Time to shine
Time to take stock
Time to shape our future

Key survey findings

Acknowledgements

- Project partners

- Representatives from the tangata whenua, community and voluntary sector in Aotearoa New Zealand who participated in this survey

- Funding from Foundation North, via Te Pūaha o te Ako—a multi-disciplinary social impact knowledge and practice hub based in the Centre for Social Impact

Data collection

Online survey

Conducted May-June 2020

Distributed nationally via networks of project partners

Mix of open-ended and closed-response questions

1424 were eligible to participate (i.e. able to speak on behalf of their organisation)

Highlighting issues, rather than representative of the sector

In which region do you operate?

Region	Percentage
All of Aotearoa New Zealand	23%
All of North Island	0.6%
All of South Island	0.6%
Northland	5%
Auckland	12%
Waikato	7%
Bay of Plenty	9%
Gisborne	1.6%
Hawke's Bay	3.8%
Taranaki	4.3%
Manawatu-Whanganui	4.0%
Wellington	8%
Tasman-Nelson-Marlborough	2.5%
West Coast	0.9%
Canterbury	10%
Otago	13%
Southland	15%

N=1199
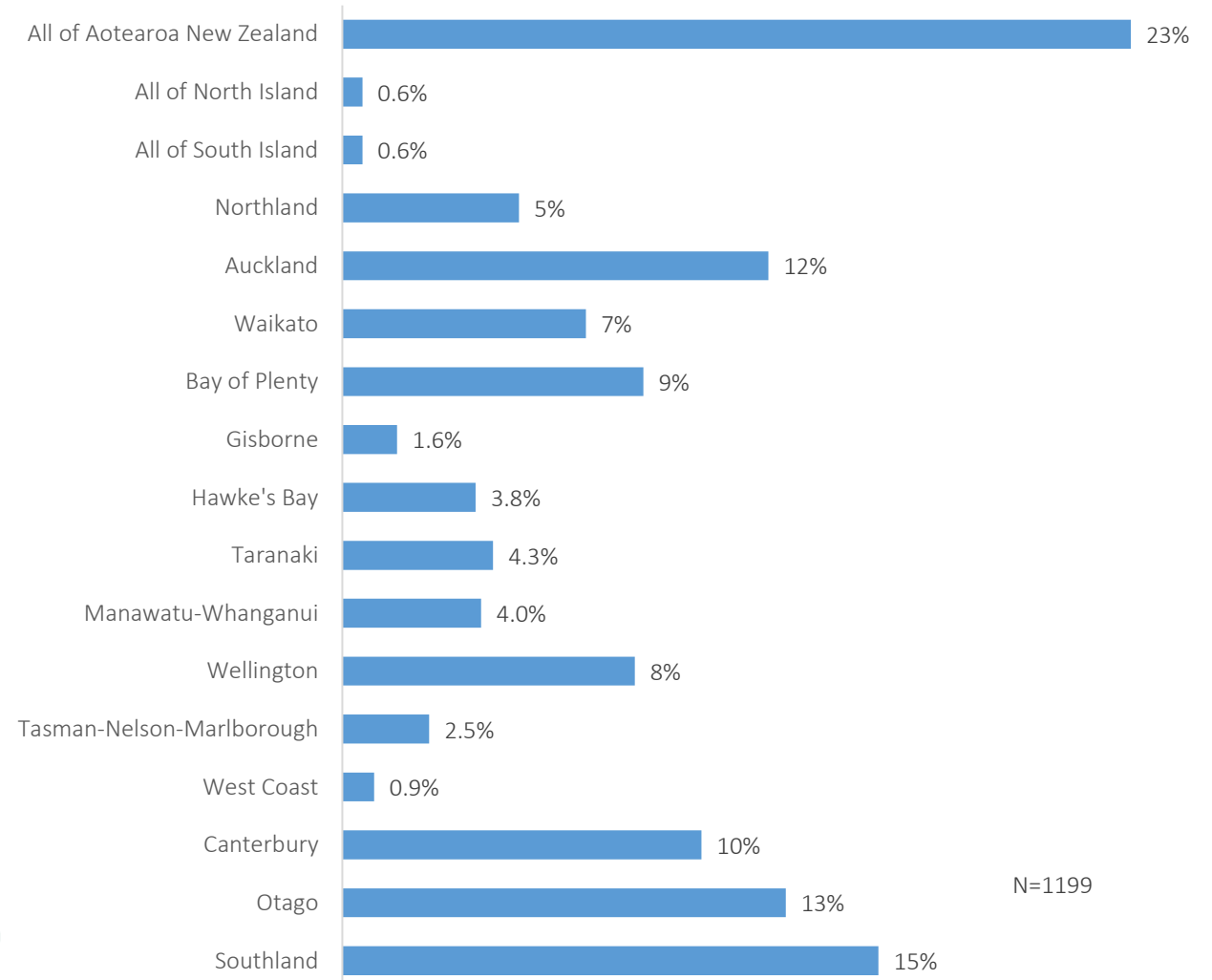
Shining a light - overview

Widespread impact of COVID-19 on tangata whenua, community and voluntary organisations throughout lockdown and beyond

COVID-19 challenged funding access, staff continuity and service delivery

Nevertheless, the sector rallied, adapted, moved with agility and in many cases did more with less

Survey participants highlighted some clear strengths and service adaptability within and across organisations:

- unlocking a previously unknown capacity for flexibility and innovation

- being responsive, nimble, adaptive and resourceful

- an appreciation of technology as a powerful tool

- the extent to which COVID-19 revealed the strengths and capabilities of teams and organisations

- the immense value of working together and the huge appetite for collaboration within the not-for-profit sector.

Taking stock

Funding impacts

A substantial majority (74%) experienced or were expecting a reduction in funding as a result of COVID-19
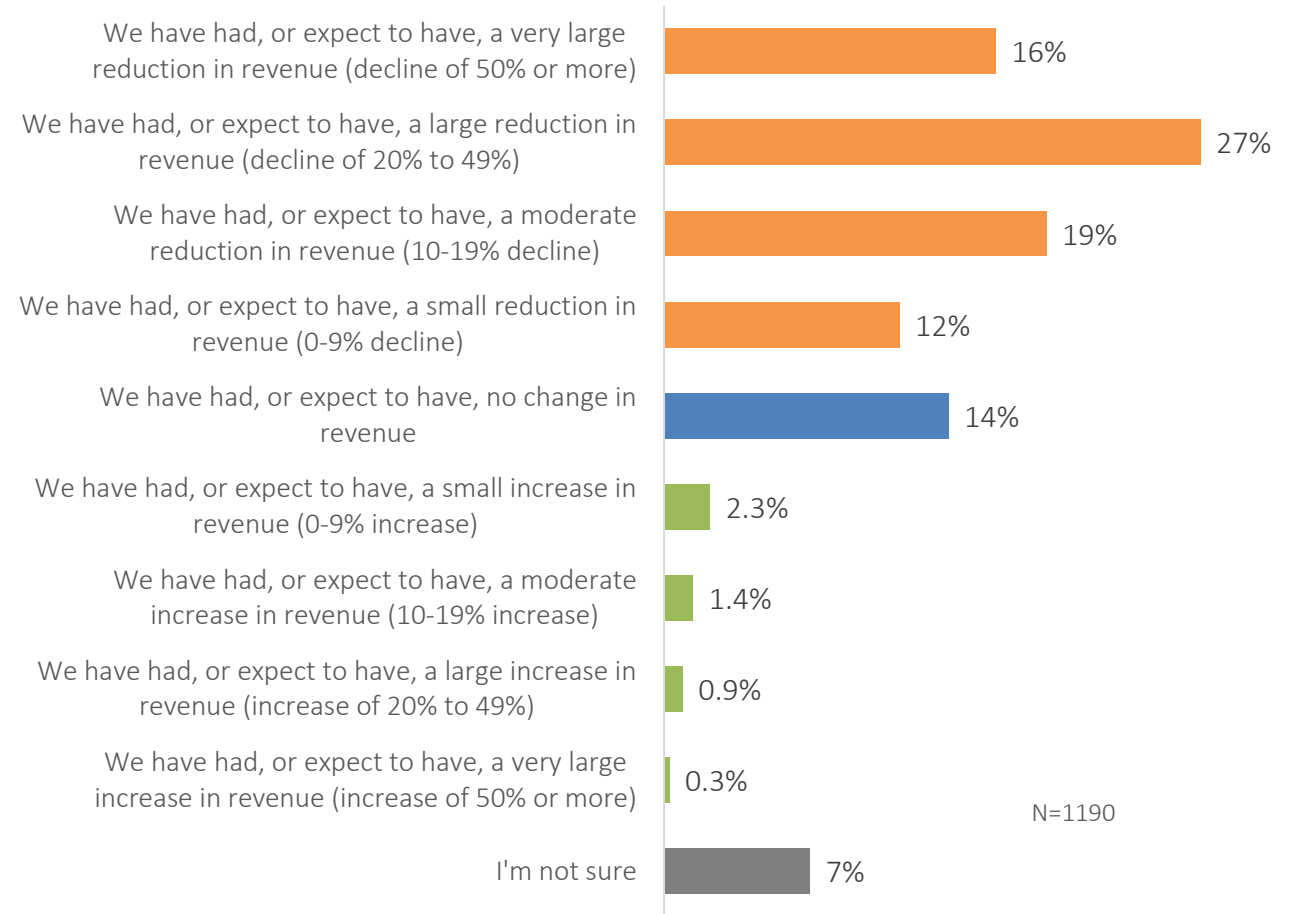
14% forecast no change

Only 5% experienced or expected an increase in funding.

When asked to specify the loss in monetary terms, those who were able to do so (622 responses) indicated losses in the range of less than $1000 to $9 million, with a median decrease of $35,000.

The small number of participants (38) who could specify funding increases were in the range of $5000 to $5 million, with a median increase of $65,000

Please tell us how COVID-19 has affected your funding or revenue for the 12 months ahead, compared to the previous 12 months?

Response	Percentage
We have had, or expect to have, a very large reduction in revenue (decline of 50% or more)	16%
We have had, or expect to have, a large reduction in revenue (decline of 20% to 49%)	27%
We have had, or expect to have, a moderate reduction in revenue (10-19% decline)	19%
We have had, or expect to have, a small reduction in revenue (0-9% decline)	12%
We have had, or expect to have, no change in revenue	14%
We have had, or expect to have, a small increase in revenue (0-9% increase)	2.3%
We have had, or expect to have, a moderate increase in revenue (10-19% increase)	1.4%
We have had, or expect to have, a large increase in revenue (increase of 20% to 49%)	0.9%
We have had, or expect to have, a very large increase in revenue (increase of 50% or more)	0.3%
I'm not sure	7%

N=1190

Funds to weather the storm

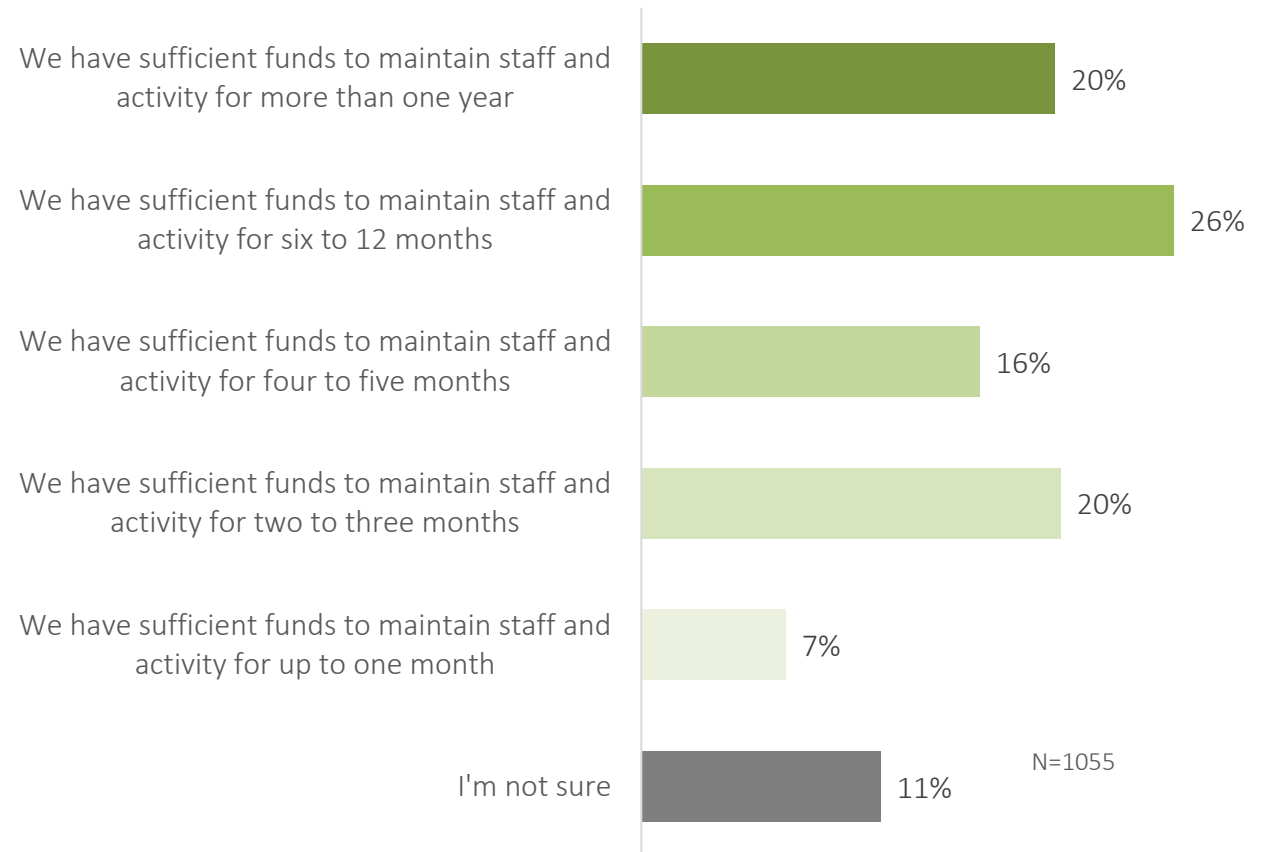Most participating organisations have funds or operational funding in reserve to enable some continuity

For some their position is clearly precarious without ongoing funding

One-fifth (20%) had sufficient funds to maintain staff and activity for two to three months.

A further 15% had sufficient funds to enable staff and activity for four to five months

Just under half (46%) have sufficient funds for six months or more

Please indicate from the list below how much funding your organisation has in reserve to maintain staff and activity

Category	Percentage
We have sufficient funds to maintain staff and activity for more than one year	20%
We have sufficient funds to maintain staff and activity for six to 12 months	26%
We have sufficient funds to maintain staff and activity for four to five months	16%
We have sufficient funds to maintain staff and activity for two to three months	20%
We have sufficient funds to maintain staff and activity for up to one month	7%
I'm not sure	11%

N=1055

Service delivery impacts

Service level reductions

- Social distancing restrictions

- Restrictions on events or large gatherings

- Closure or halt to operation during lockdown

- Reduced income

Service level increases

- Increased community need

"No gathering at all, no visiting, no personal counselling, cannot offer any assistance to the elderly."

"We run a conference as one of our primary service delivery offers. The COVID uncertainty meant it was impossible to plan for the conference (even though it is in November) so we have cancelled it."

"We closed for seven weeks and now are working at one third capacity."

"Less $ means we had to let go staff, therefore don't have the staff to do the same level of work."

"We went from helping 20 families to 80."
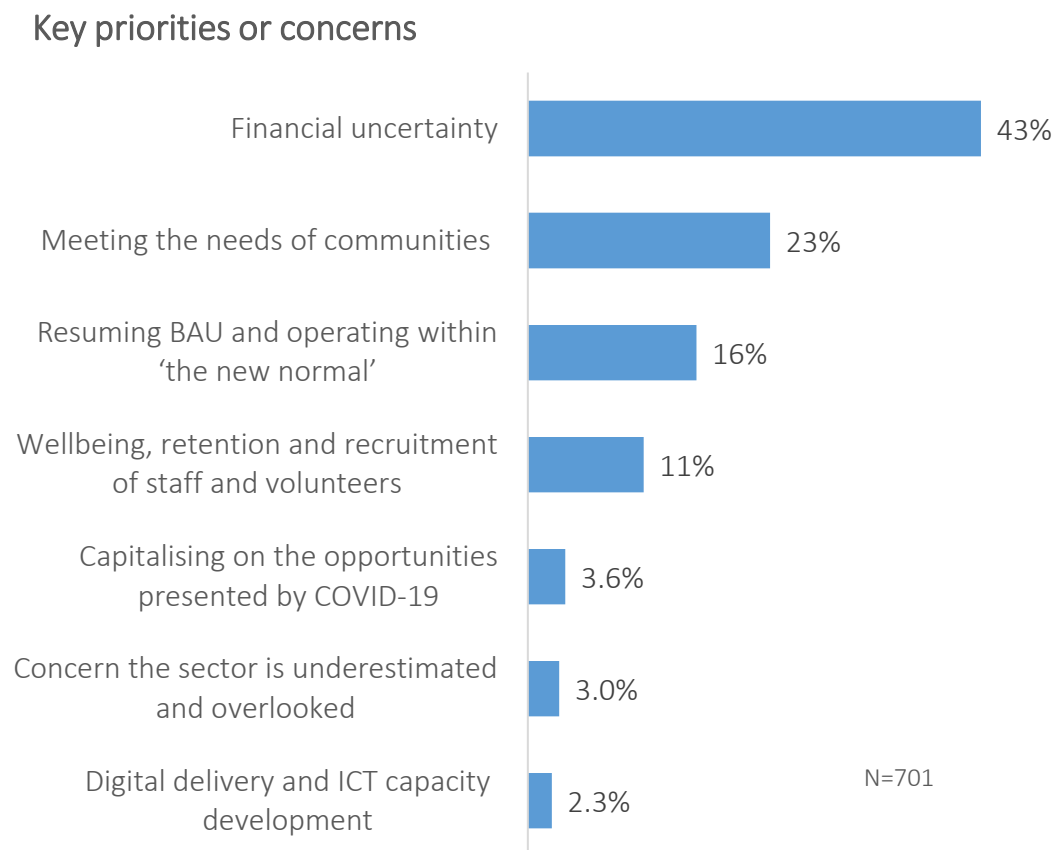
Challenges and opportunities

Key challenges

- Ongoing challenge of meeting the needs of people that the sector supports (66%)

- Ensuring revenue to maintain viability (58%)

- Providing support to staff and volunteers (51%)

- Developing new service offerings (41%)

- Meeting the levels of work required (39%)

Emerging opportunities

- Stronger sense of community and common values (47%)

- New ways of connecting with people (46%)

- Working closer with other organisations (40%)

- Greater appreciation for organisations' work (38%)

- Improved working options (34%)

- Ability to move quickly (30%)

Key priorities and concerns

Key priorities or concerns

Financial uncertainty	43%
Meeting the needs of communities	23%
Resuming BAU and operating within 'the new normal'	16%
Wellbeing, retention and recruitment of staff and volunteers	11%
Capitalising on the opportunities presented by COVID-19	3.6%
Concern the sector is underestimated and overlooked	3.0%
Digital delivery and ICT capacity development	2.3%

N=701

"We were already running on fumes and many, many volunteer hours and now our funders are struggling."

"We have never worked so hard with so little. Challenging but hopefully with good outcomes."

"Have no idea how busy we will get—stressful just waiting …"

"Maintaining momentum, taking the "best" of lock down to see how we can be leaner and smarter."

"Ongoing funding provision, mandate and support for communities and agencies to be strategically part of local-level responses in recovery phase."

Taking action

Adapting to COVID-19

Many participating organisations were rapidly innovating and adapting delivery in response to COVID-19
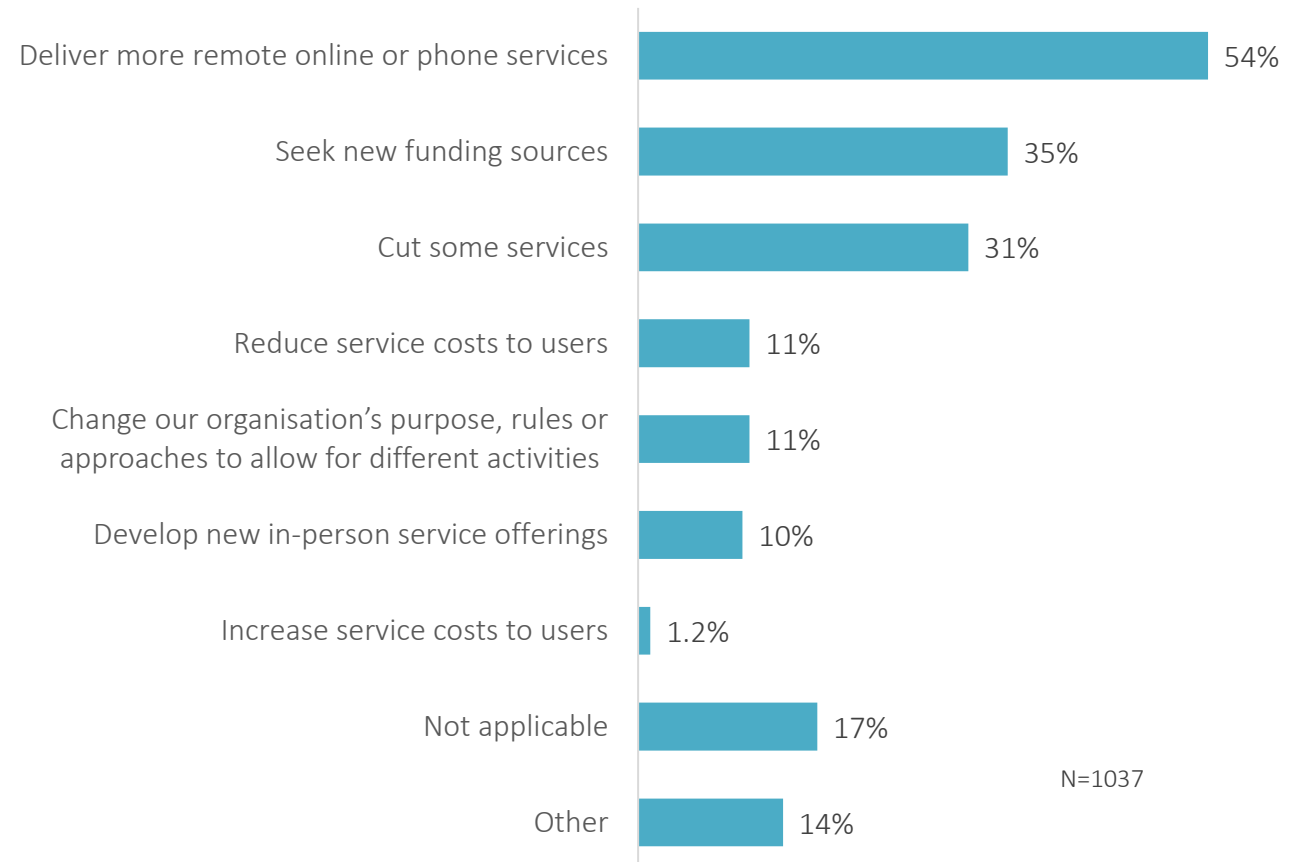
- A clear shift to remote and online services (54%), and seeking new funding sources (35%)

- One-third had to cut some services (31%)

Some notable shifts in staffing and volunteering:

- Reductions in volunteer support (14%)

- Reductions in staff wages and salaries (12%)

- Reductions in staff numbers (9%)

- Increases in volunteer support (12%)

- Increases in staff (5%)

Please indicate the steps your organisation has taken in response to COVID-19 for your service delivery

Category	Percentage
Deliver more remote online or phone services	54%
Seek new funding sources	35%
Cut some services	31%
Reduce service costs to users	11%
Change our organisation's purpose, rules or approaches to allow for different activities	11%
Develop new in-person service offerings	10%
Increase service costs to users	1.2%
Not applicable	17%
Other	14%

N=1037

New ways of working

- Online communication software

- Online service delivery

- Remote working for staff

- Ongoing flexibility for staff

- Social media/phone engagement

- Exchanging resources/developing partnerships

- Changing physical delivery of services

"We've used Zoom a lot for staff meetings, board meetings...We also ran our AGM via Zoom and the added benefit was that people from all over the country could attend, not just those in the city where it is normally held."

"We have been teaching online, we have strategised to expand our outreach program through a charitable trust."

"High trust, self-management model has worked brilliantly as a team."

"Engaging with community leaders to share the response to the increased needs of our community."

Seeking funding

Many accessed the Wage Subsidy Scheme (35%); and other government COVID-related funding (18%)
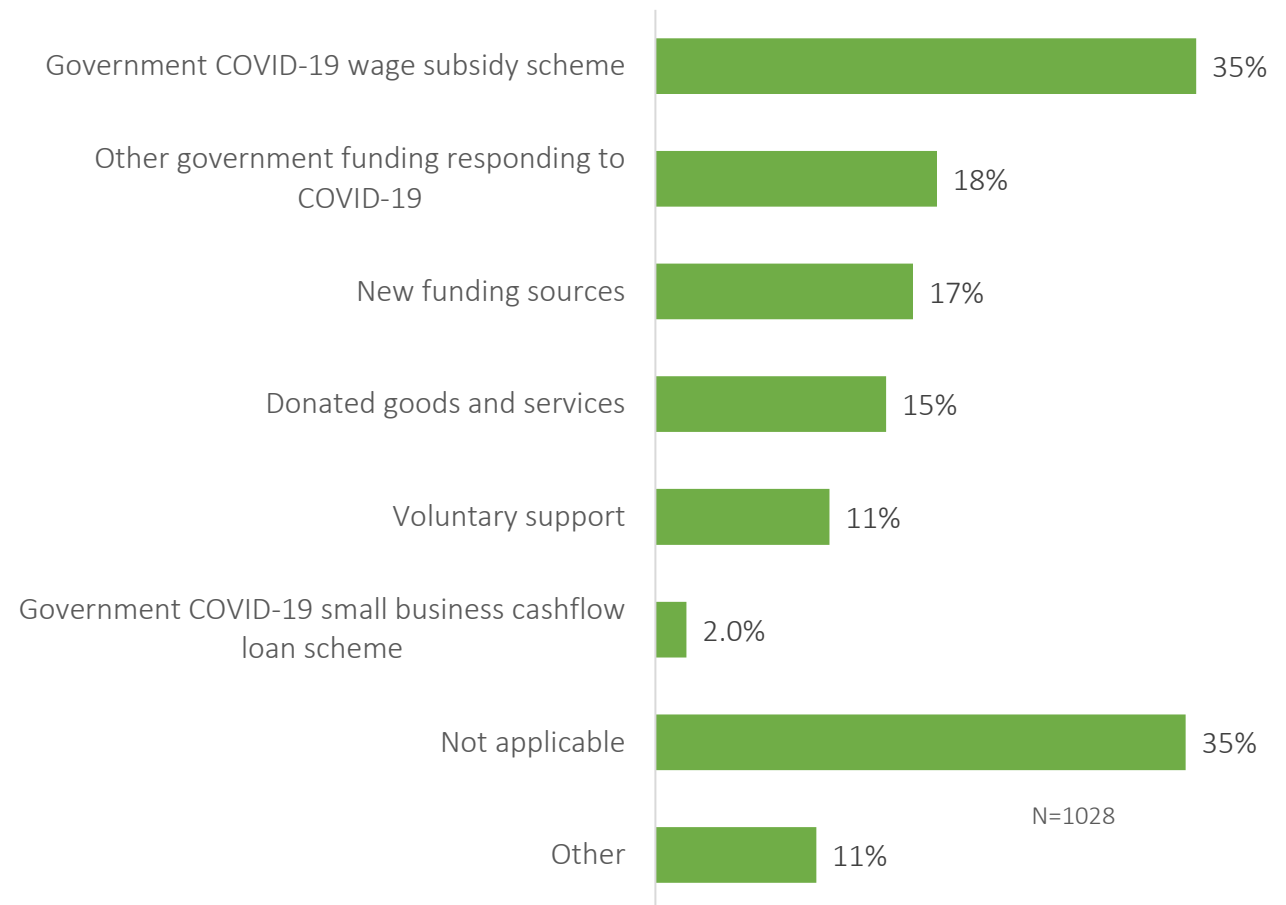
17% accessed new funding sources

15% accessed donated goods and services and 11% engaged voluntary support

Public fundraising prominent in 'other' (e.g. donations obtained via community or emergency appeals, online campaigns, cash donations from patrons or general fundraising)

Note 35% indicated not applicable

What support have you accessed for your organisation as a result of COVID-19?

Government COVID-19 wage subsidy scheme — 35%

Other government funding responding to COVID-19 — 18%

New funding sources — 17%

Donated goods and services — 15%

Voluntary support — 11%

Government COVID-19 small business cashflow loan scheme — 2.0%

Not applicable — 35%

N=1028

Other — 11%

Shaping the future
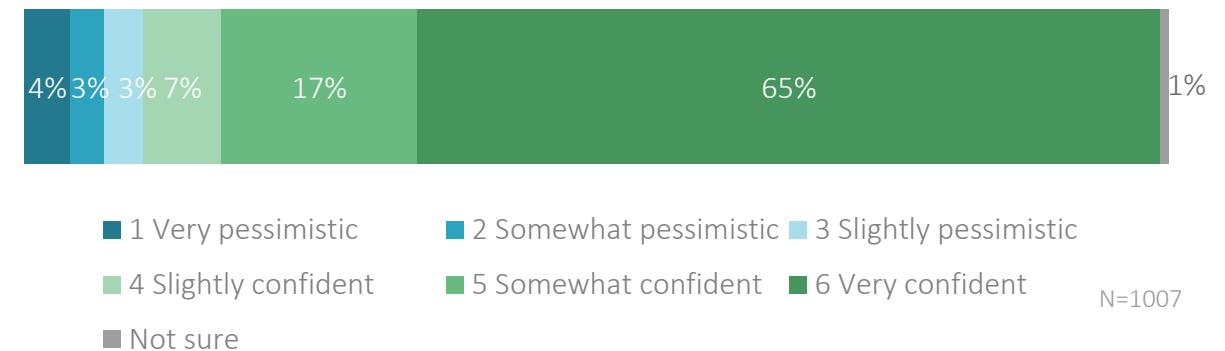
Future outlooks and support needed

Participants were generally optimistic about the stability of their organisations

- Two-thirds (65%) were very confident (rating 6), and a further 17% rated 5

- Only 4% rated very pessimistic (rating 1) and a further 3% gave a rating of 2

Five most needed areas of support were:

- Fundraising (57%)

- Marketing and communications (45%)

- Digital technology (40%)

- Innovation and strategic advice (36%)

- Grant writing (27%)

- More volunteers (26%).

How pessimistic or optimistic are you that your organisation will be still operating in six months' time?

| 4% | 3% | 3% | 7% | 17% | 65% | 1% |

- 1 Very pessimistic
- 2 Somewhat pessimistic
- 3 Slightly pessimistic
- 4 Slightly confident
- 5 Somewhat confident
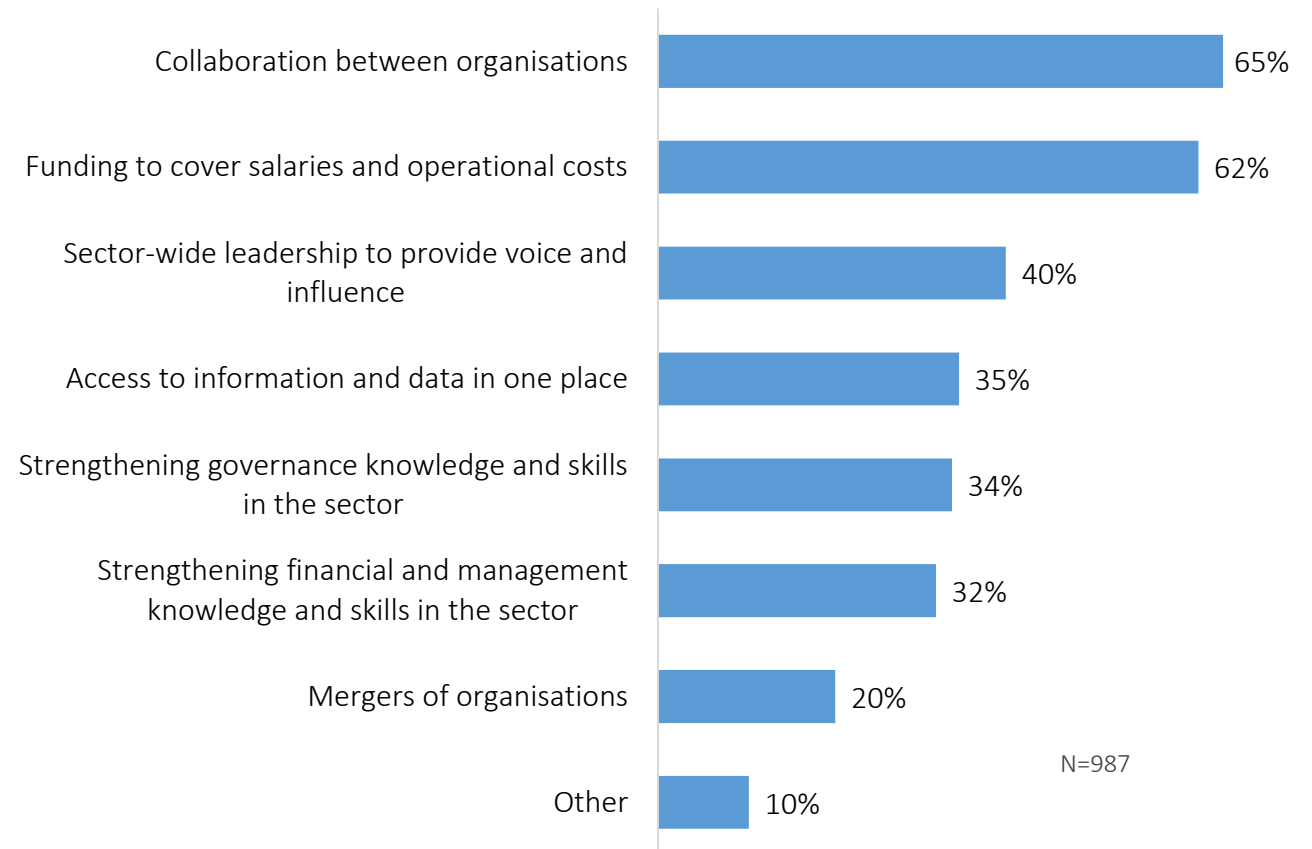- 6 Very confident
- Not sure

N=1007

Strengthening the sector
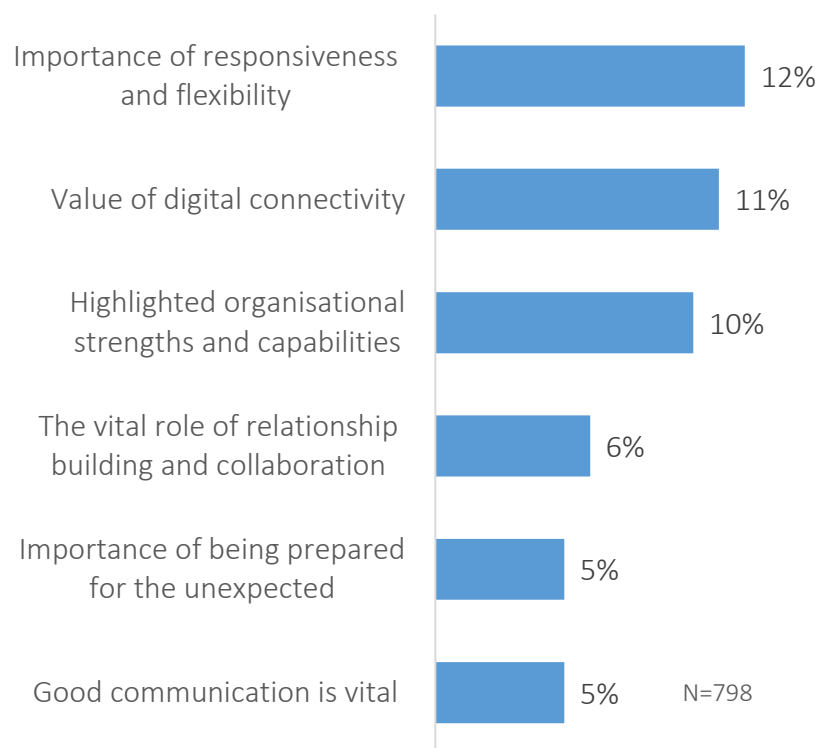
Key areas identified included

- Collaboration between organisations (65%)

- Funding to cover salaries and operational costs (62%)

- Sector-wide leadership to provide a voice and influence (40%)

Other responses included government recognition and engagement, collaboration and consolidation, engagement/partnership with Māori, and skill and capacity development

What sorts of changes do you think are needed to strengthen the community and voluntary sector in the future?

Collaboration between organisations	65%
Funding to cover salaries and operational costs	62%
Sector-wide leadership to provide voice and influence	40%
Access to information and data in one place	35%
Strengthening governance knowledge and skills in the sector	34%
Strengthening financial and management knowledge and skills in the sector	32%
Mergers of organisations	20%
Other	10%

N=987

Lessons of COVID-19

- Importance of responsiveness and flexibility — 12%
- Value of digital connectivity — 11%
- Highlighted organisational strengths and capabilities — 10%
- The vital role of relationship building and collaboration — 6%
- Importance of being prepared for the unexpected — 5%
- Good communication is vital — 5% N=798

"[We learnt] that we are an adaptable and nimble organisation that is able to respond quickly to change."

"Online service delivery and keeping connected is collaborative and cost-effective, and people have enjoyed it. This will become an increasing proportion of our service delivery."

"With added efficiency of virtual communications—have had more opportunity to get "off the tools" and work on bigger picture."

"I am so proud of our team staff and board for their commitment to our core values. We were tested and we were true."

"Cooperate with other organisations. A silver lining of COVID-19 has been the immense increase in networking and collaboration and we need to continue this momentum."

Sustaining sector voices

- Survey data to be made open source on Community Research platform, where permission given (96%)

- Large proportion willing to be surveyed again, should opportunity arise (78%)

Conclusions

- While many organisations took a hit during lockdown, they mobilised, moved with agility, and in some cases did, and are still doing more with less.

- Effective leadership and fast action by government was matched by people and communities across Aotearoa.

- The strong sense of togetherness, digital connectivity and revitalised sense of value and purpose resulted in a renewed sense of vibrancy.

- Collective effort across the sector, government and philanthropy is now needed to:

  - revive funding sources and replenish reserves

  - reshape the volunteer base

  - build technological and social infrastructure and skills,

  - Rethink how services are delivered, supported and funded.