

Greater Merseyside Third Sector Recession Consultation

*The current and predicted impact of the recession on the
Third Sector in Greater Merseyside*



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Section 1

Foreword

This report aims to assess and analyse the early impact of the recession on the third sector in Greater Merseyside. When asked if the recession was currently having an impact on their organisations, and if yes, what that impact was, over 80% of the responses identified funding issues, such as reduced funds available, as the major challenge being faced; another challenge identified was the increased demand for services currently being experienced, notably services such as advice and family support; and an increase in anxiety in both staff and volunteers, and community members was also identified as a current impact of the recession.

Supporting research, such as *“Regional Economic Forecasting Panel: State of the North West Economy Long-term Forecasts April 2009”* report, states that the recession is deep, global and worse than forecast, and that any recovery will be slow. This report also support the findings of a similar survey carried out by Voluntary Organisations Network North East (VONNE), ‘Surviving NOT Thriving’ report, (May 2009), which indicated that the main challenges facing third sector organisations in the North East are also funding relating.

It is clear that as a sector overall we are seeing the effects of the recession in Greater Merseyside, but it is also clear that there are a number of actions that can be taken, on the part of individual frontline third sector organisations and support providing or infrastructure organisations, to help mitigate these effects: For example strategically planning for the future; utilising the wealth of advice, support and services already in existence, such as Community Accountancy to help improve financial management; continuing to focus on innovation; and to remember that the voluntary, community and faith sector has a strong history of thriving and innovating in times such as these.

Ultan Russell
Chair, Greater Merseyside ChangeUp

This particular piece of locality based research serves to further underline the impact of the recession on the third sector within Merseyside. The report demonstrates that needs are greatly confounded by an increase in demand for services, and in-turn highlighting the vital role that support providers play in supporting front line organisations.

We are grateful to the Changeup team at Sefton CVS for responding so quickly to the resilience support grant and providing timely intelligence for the sector and funders.

Mark Reading
Regional Manager, Capacitybuilders

Section 2

Executive Summary

This report highlights the findings, challenges and trends facing the third sector in Greater Merseyside and will also assist the Consortium to revisit its plans for the future.

We now have documented rather than anecdotal evidence of the recession having an impact on the third sector in Greater Merseyside.

Over 200 individual responses were received and the following have been identified as key emerging trends and areas where action could be taken to try to mitigate the effects of the recession:

- Funding Issues, which include a lack of availability and reduction in, are by far the most commonly reported impact being experienced by third sector organisations - 82% of the impacts noted were funding related.
- 15% of the responses indicated confirmed an increased demand for services, notably advice giving services such as debt advice and family support.
- Third sector organisations reported increased anxiety and lower moral, in both staff of third sector organisations AND in the community members they are working with.
- Funding targets are becoming harder to achieve, for example, because of the higher number of people out of work AND the reduced number of job vacancies, meeting back to work employment targets set in 2007/8 is becoming harder to achieve.
- Respondents are seeing restrictions on the types of funding available as well as restrictions on which organisations are eligible.

There was however some positive effects of the recession noted, such as:

- An Increase in the number of service users.
- Increased number of members.
- Increase in number of people attending [Christian] religious services at Passover and Easter.

Predictions for the future

Respondents believe that problems obtaining funding will continue into the future, and that organisations will innovate and take risks less often, preferring to concentrate survival and continuation of existing projects, rather than start up new projects.

Third sector support providing or infrastructure organisations have a vital role to play in continuing to provide support, training, advice for front line organisations and in advocating on their behalf for, for example, fairer and more consistent procurement and commissioning practices.

Section 3

Acknowledgements

The Greater Merseyside ChangeUp Programme Management Team would like to thank the staff of the organisations listed in section 6 responsible for organising consultations, collating responses and returning these to the Programme Management Team.

Section 4

Introduction

ChangeUp is a government programme aimed specifically at improving the capacity of third sector support providers and improving the support they provide to local front line organisations. Support providing organisations, also known as infrastructure organisations provide help, advice and support, such as organisational development and funding advice to front line organisations to enable them to provide better services to their respective communities.

Greater Merseyside ChangeUp operates via a consortium of 18 support providing organisations, facilitated by a Programme Management Team.

The region of Greater Merseyside has a population of approximately 1.5 million people and is part of the North West region of England.

There are 6 separate districts within Greater Merseyside:

- Halton
- Knowsley
- Liverpool
- St. Helens
- Sefton
- Wirral

The aim of this report is to:

- a. gather initial baseline data on the current effects of the economic recession on third sector organisations in Greater Merseyside,
- b. analyse and highlight the impact and the predicted impact of the recession if any,
- c. recommend actions that can be taken to try to mitigate the effects of the recession.

Section 5

Rationale

Much has been said about the effects and potential effects of the economic recession on the third sector. Capacitybuilders, the main funder of Greater Merseyside ChangeUp, requested that we look at potentially amending our strategy and business plans as a result of the economic recession, to ensure the plans effectively reflect the needs of the sector. In light of this and as a result of specific 'Real Help for Communities Modernisation Fund', a £16.5million government initiative aimed at improving the resilience of third sector organisations in the current economic climate, Greater Merseyside ChangeUp Consortium conducted a consultation of front line third sector organisations across the sub-region.

Because of timescale and delivery time restrictions, the Greater Merseyside ChangeUp Working Group made the decision to host 6 borough-wide and one sub region-wide event, plus 2 additional specialist events focussing on BME and faith-related organisations.

The intention was that even though funding and timescale restrictions limited to number of events, any third sector organisation was able to participate in the consultation and provide their feedback.

Section 6

Methodology

The following organisations carried out consultations, either face to face with individuals, over the telephone with individuals, or as part of a group event:

- Churches Together in the Merseyside Region
- Halton Voluntary Action
- Knowsley Council for Voluntary Service
- Liverpool Charity & Voluntary Services
- Merseyside Network for Europe
- Sefton Council for Voluntary Service
- St. Helens District Council for Voluntary
- Wirral Council for Voluntary Service

Information about all of the events was advertised via the Greater Merseyside ChangeUp website www.changeupmerseyside.org.uk, and disseminated via all Consortium members, to ensure as many third sector organisations as possible.

In addition to this, organisations were invited to provide their feedback online, via the www.changeupmerseyside.org.uk website using the same standardised questionnaire form - see Appendix A.

Section 6 continued...

A standard questionnaire was provided by the Greater Merseyside ChangeUp Programme Management Team for use in consultations- see Annex A.

Over 200 individuals responded to the following 3 specific questions:

1. Is the economic downturn CURRENTLY having an effect on your organisation? If YES, what are the effects?
2. Do you believe the recession will have an effect on your organisation IN THE FUTURE? If YES, what will the effects be?
3. Would your organisation like access to support services designed to help you better manage the effects of the recession? If YES, what would those services be?

Section 7

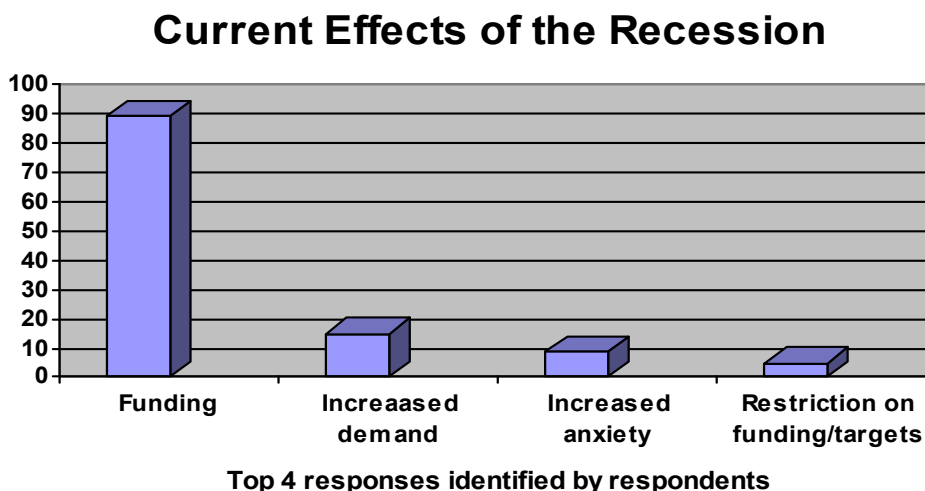
The Findings

The contents of this study were gathered over a specific period of time, between March and April 2009, and therefore are a snap shot of the current and predicted effects of the recession and support services required to help, as perceived by those responding to the consultation. Every effort has been made to include all comments as accurately as possible and in the context of how they were intended.

7.1. The CURRENT Impact of the Recession on the Third Sector in Greater Merseyside

Respondents were asked to tell us if the economic downturn was CURRENTLY having an effect on their organisation, and if the answer was YES, what those effects were:

Figure 1.1.



Out of 106 effects noted, the majority were funding related, for example reduced funding, difficulty obtaining funding, drop in donations, impact on reserves, etc.

Comments

- “Less funding coming in from charitable sources”
- “Much higher failure rate for funding applications”
- “Timescales for funding pots are becoming more restrictive”

Not all effects commented upon were negative. Some positive effects of the recession were noted, as follows:

- “Groups being upfront about core costs. Changing existing projects to meet demand.”
- “More competitive tenders e.g. buildings.”
- “Shifting in innovation.”

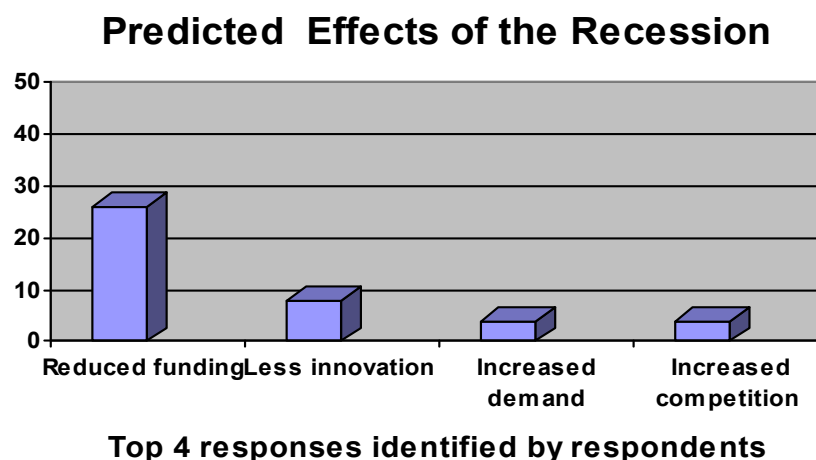
Section 7.1 continued...

- “Increase in number of people attending charity jumble sales and charity shops.”
- “Forced to make hard choices to mitigate risks.”
- “Potential to do well.”
- “Increase in service users”
- “Increase in members.”
- “Increase in number of people applying to work in the faith social care sector.”
- “Increase in number of people attending religious services at Passover and Easter.”
- “Increase in donations from local members and supporters.”
- “Increase in those using free transport service. “
- “Increase in demand for services.”
- “Shift in focus – jobs or workless.”
- “Opportunities for third sector orgs to use empty business properties to deliver services in the community.”

7.2. The PREDICTED Impact of the Recession on the Third Sector in Greater Merseyside

Respondents were asked to tell us if they believed the recession would have an effect on their organisation in the future, and if yes, what those effects would be:

Figure 2.1



Out of 85 responses noted, the majority were again funding related, in that 26 comments indicated a predicted drop in funding. The second most common predicted effect was less innovation as organisations focussed on core and standard activity, rather than taking risks with new projects and ideas.

Again, some positive predictions were made about the potential effects the recession could have, for example:

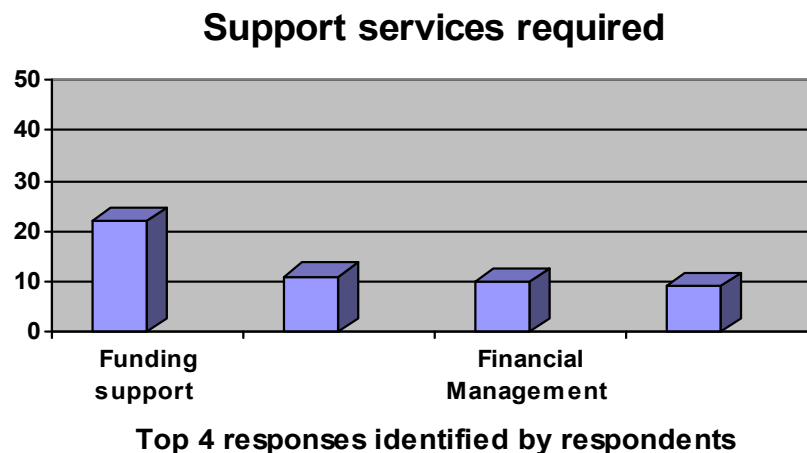
- “Increase in available pool of staff because of redundancies in other sectors.”
- “Reduction in contract prices from commissioners. “
- “Increase quality/calibre of applicants/volunteers.”

- “Changing perceptions of volunteering by benefits agencies.”
- “Opportunities to generate income from using [each other to promote services]- a cheaper alternative to common marketing activities.”
- “Internal restructuring to ensure organisation is maximising existing resources against a potential decrease in income.”
- “Future builders?”
- “Senior citizens and “mature workforce” coping better than other communities because of experience of previous [similar] times.”
- “Public sector managers moving into the third sector.”
- “Voluntary activity-big change, big opportunity e.g. inclusion/employment.”
- “Consortia model.”
- “Advice agencies collaborating more.”
- “More partnerships, mergers and amalgamations will take place.”

7.3. Support Services required to help Third Sector Organisations

Respondents were asked to tell us if they would like access to support services designed to help them better manage the effects of the recession, and if yes, to tell us what those services should be?

Figure 3.1



109 comments were received, with the majority being requests for help with funding in general. For example:

Access to an increased range of funding; fundraising support; [help with] funding applications; fundraising support; funding workshops; fundraising ideas; bid development, etc.

The second most popular request was for training, on subjects such as different types of companies, employment law, business recovery and policy.

Respondents also requested financial management support, such as community accountancy, financial planning, forecasting and full cost recovery advice.

Section 7.3 continued...

A high number of respondents requested support in the future with tendering, procurement and commissioning. For example:

“Influencing commissioning strategies and procurement practices”.

“Preparing organisations for commissioning”.

“Lobbying for a more consistent system across the region”.

“Lobbying for community value clause in tender evaluations”.

Finally, a high number of respondents requested assistance from support providing organisations by providing leadership, advocating on behalf of the sector, facilitating networks, providing briefings and information and lobbying local authorities on matters such as rent and business rate increases.

A number of respondents unsurprisingly requested money.

Section 8

Recommendations

From the current findings, the following recommendations are proposed:

1. To address the issue of lack of available funding and restrictions on funding:- This could be achieved by an enhancement of the borough wide funding advice road-shows, similar to those carried out in Sefton by the Merseyside Funding Information Portal team across Sefton, to produce a calendar of pan-Merseyside events. This will increase access to information about available sources of funding and hands-on practical advice for front line organisations. This report recommends that this work is lead and co-ordinated initially by the CVS Chief Officers' network.
2. To address to issues of increased demand for services such as debt and family counselling: - the Greater Merseyside ChangeUp Programme Management Team could coordinate a project to build a database of all advice-giving organisations across the sub region, and with consortium member partners, manage a series of themed networking events and provide relevant training and communications.
3. To address the concern of increased anxiety amongst staff and community members:- the CVS Chief Officer's network could coordinate a Merseyside-wide project which would include themed support and networking events for individuals working within the sector and show casing best practice, for example successful joint funding bids and collaboration, all supplemented by relevant communications.
4. All Greater Merseyside Consortium members to be fully committed to the ongoing Proving Value project: - by gathering statistical data on their clients and feeding this into the overall reporting structure. This will assist the sector by enabling the Greater Merseyside ChangeUp Programme Management Team to produce accurate profiles of the sector, therefore advocating on behalf of the sector by highlighting the amount and nature of the good work being carried out across Greater Merseyside. The overarching aim of this is to encourage funders, grant making trust and philanthropists to view the third sector in Greater Merseyside as healthy, thriving and worthy of continued support.
5. Front line third sector organisations have a duty to continue to take risks and innovate and consider collaborative ventures as a way of surviving through the recession period.

Section 9

Appendices

Appendix A

Copy of survey pro forma used in all consultations across Greater Merseyside as part of the Third Sector Resilience Consultation.

March-April 2009

Question	Responses
1a) Is the economic downturn CURRENTLY having an effect on your organisation. 1b) IF YES, WHAT are the effects?	
2a) Do you believe the recession will have an effect on your organisation IN THE FUTURE. 2b) If YES, WHAT will the effects be?	
3a) Would your organisation like access to local support services designed to help you better manage the effects of the recession? 3b) If YES, WHAT SERVICES would need to be provided?	

Appendix B

All feedback from Greater Merseyside Third Sector Consultation.

Merseyside Third Sector Recession Consultation

Updated 28th April 2009

Summary of the 5 responses received to date (3 individual and 2 group responses).
Need to state methodology, number of agents involved, number of respondents and whether those respondents were individual or group.

1a) Is the economic downturn CURRENTLY having an effect on your organisation.
1b) IF YES, WHAT are the effects?

1a) 7 think NO and four are unsure.

1b) Mixture of positive and negative effects:

Negative effects are:

Less funding coming in from [charitable trusts].

Drop in secured income.

Difficult to obtain funding.

Investment income has fallen.

Restrictions on funding- no cost of living increases.

Funders are becoming more restrictive, e.g. focussing on current situation.

No opportunity to develop services.

Much higher failure rate for funding applications.

Smaller budgets from partner organisations

Reduced cash flow.

Funding, especially from LA's is reducing.

Funding increasingly difficult to access.

Greater efficiencies sought for same or less funding.

Interest rates low providing low or nil return.

Smaller BME groups are disappearing.

Many BME organisations have lost staff, which has a negative impact on performance.

Increase in racial tension, not just between for example white and BRM communities, but between BRM communities.

Timescales for funding pots are becoming more restrictive, especially for BME organisations.

Hard business decisions are more start than ever.

The dynamic is shifting (e.g. contract negotiations)

Increased sense of responsibility of governance.

Refurbishment schemes placed on hold.

Faith bodies losing money on the sale of surplus buildings.

Basic needs for families, like food parcels, have risen

Increased resignation levels and stress levels/pressure on trustees.

Dramatic increase in use of reserves, and huge pressure on smaller organisations that don't have reserves.

Remodelled services

Customers have more complicated problems.

Even successful pilot services are restricted, and cannot develop past the initial stage due to lack of funding.

Public sector funders are expecting third sector organisations to maintain or even improve upon results with less funding.

Harder to get sponsorship.

Reduction in donations from local businesses; 3 out of 4 businesses have cancelled their sponsorship in 2009.

Less work for and increased competition for Migrant workers looking for work.

Struggling to find or maintain sponsors.

Fundraising from parents is down on previous years.

Harder to secure funds.

Fear that people will have less money to spend [at this years' event], which would reduce the amount of funds we have to for next year.

People struggle to pay subscriptions.

Team don't want to spend time fund-raising.

Attempting to cut costs to protect sustainability.

More competition.

More competition within the sector for local funding initiatives.

Increased competition for funds, even relatively small amounts.

Even larger organisations are chasing the relatively smaller funds.

Larger VC orgs are gobbling up smaller pots of funding.

Increase in choosing redundancy as an option for managing reduced funding.

Lower morale/lower staff morale.

Community members are more stressed

Increase in stress, especially younger people. Fear of unemployment may be an even greater problem than actual unemployment.

Uncertainty regarding funding, especially with loans and trusts.

General uncertainty regarding the future.

Political pressure.

Interest on investment income reduced. Reduction in Interest, endowments, private sector.

Land/Property values change which effects match funding.

Increase in rent/utility bills, etc, as private businesses try to mitigate impact of recession

General increase in costs of products/services such as insurance, admin, utilities and food costs.

Rising costs in utility charges, especially relating to churches as private companies see these as cash rich. There have been attempts to increase charges by 2000%.

Double whammy; Large contracts/co-finance-economic change.

Having to focus on core activities more than funded projects which is having an effect on service delivery.

Impact on reserves.

Increase in demand on services.

Increase in demand for services, especially advice and debt advice services.

Increase in demand for stress/anxiety related services, due to main breadwinner losing their job and the impact this had across families.

Increase in referrals for services relating to domestic violence, homelessness, debt problems and substance misuse.

Rising poverty in areas already classed as deprived.

Big increase in pressure on advice services, e.g. Citizens Advice Bureau).

Advice agencies unable to meet the demand

Increase in volunteers.

Increase in volunteer management/expenses etc means that smaller organisations are reaching the limit of their capacity, financially and regarding staff time.

Increase in service users

Increase in new type of service user, i.e. 'middle income people'.

Demand is increasing- organisations are reaching critical points of capacity/viability.

Increase in membership.

Increase in new type of service users, e.g. More men.

Growing concern about the trend towards bigger third sector organisations displacing smaller local ones.

Power imbalance between local and national charities.

The independence of third sector organisations is being challenged through restricting procurement practices.

[Government] less likely to take risks/try to deliver new things.

A local organisations previously funded by LA for 10 years lost a tender to a national organisation.

National organisations can offer borough-wide services and generate output target volumes.
Difficult to establish consortia due to different local practices.
Increased expectation and encouragement to collaborate/develop consortia/joint partnerships.
Local organisation winding down and making redundancies.
Poor returns on investments.
Harder for members to access LA services due to eligibility criteria.
Increase in number of volunteers waiting to be matched that cannot be met due to staff and money shortages.
Not able to meet the needs of existing volunteers who have additional or ongoing support needs.
Targets such as 'a reduction of unemployment' are becoming more difficult to achieve.
Offers of more funding, but for projects which are temporary or short term, and not strategic enough. This could raise expectations that cannot be met in the long term.
Some geographical areas, e.g. St Helens, are still dealing with the after-effects of the last recession, and so are finding this current economic crisis even harder to deal with.

Positive effects are:

Groups being upfront about core costs. Changing existing projects to meet demand.
More competitive tenders e.g. buildings.
Increase in number of people applying to work in the faith social care sector.
Increase in number of people attending charity jumble sales and charity shops.
Forced to make hard choices to mitigate risks.
Shifting in innovation.
Potential to do well.
Increase in service users
Increase in members.
Increase in number of people attending religious services at Passover and Easter.
Increase in donations from local members and supporters.
Increase in those using free transport service.
Increase in demand for services.
Shift in focus – jobs or workless.
Opportunities for third sector orgs to use empty business properties to deliver services in the community.

2a) Do you believe the recession will have an effect on your organisation IN THE FUTURE.
2b) If YES, WHAT will the effects be?

2a) 4 out of 5 respondents think YES. 5 respondents don't know. 1 thinks NO

2b) Mixture of negative and positive effects:

Negative effects are:

Less funding from usual sources.
Less funding.
Reduction in trust funds as their return on investments is hit.
Downturn in charitable donations.
Increased need to protect reserves, which can count against organisations when applying for new funds.
Asset rich/cash poor= dwindling income.
Difficult to access funding, not just traditional but also local businesses.
Difficult to access funding.
Even more difficult to obtain funding.
Downturn in meaningful grant income.
Even more difficult to remain sustainable.
The need to monitor effectiveness will increase.
Difficult to become sustainable.
Customer will have more complicated problems.
Communities will be disempowered if smaller groups fold.

Increasing shift towards funding with employability targets.
 Commissioners may want third sector organisations to work with those who are 'employment ready', neglecting those even further away from the job market.
 Partnership and collaborative working will increase.
 Difficult to support third sector orgs to become more proactive and quickly respond to community need.
 Government cutbacks will raise the bar on value for money and outcomes.
 Commissioning bodies will demand more for less: greater efficiency and impact.
 Increase in signposting to statutory bodies- but will they be able to cope with the demand?
 Third sector organisations already deliver exceptional value so where do we go from here?
 Fewer funding streams available, which was happening to our sector before talk of the credit crunch.
 Possible consolidation of contraction of services.
 Short-term impact will be on trading arm functions.
 Longer term the impact may be on public service contracts as government reduces budgets centrally.
 A change in government/political party could mean major implications for the sector.
 Attempts to cut costs to protect sustainability.
 If statutory bodies are effected it could affect us.
 Loss of expertise in certain fields.
 Increase in services.
 Lack of funding for our organisation (advice giving) will have an impact on others.
 A change in political party could have a major negative impact on the sector.
 Asylum seekers, refugees and migrant workers will return home in larger numbers.
 New migrant workers expecting streets paved with gold will need educating before they arrive.
 Working with restricted funds will inhibit flexible financial management.
 Problems for new start up projects as cash flow will be limited.
 The need for low cost community events will increase, but at the same time the available funding will reduce.
 Increase in right wing extremism, as right wing parties may target minority groups as being the cause of or exacerbating the problem.
 Uncertainty leading to reluctance to plan for the long term.
 Potential for hostility towards migrant communities as jobs become harder to find for everyone.
 A focus on survival and not development
 Increase in competition for resources.
 Increased competition
 Increased competition= change in atmosphere, less co-operative.
 Less inclined to share ideas with others and worried about changing roles of other organisations.
 Redundancies.
 Jobs under threat
 Reduced services.
 Increase in potential redundancy tribunals as trustees struggle with all the issues/amount of issues involved.
 People's [work] commitments change as they have to take on more over-time or second jobs, [which reduces the amount of spare time they have]
 Restrictions on funding- no cost of living increases.
 Increase in utility costs, effecting running costs.
 No opportunity to develop services.
 Possible redundancies.
 Uncertainty regarding funding, especially with loans and trusts.
 More reliance on volunteers.
 Reduction or potential loss of core funding.
 LA's may cut their funding altogether.
 Reduction in funding from LA's.
 Reduction in funding from LA's.
 Fewer opportunities to apply for funding as less funding becomes available because of the impact of lower interest rates on charitable investments.
 Access to cash flow – overdrafts and costs of.
 Wider effects on services-public and third sector.

Change in street/neighbourhoods.
 Staffing- Stress and depression.
 Lower staff morale.
 A drive towards consortia, collaborations and merger- Many groups are not equipped/resourced for this.
 Pressure to increase collaboration, even if not appropriate.
 Peaks and troughs on public collaboration opportunities.
 Public sector managers moving into the third sector.
 More careful with finances, therefore less innovative.
 Small groups may fold, whereas the medium to larger sized groups may be more resilient.
 Larger groups may be more resilient to the reduction of funding.
 Increase in rent prices.
 Increase in demand of services.
 Limited activity/service delivery
 Increase in forensic business approaches.
 Increased demand across service provision, all the way to infrastructure.
 Public agencies increasingly looking to VCO's.
 Perception that we are a growth sector.
 Reduction of interest on reserves.
 Potential change in political administration.

Positive effects are:

Increase in available pool of staff because of redundancies in other sectors.
 Reduction in contract prices from commissioners.
 Increase quality/calibre of applicants/volunteers.
 Changing perceptions of volunteering by benefits agencies.
 Opportunities to generate income from using [each other to promote services] - a cheaper alternative to common marketing activities.
 Internal restructuring to ensure organisation is maximising existing resources against a potential decrease in income.
 Future builders?
 Senior citizens and "mature workforce" coping better than other communities because of experience of previous [similar] times.
 Public sector managers moving into the third sector.
 Voluntary activity-big change, big opportunity e.g. inclusion/employment.
 Consortia model.
 Advice agencies collaborating more.
 More partnerships, mergers and amalgamations will take place.

3a) Would your organisation like access to local support services designed to help you better manage the effects of the recession?

3b) If YES, WHAT SERVICES would need to be provided?

3a) 4 out of 5 respondents think YES, 1 is unsure (they already have good support from their local CVS with bid writing), 3 said no.

3b) **Financial:**

A commitment that local authorities will continue to support the voluntary sector.
 Parachute payments (crisis funding).
 Fundraising support (several similar responses)
 Funding applications.
 Funding workshops.
 Fundraising ideas.
 Funding development
 Funding (several similar responses)
 Funding to help organisations through this period.

Funding development

Funding to help organisations through this period.

Money!

To deal with the acute shortage of debt advisors, ChangeUp/VOLA could play a training role as there is funding available.

Direct funding for those who deliver services.

Funding information/advice

Financial planning

Forecasting

Income generation training

Community accountancy.

Bid development.

Bid writing support function.

Personal financial advices (or training people to provide this service)

Tendering support.

Fundraising.

Financial management

Sustainability support.

Full cost recovery

Full cost recovery training.

Tendering and procurement

Lobbying for a more consistent system across the region

CVS' lobbying Local Authorities to reduce rents and business rates

Work to ensure commissioning strategies are coherent.

Influencing body regarding commissioning strategies and procurement practices.

Lobbying for community value clause in tender evaluations.

Help with writing funding bids.

Preparing organisations for commissioning.

Financial consultancy and management.

Guidance on managing financial reserves.

Capacity building must remain a priority.

Improved advice on alternative sources of funding/income generation.

A change of culture with more of a focus on income generation.

Ensuring existing sources of funding (including EU money) are used to maximum effect.

Cost cutting measures.

Realism-help with exit strategies and signposting clients.

Help with lobbying against right wing extremism, which may increase during the economic down turn.

Investment advice.

Recognise change in funding criteria and support organisations to meet this challenge.

Influence contract processes and assist the third sector with gaining access to contracts.

Work with LA's on commissioning processes.

Better recognition of the work the faith sector does in commissioning processes.

Access to an increased range of funding, e.g. campaign to bring dormant trusts into use.

Negotiating contracts with suppliers.

Organising bulk buying services for the benefit of the sector.

Lead body for combined purchasing.

Marketing and Promotion:

Marketing- how to in a recession.

Dedicated marketing and branding support to achieve maximum sector profile.

Marketing campaign on behalf of VCO's to UK population; opinion formers; government (national and local)

Miscellaneous:

CVS' to play a leadership role, giving information, direction, advice and advocating on behalf of the sector.

CVS' to facilitate networks.
 CVS' to support networks and provide info/briefings
 Improve it's own profile across Merseyside 3rd Sector.
 Social auditing- awareness-raising programme and knowledge.
 Access to independent advice and support to help us become more resilient.
 Capacity building must remain a priority.
 Accredited training.
 Forums.
 Practical and emotional support for staff.
 Health checks for smaller organisations
 Faith communities must challenge consumerism, especially in younger people.
 Faith bodies must challenge modern designer lifestyles and encourage stewardship of the earth.
 A Greater Merseyside Resilience summit for third sector organisations and LA's/Statutory bodies.
 A stronger voice representing the problems of the sector to key agencies.
 Advocacy for third sector organisations, especially on independency and improving funding regimes.
 Exploration of strategic alliances, e.g. with RSL/Connexions, etc.
 Policy advice
 Quality standards
 Business planning
 Outcomes
 Development.
 Workforce development
 Business recovery
 Meetings and info sharing.
 Further deregulation in order to assist with recruitment of trustees and volunteers.
 Training on community interest companies.
 Pros and cons of registered charities becoming companies limited by guarantee would be useful.
 Lobbying government for access to sustainable/renewable energy technology such as solar panels, and increase free energy saving light bulb schemes.
 Advice/training on different levels of stress management, debt counselling and regulation around non-payment of invoices.
 Reduction in the percentage of gift aid is serious- national lobbying is serious.
 Assurances that LA's will adhere to COMPACT guidelines
 Meetings with other relevant and significant projects and organisations to discuss the effects, and to come up with a form of resolution & support each other through this period.
 A conference where sports clubs could meet corporate sponsors.
 Setting up and support of a trustee's network.
 Information sharing for trustees.
 Trustee networks (each borough), including seminar programme, peer support, recruitment.
 Help recruiting trustees.
 Floating professional pool for specific functions.
 Services that will help us become more efficient.
 Highlighting the [good] work of the sector
 Counselling and expert advice.
 Consortia development.
 Legal advice in consortia, mergers, collaboration and contracting.
 Social franchising.
 Government support.
 Infrastructure services.
 Specialists/rationalised.
 Volunteer development.
 Skill and experience sharing between organisations
 Support with 'back office' functions such as Human Resources, monitoring, support and training of volunteers.
 Employment law training for trustees/staff.

Back office function support.

Help and support the sector to work more collaboratively together if this is identified as an option.

Support for collaboration/merger/consortia working.

Info on Merger and collaboration

Assistance with collaborative working

Help with increasing support

Access to guidance on employment law.

Appendix C

Greater Merseyside ChangeUp Consortium Member List –June 2009

Organisation	Contact Name/s	Description of Organisation
Churches Together in the Merseyside Region St James' House, 20 St James Road, Liverpool L1 7BY Email: ultan.russell@liverpool.anglican.org	Ultan Russell (Chair) Tel: 0151 705 2130	Churches Together in the Merseyside Region acts as an infrastructural body through the composition of its denominations and links to the Merseyside Council of Faiths.
CEMVO EMF North West, 12 Charlotte Street, Manchester M1 4HB. Email: rushi.munshi@cemvo.org.uk	Rushi Munshi Tel: 0161 245 3201	CEMVO is a registered charity committed to extending opportunities to people from the most disadvantaged communities in the UK.
Chara Trust 164 Windsor Street, Liverpool L8 8EH Email: gbateren@yahoo.co.uk	Godwin Bateren Tel: 0151 728 9000	Liverpool-based charity, whose aim is to help individuals to make choices about their lives -Choices about education, training, voluntary activity and involvement in the decision-making processes that affect their lives as individuals and as community members.
Community Foundation for Merseyside Alliance & Leicester, Bridle Road, Bootle, GIR OAA Email: cathy_elliott@cfmerseyside.org.uk	Cathy Elliot Tel: 0151 966 4604	The Community Foundation for Merseyside works alongside major funders, individual donors and the business community to support local improvement projects inspired by local people.
Halton Voluntary Action Sefton House, Public Hall Street, Runcorn, Cheshire WA7 1NG Email: ddalby@haltonva.org.uk	Debbie Dalby Tel: 01928 592 405	Halton Voluntary Action provides support to voluntary and community sector organisations in the Merseyside borough of Halton.
Knowsley Council for Voluntary Service Nugrove Villa, 1 Griffiths Road, Huyton, Knowsley L36 6NA Email: linda.richings@knowsleycvsv.org	Linda Richings Tel: 0151 489 1222	Knowsley Council for Voluntary Service provides support and facilities to voluntary and community sector organisations in the Merseyside borough of Knowsley.
Liverpool Charity & Voluntary Services 151 Dale Street, Liverpool L2 2AH Email: alan.lewis@lcvs.org.uk	Alan Lewis Tel: 0151 227 5177	Liverpool CVS combine the power of charitable giving with organisational support, so that voluntary and community groups in Liverpool are well governed, well resourced, well managed and well represented.
Merseyside Disability Federation Greenbank College, Greenbank Lane, Liverpool L17 1AG Email: louise@merseydisability.org.uk	Louise Barry Tel: 0151 291 9570	MDF provides support for voluntary and community groups in Merseyside and the surrounding areas that are of and for disabled people.
Merseyside Expanding Horizons Suite 616-619, Cotton Exchange, Old Hall Street, Liverpool L3 9LG Email: nicoladaley@expandinghorizons.co.uk	Nicola Daley Tel: 0151 330 0552	Merseyside Expanding Horizons provide infrastructure services to the sector concerning policy development in relation to social inclusion. They also act as the accountable body for Merseyside Social Enterprise Network and a multi-agency research observatory.
Merseyside Network for Europe 151 Dale Street, Liverpool L2 2AH Email: andy.churchill@merseynetwork.com	Andy Churchill Tel: 0151 237 3972	Merseyside Network for Europe provides technical support, training and policy advice to the sector in accessing and engaging with a range of European initiatives, particularly the structural funds.
Merseyside 3tc, 3tc House 16 Crosby Road North, Waterloo, Liverpool L22 0NY Email: jkemp@3tc.org.uk	Jackie Kemp Tel: 0151 285 4000	3tc is a not-for-profit technology centre committed to providing the community and voluntary sector in Merseyside with equal access to Information Communications Technology (ICT).
Merseyside Youth Association (MYA) The Door, 65-67 Hanover Street, Liverpool L1 3DY Email: bainbridgeg@mya.org.uk	Gill Bainbridge Tel: 0151 702 0748	MYA is a registered charity and company limited by guarantee working across Greater Merseyside to provide a variety of services to young people, and the groups that support young people across a range of personal, social and educational issues.
Refugee Action 64 Mount Pleasant, Liverpool L3 5SD Email: paulmcavoy@refugee-action.org.uk	Paul McAvoy Tel: 0161 233 1210	Refugee Action is an independent national charity that works with refugees to build new lives in the UK.
Social Enterprise Network (SEN) 23-31 Bridge Street, Birkenhead, Wirral, CH41 1AS Email: peter.furmedge@sen.org.uk	Peter Furmedge Tel: 0151 666 6514	SEN works to develop the capacity of the social economy in Liverpool and its network of members as a whole across Greater Merseyside; promotes the interests of social enterprises and contributes to grassroots and community led social and economic regeneration.

<p>Sefton Council for Voluntary Service 3rd Floor, Merseyside 3tc Centre,16 Crosby Road North, Waterloo, Liverpool L22 0NY Email: angela.white@seftoncvcs.org.uk</p>	<p>Angela White Tel: 0151 920 0726.</p>	<p>Sefton CVS exists to assist and promote voluntary and community sector activities in the Borough of Sefton, Merseyside.</p>
<p>St. Helens District Council for Voluntary Service 4th Floor, Tontine House, 24 Church Street, St. Helens WA10 1BD Email: syeoman@sthelenscvcs.org.uk</p>	<p>Sally Yeoman Tel: 01744 457 100</p>	<p>St Helens CVS is an Infrastructure Support Organisation (ISO) and works in partnership with other CVS' and support organisations across Merseyside to offer a comprehensive range of help, advice and support to new and developing Community and Voluntary Sector (VCS) organisations.</p>
<p>Volunteer Centre Liverpool 151 Dale Street, Liverpool L2 2AH Email: director@volunteercenreliverpool.org.uk</p>	<p>Tessa Willow Tel: 0151 237 3975</p>	<p>Volunteer Centre Liverpool offers the perspective of the Volunteering Merseyside comprising Volunteer Centres operating at a district and local level.</p>
<p>Wirral Council for Voluntary Service 46 Hamilton Square, Birkenhead, Wirral CH41 5AR Email: angela@wirralcvcs.org.uk</p>	<p>Angela Green Tel: 0151 647 5432</p>	<p>Wirral Council for Voluntary Service exists to support, develop and promote Wirral's not-for profit sector helping it to identify and respond effectively to current and emerging challenges.</p>

Appendix D

List of references and links to supporting documents

Page	Report Name and Author
3	'Surviving NOT Thriving' May 2009 Voluntary Organisations Network North East (VONNE) www.vonne.org.uk/survey/index.php?fblink=728
3	NAVCA Local Resilience Action Plan framework www.navca.org.uk/localvs/recession/navca/lrap/Home.htm
3	'Regional Economic Forecasting Panel: State of the North West Economy Long Term Forecasts April 2009" www.nwriu.co.uk/documents/Long_Term_Forecast_REPORT.pdf