



2021

MEMBER SURVEY

Key Findings



**Stronger Charities.
Stronger Communities.**

01

OVERVIEW

Between 6 January and 6 February 2021, The Wheel conducted a survey of its members to establish their needs, concerns and priorities. The survey provides a snapshot of the impact of the COVID-19 pandemic on charities and the community and voluntary sector in key areas such as income, fundraising, staffing and services.

The survey findings indicate that the pandemic is having a very uneven impact across the sector. Over half of respondents said their organisation's income fell in 2020, with charities relying on public fundraising most severely affected.

Of the nearly two-thirds of organisations in receipt of statutory funding, only 7% reported a reduction in funding in 2020.

More than a third (38%) increased their service provision in 2020, while 32% cut services and 30% maintained the same level of services.

The overwhelming majority of respondents said they are confident that they will be in a position to declare compliance with the Charities Regulator's Governance Code in 2021.

In relation to challenges: over half of respondents believe that their organisations will be affected by Brexit. Most say this impact will be manageable, but a small number expressed serious concern. Respondents also voiced concern about a range of other issues including the State's funding model for the sector and the need for a coherent Government Strategy for the sector.

Members expressed a high level of satisfaction with The Wheel, our services and performance. Feedback from this survey will be used to enhance and develop our member services, supports and representative work.

Finally, we thank our members for their ongoing support and engagement.

Methodology

- Online survey of members of The Wheel conducted between 6 January and 6 February 2021.
- Total respondents: 288
- One response per organisation

02

INCOME & FUNDRAISING

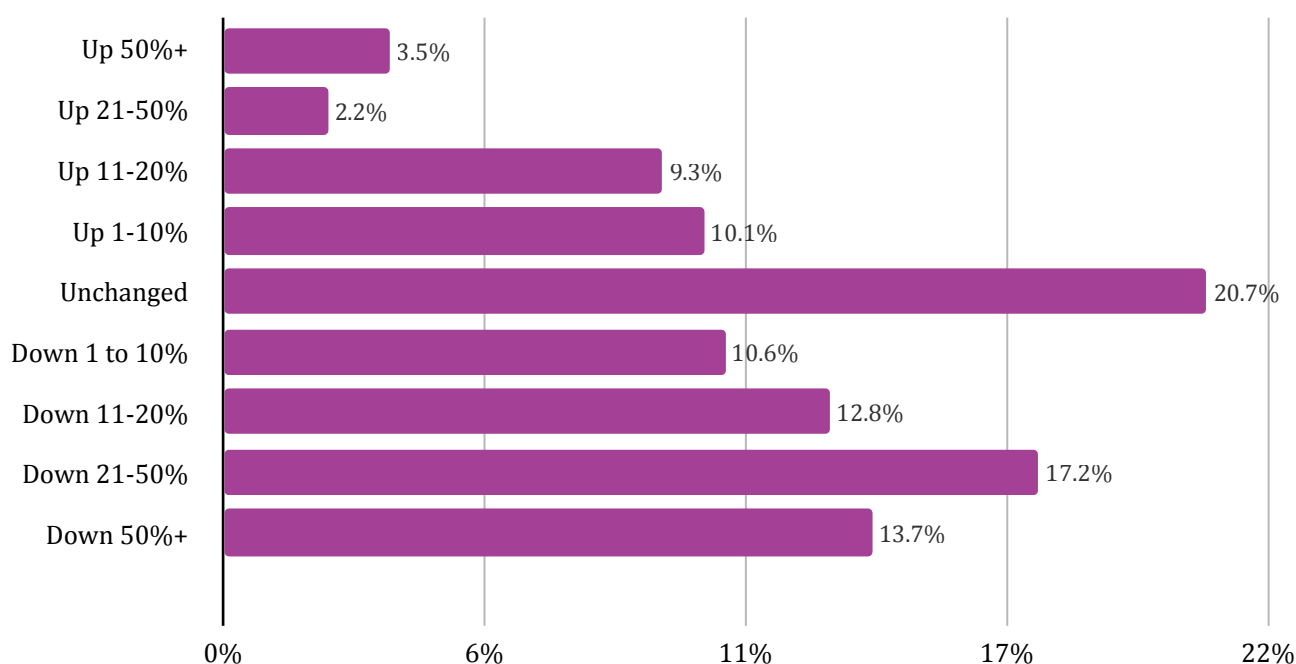
Income

- Over half (54%) of organisations reported that their overall income fell in 2020.
- 65% of organisations received statutory funding in 2020.
- A third reported increases in statutory funding in 2020, while just 7% reported cuts.
- Over a quarter of organisations have an annual turnover of over €1million.

Fundraising

- 57% of organisations fundraised from the public in 2020.
- Over half (54%) said their fundraising income declined in 2020.
- Members are diversifying their fundraising methods in response to the COVID-19 pandemic, and in 2020 there was an increase in the use of online appeals, text donations, lotteries and scratch cards.

Including all sources of income, how has your organisation's overall income changed in the past 12 months?



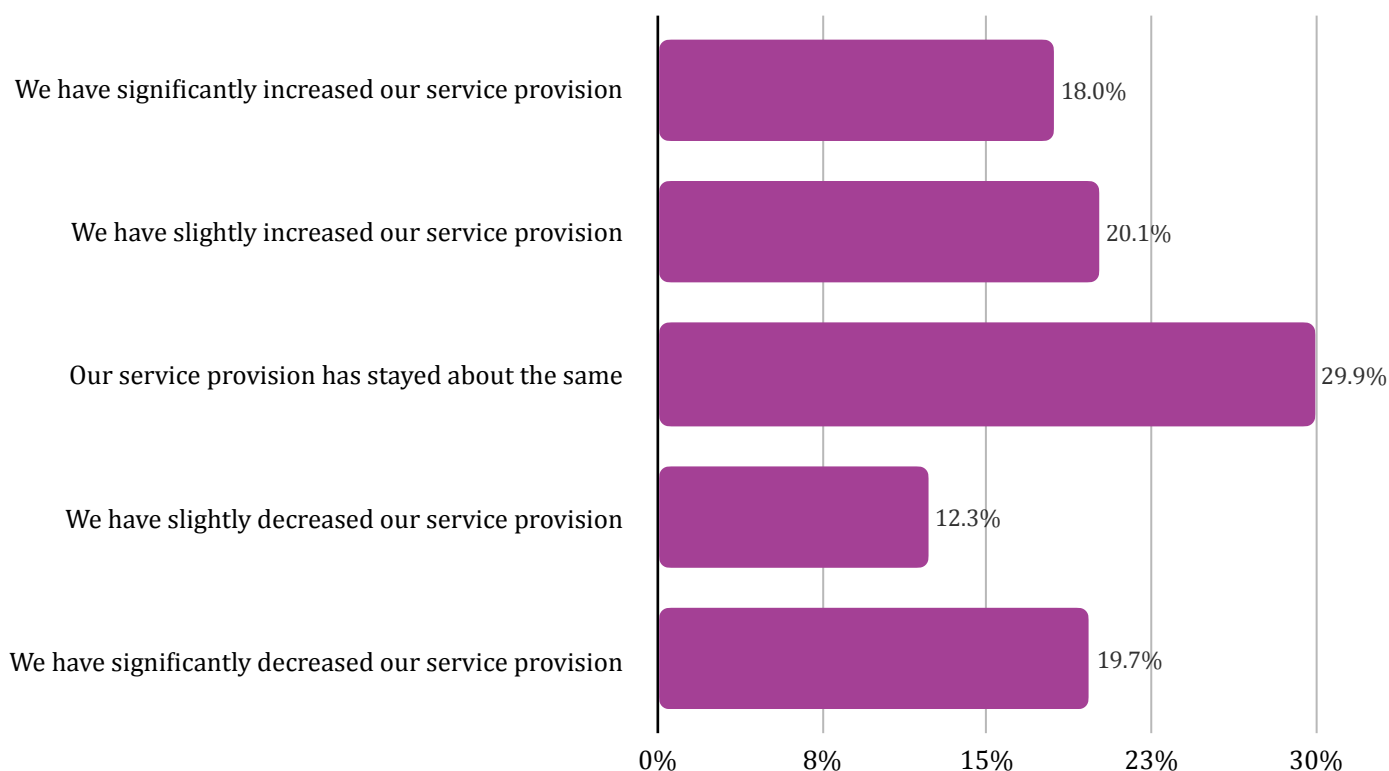
“Government funding is not strategic and should be annual funding spread out over a longer time period e.g. three years, to allow for strategic planning in the medium term and long term.” - Respondent

03

SERVICE DELIVERY

- 38% of organisations increased their service provision in 2020.
- Just under half (46%) say they were able to meet the demand for their services.
- 56% collaborated with other organisations in 2020. Joint advocacy and campaigning was the most popular form of collaboration (23%), followed by joint service delivery (22%).
- 45% of organisations have headquarters in Dublin.
- Around a third (32%) deliver services at a national level, while (46%) work locally, 9% work across the Island of Ireland and 6% deliver services abroad.

Has your organisation changed its level of service provision in the past 12 months?



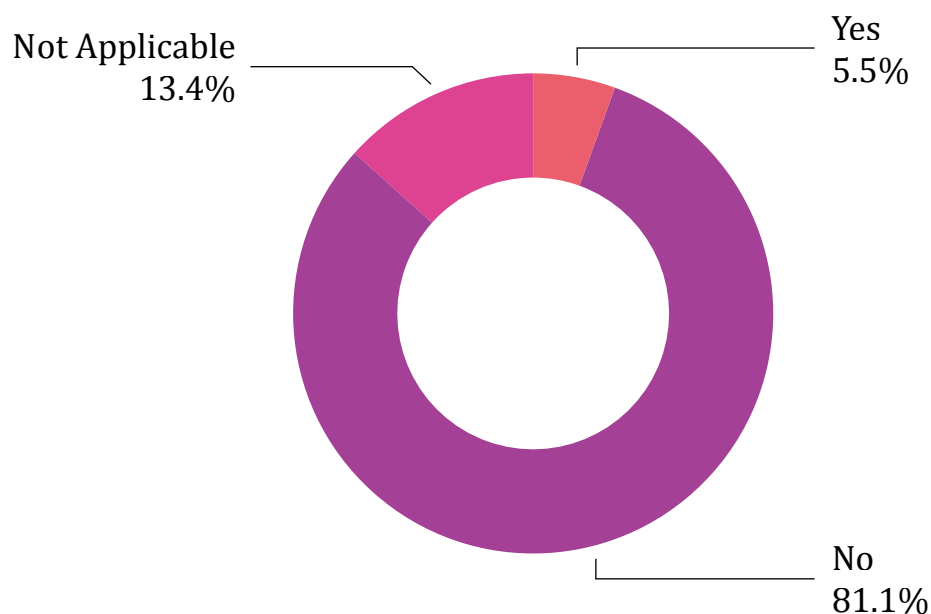
"We are able to meet demand, but any further increase would place us under severe pressure..." - Respondent

04

REGULATION AND GOVERNANCE

- 81% of respondents anticipated no difficulty declaring compliance with the Charities Regulator's Governance Code in their 2021 annual report to the Regulator.
- 83% of organisations say they are in compliance with the Guidance for Charitable Organisations Fundraising from the Public, issued by the Charities Regulator in September 2017.
- Around half (49.3%) published unabridged accounts on their websites in 2020.
- 57.6% report that their trustees had undergone training in the previous 12 months.

Do you expect to have difficulty in declaring compliance with the Charities Regulator's Governance Code in your Annual Report the Regulator in 2021?



"Our staffing has been hugely impacted by COVID-19 and having the staff hours to commit to administration for meeting existing regulatory and reporting requirements is challenging nevermind adding additional reporting time demands." - Respondent

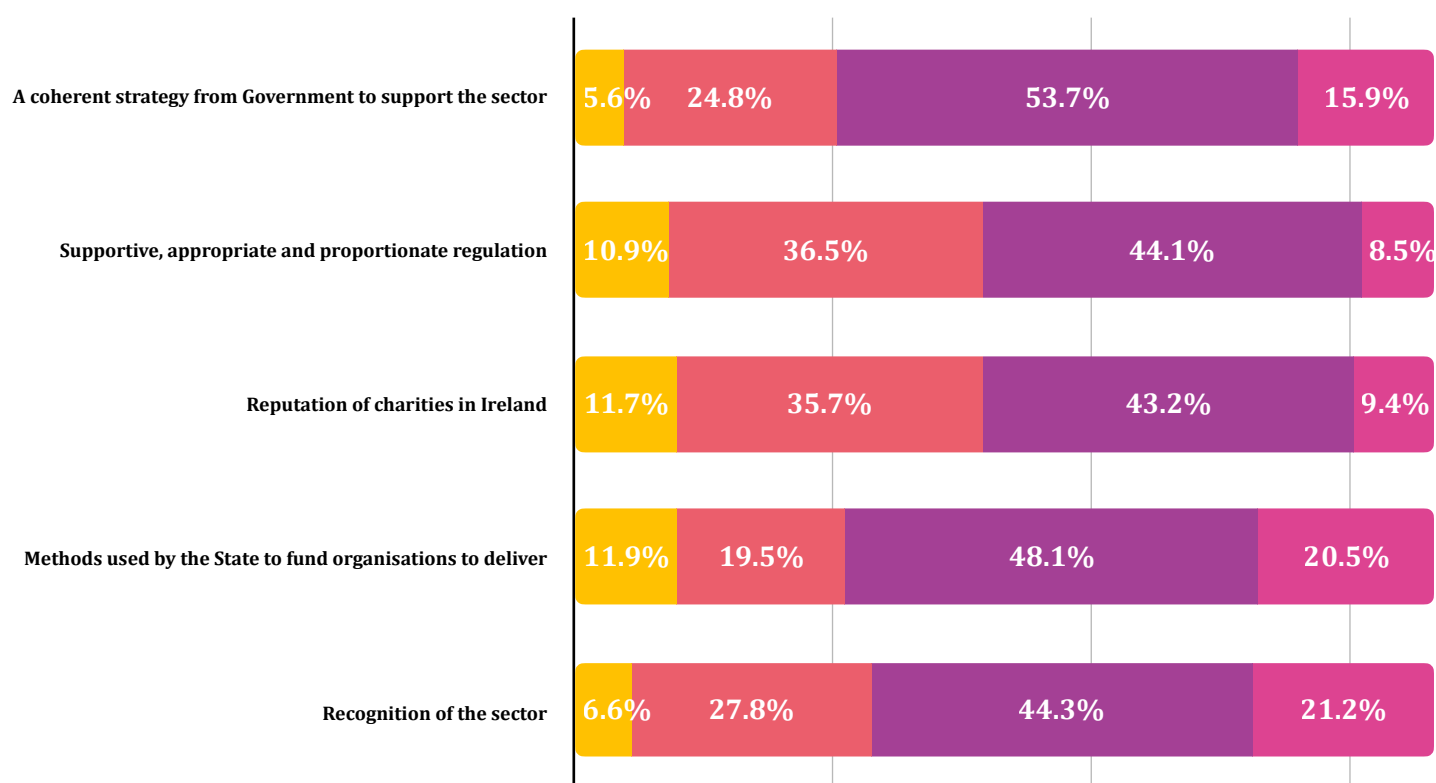
05

CHALLENGES

- 95% of respondents cited the need for a coherent strategy from Government to support the charity sector as a concern.
- Two-thirds (67%) said the methods the State use to fund organisations is either a significant concern or their single biggest concern.
- More than half (58%), said Brexit will have an impact on their work.
- Of those affected by Brexit, 38% said the issue is manageable, 18% said it was somewhat of a problem and 3% said it is a serious problem.

In thinking about the challenges facing the community and voluntary sector, please rate the following:

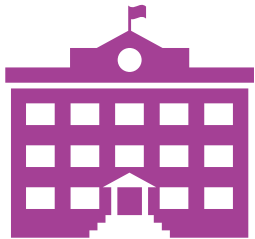
■ Not a Concern
 ■ Somewhat of a Concern
 ■ Significant Concern
 ■ Our Largest Concern



"We have good regulation and support from the [Charities] Regulator ." - Respondent

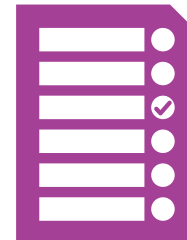
06

A SNAPSHOT OF THE RESPONDENTS



86%

identify as community/voluntary/
charitable organisations

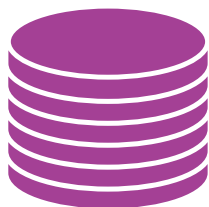


84%

are on the Register of
Charities

73%

have a total annual
income below €1m



49%

are members of a Public
Participation Network
(PPN)



65%

receive statutory
funding



93%

agree membership of
The Wheel is value for
money



"I think The Wheel is doing an excellent job in the current climate."
- Respondent

