

Somerset VCFSE State of the Sector Report

Commissioned by Spark Somerset

Produced by Quay Research, October 2024

Authors

Quay Research: Prof Catherine Leyshon, Prof Michael Leyshon,
Dr Shuks Esmene, Miriam Leyshon, Ryan Aslett

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Authors:

Prof Catherine Leyshon
Prof Michael Leyshon
Dr Shuks Esmene
Mriam Leyshon
Ryan Aslett

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Contact:

Catherine Leyshon
Email: admin@quayresearch.com
Telephone: 07813028490

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Contents

Executive Summary	5
Introduction	9
Aim.....	9
Methodology.....	9
The Big Picture.....	10
Results of the 2024 Survey	12
How many VCFSEs are there in Somerset?.....	12
Sector Profile.....	12
Proudest Achievements	18
Supporting People.....	18
Recognition and Awards.....	18
Workforce	19
How many hours a week do volunteers and paid workers contribute in Somerset?.....	20
Proudest Achievements	22
Volunteer Recruitment.....	22
Training and Education.....	22
Services	23
What kind of services are provided by VCFSEs in Somerset?.....	23
Who accesses the services and support provided by VCSFEs in Somerset?.....	25
Proudest Achievements	27
Organisational and personal growth.....	27
Demand	28
Who is feeling the pressure?.....	30
Response to Pressures on Demand.....	31
Benefits of Partnership Working.....	36
Barriers to Partnership Working.....	37
Proudest Achievements	39
Partnerships and community capacity.....	39
Managing Funding.....	39
Finances	40
Reserves.....	40
Income.....	42
Expenditure.....	44

Sources of Income	45
Funding Conditions	47
Proudest Achievements	52
Managing Funding	52
Survival	52
Financial Risks	53
The Impacts of the Cost-of-Living Crisis	54
Proudest Achievements	56
Campaigning and Advocacy	56
Building and Restoring Community Assets.....	56
The Future	57
Plans for Growth.....	57
Optimism	58
Challenges in the next 12 months.....	59
Proudest Achievements	61
Organising Events for the Community	61
Conclusion	62
References	64

Executive Summary

The shifting landscape of public services in England, shaped by systemic shocks and budget cuts, has intensified structural inequalities and health challenges. These challenges underscore the need for financial stability, strategic thinking, and continuity of service provision from a diverse range of service providers. In Somerset, creating robust public sector-VCFSE relationships are critical for community resilience and maintaining, supporting and developing a successful and sustainable VCFSE sector for the future. This executive summary is divided into nine distinct themes. Each summarises the main findings of the full report below and draws attention to the successes and challenges facing the VCSFE sector in Somerset.

The Big Picture

- 1. Evolving Public Service Landscape:** The landscape of public service design and delivery in England is rapidly changing due to increased demand on services, financial cuts, and systemic shocks such as Brexit, COVID-19, and the cost-of-living crisis. This has led to deeper structural inequalities and chronic health issues, driving a shift towards localism and diversified service providers including the private sector and VCFSE organisations.
- 2. Integration and Diversity Challenges:** Place-based delivery through integrated care systems is being implemented to foster collaboration among various service providers. However, the voluntary sector's diverse nature and the dominance of micro and small organisations pose challenges for their effective integration into these systems. The uneven distribution and varying financial capabilities of these organisations add to the complexity.
- 3. Strategic Role of VCFSE in Somerset:** In Somerset, the relationship between the public sector and the local VCFSE sector is crucial for community resilience and delivering on Council Plan ambitions. While the political drive to engage third sector organisations in public service delivery is strong, the benefits and challenges are unequally distributed, favouring larger organisations. The commitment from Somerset Council highlights the need for greater involvement of the VCFSE sector in shaping service design and delivery to achieve a flourishing community.

Sector Profile

- 1. Estimating the Number of VCFSEs:** Determining the exact number of VCFSEs in Somerset is challenging due to varying registration requirements and the presence of unregistered organisations. Estimates suggest approximately 2,400 groups, based on data from the Charity Commission and Companies House, and regional extrapolations.
- 2. Organisational Size by Income:** Somerset's VCFSEs vary widely in size, with 29.55% classified as medium-sized (income £100k-£1m). A significant portion consists of micro (27.7%) and small organisations (£10k-£50k), which together account for nearly 60% of the sector. This 'microbiome' is vital but challenging to identify and support.
- 3. Longevity and Experience:** Over half of Somerset's VCFSEs have been operational for over 15 years, showcasing significant experience. Younger organisations (operating for fewer than five years) make up just over 21% of the sector, indicating a mix of established and emerging entities.
- 4. Operational Scope and Distribution:** Most VCFSEs operate locally within specific areas of Somerset, with only 21% working countywide. The distribution of these organisations highlights the rural nature of the county and clusters in larger towns, emphasising the need for better visibility of smaller and rural groups.
- 5. Legal and Organisational Structure:** A majority of VCFSEs in Somerset are registered charities (51.28%), with significant representation from companies limited by guarantee, CICs, and CIOs. There is a notable presence of informal groups and those without a clear legal structure, reflecting the diversity of organisational forms within the sector.

Workforce

1. **VCFSE Workforce Composition:** For the financial year 2023-2024, the VCFSE sector reported 546 full-time employees, 734 part-time employees, 73 full-time volunteers, 4003 part-time volunteers, and 817 Trustees or Management Committee Members. Numbers are similar for the partial year 2024, reflecting the prominence of volunteers, who make up 79% of the workforce. The true numbers of employees and volunteers is much higher.
2. **Trends in Employment:** From 2014-2020, the number of full-time and part-time employees in the sector increased significantly. However, by July 2024, these numbers had declined by 15.19% for full-time staff and 13.06% for part-time staff, likely influenced by external factors such as the cost-of-living crisis.
3. **Volunteering Patterns:** Volunteer participation saw complex trends, with a significant proportion of respondents indicating an increase in volunteers since the end of the COVID-19 pandemic. However, there was also a notable decrease in volunteer numbers for some organisations, reflecting broader national trends in volunteer engagement.
4. **Contribution of Hours:** Volunteers contribute approximately 9,283 hours per week, while paid staff contribute around 25,702 hours per week. Despite the challenges in tracking volunteer hours, these contributions are vital for community support in Somerset. The overall stability or increase in volunteer hours since COVID indicates a resilient volunteer base. Again, the true number of hours contributed will be much higher.

Services

1. **Range of Services:** VCFSEs in Somerset offer a broad spectrum of services, with community groups such as lunch clubs, chat cafes, and social meet-ups being the most common, provided by over 42% of organisations. The range of support has broadened over the years to include diverse services like educational workshops, community larders, and cancer support.
2. **Volunteer Involvement:** Volunteering remains a stable and significant service, with 36.91% of organisations identifying it as a primary activity. This reflects the sector's responsiveness and flexibility in meeting evolving community needs.
3. **Service Users:** The primary beneficiaries of VCFSE services include older people, families/parents, individuals with mental health conditions, and socially excluded or vulnerable groups. This focus aligns with Somerset's demographics, particularly its higher-than-average aging population.
4. **Collaborative Efforts:** A significant number of VCFSEs (48.34%) support other charities, indicating strong collaborative efforts within the sector. Partnerships are a key element, with 64.95% of VCFSEs working with other organisations, reflecting a united approach to addressing social issues.

Demand

1. **Increased Demand:** Demand for VCFSE services in Somerset has risen, with 67.78% of respondents reporting some increase. This includes 26.17% noting a great increase and 41.61% a slight increase.
2. **Changing Support Needs:** Alongside the rise in service users, 28.29% of respondents have observed changes in the types of support sought, indicating an evolution in the sector to meet complex and emerging community needs.
3. **Medium-Sized Organisations:** Medium-sized organisations are experiencing the greatest shift in support needs, likely due to their close community ties and ability to adapt to new demands. They bear a considerable portion of the increased pressure.
4. **Unsustainable Trends:** The current trend of rising demand across the sector, especially in medium to micro-sized organisations, is unsustainable in the long term. Meanwhile, some smaller organisations are also seeing a decline in demand, indicating a need for expansion and adaptation to maintain service delivery.

5. **Response Strategies:** Despite increased demand, 78.8% of respondents feel capable of meeting service needs. Common responses include seeking new funding sources, offering new services, recruiting more volunteers, and developing new partnerships. However, challenges such as waiting lists, funding shortages, and staffing issues remain significant.

Working in Partnership

1. **High Partnership Engagement:** Nearly 65% of VCFSEs in Somerset work in partnerships to deliver services, with collaboration levels remaining consistent since 2017. Most partnerships are with other VCFSEs, Somerset Council, community workers/navigators, statutory service providers, and social prescribers.
2. **Modes of Collaboration:** The majority of VCFSEs collaborate on service delivery (nearly 80%), with over half sharing spaces. Partnerships for funding, training, and innovation are also common, indicating high levels of cooperation and resource-sharing across the sector.
3. **Benefits of Partnerships:** Key benefits of partnership working include increased service reach, access to new knowledge and expertise, new funding sources, and improved diversity of those being supported. Partnerships also offer opportunities for commissioning and influencing decision-makers.
4. **Barriers to Partnership Working:** Main barriers include lack of time, stringent funding conditions, extra responsibilities, and bureaucratic processes. Other challenges involve finding appropriate partners and balancing partnership demands with organisational capacities. Despite these barriers, the sector shows resilience and commitment to collaborative efforts.

Finances

1. **Funding Needs and Distribution:** The amount of funding required by VCFSEs in Somerset varies significantly based on their size, services, main funding sources, and the stability of these funds. Financial reserves, rather than income, are a critical marker of financial viability, with nearly 62% of VCFSEs holding less than six months' reserves.
2. **Precarious Financial Positions:** Almost 19% of VCFSEs reported having no reserves, and 31.20% have reserves covering only 0-3 months. This financial instability is more pronounced in medium-sized organisations, where over 70% have less than six months of reserves, indicating a significant risk of not being able to cover operational costs in lean times.
3. **Sector Income Trends:** Overall income for the VCFSE sector in the UK has declined for the first time in a decade, largely due to the COVID-19 pandemic. In Somerset, while 50% of survey respondents expect their income to remain the same as the previous year, this may still equate to a real-terms cut due to rising costs. Cautious optimism prevails, with nearly 27% expecting an increase in income.
4. **Income and Demand Relationship:** There is an association between increased demand and increased income for VCFSEs over the past three years, although maintaining financial stability remains challenging. The end of specific funding streams and donor uncertainty are significant concerns, particularly for smaller and medium-sized organisations that report expenditure exceeding income.
5. **Expenditure vs. Income:** 44.03% of respondents believe their income will match their expenditure, while 23.13% expect expenditure to exceed income, highlighting some financial vulnerability. This trend has remained stable since 2017. Unexpected disruptions, like building repairs, can significantly impact finances.
6. **Diverse Income Sources:** VCFSEs in Somerset earn income from a variety of sources, with 36% from 'other' sources and 33% from trading goods and services. Grants, public fundraising, and public sector contracts also contribute significantly. Nearly half of respondents report no change in their income sources over the past three years.

7. **Funding Challenges:** The competitive environment for funding is evident, with 79.53% of respondents noting increased competition and 70.04% finding it harder to secure funding. Salaries are the top area where funding is challenging, followed by site maintenance and project-specific funding.
8. **Cost Recovery:** Achieving full cost recovery is challenging, with 22.86% of respondents never achieving it and 14.29% sometimes losing money on contracts. Medium and large organisations, which often provide contracted services, face financial risks, with a significant portion not achieving 100% cost recovery and needing to cross-subsidise these activities.

Financial Risks

1. **Main Financial Risks:** Short-term funding, increased premises costs, and demand exceeding the ability to meet it are the top financial risks for VCFSEs in Somerset. These risks are compounded by the cost-of-living crisis and the nature of short- and fixed-term funding.
2. **Negative Impacts of the Cost-of-Living Crisis:** The crisis has led to increased demand for services, higher costs of running premises, and decreased funding from both public and private sources. These interconnected issues have significantly affected the financial stability of VCFSEs.
3. **Opportunities and Challenges:** Despite financial pressures, increased demand offers opportunities to reach more people and foster collaboration. However, the overall environment remains challenging, with a need for improved funding conditions and strategic partnerships to sustain service delivery.

The Future

1. **Plans for Growth:** Most VCFSEs in Somerset intend to grow their services, driven by increased demand and new funding opportunities. 50.79% plan a slight increase, 18.25% a significant increase, and only a small proportion (3.17%) foresee a decrease. Medium and micro organisations are particularly optimistic about expanding their offerings.
2. **Optimism and Preparedness:** The sector shows high levels of optimism, with 68.5% of respondents feeling positive about the future. Despite challenges, 65.08% feel as well-prepared as they can be for the next 12 months, highlighting a balance of optimism and realism.
3. **Challenges Ahead:** Funding and sustainability are the top challenges for the next year, followed by building capacity, leadership, financial management, and managing premises. While financial stability is crucial, the sector's resilience is bolstered by strong volunteer and staff bases and support from trustees.

Introduction

The Somerset State of the Sector report for 2024 was commissioned by Spark Somerset and builds on the work of similar reports published in 2017 and 2020.¹ It examines the size and shape of the voluntary, community, faith and social enterprise (VCFSE) sector in Somerset, a predominantly rural unitary authority with a population of 571,600 people at the last census in 2021. There is a clear interest within the VCFSE sector and across other sectors to generate insights and data to better understand the sector county-wide. This appetite is reflected at the national level in the argument that, without sufficient data, it is difficult for government to develop long-term strategies to enable the sector to maximise its potential and for social sector organisations and funders to allocate resources where they are most needed (Kenley and Wilding, 2021).

Aim

The aim of this report is to provide detailed insights into the size and shape of the VCFSE sector in Somerset and the challenges it faces. The report builds, where possible, on the findings of similar surveys in 2017 and 2020 but with the addition of new questions which add further detail. The report is targeted at those working in and supporting VCFSEs, policymakers and policy influencers, partners in the delivery of integrated care, and funders and commissioners. It increases our understanding of how best to support existing and new organisations, the different needs and challenges facing smaller and larger VCFSEs, and the potential for collaborative effort in service design and delivery, sharing resources, and peer support. The report is intended to amplify the voice of the VCFSE sector in discussions about the processes and practices of integration and commissioning and how to develop healthy, happy, and flourishing communities in Somerset. It is also a celebration of the resilience, flexibility, and responsiveness of the VCFSE sector and its enduring optimism and enthusiasm.

This report should be read alongside two further reports. First, *The State of the VCFSE Sector: Lessons from the National Picture* (Esmene et al 2024) which provides an in-depth review of the national picture for VCFSEs in the UK, drawing on scholarly and policy literature and state of the sector reports from other parts of the UK. Second, *Collaboration between the VCFSE and Public Sector in Somerset: challenge or opportunity?* (Leyshon et al, 2024). This report draws on insights from national voluntary sector organisations and think tanks, academic publications and the State of the Sector survey 2024. It outlines key considerations and sector-wide concerns that need addressing if the local authority and the VCFSE sector are to have an equitable and sustainable relationship in supporting individuals and communities throughout Somerset.

Methodology

This report is based on insights from:

1. An online survey distributed to VCFSEs across Somerset. 318 organisations participated in the survey during June and July 2024. Not all respondents answered every question but a total of 198 organisations completed at least part of the survey. This compares to 176 responses in 2020 and 130 responses in 2017. The 2017 survey contained fewer questions, only some of which overlap with the 2020 and 2024 questions. Therefore, our main point of comparison is with the 2020 data with comparisons to 2017 data where possible. Due to the variability in responding organisations between the two surveys direct comparisons of data are limited, however general trends and common concerns across the sector can be observed.
2. 32 one-to-one interviews with representatives of VCFSE organisations from the very smallest (2 people) to the largest (many employees and turnover in the millions).

¹ The 2017 report is based on data collected in 2016. The 2020 report is based on data collected in 2019, augmented by a further survey issued after the outbreak of COVID-19.

3. 3 group interviews with members of the Leaders' Group, Equality Group and Children and Young People's Mental Health Group.
4. A desk-based review of policy documents, reports from think-tanks and national VCFSE organisations, and academic papers.

Informed consent was obtained from all survey respondents and interview participants. The survey responses were analysed via enhanced descriptive statistics and comparison to the 2017 and 2020 results where possible. The interviews and qualitative responses from the survey were analysed using both content and discourse analysis – methods which ask not only how many times a topic was raised but how it was spoken about.

There are naturally some limitations with the data collection: not everyone answered every question and comparisons with previous surveys are partial because there is no way of knowing if the same organisations participated in the survey on each occasion. Cross tabulation – a statistical tool used to analyse the relationship between two or more variables such as size of organisation vs income – is not possible on all data, particularly where questions ask respondents to tick all the answers that apply to them.

The Big Picture

The landscape of public service design and delivery in England is evolving. This is because of ever-increasing demand for stretched services, driven by over a decade of austerity, cuts to funding, and shocks to the system (Brexit, COVID-19 and cost-of-living crisis). Structural inequalities have widened and deepened, leading to areas of deprivation which exhibit chronic health inequalities, especially low levels of poor mental and physical health (Blundell et al, 2022). At the same time, and partly in response, there has been a drive towards localism: devolving responsibility, decision-making and budgets and attempting to improve the transparency, efficiency and accountability of public services (Hucklesby and Corcoran, 2016). This response has broadened the base of providers of public services to include the private sector and voluntary, community, faith and social enterprise (VCFSE) organisations who have diversified their offering.

Alongside this, a new paradigm of place-based delivery has been implemented in the shape of integrated care systems. These seek ever-closer collaborative relationships between health and social care providers, local authorities and VCFSEs to deliver public services in place. However, the degree to which integration is attentive to the heterogeneity of the voluntary sector is not clear. Further, in 2020/21 (the most recently available data) the sector as a whole was dominated by micro (income <£10k) and small (income <£100k) organisations, accounting for 44.14% and 33.20% of the sector respectively (NCVO, 2023) (Table 1). This raises issues around how this 'microbiome' can participate in integrated care systems. The breakdown of Somerset's VCFSEs by income is shown in Table 3 (see [How large are Somerset's VCFSEs by income?](#)).

Income band	Name (categorisation)	Number of organisations	% of all organisations
Less than £10,000	Micro	77,295	47.14%
£10,000 - £100,000	Small	54,431	33.20%
£100,000 - £1m	Medium	25,569	15.59%
£1m - £10m	Large	5,861	3.57%
£10m - £100m	Major	743	0.45%
More than £100m	Super-major	61	0.04%
All organisations	Total	163,959	100.00

Table 1: Number and percentage of voluntary sector organisations by size, 2020/21 (NCVO, 2023).

The Community Foundation's (2023) research shows that there are about 200,000 third sector organisations with incomes below £25m in England and Wales, but they are not distributed evenly (Table 2). Excluding London, the South West has highest number of third sector organisations per 1,000 population, but only the third highest income (after the South East and the North West).

In keeping with other national organisations, the Community Foundation (2023) notes that the political enthusiasm for engaging the third sector in the delivery of public service contracts is very strong. They argue that this policy drive derives from an assumption that third sector organisations could be incentivised to undertake work for government at local and national level in a 'mixed economy of welfare'. It is worth noting that during the last 14 years the VCFSE sector has moved from providing 'value added' services into communities, through delivering 'shadow services' to now being able to provide statutory services. There is widespread consensus that, if funded appropriately, the VCSFE sector could play an important role in tackling the social determinants of health whilst reducing demand on primary health care. However, such opportunities attract only a small section of organisations, primarily the largest.

Meanwhile, in Somerset, the relationship between the public sector (Somerset Council/NHS) and the local VCFSE sector is critical to healthy and resilient communities in the unitary authority. A flourishing VCFSE sector will help deliver on all four Council Plan ambitions (a greener, more sustainable Somerset; a healthy and caring Somerset; a fairer, ambitious Somerset, a flourishing and resilient Somerset) (Somerset Council, 2023a). The VCSFE sector is a key strategic partner in the shared aim of improving lives in Somerset. There is a commitment from Somerset Council for the VCFSE sector to be engaged, involved and influential with shaping service design and delivery (Somerset Council, 2023b).

Third Sector income and expenditure in England and Wales 2022				
	Number of Third Sector Organisations	Third Sector Organisations per 1,000 population	Estimated Third Sector Income (£ millions)	Estimated Third Sector Expenditure (£ m)
North East England	6,900	2.7	1,480	1,420
North West England	20,000	2.7	4,180	3,990
Yorkshire and Humber	14,600	2.6	2,710	2,590
East Midlands of England	14,500	3.0	2,150	2,050
West Midlands of England	16,800	2.8	3,360	3,220
East of England	21,600	3.4	3,870	3,710
<i>London*</i>	<i>38,500</i>	<i>4.4</i>	<i>17,080</i>	<i>16,350</i>
South East England	33,400	3.6	7,790	7,460
South West England	23,700	4.2	3,920	3,750
Wales	10,000	3.2	1,590	1,530
England and Wales	200,000	3.4	48,130	46,070
*Organisations in London do not fit the regional analytical model as well because nearly 50% of organisations work beyond the boundaries of the capital.				

Table 2: Third Sector income and expenditure in England and Wales 2022 (Community Foundation, 2023a).

The emerging landscape of service design and delivery presents opportunities and challenges for the VCFSE sector in Somerset. There may be advantages for some VCFSEs in terms of financial stability, strategic direction and continuity of service provision, but there are also significant challenges, as this State of the Sector report demonstrates.

Results of the 2024 Survey

How many VCFSEs are there in Somerset?

The question of how many VCFSEs there are in Somerset is one of the hardest to answer – a problem shared across the UK. This is because VCFSEs do not have to register with the Charity Commission unless they are a charity with an income of over £5k or are a Charitable Incorporated Organisation (CIO). Thus, not all VCFSEs in Somerset are set up as charities (Table 5). Some might be set up as a Community Interest Company (CIC) registered with Companies House, but many will be more-or-less invisible to local infrastructure organisations, like Spark Somerset. Survey tools can only record those who respond. Other mechanisms are being explored for census methods that might make this group more visible, drawing on a suite of methods to identify and record community groups.

Meanwhile, it is possible to draw on existing data and extrapolate from regional-level data to provide an estimate of the number of VCFSEs in Somerset. Data from the Charity Commission shows that there are 1,712 charities registered in Somerset, with an income of £375m and expenditure of £360m. Data from Companies House shows that there are 190 VCFSEs in Somerset registered as CICs. Meanwhile, Community Foundation data, based on a national survey and their database of third sector organisations in England and Wales (Table 3) shows that the South West has 4.2 voluntary sector groups per 1,000 population. This would give Somerset approximately 2,400 groups in total.

Sector Profile

How large are Somerset's VCFSEs by income?

The income measure is widely used to describe the size of VCFSEs, most notably in NCVO's Civil Society Almanac. For the purposes of this report, the 'small' category was divided into those with an income of £10k-£50k and those with an income of £50k-£100k (Figure 1). In Somerset, 29.55% of VCFSEs fall into the medium sized group (£100k-£1m income p.a.) - up on 22.1% in 2020. The next largest category at 27.7% comprises the micro group with incomes less than £10k.

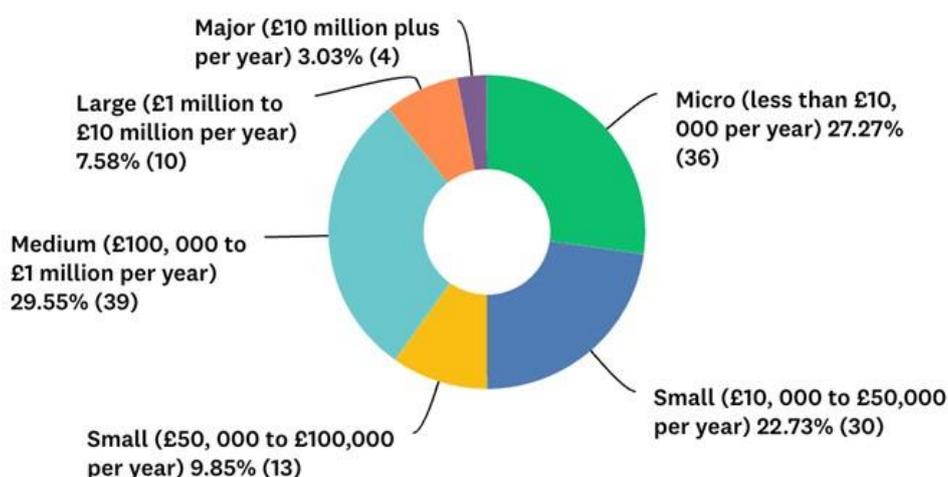


Figure 1: Size of VCFSEs by income.

The 'microbiome' of micro and small (£10k-£50k) organisations account for 50% of respondents to the 2024 survey. This rises to nearly 60% when the small (£50k-£100k) category is added in. The numbers of these organisations rose slightly in 2020 on 2017's data, have fallen since 2020 to below 2017 levels (Table 3). This could be for three reasons: first, some of the £50k-£100k organisations may have moved into the medium category since 2020. Second, some organisations in the smallest three categories

might have ceased to exist. Third, it is possible that the smallest organisations did not answer the survey. Given the size of this part of the VCFSE sector, the issue of identifying and supporting the microbiome is critical to the future success of the sector.

Income Band	2017 (n=109)	2020 (n=149)	2024 (n=132)	Change from 2020
Major (£10m +)	0.92%	-	3.03%	↑ 3.03%
Large (£1m-£10m)	-	4.70%	7.58%	↑ 2.88%
Medium (£100k-£1m)	31.19%	22.10%	29.55%	↑ 7.45%
Small (50k-100k)	37.61%*	12.10%	9.85%	↓ 2.25%
Small (£10k-£50k)		28.20%	22.73%	↓ 5.47%
Micro (<£10k)	30.28%	32.90%	27.27%	↓ 5.63%

Table 3: VCFSEs by size as a % of the sector in Somerset, 2017-2024. The 'small' category was not disaggregated in the 2017 survey.

↑↓ refer to the relationship between 2020 and 2024 data.

How long have VCFSEs in Somerset been operating?

Over half (51.55%) of VCFSEs that responded have been delivering services and/or activities to their local community for over 15 years. 27.32% of VCFSEs have been operational for between 5 and 10 years (Figure 2). Young organisations, which have been operating for fewer than 5 years, account for just over a fifth - 21.12% - of the total.

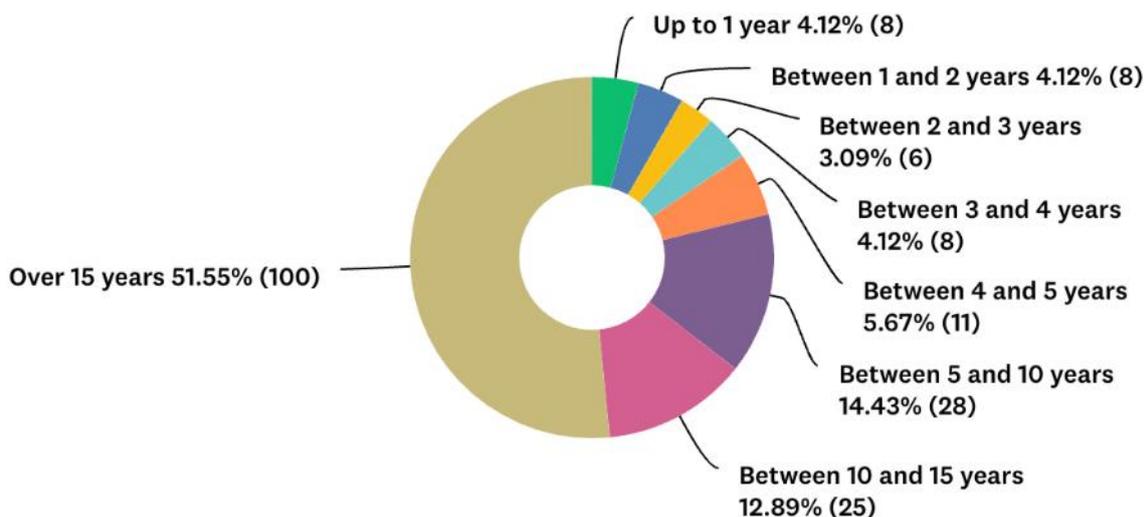


Figure 2: Length of time operating.

The larger the organisation, the longer they have been running. For example, 100% of medium, large and major organisations have been operating more than 5 years. New organisations (under 3 years old) tend to be micro or small organisations (29% of micro and 26% of small respectively). This may indicate that this part of the sector needs further support to grow.

The figures on how long VCFSEs have been operating have shifted very little since 2020 (Table 4).² The small shifts could be accounted for by, first, different organisations answering the survey and, second, some organisations maturing from one age category to another. Notwithstanding the small shifts, the figures for 2024 speak to the depth of experience in the organisations that have been operational for over 10 years and raises the question of how to support the younger organisations with the insight and experience of more mature organisations.

Length of Operation	2020 (n=171)	2024 (n=194)	Change from 2020
Up to 1 year	4.68%	4.12%	↓ 0.56%
Between 1 and 2 years	4.68%	4.12%	↓ 0.56%
Between 2 and 3 years	5.85%	3.09%	↓ 2.76%
Between 3 and 4 years	4.68%	4.12%	↓ 0.56%
Between 4 and 5 years	4.68%	5.67%	↑ 0.99%
Between 5 and 10 years	17.54%	14.43%	↓ 3.11%
Between 10 and 15 years	7.60%	12.89%	↑ 5.29%
Over 15 years	50.29%	51.55%	↑ 1.26%

Table 4: Length of operation 2020-2024. There is no data available on length of operation in 2011. ↑ ↓ refer to the relationship between 2020 and 2024 data.

How do VCSFEs in Somerset describe what they do in their own words?

Asked to give a brief, free-text description of VCSFEs do, respondents provided a valuable glimpse of the huge range of activities and support provided in Somerset. A simple content analysis of these responses reveals recurring themes (Figure 3), including working with children and young people, supporting people with a range of mental health and physical health issues, and providing spaces for community activities of all kinds.



Figure 3: VCSFEs in their own words.

The structure of VCSFEs in Somerset

In the State of the Sector Survey, over half (51.28%) of the total respondents identified as registered charities (Table 5). As this question was 'tick all that apply' (as organisations can have more than one status), percentages do not add up to 100. The next 3 largest categories are: Companies Limited by Guarantee, Other, and Community Interest Companies (CICs) at 17.44%, 13.85, and 12.82% respectively. The fluctuations in these numbers from 2020 is small and could be accounted for by different organisations answering the survey. Meanwhile, the numbers of CICs and CIOs has grown since 2017, suggesting the increased visibility and popularity of these forms of status.

In the 2024 survey, 7.69% of respondents identified as an informal group without legal status and 2.56% didn't know their status. Of the 13.85% who identified as Other, about 4% identified as an informal group of some kind. Overall, then, about 14% of respondents identified as an informal group or didn't know their status.

Cross tabulation shows that all the organisations that chose 'don't know' or 'informal group' in the 2024 survey were in the micro or small (£10k-£50k) category, and groups of these sizes also made up most of the 'other' category. This speaks to the question of how many of the smaller organisations are 'visible' either to the survey or to the system as a whole. Meanwhile, 77.55% of respondents reported that they are not part of a larger organisation, regionally or nationally.

Status	2017 (n=163)	2020 (n=171)	2024 (n=195)	Change from 2020
Registered Charity	38.04%	52.63%	51.28%	↓ 1.35%
Company limited by guarantee	15.95%	21.05%	17.44%	↓ 3.61%
Other	10.43%	14.04%	13.85%	↓ 0.19%
Community Interest Company (CIC)	6.13%	12.28%	12.83%	↑ 0.55%
Charitable Incorporated Organisation (CIO)	4.29%	6.43%	10.77%	↑ 4.34%
Informal group, no legal structure	5.52%	6.43%	7.69%	↑ 1.26%
Unincorporated Association	9.20%	6.43%	3.08%	↓ 3.35%
Don't know	1.84%	1.75%	2.56%	↑ 0.81%
Charitable Trust	3.68%	1.17%	1.54%	↓ 0.37%
Charitable Community Benefit Society	1.84%	0.00%	1.03%	↑ 1.03%
Cooperative	1.23%	0.00%	0.51%	↑ 0.51%
Community Benefit Society	1.84%	2.92%	0.51%	↓ 2.41%

Table 5: VCFSE status 2017-2024.

Without formal status, it is sometimes hard for the smallest organisations to secure the small amounts of funding they require to cover operating costs. Yet becoming a formally recognised organisation also comes at a cost of time and effort, especially to the very smallest VCFSEs.

"I'm not in a position to set up as a charity. I haven't got a Board of Trustees. I haven't got the time actually to do all of that." bureaucracy."

Where do organisations operate in Somerset?

21% of organisations that responded to the survey identified as operating countywide across Somerset (Figure 4). Cross tabulation shows that, perhaps unsurprisingly, the largest VCFSEs with incomes of £1m-£10m and over £10m operate predominantly countywide. The smaller organisations identify themselves as operating in specific localities, with only 12.82% of respondents identifying as working in more than one district of Somerset. Only 4 organisations reported doing most of their work outside Somerset. Of these, one was focused on Somerset, Bath and North East Somerset (BANES) and Wiltshire, and 2 were working overseas.

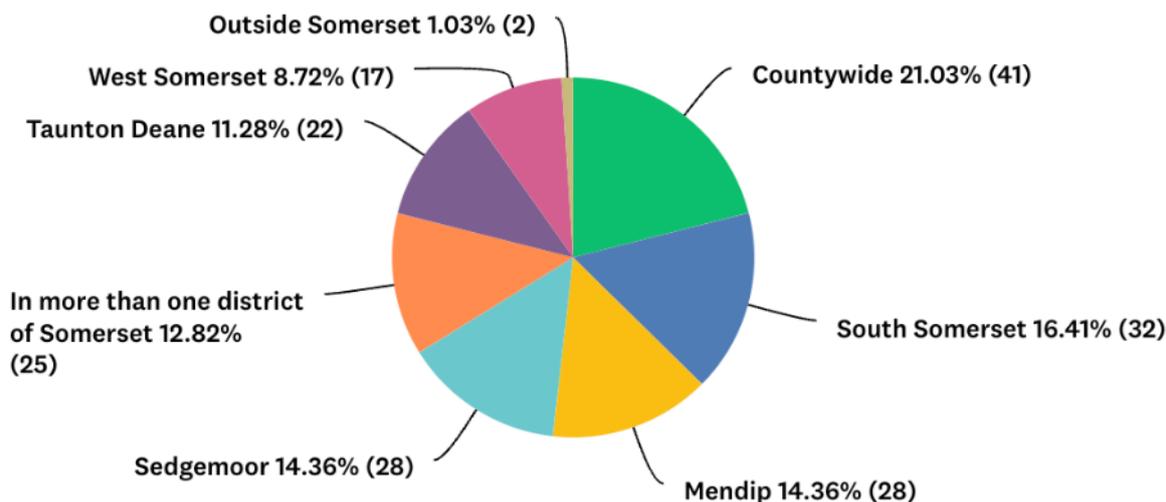


Figure 4: The locations of VCFSE operations in Somerset.

There has been very modest change in the distribution of VCFSEs in Somerset since 2020 (Table 6), bearing in mind that it's not possible to know whether the same organisations answered the survey. Some organisations identify as working in very specific parts of Somerset such as villages, towns, or within a small radius of their base.

District	2020	2024	% Change*
South Somerset	23%	24%	▲ 1%
Sedgemoor	21%	23%	▲ 2%
Mendip	20%	21%	▲ 1%
Taunton Deane	21%	18%	▼ 3%
West Somerset	16%	13%	▼ 3%

Table 6: The location of VCFSEs in Somerset, 2020-2024. Comparison with 2017 data is not possible because it asked respondents to tick all that apply rather than tick just one. ▲ ▼ refer to the relationship between 2020 and 2024 data.

Figure 5 shows the distribution of survey respondents by postcode. Whilst clearly this is a fraction of all the VCFSEs in Somerset, some interesting patterns emerge. First, and perhaps unsurprisingly, respondents are clustered in the larger towns of Wellington, Taunton, Bridgwater, and Yeovil. There were fewer respondents from West Somerset, and they were clustered around Minehead. This distribution reflects Somerset's rural nature.

"I think volunteers [in] Somerset are essential aren't they, in all sorts of areas [...] I think, particularly, we're so rural, particularly here in West Somerset, with Exmoor and so on. It's such a rural area that we need volunteers in Somerset."

Large 'blank spaces' on the map had no survey respondents but also represent the most rural parts of the county: Exmoor in the west and the Mendips in the east. Meanwhile, some respondents provided a postcode outside Somerset, including North Somerset, BANES, Bristol, South Gloucestershire, Wales and (not shown) two in London.

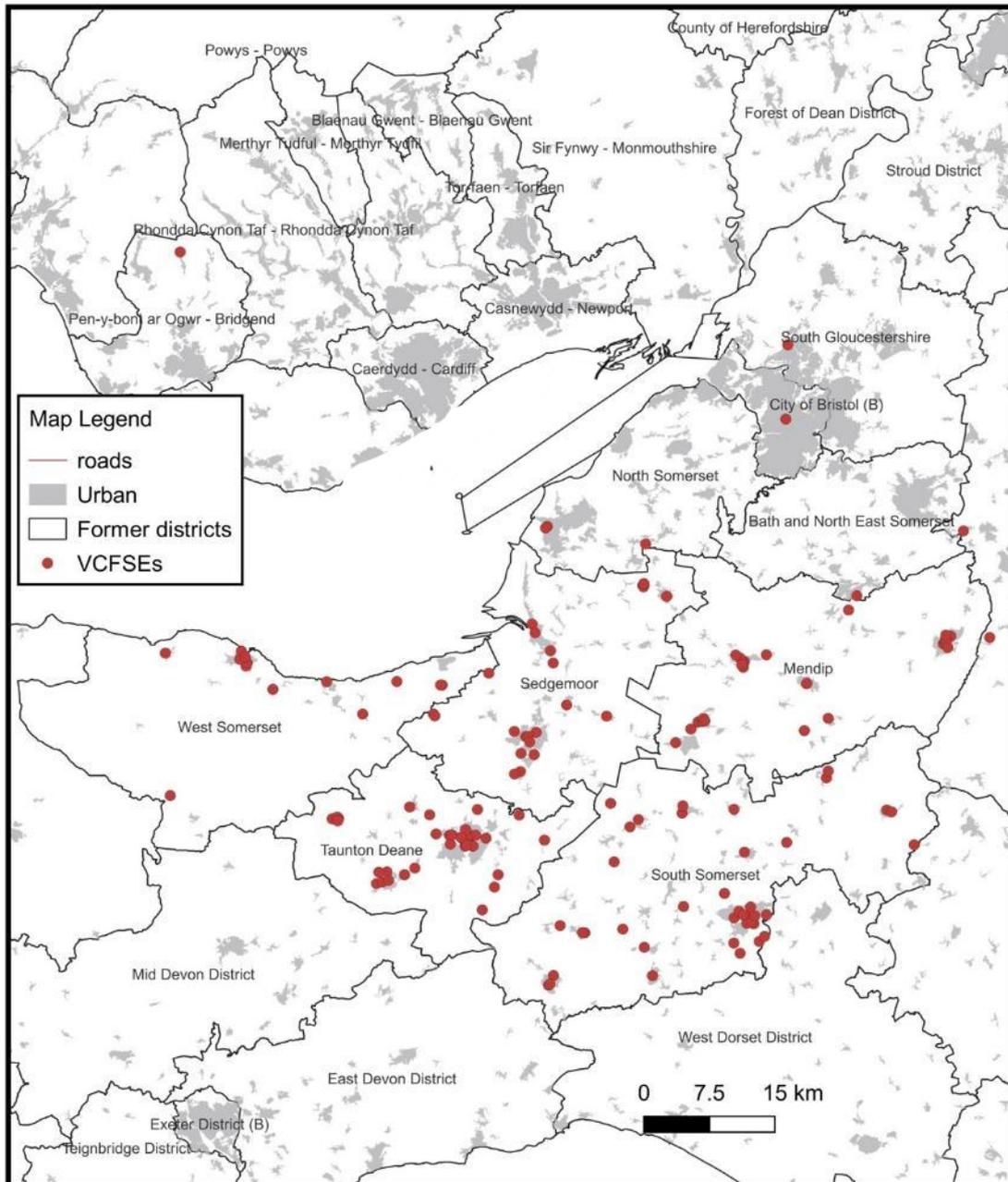


Figure 5: Location of survey respondents by postcode.

The map speaks to the persistent issue of making an accurate assessment of the size and geographical spread of the voluntary sector. Discovering which VCFSEs exist and, perhaps equally importantly, where they operate, is an important but substantial task.

Proudest Achievements

This section, and sections like it throughout this report, celebrate the achievements of VCFSEs in their own words.

Supporting People

VCFSEs in Somerset provide a remarkable range of support to people young and old in the county.

"Being able to support an autistic child who hasn't been able to attend school, doesn't communicate and has a variety of needs."

"The assistance provided to veterans throughout Somerset."

"Reaching out successfully to new carers needing support."

"Delivering Dementia Support to so many people affected by dementia in Somerset."

"Supporting 605 families despite huge financial difficulties."

"Every single donation we make... and there's about 1,350 of them to date."

"Recently we have seen two of our service users set up a woodwork shed and make and sell their produce... it [has] become part of their recovery journey."

"Providing ongoing support for people in fuel poverty and residents in need of advice on energy efficiency in their homes."

"Providing a responsive and personalised service to help people across our area with practical help (e.g. transport and food parcels) and emotional support (e.g. regular calls, Talking Café)."

"Providing starter packs for refugees and others from the street from prison etc."

"Our ability to remain supporting children, young people and adults impacted by cancer, at such a difficult time in their lives, despite enormous income challenges."

"Hosting gymnastics competition with over 500 competitors and over 1,000 spectators."

"Running the Memory Café which has been a huge success."

"Hosting a volunteer team from Brazil to work in our church and the community."

"Our Curry Nights bring together an eclectic mix of people to enjoy each other's company and make new friends."

"Operating a Hardship Fund to enable greater access to our Shed to those most affected by the cost-of-living crisis."

Recognition and Awards

The work of Somerset's VCFSEs have been recognised in a variety of ways .

"Awarded Britain in Bloom/It's Your Neighbourhood highest award."

"One of our volunteers being recognised for her efforts and being invited to the coronation concert and a garden party at Buckingham Palace."

"Finalist of the West Country Woman of the year."

"Award from police grant team for road safety."

"Being selected to be one of two NHS Somerset funded Armed Forces Hubs."

"Winning awards from RHS for working with the disabled."

Workforce

For the financial year April 2023-March 2024, respondents (n = 151) reported:

- 546 full-time employees
- 734 part-time employees
- 73 full time volunteers
- 4,003 part time volunteers
- 817 Trustees or Management Committee Members

For the partial financial year April 2024-July 2024 (when the survey closed), respondents (n = 148) reported:

- 543 full-time employees
- 766 part-time employees
- 73 full time volunteers
- 4,055 part time volunteers
- 928 Trustees or Management Committee Members

Clearly, volunteers (including Trustees or Management Committee Members) make up by far the largest component of the VCFSE workforce at 79% (Table 7). The vast majority of volunteers are part time. There is a small difference between the numbers of full-time and part-time employees between 2023-2024 and the 2024 financial year, but this could reflect the partial data for 2024.

Of more interest is the comparison with data from the 2017 survey (covering 2014-2015) and the 2020 survey, covering 2018-2019 and 2019-2020) (

Table 7). The general trend from 2014-2015 to January 2020 in numbers of full-time staff was upwards, rising nearly 60%. By July 2024 full time staff had declined 15.19% on the January 2020 figures. There is a similar trend with part-time staff, rising 33.83% between the 2014-2015 financial year and January 2020 but falling back 13.06% by July 2024.

The data on volunteer numbers is harder to unpick because the 2017 survey did not distinguish between full-time and part-time volunteers. The results from the 2020 survey are not verifiable.

Workforce	April '14- March '15	April '15- Aug '16	April '18- March '19	April '19- Jan '20	April '23- March '24	April '24- July '24
Total Responses	-*	-*	162	166	151	148
F/T paid (35 hrs + p.w.)	268	301	569	652	546	543
P/T paid (<35 hrs p.w.)	583	619	788	881	734	766
Total Paid Staff	851	920	1,364	1,533	1,280	1,309
Volunteering F/T (35 hrs + p.w.)	5,578**	5,696**	1,305	97	73	73
Volunteering P/T (<35 hrs p.w.)			6,958***	9,177***	4,003	4,055
Trustees or Management Committee	698	737	1,026	1,060	817	928
Total Volunteers	6,276	6,433	8,945	10,334	4,893	5,056
Total Workforce	7,127	7,353	10,250	11,867	6,173	6,365

Table 7: VCFSE Workforce 2017-2024. *It is not possible to determine the total number of respondents from the 2017 data. ** The 2017 survey did not distinguish between part-time and full-time volunteers. ***The data on part-time volunteers are not verifiable.

"I blame the change in the pension age, because we used to get a lot of women of 60 to 65, who were still very active. And now they're working, so we don't get any of those. And when you get to 66, which I am, you can't do what you could do six years ago. And their husbands are retiring around the same age. And it's a real struggle to find active volunteers."

The reasons behind these numbers are complex and the data should be read with caution. This question was answered by fewer respondents in 2024 and it might also have been answered by *different* respondents, although these factors are unlikely to account for the whole change since 2017. The national picture might provide some context: the Community Life Survey for 2021-2022 reported the lowest figures for participation rates in volunteering at least once a month or at least once a year since the survey started in 2012 (DCMS, 2022). NCVO's Civil Society Almanac (2023) cites the cost-of-living crisis as having an impact on volunteering rates. This might also account for fewer employees, and it is clear that there is less money in the system (Kitson, 2024). Meanwhile,

as always, the figures do not reflect informal volunteering rates. It is possible that people are still giving their time, but in informal ways rather than formal ways.

On a more positive note, asked whether, since the end of the COVID-19 pandemic, the number of volunteers had increased or decreased overall, nearly 43% of respondents reported that volunteers had increased slightly and nearly 33% said that the number of volunteers had stayed the same (Figure 6). This suggests that the fall in volunteering after COVID may be levelling off. However, nearly a quarter (24.48%) of respondents reported some sort of decrease in their volunteer numbers since the pandemic, with 11.19% stating that their volunteer numbers have decreased a great deal in this period. 143 respondents completed this question, and the results are consistent with the question about whether the number of hours contributed since COVID-19 has changed (see Figure 7 below).

"We've gone on a massive, massive advertising run [...] And we cannot get anybody. We cannot find anybody. Nobody has come forward."

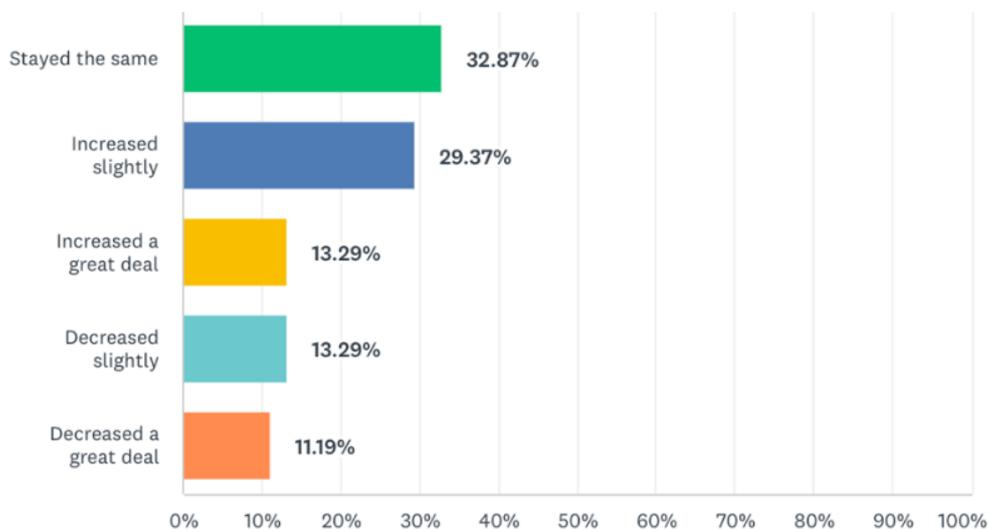


Figure 6: Since the end of the COVID-19 pandemic, has the number of volunteers in your organisation increased or decreased overall?

How many hours a week do volunteers and paid workers contribute in Somerset?

Along with identifying the VCFSE microbiome of smallest, hyper-localised organisations, a further challenge for Spark Somerset (and all LIOs) is quantifying the number of hours spent volunteering. This is partly because: i) volunteer hours are not always logged; and ii) volunteers do not necessarily work the same number or pattern of hours every week. Meanwhile, some volunteers sometimes spend time

volunteering informally – e.g. by helping out a neighbour or friend – and this effort is very hard to quantify in a meaningful way. The question about the number of hours worked by staff and volunteers was not asked in the 2017 survey and the data from the 2020 survey cannot be verified. Meanwhile, the data in the 2024 survey on hours worked by volunteers in a week is unreliable in parts: a few small organisations reported several thousand hours of effort from a handful of volunteers. However, omitting this data from the 2024 survey results gives us the following results.

Table 8 shows the hours contributed by volunteers (in an average week) as reported by organisations that answered this question. 28 organisations stated that they did not have this information, were not sure, or provided information inconsistent with the question. Finally, there is also huge variability in hours volunteered across all forms of organisations.

Hours p.w.	≤ 10 hrs	11-50 hrs	51-100 hrs	101+ hrs
# Organisations	48	46	16	22

Table 8: Number of hours contributed by volunteers in an average week, 2024.

Table 9 shows the time (in an average week) worked by paid staff for each organisation. Four organisations did not have this information, and their responses are excluded from the table below.

Hours p.w.	0 hrs	1-10 hrs	11-50 hrs	51-100 hrs	101-1,000 hrs	1,000+ hrs
# Organisations	55	9	18	13	39	9

Table 9: Number of hours contributed by staff in an average week, 2024.

Establishing a total figure for the number of hours worked in an average week by staff and volunteers is difficult because some organisations have answered the question incorrectly, sometimes citing thousands of hours worked by relatively small numbers of staff and volunteers. After cross checking number of hours of work or volunteering against the reported number of employees or volunteers, it is possible to arrive at a tentative figure: volunteers contribute 9,283 hours a week whilst paid staff contribute 25,702 hours a week to supporting communities in Somerset.

Since COVID, the number of hours contributed by volunteers has either stayed the same, increased slightly, or increased a great deal (Figure 7). Those who reported some kind of increase amount to 45.14% of respondents, whilst 34.03% reported that volunteering hours had stayed about the same.

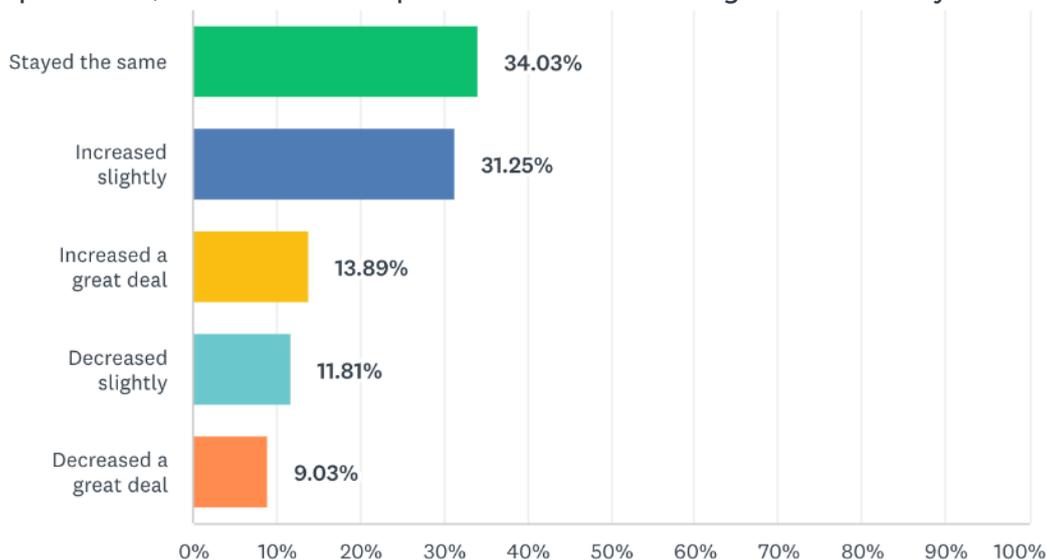


Figure 7: Since the end of the COVID-19 pandemic, have the number of hours contributed by volunteers increased or decreased overall?

Proudest Achievements

Volunteer Recruitment

Recruiting volunteers is often tricky for VCFSEs but there are good news stories from VCFSEs who have recruited service-users to be volunteers, increased their numbers, or supported volunteers to lead sessions.

"Recruiting new volunteers - majority of whom are Royal Navy veterans."

"We are delighted to now have more volunteer session leaders - 40% are volunteers and 60% are freelance self-employed. This supports our sustainability greatly."

"Increasing volunteer drivers back up to 200 plus."

"Finding 4 new volunteers in a short space of time and therefore being able to increase our opening times again back to pre-COVID times".

Training and Education

VCSFEs in Somerset actively support people from many different backgrounds through training and skills development.

"Delivering English lessons and individual coaching to Ukrainian guests to help them integrate socially and gain appropriate employment."

"Delivering a new programme of wellbeing courses for SS&L. Expanding the Memories Services

Training and Employing Experts with Lived Experience."

"We have educated and supported over 17,000 young people in a school academic year."

"Being able to provide regular work experience for a student from Foxes Academy."

"Launching out access ecology programme in partnership with local schools."

"The number of young people who have felt able to return to mainstream education as a result of the work we have done with them."

"Getting our children into schools which can meet their complex needs on the next stage of their SEND journey by the submission of 19 EHCPs, all which have been issued and the support we are able to provide families."

"Having over 30 youth workers across Somerset trained to at least Level 2."

Services

What kind of services are provided by VCFSEs in Somerset?

In broad terms, VCFSEs in Somerset are extremely diverse and adopt an assortment of roles. Broadly, these can be described as follows:

1. **Adding value to communities.** This is often by augmenting public services with bespoke activities and support. Examples include support groups, chat cafés, hobby and sports groups and so on.
2. **Substituting public services, especially non-statutory functions.** Examples include youth groups which provide skills development, personal growth, social cohesion, targeted support, and signposting to other services. At the same time, they work to prevent negative outcomes in the long term such as crime, anti-social behaviour and poor mental health. Another example is the type of care organisation that provides domiciliary care and stay-at-home support.
3. **Contracted or commissioned to deliver statutory services.** Examples include some of the larger organisations undertaking the delivery of mental health services. Sometimes such contracts and commissioned work can require the organisation to meet the stringent evaluation and reporting requirements, putting such work beyond the capacity of smaller organisations.

The largest cohort mainly fall into the first category by adding value to communities and include community groups (lunch clubs, chat cafés, WI, Men's Shed, gardening, social meet-ups) - over 42% of VCFSEs provided this type of service, down slightly on just over 45% in 2020 but up slightly on 2017 data (Table 10). This is not a surprise considering the likely client groups of such services (Table 11) who constitute the top four categories of people who use VCFSE services: older people, families/parents, people with mental health concerns or conditions, and socially excluded/isolated or vulnerable groups.

"Fast forward to where we are now, we see over 200 people a week for one-to-one counseling, we've got 150 on a waiting list. This does not include our Schools Project, which we launched this year [...] we really diversify to what the children need at that moment in time."

Another category that has stayed very stable since 2017 is 'volunteering', with 36.91% of respondents identifying this as a service. Meanwhile, there is an increase in the number of organisations who put their services in the 'Other' category, with this group growing consistently since 2017. These cover everything from educational workshops, community larder, supplying furniture, coaching, nature wellbeing, support for people with cancer, mentoring, waste reduction, handyperson services, amateur radio, protecting bus services, disabled riding, and loans. This seems to indicate that the range of support that people need has broadened but also that organisations have diversified what they do to cover these emerging or specific needs, highlighting the responsiveness and flexibility of VCFSEs.

Overall, the data exhibits mixed trends from 2017, which are identified in Table 10, below, in the following ways:

-  Trending upwards from 2017
-  Trending downwards from 2017
-  Fluctuating within +/- 3% from 2017
-  Fluctuating more than +/- 3% from 2017

What kinds of services do you provide? (Tick all that apply)	2017		2020		2024	
	%	n	%	n	%	n
Community groups e.g. lunch clubs, talking/chat cafés, WI, Men's Shed, gardening, social meet-ups	40.15%	53	45.10%	69	± 42.28%	63
Volunteering	38.64%	51	37.91%	58	± 36.91%	55
Other (please describe here)	14.39%	19	20.26%	31	 28.86%	43
Black, Asian, and Minority ethnic communities including gypsy, traveller, Roma/Irish	32.58%	43	24.03%	37	 31.13%	47
Health - e.g. advice or support for physical or mental health conditions such as dementia, Parkinson's, diabetes or sensory impairment	27.27%	36	20.26%	31	 23.49%	35
Youth work - e.g. youth clubs, activity-based groups	15.91%	21	24.84%	38	 22.82%	34
Community development/building	31.82%	42	22.22%	34	 20.13%	30
Community venue/building use	16.67%	22	20.92%	32	 20.13%	30
Older people/elders' advice and support	-	-	22.88%	35	 19.46%	29
Peer support - health and/or social support for a health-related situation or social situation	-	-	24.84%	38	 18.79%	28
Food - e.g. education/cooking classes/food security	10.61%	14	13.07%	20	 18.12%	27
Arts/music/culture	13.64%	18	27.45%	42	 17.45%	26
Adult education or learning/careers advice or support	22.73%	30	22.22%	34	 16.78%	25
Employment/skills/training	25.00%	33	18.30%	28	 16.78%	25
Advice - e.g. financial/debt advice, legal, welfare, civil rights	11.36%	15	15.03%	23	 15.44%	23
Supporting other VCSE organisations	10.61%	14	13.07%	20	 14.77%	22
Advocacy - e.g. on behalf of vulnerable or minority groups e.g. BAME, victims of crime, group with protected characteristics	12.12%	16	12.42%	19	± 14.09%	21
Sport or physical activity e.g. sports club/dancing/exercise classes/walking group	12.12%	16	26.80%	41	 14.09%	21
Counselling services	10.61%	14	10.46%	16	± 13.42%	20
Environmental protection/conservation/sustainability/recycling	13.64%	18	15.69%	24	± 13.42%	20
Carers support - those caring for adults	-	-	15.03%	23	± 12.75%	19
Learning difficulties advice/support	50.00%	66	11.76%	18	 11.41%	17
Care for adults - adult social care	8.33%	11	9.80%	15	± 9.40%	14
Campaigning organisation (e.g. social/environmental justice, policy changes/discrimination/poverty)	15.15%	20	7.19%	11	 8.05%	12
Carers support - those caring for young people or children	-	-	9.80%	15	± 8.05%	12
Community transport	4.5%	6	3.27%	5	 8.05%	12
Equalities/human rights/LGBTQ+ rights/civil rights	5.30%	7	6.54%	10	 8.05%	12
Immigration support/refugee and asylum support	0.76%	1	5.88%	9	 8.05%	12
Addiction - e.g. drugs, alcohol, gambling, gaming/substance use/recovery	3.79%	5	3.92%	6	 7.38%	11
Accommodation/housing/homelessness	3.79%	5	7.19%	11	 6.71%	10

Criminal Justice organisation e.g. support for victims of crime, reducing reoffending, supporting offenders	-	-	2.61%	4	↑ 6.71%	10
Faith-based advice/support/activities	-	-	3.92%	6	± 6.71%	10
Funding e.g. individuals/organisations/projects	-	-	7.19%	11	± 6.71%	10
Heritage organisation/activities	10.61%	14	7.19%	11	↓ 6.71%	10
Economic development/regeneration	11.35%	15	7.19%	11	↓ 4.03%	6
Animal welfare/rescue/assistance animals	3.79%	5	1.96%	3	± 3.36%	5
Childcare	1.52%	2	5.88%	9	↔ 3.36%	5
Community safety e.g. Neighbourhood Watch	3.79%	5	3.92%	6	± 2.68%	4
Answered	132		153		149	

Table 10: Services provided by VCFSEs in Somerset.

The comparisons to 2017 should be treated with a degree of caution as some of the categories changed between 2017 and 2020. This signifies a greater appreciation of the nuance of some social problems – e.g. the change from substance users to addiction in all its forms, and the recognition that work in the criminal justice system isn't just focused on those who commit crime but also the victims of crime and reducing reoffending.

Who accesses the services and support provided by VCSFEs in Somerset?

"We're still finding people who haven't been out of their house since COVID because they're still scared. So we're finding people with massive anxiety."

VCSFEs in Somerset provide services to a wide range of people, as shown in Table 11, but the top 5 groups are older people; families/parents; people with mental health concerns or conditions; socially excluded, isolated or vulnerable people; and other charities and organisations/ groups.

The focus on older people is not surprising given that Somerset's aging population (aged 65+) is higher at 25.18% in 2020 than both the national average (18.50%) and the average for the South West (22.45%) (Somerset Intelligence, 2024). The focus on families/parents, those with mental health issues, and socially excluded people shows the impact of a range of conjoined issues including the cost-of-living crisis and the reduction of Council-run services, especially non-statutory ones, over a number of years. The high level of support for other charities (48.34%) indicates a strong collaborative instinct amongst VCFSEs, also reflected in the data on partnership (see [Working in Partnership](#)) where 64.95% of VCFSEs who reported working in partnership do so with other VCFSEs – the largest category of partnership working.

Trends in the data between 2017 and 2024 are identified in Table 11 in the following ways:

↑ Trending upwards from 2017

↓ Trending downwards from 2017

± Fluctuating within +/- 3% from 2017

↔ Fluctuating more than +/- 3% from 2017

Who accesses services? (Tick all that apply)	2017		2020		2024	
	%	n	%	n	%	n
Older people	-	-	56.49%	87	↔↑ 60.93%	92
Families/parents	49.24%	65	55.19%	85	↔↑ 58.94%	89
People with mental health concerns or conditions e.g. depression, anxiety, stress, low mood, PTSD	54.44%	72	55.84%	86	± 57.62%	87
Socially excluded/isolated/ or vulnerable people	47.73%	63	50.65%	78	± 50.33%	76

Other charities and organisations/groups	-	-	44.16%	68	▲ 48.34%	73
Volunteers	-	-	56.49%	87	▼ 48.34%	73
People with learning difficulties and/or autism	-	-	41.56%	64	▲ 45.70%	69
Young people and children	52.27%	69	50.00%	77	▼ 45.70%	69
People who consider themselves physically disabled/mobility problems/sensory impairment	50.76%	67	42.21%	65	▲ 43.05%	65
People with physical health conditions e.g. diabetes, heart disease, arthritis, cancer	-	-	38.96%	60	▲ 42.38%	64
Carers - (not employed as a carer) looking after adults	-	-	35.71%	55	± 37.75%	57
People from LGBTQ+ community	27.27%	36	23.38%	36	▲ 36.42%	55
Unemployed/low employed and seeking info/support	39.39%	52	33.12%	51	↔ 33.77%	51
People seeking healthier lifestyles	-	-	30.52%	47	± 32.45%	49
Black, Asian, and Minority ethnic communities including gypsy, traveller, Roma/Irish	32.58%	43	24.03%	37	↔ 31.13%	47
Addiction concerns - e.g. drugs/alcohol/ gambling	21.97%	29	16.23%	25	▲ 26.49%	40
Carers - (not employed as a carer) looking after children or young people	-	-	23.38%	36	▲ 26.49%	40
Homeless/vulnerably housed people**	20.45%	27	22.73%	35	▲ 23.84%	36
Other (please specify)	36.36%	48	25.97%	40	▼ 23.84%	36
People with dementia - all forms	-	-	27.92%	43	▼ 23.18%	35
Prisoners/ex-offenders/people at risk of offending/criminal justice issues	23.48%	31	14.94%	23	↔ 19.87%	30
Refugees/people seeking asylum	12.88%	17	11.69%	18	▲ 19.21%	29
Faith-based communities	21.21%	28	12.34%	19	↔ 15.89%	24
Victims of crime/anti-social behaviour	21.97%	29	16.88%	26	▼ 15.23%	23
Answered		132		154		151

Table 11: Who accesses VCFSE services?

Older people, families and parents, and people with mental health concerns ranging from depression to PTSD constitute the 3 largest groups of service users, with 60.93%, 58.94% and 57.62% respectively of respondents reporting that these groups use their services. The question asked respondents to tick all that apply, so the percentages do not add up to 100%. The types of services accessed by these top three groups could range from support for care needs, advice and advocacy, community support, café, lunch or walking groups, play facilities, and befriending, amongst other specialist and non-specialist services. The benefits of volunteering to volunteers themselves should also not be overlooked.

"People are struggling, varying degrees of mental health, they're socially isolated, they haven't got any friends. They're not leaving leaving the house [...] [our organisation has] been described as kind of our safe space where they come, they slow things down. They connect with themselves first, and then they connect with others and other things."

Data from 2017 is not comparable in the following categories because of changes in nomenclature in 2020 and 2024: 'animals and wildlife', 'carers', 'deaf and hearing-impaired people', and 'visually impaired people'. 'People with learning disabilities/difficulties' and 'people with autism' had become one category by 2020. Substance users had expanded to 'Addiction concerns - e.g. drugs/alcohol/gambling' by 2020. This reflects more sensitive understanding of the complexity of some issues. Meanwhile, some categories were not present at all in 2017: the introduction of categories on dementia, people seeking healthier lifestyles, and older people reflects emerging issues and priorities and the characteristics of the aging population in Somerset.

Proudest Achievements

Organisational and personal growth

VCFSEs have secured the growth of their organisations and supported personal growth for the people who turn to them for help. Some have expanded into new premises or extended their services. Others have seen the people with whom they work make amazing progress.

Examples of Organisational Growth:

"As an organisation, we secured the contract for services to all women in the CJS in Wales, as a result of our outcomes in our other services."

"Completed a merger of 4 charities and at the same time launched new community advice access points across 15 Local Community Networks, whilst continuing to run Adviceline 5 days a week."

"Our merger with Sustainable Food Somerset is our most important step for strengthening our organisation. Our annual conference is usually our highlight."

"Opening our new £600k building extension on 20 July."

"Increasing the number of visitors to the museum at Bishops Lydeard, securing a permanent covered site for carriage restoration, moving forward on accreditation."

"Expanding our Repair Cafe."

"We continue to grow steadily and safely, bringing in new staff and further developing our organisation."

"Opening our Free Youth Drop-In supporting over 30 young people, and dealing with issues from addiction and trauma to self-harm and eating disorders."

"Opening up a second and third branch of community counselling services."

"Starting up a Community Pantry at St Peters Community Centre, providing affordable food and necessities for 30 households a week."

"Establishing courts chaplaincy."

"Switching on our Air Source Heat Pump powered by our solar panels which will reduce our reliance on fossil fuels and ensure our future."

"Starting a new Rotary Club in an area that has a need."

"We're now a charity with a turnover of more than £1million."

"Starting up the group and managing to raise £1,500 from fund raising."

"10,992 contacts across Somerset, very proud of our 2BU Team!"

"Supporting the setup of a new youth football team (after there have been none in Woolavington for many years) and seeing over 40 children from the community getting involved in football."

"An increase in use of the centre."

"Growing our visitor numbers by 15%."

"Setting up a peer support group for deaf people and setting up the Hearing Loss Champions project to break down barriers for D/deaf people within organisations/services."

"2 years ago we would have one corporate volunteering group per year. We now have one corporate group (on average) per week."

"The setting up of 6 monthly pop-up hubs across the town."

"Continued safe growth in numbers of young people matched with a PROMISE works mentor opened up several flight corridors within reserve."

"Bringing our numbers up to pre pandemic level."

Examples of Personal Growth:

"Seeing our beneficiaries move onto employment."

"An 83% improvement for client's mental health over the course of their therapy."

"85% improvement in our young people's COREYP mental health and emotional wellbeing measures."

"Watching people diagnosed with Parkinson's Disease be confident in walking further distances."

"Getting positive feedback from participants which demonstrates the benefits they already feel they are gaining from being part of the singing groups!"

"Getting to know the young person who is in Foster Care that I'm an Independent Volunteer for."

Demand

Demand - defined as the number of people being helped by VCSFEs - has risen in Somerset. 26.17% of respondents reported that demand has increased greatly, while 41.61% of respondents reported that demand has increased slightly (Figure 8)- an overall total of 67.78% of respondents reporting some kind of increase in demand. The number of service users stayed the same for 22.15% of the respondents and a decrease of some sort was reported by 6.71%, with 2.01% reporting that demand decreased greatly. A small proportion (3.36%) of respondents didn't know whether demand had changed or not.

"And I feel sometimes now that statutory intervention doesn't happen, because we're here. And there's a kind of, oh, well, we don't need to worry about anyone who lives there, because [we're] now, and [we'll] sort them out. That's an issue of capacity and demand on the statutory services. And money, obviously[...] there definitely has been a shift."

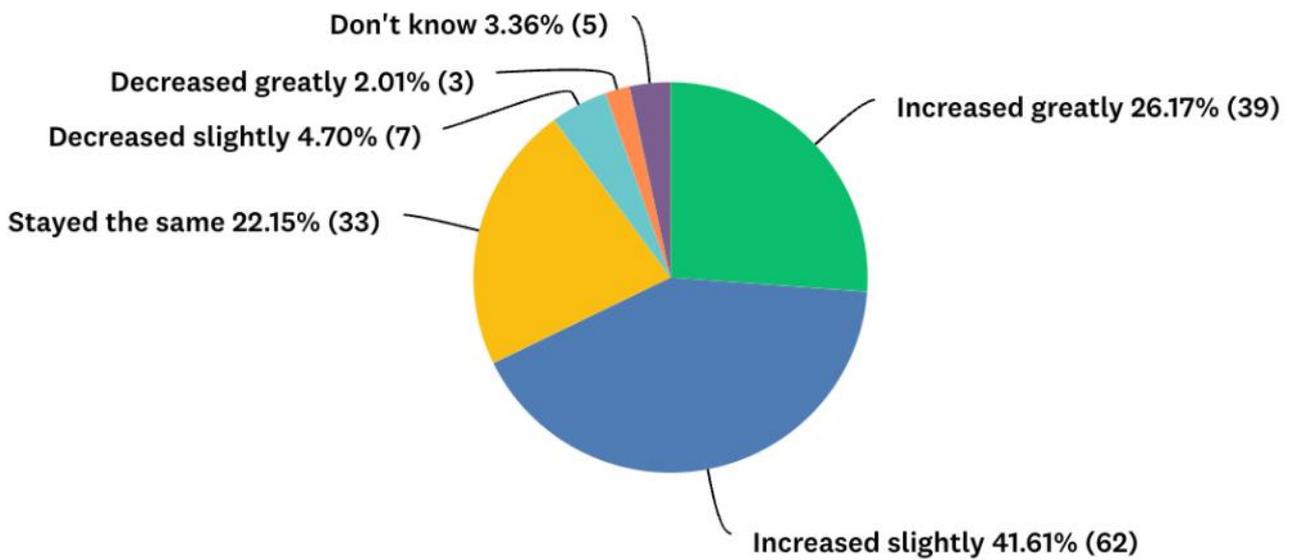


Figure 8: Compared to last year, has the number of people who use your service or come to your group/activity changed?

"Demand is enormous. State services are stretched to the max and the impact is noticeable."

58.82% of respondents reported increases in demand in 2017, rising to 69.33% of respondents in 2020. This has levelled off slightly in 2024, with 67.68% of respondents reporting increased demand (Table 12). Although 10.80% of respondents reported a decrease in demand in 2017, and dropped to just 2.67% in 2020, is sitting at 6.71% in 2024.

Trends in the data between 2017 and 2024 are identified in Table 12 in the following ways:

- ▲ Trending upwards from 2017
- ▼ Trending downwards from 2017
- ± Fluctuating within +/- 3% from 2017
- ↻ Fluctuating more than +/- 3% from 2017

Compared to last year, has the number of people who use your service or come to your group/activity changed?	2017		2020		2024	
	%	Count	%	Count	%	Count
Decreased	10.80%	12	2.67%	4	6.71%	10
Increased	58.82%	70	69.33%	104	67.78%	101
Stayed the same	21.85%	26	25.33%	38	22.15%	33
Don't know	9.24%	11	2.67%	4	3.36%	5
	Answered	119	Answered	150	Answered	149

Table 12: Changes in number of people using the activity/service 2017-2020.

In addition to increased numbers of people seeking support, 28.29% of respondents reported a change in type of support that people seek (Figure 9). This suggests a core of support has remained constant alongside evolution in the sector.

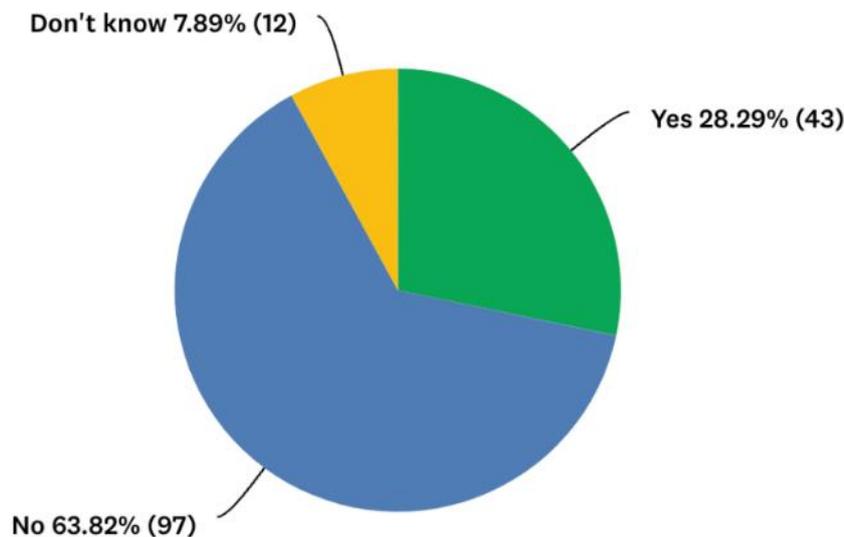


Figure 9: Compared to last year, has there been a change in the type of support that people seek from your group or service?

Medium sized organisations are the greatest number reporting a change in the type of support sought (Table 13). Following anecdotal evidence in the interviews, we can speculate that this may be happening because these organizations are 'closer to the ground', embedded in communities and are witnessing the emergence of new, as well as greater, demands on the sector. The need for different types of support also reflects the complexity of the issues that people face.

Size of Organisation	Type of support has changed	Type of support has not changed
Major	3	1
Large	3	7
Medium	17	22
Small (50k-100K)	5	7
Small (10k-50k)	6	20
Micro	6	27

Table 13: Size by income against reported change in type of support sought.

Who is feeling the pressure?

Pressure on services is rising across the whole sector. As noted above, nearly 68% of all organisations have experienced increased demands for their services. This includes supporting people who used to be helped through statutory services. Cross tabulation shows that proportionally more of this pressure is felt in medium to micro sized organisations (60% of the demand) (Table 14). There is also some evidence for a decline of demand on a few smaller organisations. This trend will not be sustainable for the current sector in the longer term and indicates that certain parts of the sector will need to expand to meet demand.

Size of Organisation	Increased	Stayed Same	Decreased
Major	2	1	0
Large	8	2	0
Medium	32	5	2
Small (50k-100K)	10	2	0
Small (10k-50k)	18	6	3
Micro	20	10	4

Table 14: Size by income against reported changes in demand, 2024.

Some pressure is being felt because of the withdrawal of council-run services. This is not a new story: Power and Skinner (2019) note that, since the 1980s, the scale and scope of the voluntary sector as a vehicle for service delivery has increased in the face of a shrinking welfare state and public health and social care provision. As a result, VCFSEs have become part of what is commonly characterised, after Wolch (1990), as a 'shadow state', through which not only delivery but also risk and responsibility have been devolved to non-state actors as they fill the gaps in welfare provision. Substitution is what happens when VCFSEs step in to provide services that have traditionally been the responsibility of the government, becoming a 'safety net'. Some VCFSEs in Somerset are 'picking up the slack' in a way that is not sustainable, as in the case of this interviewee:

Because I do feel we're constantly picking up the slack... The things that have just been dropped, yeah? Okay, completely dropped. So, the social group, for example, that we ran, which is in replacement of the day centres for adults living with dementia. You know, like all the bungalows and they had a dayroom, and there was always stuff going on in the day room, and a warden. That's all gone so just before COVID – 2018 - we said we'd start this day group for adults living with independently, with dementia. And I can't find funding for it, right? It's costing us an arm and a leg, and I can't find funding to pay for it. – Interviewee 31.

One provider of mental health services for young people reflected on the link between substitution and commissioning, questioning whether VCFSEs are in a position to effectively participate in commissioning processes:

The systematic hollowing out of the health service has pushed lots of elements to be commissioned, and privatised, but they are commissioned to private companies. So I'm sure there are plenty of voluntary organisations being commissioned for services. But we don't have the sort of capacity to be able to fight that fight all the time. – Interviewee 22.

Response to Pressures on Demand

Asked whether, despite the increased demand, respondents felt able to meet the needs of people using the service or coming to the group, 78.8% answered yes (Figure 10).

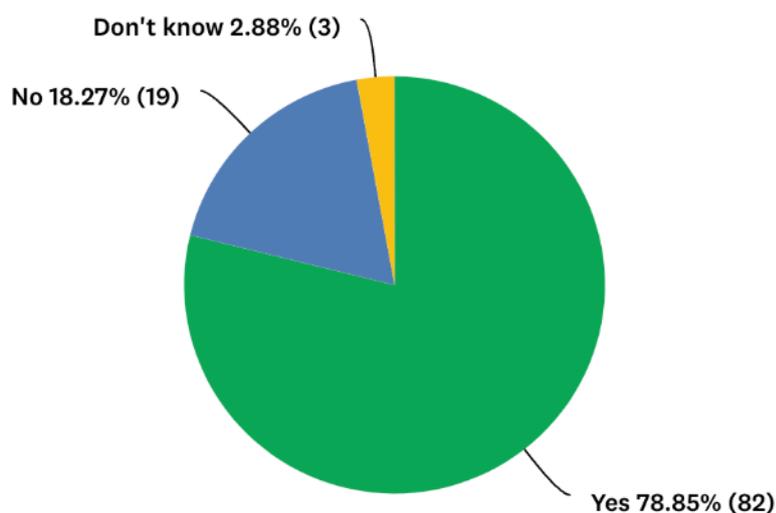


Figure 10: Despite the increased demand, have you been able to meet the needs of people using your service or coming to your group?

Although the numbers are small, about a third of medium sized organisations and just over 40% of small (10k-50k) organisations reported not being able to meet demand (Table 15).

Size of Organisation	Yes	No
Major	3	0
Large	7	1
Medium	24	8
Small (50k-100K)	8	2
Small (10k-50k)	12	5
Micro	18	1

Table 15: size by income against whether demand has been met.

The important thing here is the lengths to which VCFSEs will go to help people, largely meeting demand despite the cost-of-living crisis, reduced council spending, and other pressures on delivery (see Financial Risks below). For example, one interviewee expressed the views of others when they reflected on how, despite not having funding, they won't turn anyone away:

If you're scrambling around at the lower decks of the voluntary sector in Somerset, and just little contracts and small amounts of money and just keeping your head above water, and you get another [client] come with no money, but you want to be able to respond, but you've got to go 'can I actually respond?' And then that's the tug isn't it? – Interviewee 20.

Seeking new sources of funding is the most common way to respond to increased numbers of services users – 57.43% of respondents reported doing this (Figure 11). Offering new services, recruiting more volunteers, developing new partnerships, increasing the frequency of services and/or activities, and employing staff are also notable responses – all being adopted by over a quarter of the respondents to this question (which asked respondents to tick all that apply).

'Other' was selected by 13.86% of the respondents to this question. Other responses that were specified include: staying the same, as they were able to manage; changing organisational practices to be more efficient and *"spreading ourselves more thinly"*.

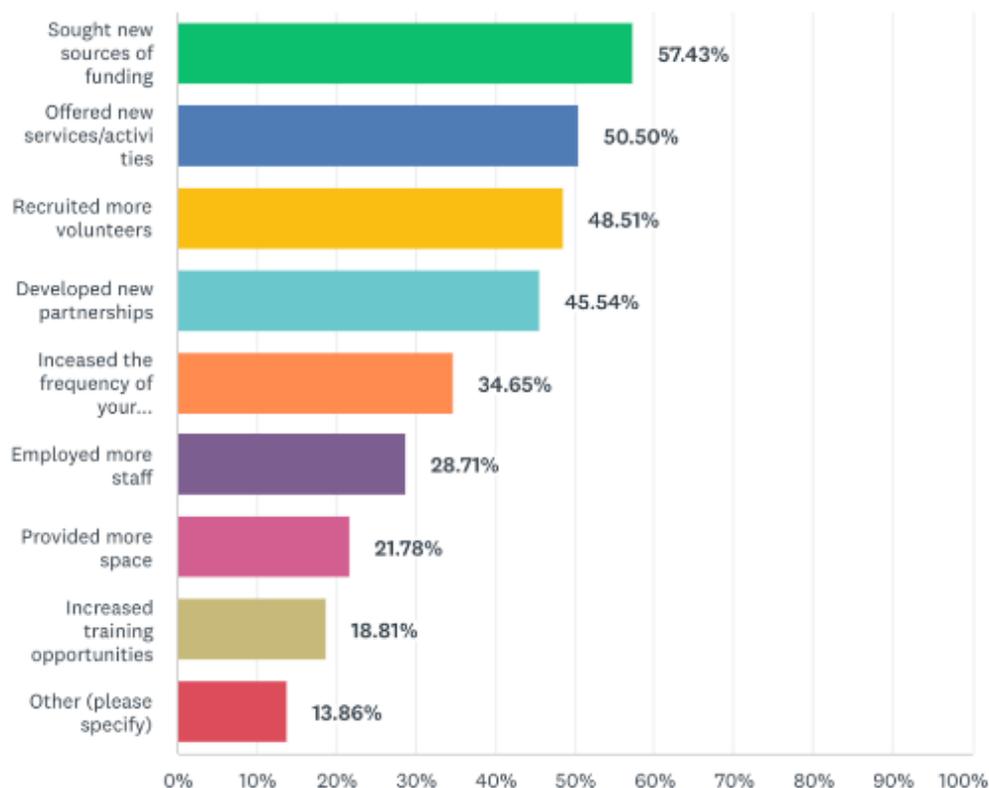


Figure 11: In what ways have you responded as an organisation to the increase in the number of people using your service or coming to your group/activity?

The offer of new services and delivery certainly chimes with the findings outlined above that VCFSEs are running services in addition to their core offering.

Asked to elaborate on whether they had felt able to meet demand or not, respondents gave a variety of insights. Even respondents who felt they had met demand commented on challenges they face. Across all respondents, these fall into 7 categories. The largest category of comments related to starting a waiting list, followed by finding bespoke coping mechanisms, not having enough funding and not having enough staff and/or volunteers. The top 7 types of response are summarised in Table 16.

Response themes	Summary of comments
Waiting list/referrals	Add to own waiting list and refer people to other organisations; Started a waiting list; Not taking referrals; Waiting list is growing; People are waiting longer to be helped; Referrals are increasing.
Coping mechanism	We are growing to meet demand; Sought out specific funding for facilities or equipment; Offered different events and adapted what we do; Increased capacity on the team; Recruited more volunteers; Changed the way we charge for services.
Funding prevents meeting demand	If we had more funding, we could meet the demand that we know is out there; Prioritising beneficiaries who meet funding criteria, some people miss out; We can draw on additional capacity, but those people need paying; Struggle to gain sufficient funding.
Shortage of staff and volunteers	We need more volunteers and trustees; Recruitment is difficult; Numbers have increased and we are doing more; Certain Volunteers do more than others and therefore get overstretched; We very occasionally have to close early due to lack of volunteers; We need more staff and volunteers

Have met demand but not in all areas	Despite demand we have managed to meet most requests; Have not met demand in some critical areas: Family Support, Young People's counselling or Youth support; Service has become limited or ad hoc; Need has been partially met; Response is slower.
Staff and volunteers work harder	We have been able to maintain the same standard of service and activities by staff working more hours, but this is unsustainable long-term; We have to ask more of our volunteers; we are better organised than a few years ago; We are spending more time with each individual as their needs are more complex; By using more volunteers we have managed to extend our service; We try to be flexible
We are aware of more need	Try to help everyone who comes to us but... lots of people don't know about us; There is significant need within the sector and we are able to support those that come to us - but know that many more are unaware of our support, or don't know how to access it. This is something that we continually seek to address; Emails have increased ten fold... and there is not enough time in the day, we have had to increase bus stalls and information hub in a wider area.., but still feel resistance from town council to acknowledge the public transport issues that affect so many people; The need is vast we are a small Christian mission and charity here in somerset I'm also the national Chair) we don't seek funding we pray everything in. We do what we can with what we've got.

Table 16: Despite the increased demand, have you been able to meet the needs of people using your service or coming to your group? Qualitative responses.

As noted above, VCSFEs reported that the type of support that people sought has changed. Asked to reflect on this trend, respondents identified several different themes, summarised in Table 17.

Response themes	Summary of comments
Complex needs	People are presenting with multiple, complex underpinned by trauma, high levels of anxiety and mental health issues; service uses returning due to lack of Adult Social Care resources; more people in crisis; complex abuse cases.
One-to one support	More one-to-one support, especially where needs are complex.
More support for families and parents	Families managing finances, parents coping with stress, children's mental health; children needing support at a younger age; children out of education.
Cost-of-living	People who cannot pay their bills, help with food, hygiene packs, bikes etc.; stress caused by those things
More mental health needs	Including loneliness; accessing and navigating mental health support.
More support for YP	Isolation; space to socialise.
Immigration advice	Housing, employment.
People with specific needs	Neurodiverse and SEND service users; older people; disabilities such as deafness.

Table 17: What has changed about the type of support sought by people using your group or service? Qualitative responses.

Working in Partnership

Nearly 65% of the respondents to the 2024 survey work in partnerships to deliver their services and only 35% report not working in partnership. This proportion has fluctuated very little since 2017 (Table 18).

Trends in the data between 2017 and 2024 are identified in (Table 18) in the following ways:

- ▲ Trending upwards from 2017
- ▼ Trending downwards from 2017
- ± Fluctuating within +/- 3% from 2017
- ≈ Fluctuating more than +/- 3% from 2017

Do you work in partnership?	2017		2020		2024	
	%	Count	%	Count	%	Count
Yes	61.11%	77	68.21%	103	≈64.94%	100
No	38.89%	49	31.79%	48	≈35.06%	54
	Answered	126	Answered	151	Answered	154

Table 18: Do you work in partnership? 2017-2024.

A large majority of organisations work in partnerships with other VCSFEs - 64.95% - whilst 54.64% work with Somerset Council, 47.42% with community workers/navigators, 46.39% with Statutory Service Providers, 42.37% with social prescribers (Table 19). *Other* was selected by 28.87% of respondents, who reported working with a range of different partners, including schools, landowners, funders and local residents. Some respondents also described their network, which included other voluntary sector organisations, village agents, parish councils, and social services, for example. As this question asked respondents to tick all that apply, the percentages do not add up to 100.

What kinds of organisations do you work in partnership with?	% (total more than 100% because respondents ticked all that applied)
Other VCFSEs	64.95%
Somerset Council	54.64%
Community Workers/Navigators	47.92%
Statutory Service Providers	46.39%
Social Prescribers	42.37%
GP Surgeries	31.96%
Other	28.87%
Hospitals	23.71%
Businesses	21.65%
Universities or Colleges	20.62%
Faith Organisations	17.53%

Table 19: What kinds of organisations do you work in partnership with?

It is interesting to note that all sizes of VCFSEs work in partnership from the smallest to the largest (Table 20).

Size of Organisation	Work in partnership	Do not work in partnership
Major	3	1
Large	9	1
Medium	29	10
Small (50k-100K)	7	6
Small (10k-50k)	15	15
Micro	23	13

Table 20: Size by income against working in partnership.

Asked in what ways VCFSEs are collaborating with other partners, it is perhaps unsurprising that the majority – nearly 80% - are working together on service delivery (Figure 12). Over half (54.35%) share spaces. Respondents also reported that they work in partnership for funding and training: 33.70% and 30.43% respectively.

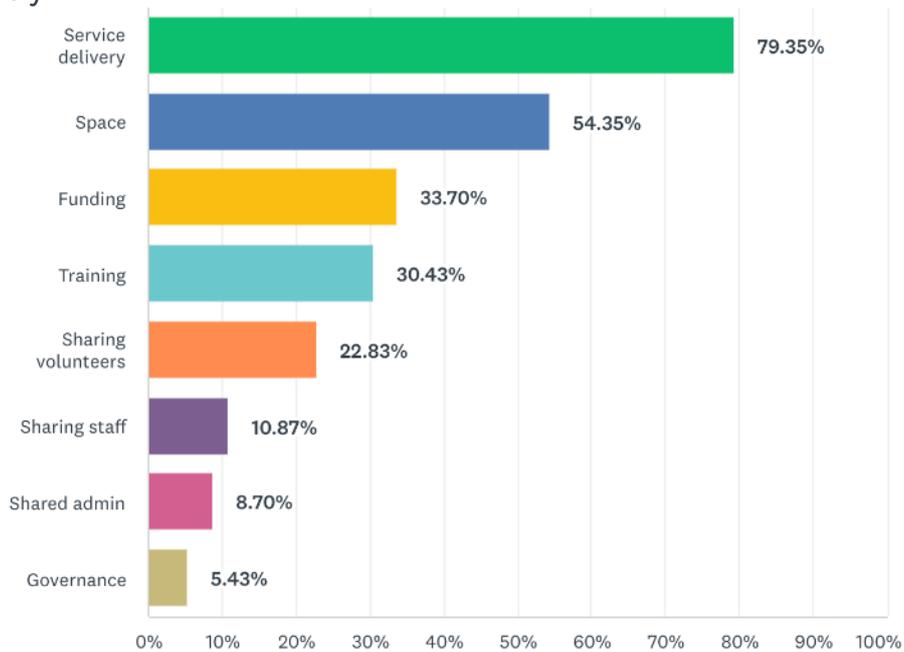


Figure 12: In what ways are you collaborating or working together? Tick all that apply.

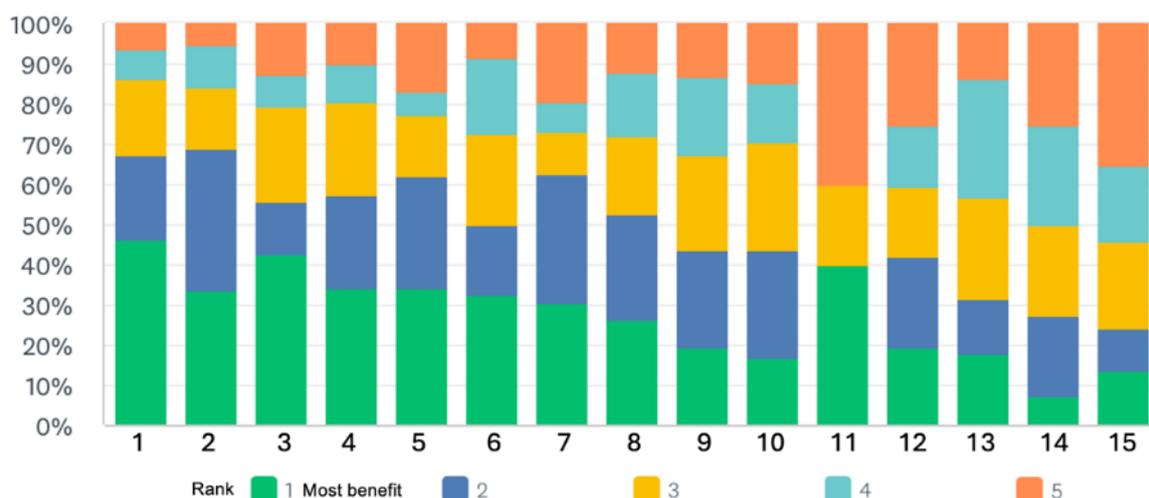
The data suggests two things. First, that working in partnership is an important feature of delivery in the county and there are high levels of cooperation and collaboration, especially amongst VCFSEs. Second, that partnership with elements of the integrated care system is important, as evidenced by the number of respondents who identified Somerset Council and Statutory Service Providers as their partners.

The data on partnership also raises some important questions. First, is there untapped potential for sharing staff, admin or governance, especially in light of the finding that the numbers of trustees are falling, along with the workforce overall? Second, what is the need for peer support, training or mentoring between VCFSEs that have experience of partnership working – what are the shared lessons, insights and knowledge that might be worth disseminating more widely, especially to those who have less experience? Finally, what novel partnerships might be formed to help address conjoined problems, such as social determinants of health?

Benefits of Partnership Working

Respondents were asked to rank their top 5 benefits of partnership working. 'Increased reach for your service' had the lowest weighted average, indicating that the majority of respondents ranked this as one of their top 1 or 2 benefits (Figure 13). Clearly, whilst the ability to reach more clients is frustrated by the constraints of number of staff and volunteers and lack of finances, the appetite and ambition for VCFSEs to reach more people is clear. The benefits of partnership working can support this ambition, with 'access to new knowledge and expertise' receiving the second-lowest weighted average (Table 21). The extent to which funding and commissioning processes encourage or facilitate partnership working is unclear but VCFSEs report being put in the position of competing with each other for ever more scarce funding.

"We do a lot of training together with other organisations, seminars, etc. We also have worked quite closely recently with an organization, a new charity, and we might then support them."



- 1: Increased reach for your service
- 2: Access to new knowledge and expertise
- 3: Access to new sources of funding
- 4: Improves the diversity of those being supported
- 5: Referral
- 6: More capacity
- 7: Greater opportunities to influence decision-makers
- 8: Increased innovation
- 9: Access to training
- 10: Reduces risk
- 11: Other
- 12: Provides opportunities to be commissioned for services
- 13: Access to more volunteers
- 14: Recruiting more diverse volunteers
- 15: Frees up time for staff

Figure 13: Ranked benefits of partnership working.

Benefits of partnership working	Those who identified each benefit in their top 5	
	Count (n=96)	Weighted Average*
Increased reach for your service	80	2.06
Access to new knowledge and expertise	77	2.18
Access to new sources of funding	63	2.35
Improves the diversity of those being supported	61	2.38
Referral	53	2.43
More capacity	58	2.53
Greater opportunities to influence decision-makers	56	2.54
Increased innovation	57	2.61
Access to training	46	2.83
Reduces risk	41	2.83
Other	10	3.00
Provides opportunities to be commissioned for services	52	3.04
Access to more volunteers	51	3.08
Recruiting more diverse volunteers	40	3.40
Frees up time for staff	37	3.51

Table 21: Partnerships benefits *Weighted average: the lower the score, the higher each option was ranked as a benefit.

Barriers to Partnership Working

Interestingly, 140 respondents provided information on the barriers to partnership working, as compared to 96 respondents who provided information on the benefits. This suggests that respondents experience more barriers than benefits. The highest weighted average is ascribed to 'lack of time' (Figure 14). Lack of time arguably compounds other issues in the top 5 barriers, like extra bureaucracy and complex processes, whilst the issues about funding that are faced by many organisations also impact effective partnership working (Table 22). 'Other' – the second most highly ranked category – is discussed below.

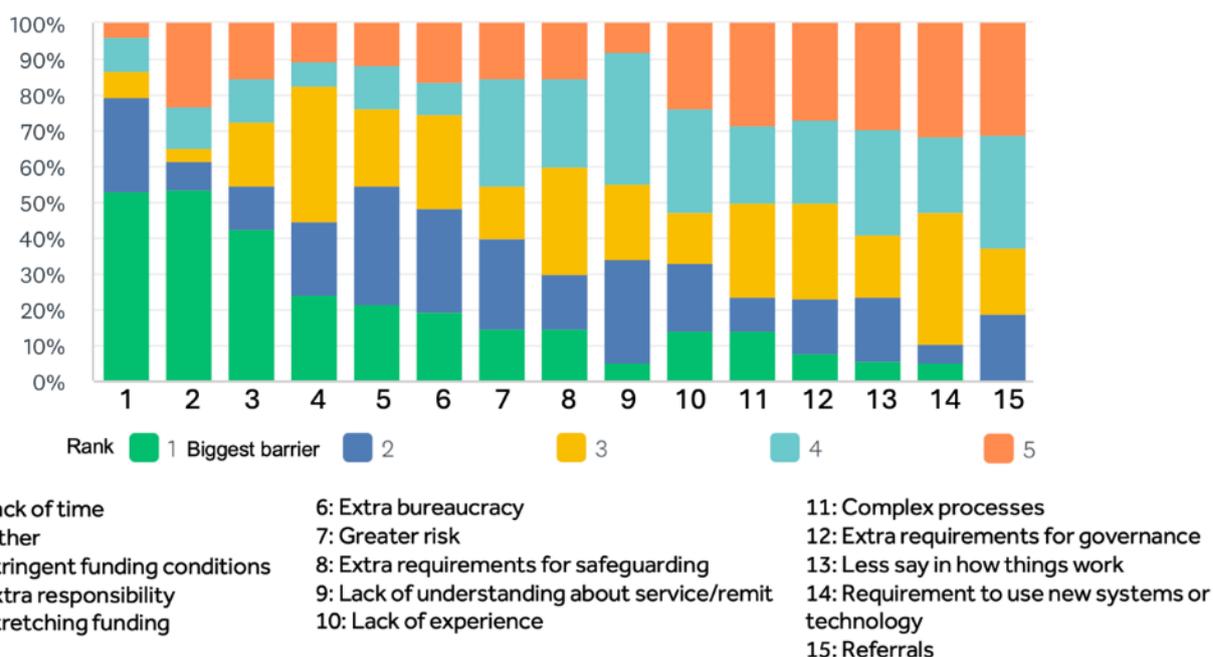


Figure 14: Ranked barriers to partnership working.

Barriers to partnership working	Those who identified each barrier in their top 5	
	Count (n=140)	Weighted average*
Lack of time	83	1.84
Other	26	2.42
Stringent funding conditions	40	2.45
Extra responsibility	29	2.59
Stretching funding	51	2.59
Extra bureaucracy	56	2.73
Greater risk	20	3.05
Extra requirements for safeguarding	20	3.10
Lack of understanding about service/remit	38	3.13
Lack of experience	21	3.29
Complex processes	42	3.40
Extra requirements for governance	26	3.46
Less say in how things work	17	3.59
Requirement to use new systems or technology	19	3.68
Referrals	16	3.75

Table 22: Partnership barriers *Weighted average: the lower the score, the higher each option was ranked as a barrier.

There are some understandably bespoke reasons why organisations do not work in partnership, such as being so specialised that they can't imagine linking with other groups. Respondents who replied 'other' tended not to have sought out partners, didn't expect positive outcomes, didn't know who to partner with, or faced other pressures such as time (Table 23).

Response themes	Summary of comments
Independent/have not sought out partnership/partnership is not relevant.	Independent organisation; no desire to partner; incompatible needs and objectives; do not have partnerships; specialised delivery; protective; have not sought out partnership; partnership is not relevant to our organisation.
Don't expect positive outcomes	Getting the right people in the room who have the authority and courage to innovate, reimagine and make the decisions; systems at council or NHS level are the main barrier; have tried to form partnerships but have ended up being left behind or marginalised by the big organisation which don't deliver what they promise; it'll be more work.
Don't know who to partner with	Difficult to find partners with the kind of service offers; don't know who would welcome partnership; other organisations don't understand the service; lack of communication about what is going on in Somerset; can't find any partners.
Other pressures	Lack of funding and capacity means organisations are not in the right place to develop partnership; personal health; competition in the voluntary sector; lack of trustees to liaise with other VCFSEs.
No time to form partnerships	Shortage of volunteers means directors do everything, leaving no time for building partnerships; busy raising funds; diary matching with other organisations; staff are employed on a freelance basis.
Slows service delivery down	Having to wait for the partner to act.
Competition	Trying to recruit volunteers from a shrinking pool.

Table 23: 'Other' barriers to partnership working.

Partnership building can certainly be time-consuming and unproductive when there is a lack of overall vision for the purpose of the partnership, as observed by one interviewee:

You sit around that table, and you think they're all doing good stuff. Yeah. They've all been to each other's centres... But there isn't a brief. And we've asked for that several times. Like what's the mission? Mission and Vision? Yeah, like in your three years what are the outcomes you want us to achieve? And we've asked it numerous times. So when you don't get response to that? You know, they don't really know. – Interviewee 02.

It can also be characterised by unequal power relationships – a particular risk for Integrated Care Systems where some of the partners (especially the local authority and NHS) have a lot of *de jure* power over finances, governance, and regulation and *de facto* soft power. As one interviewee put it:

Sometimes when I'm talking to colleagues who are coming from a statutory perspective, they use the word collaborate, well, actually, they actually mean as a partnership, or a contract, where they're the commissioner, and you're doing what they want you to do. – Group Interview Respondent.

Proudest Achievements

Partnerships and community capacity

There are great examples of VCFSEs in Somerset building partnerships and networks and growing community capacity.

"BASA development of Food Resilience Pathway that has been adopted Somerset County wide, along with terms of ref for county wide development of other local support alliance groups."

"Introduction of Worrying about Money leaflets locally and to County. Work supporting Signposting Volunteers."

"Setting up the welcome hub network in Somerset supporting all displaced people."

"Provide a West Somerset focus in activities where information is shared."

"Leading on a successful system partnership bid - Volunteering for Health - which will provide funding over three years to support the development of a volunteering vision for Somerset."

"Launching the CAG Somerset network, and having a thriving engaged membership."

"Agreeing MoU with Oake Village Hall Community Emergency Team and Agreement with Wessex Water in the provision of emergency communications at times of need."

"Working with more council partners."

"Continuing to work in productive partnerships with the local village organisations including the Stowey Walking Festival and saving the historic Women's Walk from closure."

"Coming through a merger of 4 charities into one and maintaining our client services and numbers."

"Building even stronger relationships with VCSE colleagues in the area, working well together through the SPOC, and sharing volunteer recruitment campaigns."

Managing Funding

Finances are clearly tight, but VCFSEs take pride in managing their finances, seeking out new sources of funding and find the money to help others.

"Extra fundraising to be able to offer services without increasing membership fees."

"Doing what we do and helping a large contingency of our community with their mental health."

"Raising enough to launch a prevent men's suicide campaign that will be launched in the next couple of months,"

"Securing continued funding to keep running our Somerset services into 24/25."

"Securing funding from Bridgwater Town Council."

"We won funding bids to enable us to host indoor sessions twice monthly instead of once monthly." "We've paid our rent until 2026 which adds security and enables us to plan our future goals as a group."

"We raised over £9,000. Not easy task in the current cost of living crisis."

"Getting a grant to refurbish the toilets and facilitate a wide range of social demographic of people to play rugby for physical and mental wellbeing."

"We managed to raise enough funds to meet demand for counselling."

"Securing Lottery Funding as we lost Somerset Council Funding."

"Securing the Connect Somerset commission and ensuring the Village Agent service is available in Somerset for the next few years."

"Securing two rounds of funding and being able to deliver courses to two wonderful groups of people in Somerset."

"Raising £169,000.00 + VAT for the project to replace the old skateboard park with a new concrete installation. The contract has been placed and work started on 1st July 2024."

"Reaching £250k donated to various charities since opening in 2006."

"Obtaining a £200,000 bid from the National Lottery Community Fund to sustain us for the next 3 years."

"Being able to financially support local groups directly improving the wellbeing of women who have been affected by domestic abuse."

"Turning the organisation into a financially viable one without being reliant on grants and donations."

"Receiving funding from the ICB for our Maternal Mental Health work."

"Successfully negotiating new grant with the Council despite their financial situation - to assist our transition to spot purchase commissioning model for care."

"Managing the income through the financial crisis. Staff still being productive and happy. Getting national lottery income."

Finances

Funding is a significant issue in the sector, covering resource distribution, fairness, value for money, quality assurance processes, governance and reporting. The amount of funding that an organisation requires depends a great deal on their size, the range of services they provide, their main sources of funding, and how precarious that funding is. As a reminder, this is the breakdown of the size of VCFSEs in Somerset by income (Table 24).

Size of Organisation	2024
Major (£10m +)	3.03%
Large (£1m-£10m)	7.58%
Medium (£100k-£1m)	29.55%
Small (50k-100k)	9.85%
Small (£10k-£50k)	22.73%
Micro (<£10k)	27.27%

Table 24: Size of VCFSEs in Somerset by income.

Reserves

Whilst VCFSEs vary enormously in terms of income, their reserves are a better marker of their financial viability and sustainability. Reserves help to cover salary, rent, utilities, and other costs during lean times. In extremis, they are used to pay off creditors and settle final accounts when an organisation is winding up. Reserves therefore represent a buffer in a sector in which funding can be highly precarious.

Nearly 19% of respondents reported not holding any reserves, 12.20% reported holding 0-3 months reserves, and nearly 31% of respondents reported having between 3- and 6-months reserves (Figure 15). This means that nearly 62% of VCFSEs are holding less than 6 months reserves.

Charity Commission guidance does not call for a minimum level of reserves, suggesting instead that the level of reserves to be held should reflect the particular circumstances of the individual charity. Nevertheless, the 31.20% of organisations with 0-3 months reserves are at risk of not being able to cover their commitments like rent or utilities should they fail to raise sufficient income. Lack of reserves is one part of the struggle for survival, which can stifle investment and innovation, as this interviewee reflected:

If I'm running my little charity, I'm generally focused on survival. And task lists of wanting to do this, we need to do this, we've set up these programs. And the reason we exist is these programs, we just have to keep delivering these programs – Interviewee 11.

Spending reserves on investment or innovation is, of course, a risk, as this survey respondent noted:

Currently we have a high level of reserves, but this will be depleted over the next 3 years because of deficit budgets. It allows us to invest in fundraising and marketing to set up and nurture new income streams but if they don't work, we will be in trouble.

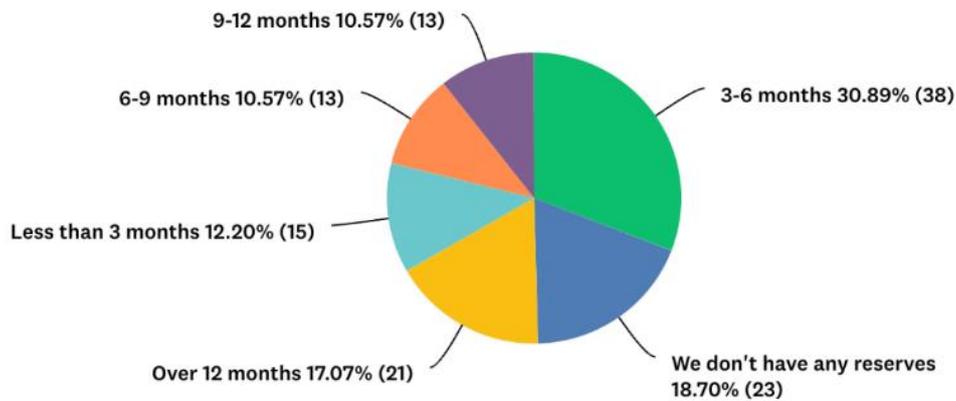


Figure 15: How many months of operating costs are covered by reserves?

Trends in the data between 2017 and 2024 are identified in (Table 25) in the following ways:

- ▲ Trending upwards from 2017
- ▼ Trending downwards from 2017
- ± Fluctuating within +/- 3% from 2017
- ⋈ Fluctuating more than +/- 3% from 2017

How many months of operating costs are covered by reserves?	2020		2024	
	%	Count	%	Count
Less than 3 months	27.14%	38	▼ 12.20%	15
3-6 months	35.71%	50	▼ 30.89%	38
6-9 months	10.71%	15	± 10.57%	13
9-12 months	11.43%	16	± 10.57%	13
Over 12 months	15.00%	21	± 17.07%	21
We don't have any reserves	-	-	18.70%	23
	Answered	140	Answered	123

Table 25: How many months of operating costs are covered by reserves? 2020-2024. NB the data from 2017 are not comparable.

Cross tabulation with size of organisation by income shows a mixed picture. 36% of micro organisations reported having no reserves, but conversely 27% of these respondents reported having over 12 months of operating costs in reserves. This probably reflects the degree to which these organisations run on a shoestring. Thus, 12 months of operating costs would be a small amount of money, and some manage on no reserves at all. It is a similar picture for small organisations (£10k-£50k). Perhaps a trend of more concern is that over 70% of respondents from medium sized organisations (£50k-£100k) reported having reserves of less than 3 months or 3 to 6 months. This suggests significant precarity for these organisations, which represent nearly 30% of the sector in Somerset.

Exploring how many months running costs are covered by unrestricted reserves illustrates that small and micro organisations are more likely to have no or limited reserves. As expected, larger organisations are more financially secure: they have larger running costs but also much larger reserves. Smaller organisations may require more support in financial planning although they may run on very small and sustainable budgets.

Size of Organisation	No Reserves	<3 Months	3-6 Months	6-9 Months	9-12 Months	>12 Months
Major*	0	0	0	0	0	0
Large	0	0	5	2	1	0
Medium	3	7	15	5	4	2
Small (50k-100k)	0	2	9	0	1	1
Small (10k-50K)	7	4	6	4	3	6
Micro	13	2	3	1	4	10

Table 26: income by size against reserves. *No major organisation answered this question

Income

The VCFSE sector as a whole in the UK is funded via a mixed portfolio of grants (e.g. the National Lottery Community Fund or trusts and foundations), individual or corporate donations and legacies, fundraising events, trading, membership fees, endowments, investments as well as contracts and commissioning via public sector contracts from the local authority, NHS, HM Prison Service or the Police and Crime Commissioner (NCVO, no date). The Civil Society Almanac shows that, for the first time in a decade, overall sector income in the UK has declined (NCVO, 2023). Given that voluntary sector income has been increasing year-on-year since 2012/13, NCVO attribute the fall in income to the effects of the COVID-19 pandemic. They show that, despite an increase in government income (largely as a result of furlough and emergency funding for charities), overall sector income declined by £1.8bn (3.06%).

In Somerset, exactly 50% of the 2024 survey respondents expected their income to be the same as last year, with nearly 27% expecting it to be more and 16.42% expecting it to be less (Figure 16). It is important to note that an income that stays the same will likely be a cut in real terms, given inflationary pressures (see [The Impacts of the Cost-of-Living Crisis](#)).

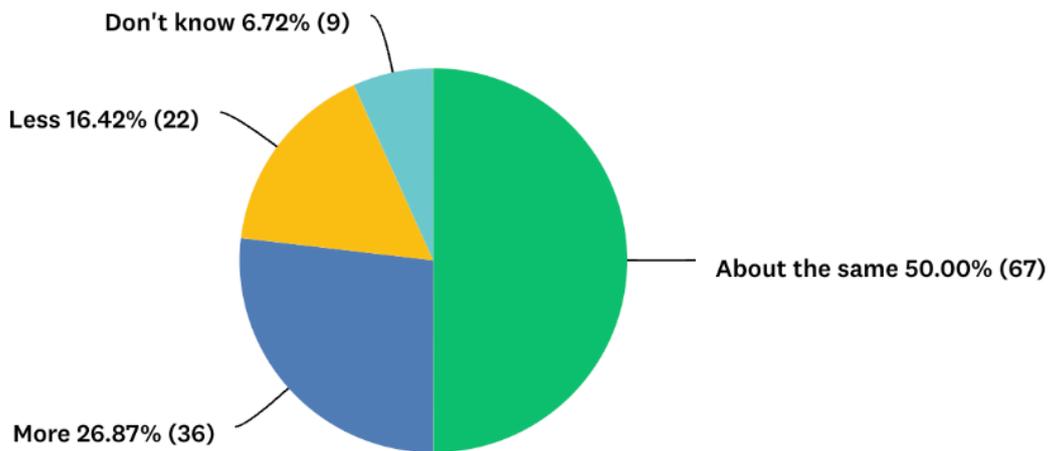


Figure 16: Compared with last year, what do you expect this year's income to be?

A comparison with the surveys from 2017 and 2020 shows fluctuations in the fortunes of VCSFEs in Somerset. The number of respondents who said their income is expected to be roughly the same has risen from 45.95% in 2017 to 50% in 2024, whilst the numbers expecting an increase compared to the previous year peaked in 2020 and settled back to 26.87% in 2024 (Table 27). The numbers expecting a decrease have trended downwards from a high of 27.93% in 2017 to 16.42% in 2024. Cautious optimism is a way to read these figures: having a predictable income is a good thing, but when incomes stay the same year-on-year, they are unlikely to keep up with expenditure over the medium- to long-term.

Trends in the data between 2017 and 2024 are identified in (Table 27) in the following ways:

- ▲ Trending upwards from 2017
- ▼ Trending downwards from 2017
- ± Fluctuating within +/- 3% from 2017
- ⋈ Fluctuating more than +/- 3% from 2017

Compared with last year, what do you expect this year's income to be?	2017		2020		2024	
	%	Count	%	Count	%	Count
Stayed the same	45.95%	51	46.89%	70	▲ 50.00%	67
Increased	18.92%	21	30.20%	45	⋈ 26.87%	36
Decreased	27.93%	31	16.78%	25	▼ 16.42%	22
Don't know	7.21%	5	6.04%	9	± 6.72%	9
	Answered	111	Answered	149	Answered	134

Table 27: Compared with last year, what is income expected to be? 2017 -2024.

Asked whether the amount of income that respondents have received changed in the last three years, 37.5% reported that they receive slightly more income than three years ago, whilst 22.66% reported that they received much more income than three years ago (Table 28). Only 4.69% of respondents reported that they receive much less income than three years ago.

Income changes over last three years	% of respondents
We now receive slightly more income than three years ago.	37.50%
We now receive much more income than three years ago.	22.66%
We now receive slightly less income than three years ago.	16.41%
We receive the same amount of income as three years ago.	14.06%
None of the above (we do not receive any income)	4.69%
We now receive less income than three years ago.	4.69%

Table 28: levels of income compared to three years ago.

The data can be treated with cautiously optimism. Increased income is a good thing but has to be put in the context of: i) rising cost-of-living, meaning that income doesn't go as far; ii) increased effort going into applying funding or diversifying what's on offer; iii) the persistence of short-term and underfunded contracts; and iv) rising demand. Indeed, when demand is looked at against whether income has changed in the last three years, VCFSEs that report increased demand also, for the most part, report increased income. Conversely, those that report that demand has stayed the same or reduced also report that income has stayed the same or reduced for the most part.

Seventeen respondents elaborated on their answers to the question about income. The ending and/or loss of particular funding streams feature as a reason for downturns in income. In addition, uncertainty about income is voiced by organisations and/or groups who rely on donations and their donor groups, e.g. faith-based groups.

A cross tabulation of organisational size against income expectations illustrates that 74.24% of organisations who responded (out of a total of 132) expect their income to be the same or more this year compared to last year. 9.09% didn't know whether their income would be more or less. Therefore 16.6% of organisations believe they will have less money this year. The majority of these are in the medium (24.67%) and micro (20%) categories (Table 29).

Size of Organisation	Income more than last year		Income less than last year	
	Count	%	Count	%
Major	1.00	0.83%	-	-
Large	7.00	5.83%	2.00	1.67%
Medium	29.00	24.17%	8.00	6.67%
Small (50k-100K)	26.00	21.67%	3.00	2.50%
Small (10k-50k)	11.00	9.17%	1.00	0.83%
Micro	24	20.00%	8.00	6.67%

Table 29: Income by size against expectations for income in the current year.

However, when we drill down into size of organisations, we witness a more complex picture emerging. Nearly a fifth of organisations are reporting that their expenditure exceeds income, and this is particularly felt by medium, small and micro organisations (Table 30).

Size of Organisation	Income exceeds expenditure	Income matches expenditure	Expenses exceed Income
Major	0	1	2
Large	1	5	3
Medium	7	21	9
Small (50k-100K)	3	6	3
Small (10k-50k)	8	11	6
Micro	10	13	7

Table 30: Size by income against expenditure and income.

Expenditure

44.03% of respondents thought that their income would match their expenditure in the current financial year (Figure 17). 23.13% thought that expenditure would exceed income. This presents a picture of a sector holding steady for the most part but with some vulnerability, especially from falling donations, competition for funding, and the rising cost of living. One possible outcome of expenditure matching or exceeding income is that VCSFEs are not adding to reserves or creating the financial headroom for expansion or innovation. On a more positive note, 21.64% of respondents thought that income would exceed expenditure.

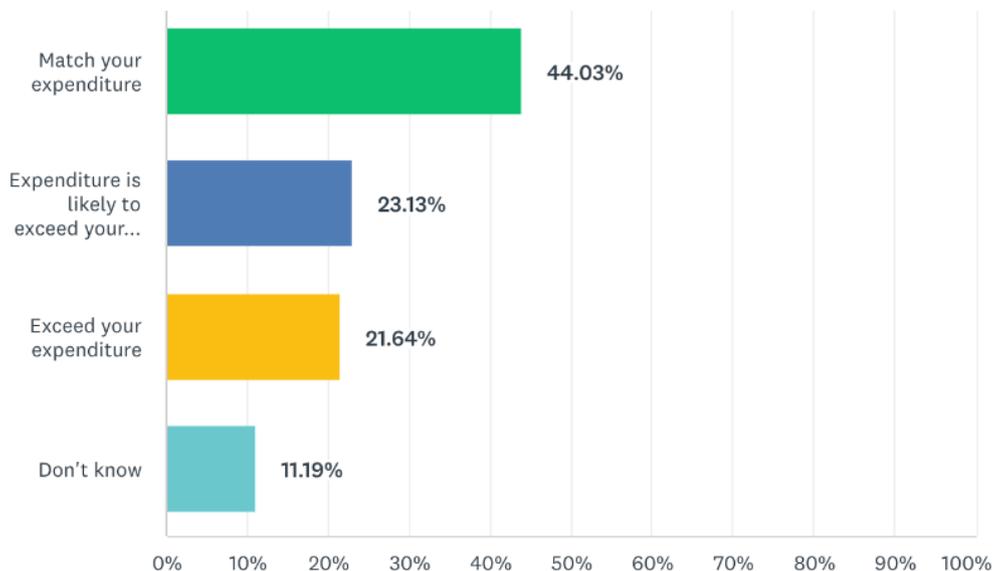


Figure 17: Income vs expenditure in the current financial year.

The trends in the data between 2017 and 2024 have remained remarkably stable, with little movement in the percentage of organisations which expect their income to match, fail to meet, or exceed their expenditure. Trends in the data between 2017 and 2024 are identified in (Table 31) in the following ways:

▲ Trending upwards from 2017

▼ Trending downwards from 2017

± Fluctuating within +/- 3% from 2017

↯ Fluctuating more than +/- 3% from 2017

Income vs expenditure in the current financial year	2017		2020		2024	
	%	Count	%	Count	%	Count
Income matches your expenditure	43.24%	48	48.65%	72	± 44.03%	59
Expenditure exceeds income	25.23	28	18.92%	28	± 23.13%	31
Income exceeds your expenditure	19.82%	22	21.62%	23	± 21.64%	29
Don't know	11.71	13	10.81%	16	± 11.19%	15
	Answered	111	Answered	154	Answered	134

Table 31: Income vs expenditure in the current financial year, 2017-2024.

16 respondents provided further comment. Sudden disruptions, such as unexpected building repairs, can have a big impact on finances. Respondents tend to try and adapt to balance their books, e.g. by holding new fundraising activities and/or by changing the way they deliver services. Overall, expenditure is controlled carefully.

Sources of Income

VCFSEs earn their income from diverse sources (Table 32) and this is the case across all sizes of organisations. Respondents reported that they receive, on average, 36% of their income from 'other' sources,² with earned income (trading goods and services) accounting for 33% of income on average. Grants (trusts or foundation), public fundraising (including legacies) and public sector contracts (direct) accounted for the next largest sources of funding, with VCSFEs receiving 24%, 23% and 17% of their income on average from these sources. This suggests that VCFSEs are adept at seeking out a wide range of funding sources and do not limit themselves to one type.

Source of Income	Average % of income received from this source
Other	36%
Earned income (trading goods/services)	33%
Grants (trusts or foundations)	24%
Public fundraising (inc. legacies)	23%
Public sector contracts (direct)	17%
Lottery grants	16%
Grants (local authorities, NHS, other public bodies)	15%
Public sector contracts (sub-contract or consortium)	6%

Table 32: Sources of income.

² The 'other' sources of income were not specified but are likely to include legacies, donations, and investment.

Asked whether sources of income had changed over the last three years, 44.78% of respondents replied yes and 48.51% replied no (Figure 18). A small percentage of respondents felt that this question was not relevant to them, or they could not answer it accurately – 6.72%.

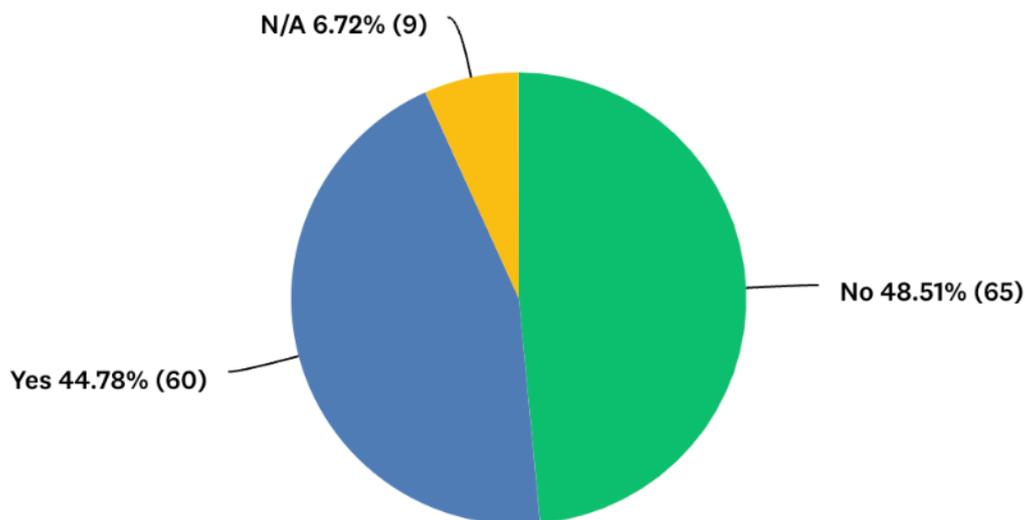


Figure 18: Have sources of income changed over the last three years?

Asked to elaborate on how their sources of funding had changed, most of the responses referred to seeking out mixed sources, applying for grants or suffering the effects of funding being no longer available (Table 33).

Response themes	Summary of comments
Mixed sources	Changing balance between grants, donations and/or sponsorship; less from Council, more from other sources; applying to a wider range of funders; corporate fundraising and high net-worth individuals; National Lottery alongside other sources; national and local funding sources; corporate sponsorship plus grants; approaches new local funders; Go Fund Me alongside other sources.
Funding no longer available	Reduced funding from the public sector and larger scale commissioning; reduced contribution to overheads; specific local authority funding withdrawn; lack of statutory funding; issue-specific funding withdrawn; annual grant funding has decreased; hard to secure grants and there are fewer of them.
Grants	Making applications systematically; increasingly competitive environment; aiming for bigger pots rather than chasing small grants; everyone going for the same grants; new grant funders sought out; making more applications; seeking grants that support core costs; grants and loans from the Council; Lottery Funding; constantly applying due to short time-scales of funding.
Donations and legacies	Far fewer donations; fewer people supporting the organisation; more legacies.
Increasing activity/trading/ services provided	Increase in service users; receive more income in rent from hosted services; opening a bar and increasing fundraising activities; fewer grants and more trading; use capacity to generate own further income.
Contracts and commissioning	Funding sources change frequently due to short contracts and commissioning arrangements; more NHS contracts for ED.

Table 33: How have sources of funding changed? Qualitative responses.

Funding Conditions

Respondents were asked to agree strongly to disagree with a range of statements on changes to funding conditions. 79.53% of respondents agreed strongly or agreed that there is more competition for funding whilst 70.04% agreed strongly or agreed that funding is harder to find (Figure 19). 66.13% agreed strongly or agreed that the eligibility criteria are harder to meet. Meanwhile, whilst 48.40% agreed strongly or agreed that there are more reporting requirements, 44% had a more neutral view, neither agreeing nor disagreeing with this statement. 48% agreed strongly or agreed that the application process was harder to navigate, whilst 44% neither agreed nor disagreed with this statement.

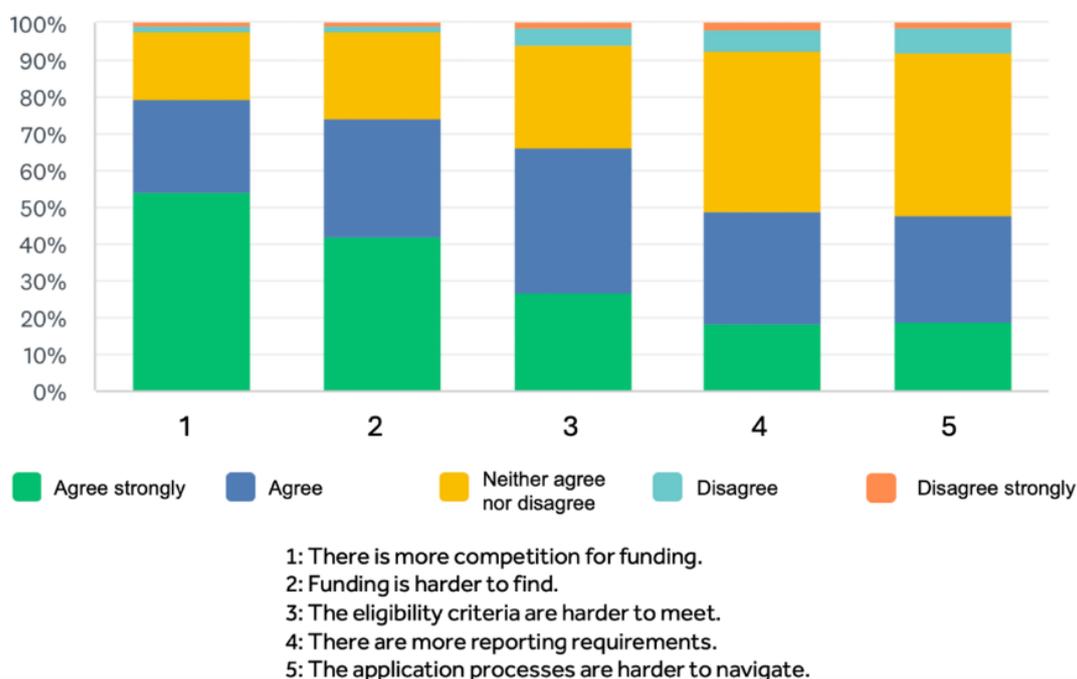


Figure 19: Changes to funding conditions.

Overall, these responses give the impression of a competitive environment in which funding is harder to find and qualify for. Gongora-Salazar et al (2022: 2) argue that, despite a decade of experiments in integrated care and the formal introduction of integrated care systems by the Health and Care Act (2022):

It is still unclear how local healthcare commissioners allocate budgets to healthcare services, particularly in the context of integrated care. It is yet not clear what factors drive the local decision-making process, who is involved, and what are the main challenges that commissioners face when investing in one intervention over others.

Although focused on healthcare commissioning, their comments ring true of public service commissioning in the ICS more generally, particularly when VCFSE organisations are involved. In the State of the Sector research, one interview talked about learning to navigate a complex funding landscape:

And part of that journey was learning that the system has capital letters. So it's 'The System' and you're either in it or you're not. And we're very much embedded into that as a voluntary sector partner – Interviewee 28.

This gives them an advantage which other organisations do not have: the superior ability of a large organisation to satisfy commissioning requirements. They argue that:

In terms of third sector organisations operating at scale, there probably isn't much room for any other large one at the moment, because it's not enough money to go into accommodate [them]" – Interviewee 28.

Areas in which it is challenging to find funding

Respondents were asked to rank their top five areas in which it is hard to find funding. "Salaries" had the lowest weighted average, indicating that the majority of respondents ranked this as one of their top 1 or 2 areas that are challenging to find funding (Figure 20). The second most highly ranked category was 'other' and 'fundraising' (Table 34). Amongst those who ranked 'other' highly, issues included site/facility maintenance, funding for specific projects, securing funding from organisation which themselves are financially distressed, and the sheer frustration of not being able to find funding for new projects.

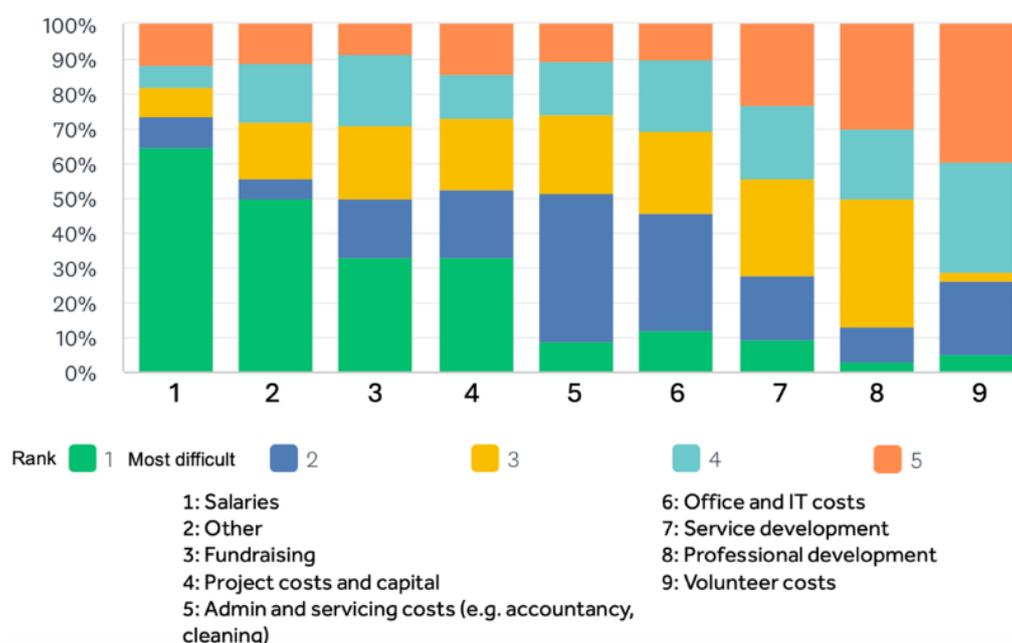


Figure 20: Ranked areas for which it is *challenging* to find funding.

Areas in which it is challenging to find funding	Those who identified each area in their top 5	
	Count (n=118)	Weighted average*
Salaries	68	1.91
Other	18	2.33
Fundraising	48	2.54
Project costs (e.g. capital)	63	2.56
Admin and Servicing costs (accountancy, cleaning etc)	66	2.76
Office and IT costs	59	2.83
Service Development	43	3.30
Professional Development	30	3.63
Volunteer Costs	38	3.79

Table 34: Areas in which it is hard to find funding. *Weighted average: the lower the score, the higher each option was ranked as a benefit.

Contracted for Statutory Services

A large majority – over three quarters (75.38%) – of respondents do not have contracts for statutory services, with only 24.62% holding such contracts (Figure 21).

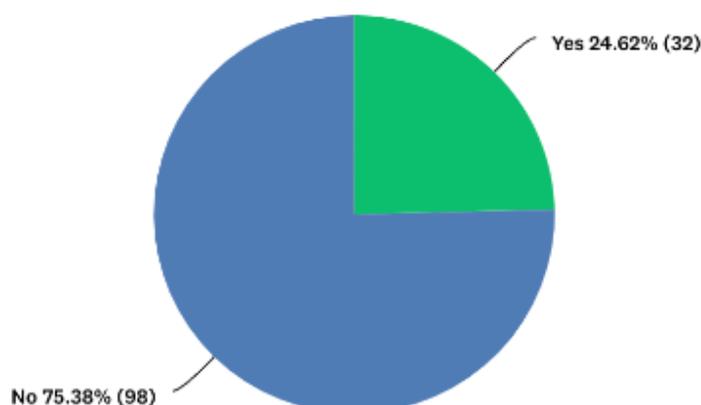


Figure 21: Is your organisation contracted to run services or activities by the local authority, the clinical commissioning body or any other statutory organisation?

This finding comes into sharper focus when cross tabbed against size of organisation by income (Table 35). This indicates that mainly larger organisations are contracted to deliver services or activities by the local authority, the clinical commissioning body, or any other statutory body. 23 out of 31 'yes' responses below are amongst medium, large, and major organisations upward. There are perhaps further issues to explore here on single points of commissioning and engaging the microbiome of the sector. For example, what is the appetite amongst smaller organisations to deliver statutory services? What are the possibilities of alternative commissioning models such as Single Point of Commissioning or Community Commissioning?

Size of Organisation	Yes	No
Major	1	2
Large	9	1
Medium	13	25
Small (50k-100K)	4	9
Small (10k-50k)	3	27
Micro	1	32

Table 35: Is your organisation contracted to run services or activities by the local authority, the clinical commissioning body, or any other statutory body?

Having contracts in place does not guarantee financial viability and may drive a VCFSE to deliver against the specific, narrow demands of the contract. One interviewee reflected that:

I think we're measuring outcomes... which is right, but it needs to be connected to people in order for us to see that whole value in the community and that wider perspective and the longevity of it rather than just "well we've had the year [long] project. Wasn't that marvellous?" No, it wasn't, because we've all gone back to nowhere... Where it's five-, six-year projects, it's actual investment in the community, not project, and its investment in the people, not us – Group Interview Respondent.

Cost Recovery

The NPC national State of the Sector Report for 2024 identifies as a key risk underfunded contracts held by charities, undermining the delivery of essential public services (NPC, 2024). It is common for VCFSEs to be viewed as a resource which can provide services more cost-efficiently than the statutory sector and potentially access sources of funding not available to statutory agencies (Hucklesby and Corcoran, 2016).

Asked whether, when running a project, respondents received sufficient funding to cover the costs of the activity they provide, the results convey a mixed picture. The example given in the question referred to 100% cost recovery and only 35 VCFSEs provided a response. With this in mind, 22.86% of respondents reported that they never achieve 100% cost recovery, with a further 14.29% reporting that they sometimes lose money on a contract. Equally, 22.86% reported that they sometimes achieve 100% cost recovery and 14.29% always achieve 100% cost recovery (Figure 22).

“Funders do not want to address the Full Cost Recovery issue [...] we can only claim 15% towards overheads for example. This is exacerbated by lack of uplifts to contracts in multi-year programmes [...] This does not cover increase to employee salaries, let alone cost of living rises. Ultimately charities are expected to do more, with less and it is unsustainable.”

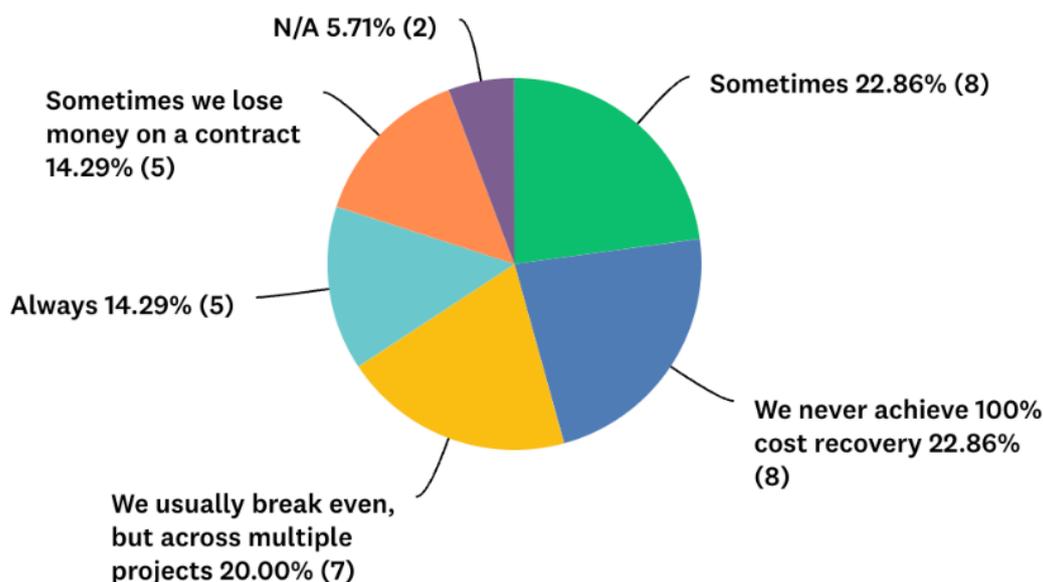


Figure 22: Do you receive sufficient funding to cover the costs of the activity you provide?

14 respondents elaborated on their answers (Table 36). Their insights concentrated on the ways in which funding does not meet need, but also touched on appropriation (where VCFSEs are required to act like the public sector), and that different types of funding have different commitments to full cost.

Response themes	Summary of comments
Funding doesn't meet need	Need is prioritised and office space and other facilities are repurposed; cost to provide specialist provision outweighs income from the Council and national government; grants make a contribution to full cost.
Appropriation	Contractors want us to work like they do and it is challenging, unproductive and relationship destroying.
Unpredictable levels of funding	NHS underfunded, council full funded but only in certain circumstances, lottery different again.
Benefit outweighs cost	Projects are of great benefit but don't cover their costs.
Cross-subsidising projects	Some projects achieve full cost, some don't - balancing act.
Powerless to change the situation	Working in alliances means taking what you can get.
Funders are oblivious	Funders don't want to address the full cost question; uplift does not cover increased costs.
Real costs are unpredictable	Hard to fully cost up a project, taking into account unforeseen challenges.

Table 36: Cost recovery – qualitative responses.

Taking a broader view, it is possible to drill down into which organisations might be most at risk from not achieving 100% cost recovery, especially where they provide contracted services. As Figure 21 shows, some VCSFE are providing contracted services, and they can be 'financially risky' for these organisations. For example, medium and large organisations who dominate this provision report that only 14% and 0% respectively of these contracts 'always' run at 100% cost recovery. Further, only 28.5% of medium and 20% of large organisations achieve 100% cost recovery 'sometimes'. 30% of large organisations and 14% of medium organisations lose money on these contracts. There is also evidence to suggest that organisations cross subsidise these activities (30% for large and 14% for medium).

"They don't understand the additional work we have to do and want us to work like they do, this is challenging, unproductive and relationship destroying."

Proudest Achievements

Managing Funding

Finances are clearly tight, but VCFSEs take pride in managing their finances, seeking out new sources of funding and find the money to help others.

"Extra fundraising to be able to offer services without increasing membership fees."

"Doing what we do and helping a large contingency of our community with their mental health."

"Raising enough to launch a 'prevent men's suicide' campaign that will be launched in the next couple of months."

"Securing continued funding to keep running our Somerset services into 24/25."

"Securing funding from Bridgwater Town Council."

"We won funding bids to enable us to host indoor sessions twice monthly instead of once monthly."

"We've paid our rent until 2026 which adds security and enables us to plan our future goals as a group."

"We raised over £9,000. Not easy task in the current cost of living crisis."

"Getting a grant to refurbish the toilets and facilitate a wide range of social demographic of people to play rugby for physical and mental wellbeing."

"We managed to raise enough funds to meet demand for counselling."

"Securing Lottery Funding as we lost Somerset Council Funding."

"Securing the Connect Somerset commission and ensuring the Village Agent service is available in Somerset for the next few years."

"Securing two rounds of funding and being able to deliver courses to two wonderful groups of people in Somerset."

"Raising £169,000.00 + VAT for the project to replace the old skateboard park with a new concrete installation. The contract has been placed and work started on 1st July 2024."

"Reaching £250k donated to various charities since opening in 2006."

"Obtaining a £200,000 bid from the National Lottery Community Fund to sustain us for the next 3 years."

"Being able to financially support local groups directly improving the wellbeing of women who have been affected by domestic abuse."

"Turning the organisation into a financially viable one without being reliant on grants and donations."

"Receiving funding from the ICB for our Maternal Mental Health work."

"Successfully negotiating new grant with the Council despite their financial situation - to assist our transition to spot purchase commissioning model for care."

"Managing the income through the financial crisis. Staff still being productive and happy. Getting national lottery income."

Survival

The proudest achievement of some VCFSE's in Somerset is managing to keep going despite straitened financial circumstances.

"Keeping going. Despite funding not being achieved, more need than we can handle and burnout amongst our team. And being able to provide amazing sessions for the most needy children in the holidays; having mental health clients say 'this place changed my life'; and having a longstanding volunteer say 'coming here as a participant and then as a volunteer has helped me to really be myself in the world'."

"We're still running! We secured some funding from the National Lottery for some strategic development work, which has help us enormously."

"Staying open."

"Surviving the significant loss of funding from Somerset Council and continuing our families work at similar numbers."

"Maintaining chaplaincy to all our placements despite financial challenges to the organisation."

Financial Risks

Asked to rank the main financial risks in the next 12 months from 1 (greatest risk) to 5, the category of 'other' had the lowest weighted average, meaning that it featured in respondents' top one or two risks (Figure 23). Respondents elaborated by citing getting grants for new projects, lack of volunteers and replacing volunteers who have left with paid staff, lack of larger grants and low success rate, lower bank interest rates, having low reserves, risk of Somerset Council withdrawing contracted services.

"Probably like a lot of organisations, [it] has been a lot about just surviving and getting through and taking the next opportunity."

Although 'other' had the highest weighted average, it is important to note that it had one of the lowest number of respondents. This means that those who identified this risk scored it highly but other risks which were selected by more respondents are more pressing for a greater percentage of VCSFEs (Table 37). Other risks include service users needing to cover some costs (which they cannot afford), low bank interest rates for the types of accounts that VCFSEs have, declining success rates for securing funding, and finding appropriate funding for new services and/or activities.

In light of these findings, it is probably more instructive to look at which issues consistently appeared in most respondents' top five, regardless of the weighted average. 52.45% of respondents chose short-term funding, followed by increased premises costs (45.9%), demand exceeding the ability to meet it (43.44%), increased salary costs (38.52%), fixed-term funding (36.88%) and falling donations from the public (36.88%). These amount to a group of conjoined risks that relate to the combined effects of increased cost-of-living (see The Impacts of the Cost-of-Living Crisis, below) and the short- and fixed-term nature of funding.

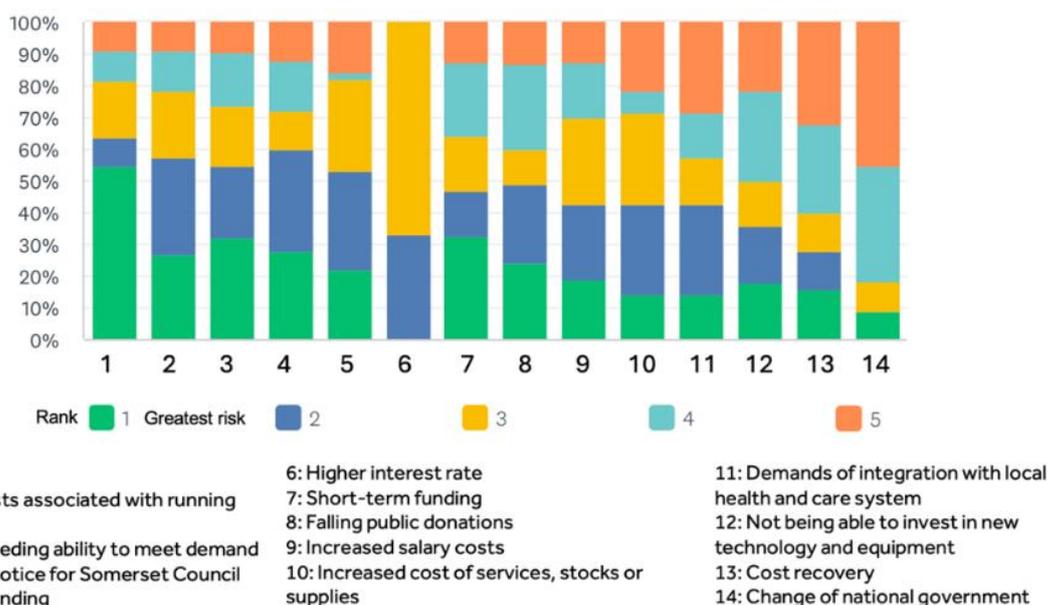


Figure 23: Ranked financial risks.

The top five financial risk that are shown in (Table 37) are ranked quite evenly. High interest rates and short-term funding came close to making the Top 5.

Financial Risks	Those who identified each financial risk in their top 5	
	Count (n=122)	Weighted average*
Other	11	2.09
Increased running costs associated with premises	56	2.46
Demand exceeding your ability to meet that demand	53	2.49
Section 114 notice from Somerset Council	25	2.52
Fixed-term funding	45	2.58
Higher interest rates	3	2.67
Short-term funding	64	2.69
Falling donations from public	45	2.80
Increased salary costs	47	2.81
Increased cost of services, stock or supplies	42	2.93
Demands of integration with the local health and care system	14	3.14
Not being able to invest in new technology and equipment	28	3.18
Cost recovery	25	3.48
Change of national government	11	4.09

Table 37: Financial Risks *Weighted average: the lower the score, the higher each option was ranked as a benefit.

The Impacts of the Cost-of-Living Crisis

The cost-of-living crisis has had mixed impacts on the voluntary sector. The negative impacts are reasonably easy to predict: increased demands and costs for providing services, coupled to decreases in the funding environment. The positive impacts are somewhat less intuitive but exist nonetheless. These include opportunities to work with more people (the corollary of increased demand) and the potential for more collaboration.

Negative Impacts

Asked to rank the top five negative impacts from a list of 11 choices, the most significant impact by weighted average is 'increased demand on your services' (Figure 24). The next 5 by weighted average cover increased costs of running premises, decreased funding from public sources, increased cost of equipment, supplies and hiring space, and decreased funding from private donations (Table 38). It is apparent that the top 6 impacts by weighted average are all linked to either increased costs or falling funding. These top 5 impacts cannot be seen as separate issues – they are fundamentally conjoined and the cumulative effect of them is significant. Those who chose the 'other' option also cited difficulty in finding corporate sponsorship and less donations, increased fuel costs and increase in volunteers seeking expenses.

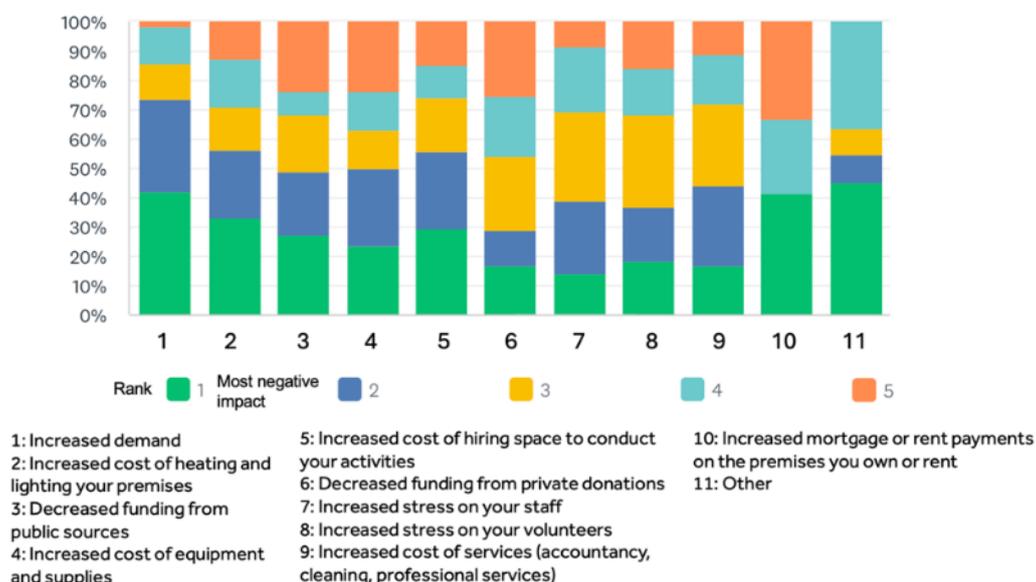


Figure 24: Ranked negative impacts of the cost-of-living crisis.

Negative impacts from the cost-of-living crisis	Those who identified each negative impact in their top 5	
	Count (n=118)	Weighted average*
Increased demand on your services	57	2.00
Increased cost of heating and lighting your premises	48	2.52
Decreased funding from public sources	51	2.78
Increased cost of equipment and supplies	46	2.87
Increased cost of hiring space to conduct your activities	27	2.56
Decreased funding from private donations	48	3.25
Increased stress on your staff	49	2.86
Increased stress on your volunteers	38	2.92
Increased cost of services you purchase (e.g. accountancy, cleaning, professional services)	36	2.78
Increased mortgage or rent payments on the properties you own or rent	12	3.08
Other	11	2.36

Table 38: Negative impacts of the Cost-of-Living Crisis. *Weighted average: the lower the score, the higher each option was ranked as a barrier.

Positive Impacts

This question had 6 options and respondents were asked to rank their top 3 (Figure 25). Because of the small number of choices, the weighted average (Table 39) is less useful than looking at how many respondents ranked each choice first. 67.21% ranked 'More opportunities to reach more people with your work' first in their top 3, 44.44% ranked 'other' first in their top 3, and 38.46% ranked 'more opportunities to collaborate' first in their top 3.

It should be noted the numbers who chose 'other' are small (9 respondents) and 6 of these said there was no positive impact. The other 3 cited: i) early signs of a change in Somerset Council's attitude towards partnership and innovation; ii) the opportunity for the sector to think differently about how it works and is funded, with a greater sense of freedom and autonomy; and iii) increased faith that God will meet their needs.

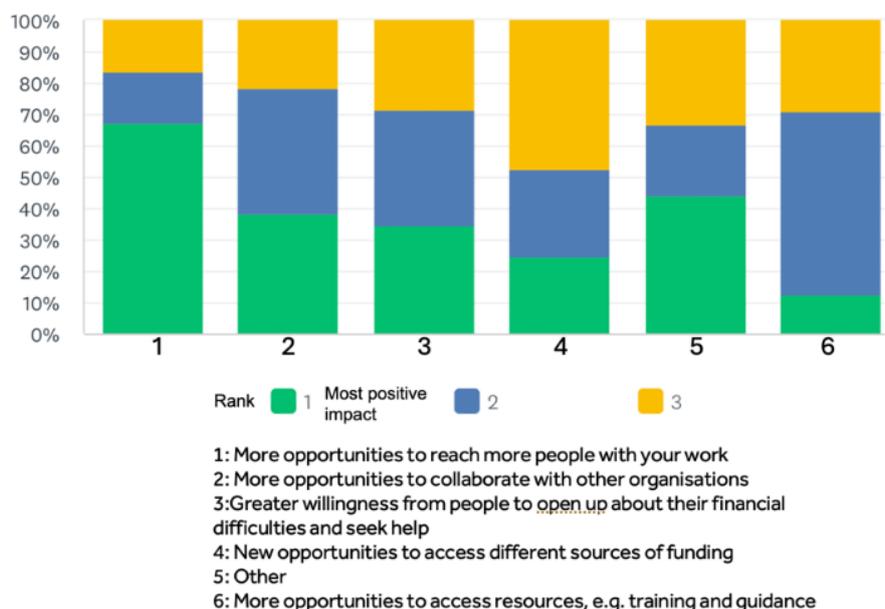


Figure 25: Ranked positive impacts of the cost-of-living crisis.

Positive impacts from the cost-of-living crisis	Those who identified each negative impact in their top 3	
	Count (n=104)	Weighted average*
More opportunities to reach more people with your work	61	1.49
More opportunities to collaborate with other organisations	65	1.83
Greatest willingness from people to open up about their financial difficulties and seek help	9	1.89
New opportunities to access different sources of funding	46	1.93
Other	24	2.17
More opportunities to access resources, e.g. training and guidance	36	2.22

Table 39: Positive impacts of the Cost-of-Living Crisis. *Weighted average: the lower the score, the higher each option was ranked as a barrier.

Proudest Achievements

Campaigning and Advocacy

Campaigning for facilities, protecting community and natural assets, and communicating impact are all important parts of the work that VCFSEs in Somerset.

"Starting a campaign to set up a community hub in Crewkerne."

"Protecting special places from bad development with help from the local community."

"Produced our first Social Impact report which demonstrates the value to customers, beneficiaries and wider Somerset society."

"Getting the 54 bus service to go to Yeovilton, saving 54 and 58 bus and saving Yeovil bus station and its waiting room."

"Raising awareness in our local area and supporting children not in education."

"We have been able to save a local youth club from closing down permanently by taking it on as one of our projects. Our proudest moment was welcoming 45 children back in for the first time to enjoy their beloved club."

Building and Restoring Community Assets

The preservation, restoration and building of community assets is an important part of the work that VCSFES in Somerset do.

"Undertaking refurbishment of seven flats to improve the standard of accommodation for our elderly residents who are in need."

"Bringing our market garden area into production and starting to provide nutrient dense vegetables to the local community."

"We have maintained a thriving town which is attractive to visit and has a thriving High St of independent shops. Our community is very supportive and includes an impressive culture of volunteering."

"Improvements to the library and continues service."

"Donating our 1,000th device in 2024."

"Stage Zero & Riverlands work at Holnicote (Exmoor River restoration)."

"Overcoming the flood at Queen Camel."

"Cemetery clearing project."

"Working with a school in Glastonbury repairing playground equipment and making wellie boot stands for the children."

"Completing the installation of new play equipment, sensory garden and basketball area."

"Building community projects."

"Refurb Doulling church sign."

"Retirement and public display of James I mace granted to the town in 1623."

"Re-entry of our steam engine Pectin into active service following completion of its overhaul."

"Taking on the repurposing of the Old Railway Station in Axbridge."

The Future

Plans for Growth

Most VCFSEs in Somerset plan to grow their service (Figure 26). Asked whether they had plans to increase or decrease the type or level of service or activity they provide, 50.79% VCFSEs answered that they planned to increase slightly and 18.25% that they planned to increase greatly. 27.27% planned to stay the same and only 3.17% said it would decrease in any way.

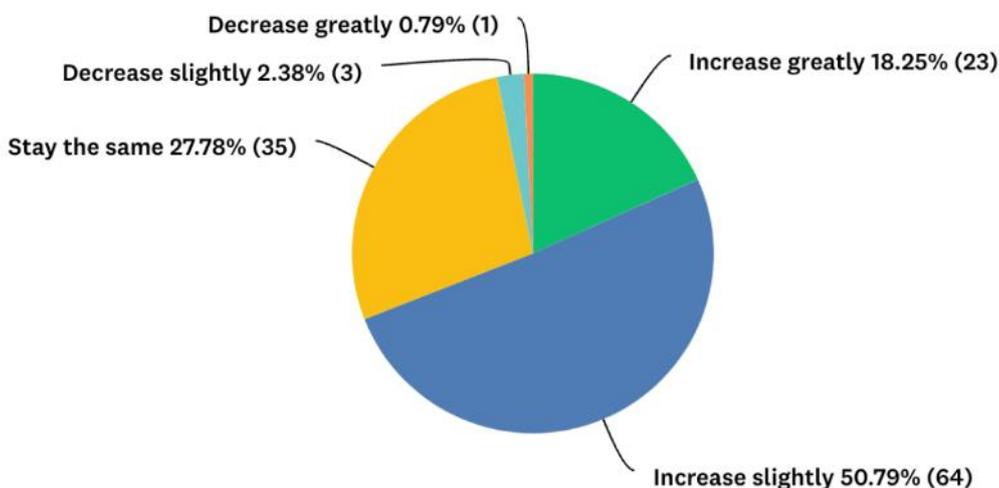


Figure 26: Plans for growth.

Asked what had informed the decision to increase services, the qualitative responses overwhelmingly refer to increased demand. First, there are simply more people in need. Second, demand has increased because a group, organisation or charity in the same field is foundering or has closed. A further important reason for planning to increase service is that the organisation is moving into new activities, pursuing new ideas or a new direction, often supported by the energy and enthusiasm of volunteers or a push on strategic direction from the board. Some VCSFCs want to raise awareness of the issue that

"But just in terms of, you know, our succession plans for our board, for our staff, having progression routes for staff, to be able to - for the health of the organization - know that it is secure and safe for the future [...] If I step aside, everything is in place for someone else to come in and for the organization not to fall over."

they support whilst others are responding to a public survey or consultation in their area identifying new demands. Finally, for some, new sources of funding or the need to increase funding by offering new services are drivers in increasing their activity. Fewer respondents offered reasons for decreasing their services, reflecting the fact that very few plan to do so. Amongst these reasons were dropping the things that aren't working, and lack of volunteers and funding for staff.

All organisations are expecting to increase their services/activities in the next 12 months. The most significant expected increases in provision are amongst the medium organisations of which 72.9% expect an increase and 62.5% micro organisations (Table 40).

Size of Organisation	Increase greatly	Increase slightly	Stay the same	Decrease slightly	Decrease greatly
Major	0	1	1	1	0
Large	1	5	4	0	0
Medium	10	17	9	1	0
Small (50k-100k)	4	6	3	0	0
Small (10k-50K)	6	14	6	0	0
Micro	1	19	11	1	1

Table 40: Do you have plans to increase or decrease the type or level of service/activities you provide next year?

Optimism

Without a doubt, the VCFSE sector’s superpower is its optimism. Less than 9% of respondents reported feeling very pessimistic or somewhat pessimistic about the future (Figure 27). Conversely, 68.5% felt either very optimistic or somewhat optimistic whilst 22.83% felt about the same as last year.

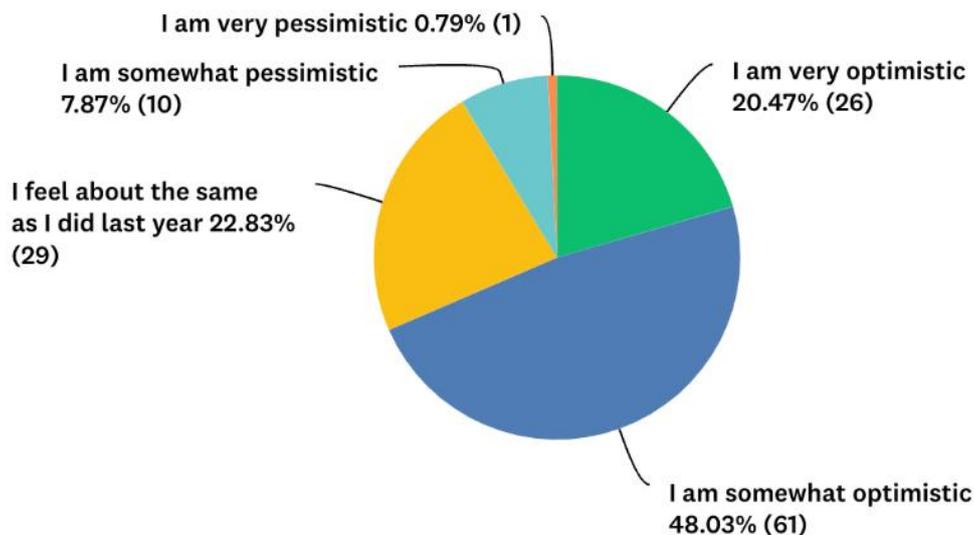


Figure 27: Optimism about the future.

Further reflecting on the positive outlook amongst organisations, we can see from Table 41 how the sector has a high level of optimism going forward. In the cross tabulation below, 68% of organisations are somewhat optimistic or very optimistic. What is especially noticeable is that medium, small and micro organisation feel highly optimistic. There is clearly strong hope for the future of the sector but, as discussed above, it still needs support.

Size of Organisation	Very optimistic	Somewhat optimistic	Same as last year	Somewhat pessimistic	Very pessimistic
Major	1	2	0	0	0
Large	0	7	1	1	0
Medium	4	24	7	2	0
Small (50k-100k)	4	4	5	0	0
Small (10k-50K)	8	10	6	4	0
Micro	9	12	10	3	1

Table 41: Size by income against levels of optimism.

As one interviewee asserted:

The third sector has got a phenomenally powerful role to play in delivering public services in all the classic ways [...] because we are agile with fleet of foot, we're responsive, grassroots. As a sector, wide and deep and long and tall. It's such a mixed economy from pure voluntary as in no paid work, no paid staff whatsoever, doing amazing things in communities place based or demographically based organisations – Interviewee 28.

Challenges in the next 12 months

Of the many challenges that VCFSEs might face over the next 12 months, funding and sustainability is clearly ranked highest by weighted average, meaning that most respondents ranked it 1 or 2 (Figure 28). Building capacity, leadership, financial management and managing premises were the next most highly ranked challenges by weighted average (Table 42).



Figure 28: Ranked challenges in the next 12 months.

Challenges over the next 12 months	Those who identified each challenge in their top 5	
	Count (n+124)	Weighted Average*
Funding and sustainability	71	1.69
Building capacity within your organisation	58	2.24
Leadership	11	2.45
Financial management	9	2.67
Managing premises	16	2.75
Recruiting trustees/board members/management committee with necessary skills	45	2.8
Recruiting paid staff for the organisation	17	2.82
Recruiting volunteers to provide back-office support	22	2.95
Recruiting volunteers to provide front line services	45	2.96
Time constraints	40	3.05

Influencing public policy	16	3.06
Measuring impact and demonstrating social value	33	3.15
Working with funding providers - whether statutory bodies or private funding organisations	27	3.3
Getting 'left behind' by new technology	3	3.33
Managing people/HR (including staff skills/professional development)	15	3.4
Organisational development and management	25	3.44
Environmental impact/footprint	2	3.5
Business planning	12	3.67
Partnership working/collaborating	18	3.67
Technological/digital change	9	3.67
Equality and diversity within your organisation	12	3.75
Data security	2	4
Artificial Intelligence	5	4.4
Other	3	5

Table 42: Challenges next 12 months *Weighted average: the lower the score, the higher each option was ranked as a benefit.

Asked to describe how ready they feel to face the challenges of the next 12 month, respondents largely felt as well-prepared as they could be (65.08%) with 4.76% feeling extremely well prepared and 18.25% feeling somewhat well prepared (Figure 29). This suggests that high levels of optimism are matched by a strong sense of realism. Just 2.38% felt very underprepared and 9.52% felt somewhat underprepared.

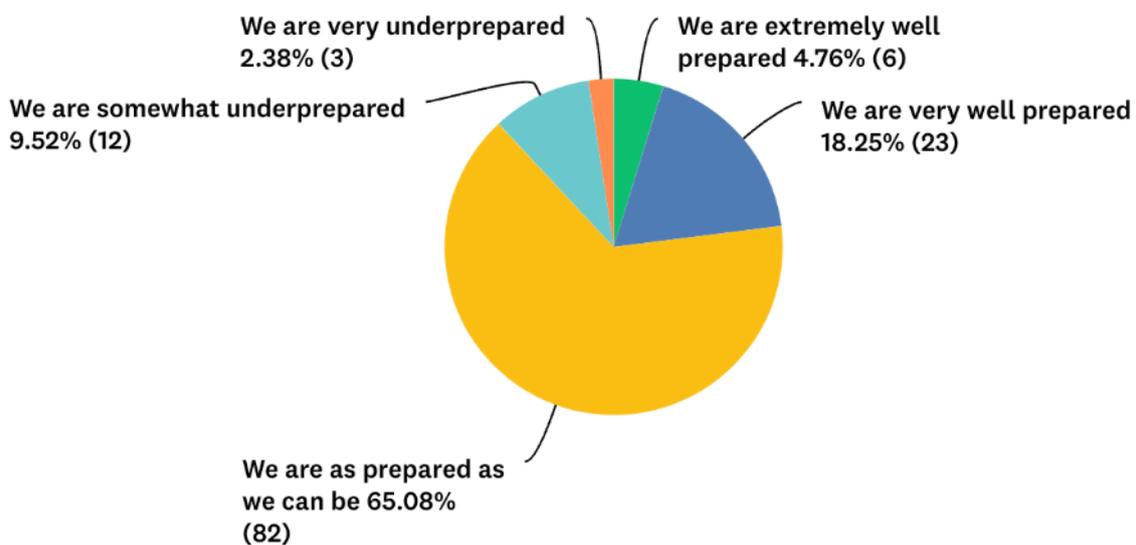


Figure 29: Levels of preparedness.

The qualitative response to this question indicates that preparedness depends on financial stability, but challenges are often overcome by strong volunteer and staff-bases. Support from trustees also helps. A history of dealing with issues – particularly in collaboration – helps. Negative points focus on initial plans, e.g. funding management, not being relevant to the current conditions.

Medium, small (both 50-100K and 10-50K), and micro organisations predominately feel they are only 'as prepared as they can be' (Table 43), but hugely positively, a small number show signs of being extremely prepared and well prepared going forward. Somewhat negatively however, no large, major or medium organisation feels extremely well prepared.

Size of Organisation	Extremely well prepared	Well prepared	Prepared as can be	Somewhat underprepared	Very underprepared
Major	0	1	1	1	0
Large	0	4	4	1	0
Medium	0	6	28	2	1
Small (50k-100k)	1	2	9	0	1
Small (10k-50K)	3	3	15	7	0
Micro	2	5	24	1	1

Table 43: Income by size against preparedness.

Proudest Achievements

Organising Events for the Community

VCFSEs in Somerset builds community togetherness and cohesion through the many events that they organise every year.

"Increase in concerts performed."

"Organising a range of community events to bring our community together. We organised 19 events in the last 12 months (most of these were free or donation based)."

"Last year's carnival season."

"Delivering the 10th anniversary Children's Festival in July for half the normal budget (funding has been so hard to find) and families saying it was the best yet."

"Being able to provide a diverse range of performances and facilities to a wide range of the local community (individuals and organisations)."

"Generally seeing people smile and particularly enjoying a visit to an animal sanctuary."

"60 Veterans for Christmas Lunch."

"Christmas Dinner served at 6pm for 65 guests and around 10 helpers, followed by entertainment and community singing."

"Serving a full Christmas lunch to 150 people in 2 sittings."

"Performing as a group live on BBC Radio Somerset."

"Running our most successful Home Farm Festival to date through our trading company."

"A Heritage project that brought over 500 people in one weekend to an exhibition and reconnected elders back together and back to the building which has springboarded an elders' cafe to keep the connection going and will be expanding into an intergenerational project."

"Most recently we have delivered a host of successful holiday clubs supporting children from low-income families and those on free school meals. These events offer a safe space, access to food, physical activities to support wellbeing and enrichment activities that provide opportunities to learn and grow. These sessions have been accessed by young people within our local catchment area and as far afield as Williton and Taunton and are regularly attended by around 12-15 young people each day. As part of the sessions young people get access to a youth worker and 1:2:1 conversations, as well as opportunities to develop their life skills through cooking, visits from other groups, learning traditional skills like fire lighting and first aid. Through the programme young people have the opportunity to develop their soft skills and social experiences. This provision provides access to nutritional food, ability to learn new skills, make new friends, and respite from issues they may face at home."

Conclusion

The evolving public service landscape in England, driven by systemic shocks and financial cuts, has amplified structural inequalities and health issues, necessitating localism and diversified service providers. While place-based delivery aims to enhance collaboration, the integration of the diverse VCFSE sector, especially micro and small organisations, remains complex. In Somerset, strong public sector-VCFSE relationships are essential for community resilience and achieving Council Plan ambitions, though the benefits and challenges of third-sector engagement are unevenly distributed.

VCFSEs in Somerset, estimated at around 2,400 groups, vary widely in size and financial stability, with over half operational for more than 15 years. 'Mapping the sector', i.e. the locations and types of service delivery of the VCSFE should be a goal for Spark Somerset. Having a comprehensive understanding of the extent of the sector is problematic, especially when considering its dynamic formation (forming and folding of organisations) and the underreporting of activities within smaller- and micro-organisations and the role of informal volunteering in communities. However, this should not be a deterrent to undertaking this important task as it will help to identify future strategy.

The sector faces increased demands, with most organisations planning to expand services. However, increased demand for services has been accompanied by funding challenges, with competition for resources and difficulties in securing funding. Achieving full cost recovery remains a struggle, especially for medium and large organisations providing contracted services. The top financial risks include short-term funding, increased premises costs, and demand exceeding capacity. Although resources are limited, optimism remains high. VCFSEs demonstrate resilience through strong volunteer bases and collaborative efforts. Effective partnerships and strategic funding are crucial for sustaining and enhancing service delivery to meet the evolving needs of communities.

How can the sector respond to these pressures? In our other report, *Collaboration between the VCFSE and Public Sector in Somerset: challenge or opportunity?*, we set out a series of recommendations for developing the relationship between members of the ICS in Somerset. Some of these are worth repeating here, with additional points arising from the State of the Sector survey:

1. **We need true co-production and delivery that uses the following questions as a touchstone: 'what is the ask of VCSFEs?' and 'what is the offer to VCSFEs?'**. We need to ensure that the VCFSE voice is not only strongly represented but listened to, respected, and acted upon. Diversity of the sector is a key strength which must be embraced. Central to this recommendation is a well-supported Local Infrastructure Organisation.
2. **Commissioning processes must be inclusive and accessible to all VCFSEs who wish to participate.** Alternative commissioning options, such as Collaborative Commissioning, Community Commissioning and Single Point of Commissioning, prioritise local knowledge and community connections as key criteria in the commissioning process. It also ensures that the unique strengths of smaller, local organisations are valued and harnessed.
3. **We need to build meaningful, equal relationships, where shared understanding and 'parity of esteem' becomes the norm.** We need to build this into our induction for new staff, training and internal communications.
5. **Develop a long-term and flexible funding model for VCFSEs** which recognises the diversity of the sector and reduces the barriers to collaboration that exist where VCFSEs have to compete for funding. This may require extensive coordination on behalf of the sector. The benefits could be manifold. For example, securing longer term funding for the sector will help to de-risk organisations and provide a stimulus for new social innovations from the ground up.

6. **Support the eco-system of small and micro VCFSEs.** A review of training needs, access to resources, guidance, and the role of peer support or mentorship will help target initiatives. Where VCFSEs are having people signposted to them, appropriate support and funding should be provided to ensure that the VCFSE has the capacity to help.
7. **Recognise and mobilise the untapped potential amongst VCSFES.** The survey figures for 2024 speak to the depth of experience in organisations that have been operational for over 10 years which could be mobilised to support the younger organisations with the insight and experience of more mature organisations. This could take the form of peer support, training or mentoring between organisations that have experience of the sector. Where discussed in the interviews, mentoring has been largely a success and therefore raises further questions of what are the shared lessons, insights and knowledge that might be worth disseminating more widely, especially to those who have less experience.
8. **Reduce the administrative burden.** What are the possibilities sharing staff, admin or governance, especially in light of the finding that the numbers of trustees are falling, along with the workforce overall? Further, interview evidence called for greater help from Spark Somerset to offer key business services especially to smaller organisations.

To finish on a positive note, despite the many pressures, there is a strong drive towards service growth, with many VCFSEs planning to expand. Optimism remains high across the sector and especially in the micro and small organisations, with 68.5% of respondents feeling positive about the future. However, ensuring financial stability and sustainability will require strategic partnerships and improved funding conditions to meet the sector's evolving needs.

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