constraining their organisation over the following year.

Figure 11.1: Factors anticipated as assisting or constraining organisations over the next 12 months



Source: Bolton State of the VCSE sector survey 2016/17
Base: 62-104

Following on from quantitative questions regarding the factors organisations anticipated assisting or constraining their organisation over the next year, respondents were also asked to provide further qualitative (i.e. written) information about these factors.

Most comments focused on the factors constraining organisations, with issues accessing funding and recruiting and retaining volunteers and staff common themes in the responses:

"We're unable to fund staffing costs and rely on volunteers. However, we are struggling to recruit volunteers as we are a niche group, and members within the group are time-poor."

"Always a problem to obtain funding. Our organisation can remain at its present level but cannot grow in size."

"As an organisation that receives significant level of public sector grant funding, planned reductions will constrain our ability to deliver services. Along with limited opportunities to apply for grant funding to deliver our work."

"Lack of funds, staff and resources make interaction with the private sector difficult."

"We get volunteers to take up roles on our committee but very few last. It is an increasing problem trying to get people to take on these administrative roles. Getting volunteers to actually join in the community work is not a problem."

There were however some more positive comments received:

"We believe that finding other sources of funding will greatly assist in the sustainability of the organisation as will staff retention and volunteer recruitment."

"We do our own fund raising throughout the year, and are capable of carrying on with reduced funding."

"Partnership, skills and resources are the three key factors for survival and eventually development of the sector."

"We have been fortunate to receive grants from Bolton CVS for the last two years."

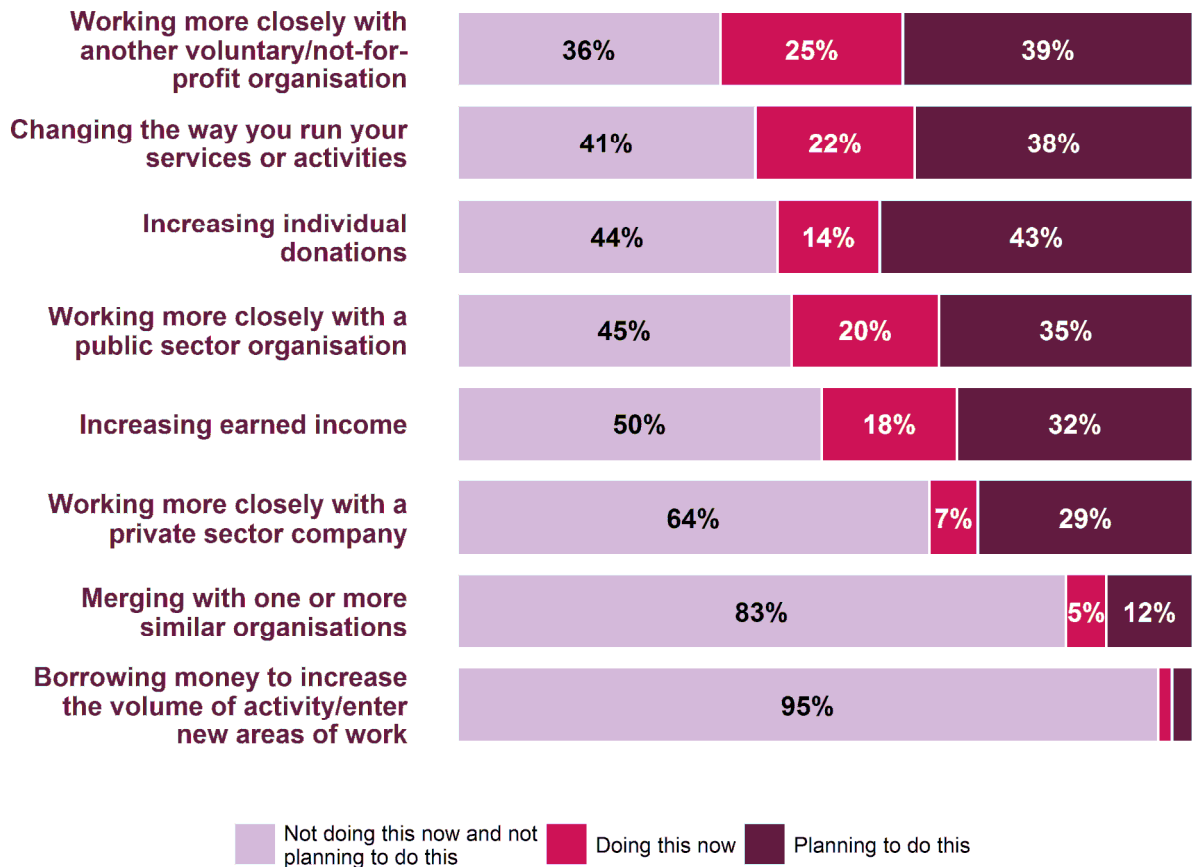
11.2. Current and future strategies

Survey respondents were asked what strategies they are actively pursuing or planning to pursue. Figure 11.2 summarises the responses received and shows that over 55 per cent of respondents were already doing or planning to do the following:

- **working more closely with another voluntary/not-for-profit organisation:** 64 per cent were already pursuing or planning to pursue this strategy; including 25 per cent who are doing this now and 39 per cent who are planning to do this in the future
- **changing the way you run your services or activities:** 59 per cent were already pursuing or planning to pursue this strategy; including 22 per cent who are doing this now and 38 per cent who are planning to do this
- **increasing individual donations:** 56 per cent were already pursuing or planning to pursue this strategy; including 14 per cent who are doing this now and 43 per cent who are planning to do this.

Working more closely with another voluntary/not-for-profit organisation was also the most common strategy being pursued by organisations across Greater Manchester as a whole.

Figure 11.2: Strategies being planned or pursued



Source: Bolton State of the VCSE sector survey 2016/17
 Base: 105-111

Conclusions

1. The VCSE sector in Bolton continues to occupy an important strategic position between policy development, service provision and everyday life.

There are an estimated 1,561 organisations working in the VCSE sector in Bolton who are involved in many areas of activity.

As in the 2013 study, the local area is a main focus for the majority of organisations; 36 per cent identified particular neighbourhoods or communities in Bolton as their highest main geographic focus and 37 per cent identified the whole Bolton local authority area as their highest main geographic focus.

The thematic areas with the greatest proportion of organisations working in them are: health and wellbeing; community development; education, training and research; and sport and leisure; the same four areas selected most frequently in 2012/13.

The VCSE sector plays a key role in fostering strong and cohesive communities within Bolton and is an essential part of the social fabric of the borough. Over three-fifths of organisations felt they are improving people's skills (64 per cent), improving people's mental wellbeing (61 per cent) or helping people from different backgrounds to get on well together (61 per cent).

2. The sector in Bolton remains an important economic player, contributing significantly to GVA²⁶, but patterns in income, expenditure and the level of reserves suggest that, as in 2013, the sustainability of many organisations may be under threat.

Total income of the VCSE sector in 2014/15 is estimated to be £137 million. This represents an increase of three per cent compared to 2013/14 when the total income of the VCSE sector was an estimated £134 million. The vast majority of organisations are micro or small although the majority of income is concentrated in large and medium-sized organisations.

The picture is more positive overall than in the previous 2013 study which identified year-on-year reductions in income. However analysis of income data across Greater Manchester by organisation size revealed micro and small organisations experienced year on year reductions in total income between 2012/13 and 2014/15. By contrast medium and large organisations saw a reduction in total income between 2012/13 and 2013/14 but then an increase between 2013/14 and 2014/15.

²⁶ Gross Value Added (GVA), the value of goods and services produced, is a key measure of the economic contribution of organisations or sectors.

Over two-fifths (44 per cent) of respondents reported increasing their expenditure but only 34 per cent had experienced an increase in income and only 22 per cent report an increase in reserves.

In addition, 32 per cent of respondents reported a decrease in income but only 15 per cent reduced their expenditure.

26 per cent of respondents provided an expenditure figure for 2014/15 that was greater than their income.

These results indicate a sizeable number of organisations spent more money than they received in the last 12 months and that a considerable number of organisations are using their reserves to supplement their income, potentially leaving them in a fragile financial position.

3. The VCSE sector in Bolton continues to provide significant social value.

It is estimated that the VCSE sector in Bolton made 2.3 million interventions with clients, users or beneficiaries in the previous year.

VCSE organisations work with a range of different people, especially children and young people and older people, but also people from vulnerable groups (for example those with health problems or unemployed people).

4. The VCSE sector continues to be a significant employer.

In 2016/17 there were an estimated 3,000 FTE paid staff. In addition the sector was supported by 36,300 volunteers and 10,600 committee/board members who combined donated 113,500 hours per week.

Valuing the contribution of paid employees to Bolton organisations by the expected value of the output that they produced gives an estimated annual contribution of £94.4 million. Doing the same for volunteers and committee/board members gives an estimated contribution of £102.7 million.

5. The number of volunteers within the sector in Bolton appears to have grown consistently over recent years, however this was not the case for all organisations and there are challenges associated with volunteering across the borough.

Two-fifths of organisations responding to the survey reported increased numbers of volunteers compared to the previous year, while just nine per cent of organisations reported a decrease in volunteer numbers.

Consistent with the survey findings, registered charities participating in the focus groups reported that, the numbers of volunteers have been rising. This increase was associated with austerity and the precarious labour market as increasing numbers of (especially young) people approach charities to gain job experience, augment their CVs and improve their employability.

In contrast participants from smaller VCSEs, reported a mixed picture around volunteer numbers: some stated that in the last year volunteer numbers had reduced, others that they had increased and others still, that they had remained more or less stable.

Regardless of whether there had been an increase or decrease in volunteering, most participants identified significant challenges associated with the funds, staff and

resources to properly train, support and retain volunteers with the skill-sets their particular organisations need.

6. There is a mixed picture in Bolton regarding relationships between the VCSE sector and public sector bodies.

Overall, 86 per cent of respondents in Bolton had some dealings with Bolton Council (72 per cent in 2012/13): 17 per cent had a great amount of dealings with the Council and 39 per cent had a fair amount of dealings.

Almost two-fifths (37 per cent) of respondents were satisfied with their ability to influence Bolton Council decisions of relevance to their organisation while 49 per cent said Bolton Council had a positive influence on their organisation's success, both more positive than the proportions reported in 2013.

Experiences with the public sector varied for organisations participating in the focus groups: sometimes they have been positive, and others negative. It tended to depend on the personal, trust-relationships VCSE organisations can build and maintain with specific people in the public sector.

A common criticism of the public sector was the lack of funding and their inability to effectively communicate with the VCSE sector, to properly understand its work, and to incorporate its input, reach and experience into their decision making processes.

With regards to devolution in Greater Manchester, respondents from larger charities and smaller VCSE organisations were in agreement that they don't know enough about what it is and had received limited or contradictory information. Most participants thought that devolution would probably have negative consequences for the VCSE sector in Bolton, either in terms of funding or ability to influence policies and decisions.

7. Engagement with private businesses has increased and perceptions of the private business sector appear to have improved, however engagement is still relatively low.

60 per cent of organisations had some direct dealings with private businesses, with 16 per cent having a 'great' or 'fair' amount of contact. This is an increase since 2012/13 when 45 per cent reported some direct dealings, including 12 per cent having a 'great' or 'fair' amount of contact.

Almost one third (30 per cent) felt that the private business community in Bolton was a positive influence on their organisation's success. This is an increase since 2012/13 when just 14 per cent agreed private businesses were a positive influence.

Overall, the experiences of focus group participants in working with private businesses was very positive, with participants stressing the importance of the 'local' component of these relationships: VCSE organisations with roots in the local area worked most effectively with businesses with similar roots or origins.

8. The VCSE sector in Bolton continues to be well connected internally although most contact appears to be informal.

As in the 2013 study, the vast majority of organisations had some direct dealings with other VCSE sector organisations in their local area, including 64 per cent who had a 'great' or 'fair amount' of contact.

21 per cent of respondents said their organisation is a member of a formal VCSE sector consortium.

Overall, focus group participants were overwhelmingly positive about working closely with other organisations in the sector. The only barrier that had derailed partnerships in the past was misconceptions about other organisations' mission and abilities, which could lead to unrealistic expectations and misunderstandings.

9. The sector still faces an uncertain future.

With austerity measures set to continue for the foreseeable future and public sector funding for the sector continuing to be squeezed, there are still reasons for caution within the sector.

Respondents appear to recognise this uncertainty and are pursuing a range of strategies to ensure their sustainability, in particular: generating earned income from other sources, partnership working and organisational change.

Appendix 1

Methodology

Survey of organisations

At least partial responses were received from 62 of the 960 organisations that were sent a survey questionnaire: this represents a response rate of six per cent. Another web-based version of the survey was also distributed by Bolton CVS, reaching organisations also included in the original sample and beyond. In addition GMCVO distributed a version of the survey via their networks. A further 101 responses were collected via this method, meaning a total of **163 responses were collected overall** during September 2016 - January 2017, giving a higher overall response rate.

The survey was undertaken as part of a wider study in six other Greater Manchester boroughs: the City of Manchester, Oldham, Rochdale, Salford, Stockport and Tameside.

The questionnaire was based on the one originally developed for the 'State of the Voluntary Sector Survey' undertaken in Salford in 2010. The questionnaire was revised for the 'Greater Manchester State of the Voluntary Sector' research undertaken in 2012/13 and again for this wave of the survey following input from the Research Steering Group. The Greater Manchester Chief Officers Group also provided additional oversight regarding the survey design and implementation.

The questionnaire provided data on various aspects of the VCSE sector including:

- **the scale and scope of its activity**, including the roles organisations undertake, the people they support, and the areas they benefit
- **the economic impact of its work**, including income and expenditure, sources of funding, the role of paid staff and volunteers, and financial sustainability
- **relationships with the public sector**, including Bolton Council, public sector health bodies, and a range of other local statutory bodies
- **relationships with other local organisations**, including VCSE organisations and private businesses.

Where possible the report compares results from the latest survey and the 2012/13 study. Revisions to the questionnaire mean that comparisons are not always possible or appropriate. It is also worth noting that in 2012/13 a large postal survey was the main method of data collection which was supplemented with a web based survey. This is different to the latest study when a web based survey was the primary method of data collection.

When reading the report it is important to acknowledge two key points. First, the results reported are based on the survey responses received. Therefore it is possible that if a different sample of organisations had taken part in the survey different results may have emerged. It is estimated that the results reported are within +/- 7.3 percentage points of the true value.

Secondly, on a number of occasions the analysis in this report has used extrapolations from the survey responses to provide estimates of totals for all organisations that work in the VCSE sector including:

- the number of clients, users and beneficiaries of the sector
- the total income of the sector
- and the number of FTE paid staff and the number of volunteers and committee/board members that are part of the sector's workforce; including the hours per week that volunteers contribute.

In each case the same three stage method has been used for calculating the sector wide totals:

- **stage one:** calculate the Greater Manchester averages for each of the four size bands of organisations: 'micro', 'small', 'medium' and 'large': column (a) in table A1
- **stage two:** multiply the average for each size band (column (a) in table A1) by the estimated number of organisations within that size band (column (b) in table A1) to give the total for each size band of organisations (column (c) in table A1)
- **stage three:** sum the estimates from stage two (column (c) in table A1) to give a sector wide total estimate (cell (d) in table A1).

This was necessary to take account of noticeable differences in the response rates by organisation size. A failure to do this would lead to upwardly biased estimates: a small number of mainly 'large' organisations create a high mean value that is not representative of the majority of organisations. This is an important point given that we estimate that a large proportion of the sector is made up of 'micro' organisations which tend to have far lower values and not taking into account difference by size of organisations would produce estimates that are much higher.

Table A1: Extrapolations: a worked example (total annual income)

	Average income by size (a)	Estimated number of organisations (b)	Total income (thousands) (c)
Micro (under £10k)	£2,438	1,115	£2,718,635
Small (£10k to £100k)	£38,844	263	£10,214,634
Medium (£100k to £1m)	£320,581	148	£47,409,047
Large (over £1m)	£2,201,023	35	£76,966,956
Total			(b) £137,309,272

Please note it has been assumed here that the estimated averages for Greater Manchester organisations are representative for organisations within Bolton. So for example it has been assumed that the estimated average income of approximately £320,600 for medium sized organisations across Greater Manchester is representative of the income for medium sized organisations within Bolton.

Using the Greater Manchester averages improves the reliability of the estimates.

Focus groups

To provide a further depth of understanding to some of the themes covered in the State of the Sector Survey two focus groups were conducted. The groups were held midway through the survey administration and undertaken by Bolton CVS who recruited local organisations to participate in the groups.

A topic guide was devised to help guide discussions and ensure a standardised approach across all local authority areas conducting focus groups. The topic guide was created in partnership between CRESR and the Research Steering Group with CRESR providing advice and guidance on best practice in undertaking this type of research.

The focus groups lasted approximately 1 hour - 1 hour 30 minutes and were digitally recorded where consent was obtained from all participants. The recordings were then provided to CRESR who analysed the discussions. Analysis of the discussions is included in the relevant chapters of this report.

The topics discussed in the focus groups concentrated on four key themes: volunteering, working with the public sector, working with other VCSE organisations and working with the private business sector.

One focus group took place with small VCSE groups and the other with registered charities.

Legal status of responding organisations

Respondents to the questionnaire were asked to identify the legal status of their organisation. For this question it was possible for organisations to select registered charity in addition to identifying their legal form. Figure A1 below shows that 37 per cent were a group with a constitution, but not registered charities and 18 per cent of organisations were a company limited by guarantee, and that separate to identifying their legal status two fifths of respondents, 48 per cent, identified that their organisation was a registered charity.

These results are different to those in the 2012/13 survey when:

- 56 per cent of organisations were a group with a constitution, but not registered charities
- 16 per cent were companies limited by guarantee
- two per cent of organisations had no legally constituted form
- 34 per cent of respondents identified that their organisation was a registered charity.

Across Greater Manchester:

- 30 per cent of organisations were a group with a constitution, but not a registered charity
- 28 per cent were a company limited by guarantee
- four per cent of organisations had no legally constituted form
- 49 per cent of organisations were registered charities.

Figure A1: The legal status of responding organisations



Source: Bolton State of the VCSE sector survey 2016/17
Base: 162