

ComVoices

Advancing the community sector



STATE OF THE SECTOR 2022

Community and Voluntary Sector Survey Report

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It gets hard, but there's a need out there and no one else to do it.

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COMVOICES

ComVoices is a network of 23 peak bodies working nationally and regionally across the community and voluntary sector. We amplify the voices of Aotearoa's community sector so that collectively we are heard by decision-makers. Our vision is Confident, Connected Communities served by a valued and collaborative Community Sector.

We provide a collaborative platform so that members of ComVoices can encourage the development of a policy and regulatory environment that is supportive of sector organisations and their communities and can provide effective responses to the New Zealand Government on emerging issues.

Comvoices is proud to have partnered with one of its peak-body members Community Networks Aotearoa (C.N.A) to undertake the Snapshot Survey in 2022.

COMMUNITY NETWORKS AOTEAROA

C.N.A is the umbrella organisation for local, regional and national Community Networks in Aotearoa/New Zealand. C.N.A. provides a collective voice for communities. C.N.A. is a communicator, a National organisation, a partner, connector and a catalyst for change.

C.N.A. is an organisation that is a supportive and informational organisation dedicated to helping it's members that reaches across the motu and down into communities via it's networks.

INTRODUCTION

From its outset in 2014, this Survey has been conducted to raise the visibility of our community and voluntary sector, particularly among our nation's decision-makers. By monitoring this sector's well-being, the intention is to promote the value of this sector, with all its diverse variety of organisations and all they add to Aotearoa New Zealand's economic and social wellbeing.

Members of the community and voluntary sector focus on the wellbeing of those in need, however we believe not enough focus is given to the wellbeing of the community and voluntary sector. This survey report aims to rectify this, with telling results both accumulative and individual, as we analyse statistics while spotlighting comments volunteered by sector participants.

It's worth pointing out what the community and voluntary sector contributes to New Zealand's economy. The sector has roughly 115,000 organisations – mostly non-profit entities or institutions (NPIs) with about 150,000 paid staff and well over one million volunteers. All those volunteers work close to 160 million hours a year – unpaid labour worth about \$4billion in savings to the entities deploying them. Those savings are shared with the nation when those entities are contracted by government, which a sizeable proportion of NPIs are. Economically speaking, according to Statistics New Zealand's most recent report of the non-profit institutions satellite account (NPISA 2018) NPIs' contribution to New Zealand's GDP was \$8.1billion, or 2.8%.

Over the years, this Snapshot Survey of the community and voluntary sector has highlighted the burden as it's experienced by its members, of the lack of visibility to the work we do despite the benefits all New Zealand gains from this mahi. Community and voluntary groups hold firm to the principle that not just the most fit or the most competitive deserve to prosper – everyone deserves a dignified life with purpose.

Over the course of the global pandemic and its aftershocks of staff and supply shortages, the emergence of a cost of living crisis for those we serve, not to mention the prolonged housing crisis, the sector has experienced heightened demand for services over the last two years, and greater complexity of need within the communities we serve. This has not been matched with any growth in volunteer numbers and so the number of paid employees in the sector has instead increased 10% since 2013, according to the NPISA. Without equivalent increases in donations and grants (including government grants) adaptations like these cut increasingly into sector members' financial position.

Every two years Comvoices launches this survey to monitor the wellbeing of the sector that does so much to support the wellbeing of all New Zealanders in need. 2022's State of the Sector Survey is the 5th biennial snapshot of the community and voluntary sector in New Zealand. Celebrating a decade worth of survey data from this sector this year, its findings reinforce those of previous surveys and other recent reports on the community and voluntary sector.



Non-profit organisations carried New Zealand through the pandemic. Government's financial response was ad hoc and chaotic. Available funds/contracts were one off and short term. The impacts of COVID-19 will have a long tail and NPIs are bearing the weight of this.

EXECUTIVE SUMMARY

Post-pandemic, the sector delivering community wellbeing has wellbeing issues of its own.

This report provides a snapshot every two years of how the Community and Voluntary Sector is faring, because it's important we properly care for and represent the organisations caring for and representing New Zealand's communities. Through the disasters of recent times, communities have seen how connected their local economies are to the global economy. No longer just a proportion of us, but all New Zealanders have now experienced firsthand in the last two years how affordable food, housing, power supplies, health and education can be impacted and disrupted by global phenomena, some originating on the other side of our planet.

For ten years, the respondents to this survey – Leaders of community and voluntary organisations – have spoken of their own financial vulnerability and the pressure to grow their provision and delivery to meet their communities' growing service demands, despite static funding levels coupled with what seems constant revisions to funders' contract specifications and standards for reporting.

The good news in 2022 was found in a decrease in respondents' fear of speaking out critically about government policy. Advocacy to government agencies and decisionmakers is a vital role this Sector plays, both on behalf of individuals being directly served as clients and on behalf of populations, when evidence shows their conditions are affected inequitably by policy settings. Unless you can afford a lawyer, most of us have nowhere else to go for help advocating our interests, but the organisations in our community providing free advice, peer support and counselling, or other free social services. Measuring the Sector's capability to speak out critically is vital when we know government is one of the main sources of the Sector's funding, so this good news in 2022 is tempered by the fact that respondents also reported increased dependence on this funding source.

"If Government agencies recognised how chronically and historically underfunded we are for the work we do we would be fine. I am SICK of hearing what great work we do - but no one steps up to fund us for that great work in a fair way. My staff have not had a pay rise for two years. That is just not OK"

Some governments may seem kinder than others, but in fact it is through the persistent advocacy and collaboration among community organisations on behalf of those they serve, that enough support and information is given to government to create equitable social policy settings for our communities. The capability to advocate often rests on organisations' financial viability and in 2022 there is evidence more in the Sector are faring better financially than previous years, while less are facing closure or struggling. The question remains, have we lost those that faced closure in Surveys past? Does this skew our survey results towards a picture of better off? The qualitative data for our 2022 Survey paints quite a different picture, of a Sector on the brink.

“there is so much chaos now with focus on short term, many staff/contract manager changes, uncertainty of contract futures due to system changes”

Covid transformed workforce capacity in the Sector, like it did for many others. What’s unique is that the Community and Voluntary Sector relies so heavily on volunteers, and this workforce was thrust into flux by lockdowns, vaccination mandates, and genuine fear of catching the infection. While some respondents related how they’d been overwhelmed by volunteers, more said the opposite, that they’d lost many and couldn’t get more. Compounded with this was the pay equity claims for Community nurses, Social Workers and Caregivers impacting the Sector that coincided with New Zealand’s labour shortage. Reliance on government funding hamstrung some organisations’ capability to pay workforces what they’re worth, and retention and recruitment woes peppered the comments of 2022’s respondents.

With staff shortages and the flux in volunteers, too many respondents (60%) also said they were working beyond their organisational capacity, largely due to increasing demands for their services exceeding what they were funded to deliver. This imbalance has been reported by a growing proportion of respondents across all surveys over the 10 years: “Covid’s tail” lands on the back of the wicked housing crisis, with supply chain issues and public service disruptions pushing more whānau than ever into financial debt, mental anguish, conflict and harm. Respondents’ comments related how much it affected their workforces, to serve unending and increasingly complex need while understaffed, un- or underpaid and under-resourced.

“Increased complexities of needs & family issues, mental health support has very long waitlists & not enough services, increased demand on services & support but staff working harder & spread wider regions & roles.”

All of us should be alarmed by the vulnerable state of our Sector, now that Climate Change has morphed into Climate Catastrophe with increasing frequency, impacting any and every region of Aotearoa.



Ros Rice
CEO Community Networks Aotearoa



Dr. Prudence Stone
Chair Comvoices

METHODOLOGY

Since 2014 Comvoices have kept most of the questions consistent. Additional questions have been added on over time as collectively, the members of Comvoices have identified new emerging issues requiring attention. As a result newer questions will not have a complete dataset from the last decade of surveys.

As in previous surveys a snowball method of outreach was used to distribute the electronic questionnaire, starting with the mailing lists and social media of ComVoices and Community Networks Aotearoa, both national umbrella organisations. The snowball method was relied upon because Comvoices members are mostly umbrella organisations with capability of reaching further and deep into regional networks. This method was also cost-effective, but over time we have noted the need for greater investment in promotion of the survey, as response rates over time have declined. While in 2014 our sample size was 311 in 2023 it has dwindled to 87.

Much of the lowered response rate in 2022 can be explained by the timing of our survey in the field at the end of the year. Throughout 2022 members of our networks spoke repetitively of exhaustion and burn out among staff both at leadership and at ground levels. It is a big ask for many community organisations, already busy with the tasks of wrapping up the year, to complete our somewhat lengthy survey. Comvoices itself was financially challenged due to the network's commitment to policy weigh-ins throughout the year and the investigation of its commitments to Te Tiriti o Waitangi. These fiscal challenges were the reason for the late launch of the Survey in 2022, and without C.N.A's offer of partnership to conduct the survey, we may not have been able to keep it to its biennial schedule.

For the 2022 survey, a total of 42 questions are included, note that depending on responses to key questions, some responses may only include a percentage of these questions based on relevancy to the respondent.

Reponses were collected online from 21 November 2022 and 31 December of 2022. The survey consisted of five parts:

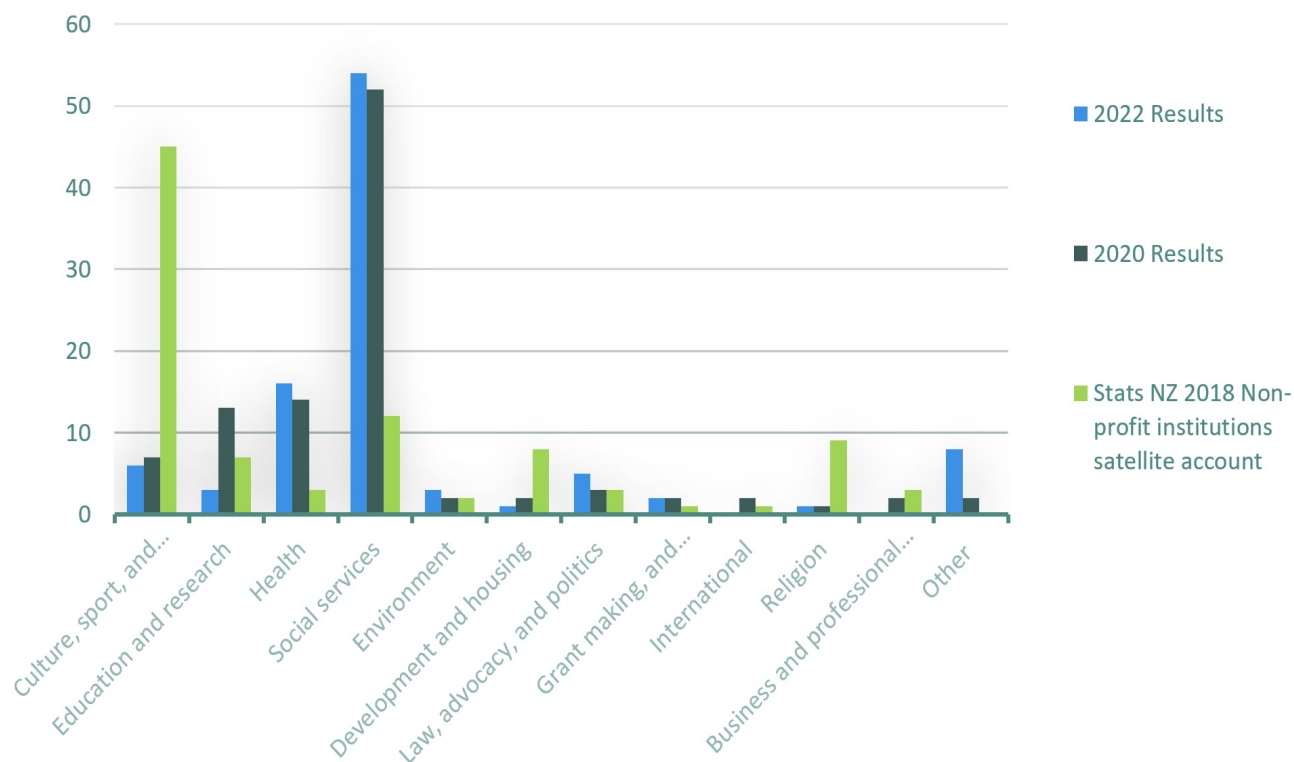
1. About your organisation
2. Service Delivery
3. Central and Local Government Contracting
4. Financial Viability
5. Final Comments

While most questions were multichoice, a small number of questions were open ended text inputs for specific numbers or comments. Additional to this was one ranking question, and one Likert scale question with several subsets.

RESPONDENT OVERVIEW

Our respondents reflect the diversity of the Community and Voluntary Sector

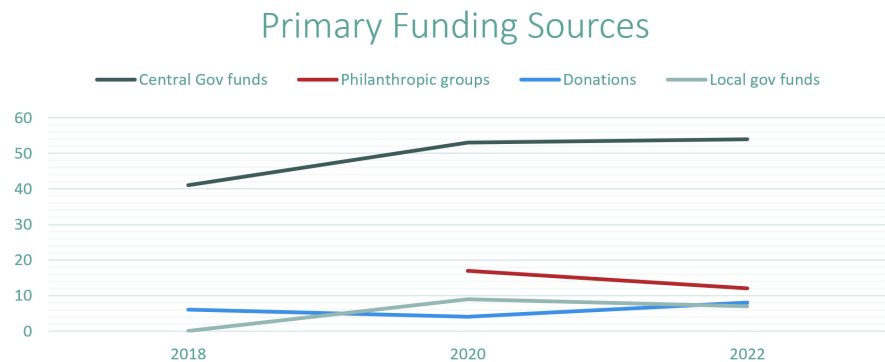
The method of outreach is through our network of members which means there is a great variety of respondents, showing the true diversity of groups and services in our Community and Voluntary sector. In 2022, just over half our respondents (54%) identify most with Social and Community Services. The next highest portion identified as Health (16%), followed by Arts, Culture, Sport, and Recreation (6%). But responses were received from educational entities, environmental organisations, community law, as well as one community housing provider and one religious organisation.



Central Govt now top funding source among respondents

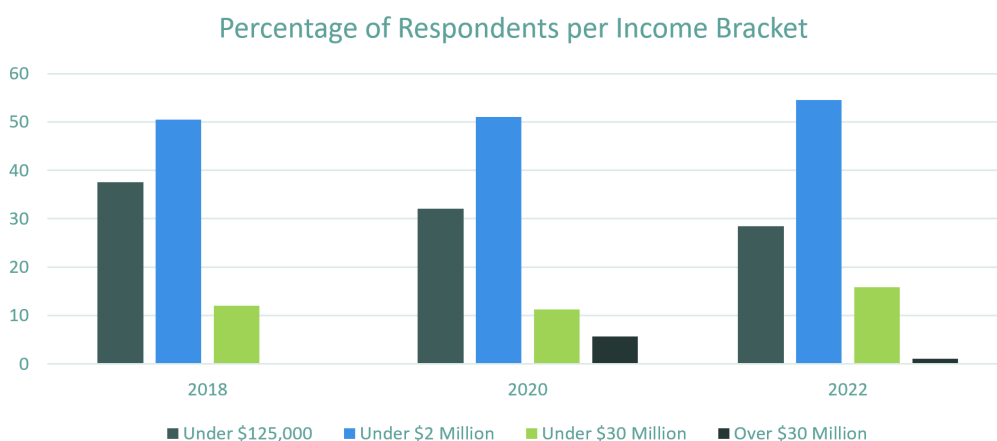
Respondents were asked to rank funding sources from a selection of options. Funding sources have largely stayed the same for organisations from 2018 onwards, although self-generated funds are no longer among the top four sources listed by participants. This is likely to be because organisations were prevented during Covid from holding events and conferences which are a usual source of self-generated income. As a result it appears the sector is gradually becoming more reliant upon central government funds, with local government funds also becoming an important source of funding.

The graph indicates the percentage of respondents indication of their primary funding source for that year. Note that Philanthropic Groups in red was only an option on the 2020 and 2022 surveys, hence the cropped trend line.



The income range of survey respondents

We originally asked a question about entity income range in 2018 and since then percentages reported for each income range above \$125,000 are slowly trending upwards. But this could reflect the fact that the survey's response rate has decreased, which may be due to a significant drop off of participants in the lowest income range, rather than any increase generally in entity income among the social sector.



Employee/Volunteer Breakdown

Survey participants have overwhelmingly higher proportions of volunteer staff compared to paid staff. Over the last 8 years there has been a steady trend upwards in the proportion of volunteers and consequent decreases in the proportions of paid staff and contractors.

This trend is alarming considering the number of participants noting a flux of volunteer movement created by the conditions of the pandemic, and a sense of helplessness regarding the difficulty to recruit paid staff. There was considerable variety of experience in finding and deploying volunteers within the comments made by respondents, some noting the pandemic as a factor influencing the way volunteers are deployed.

The survey results and comments reflect the changing landscape for work in Aotearoa. The flux in volunteer availability among participants only indicates a broader transformation of people's capability to work and contribute in the Community and Voluntary sector. More research is needed to reveal how much Covid 19 has transformed the labour and volunteer market in New Zealand.



Our staff are totally overworked to the point it is not sustainable. In 2023 we will be having a strategy day to work out what we say no to and how we intentionally curb our growth to look after our teams' mental health. It is a tough thing for our people to do as we are all here to make a difference yet cannot cover all the needs in our community.

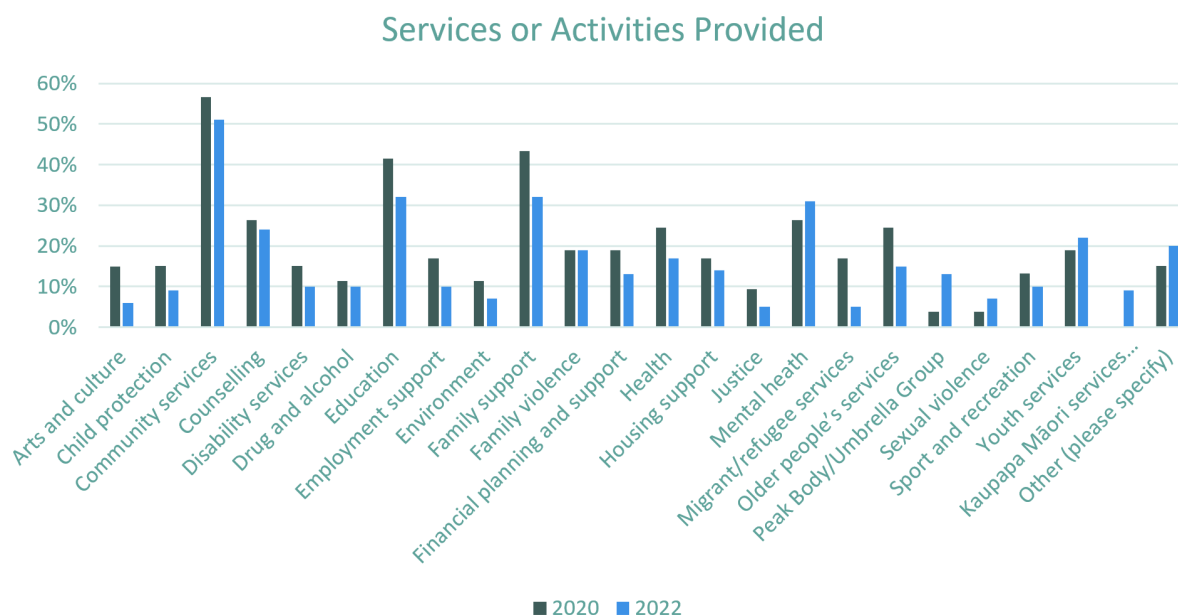
While some participants commented that paid staff were increasingly difficult to find and recruit, more also commented on the stress and unsustainability of workload for their existing staff. Participants noted that funding has not matched the demand for their services, pointing out that their inability to pay higher salaries has hamstrung their ability to attract more talent. Border closures during the pandemic impacted the sector greatly but pay inequity among the sector's highly gendered workforces in caregiving, social work and aged care nursing have played a part historically, due to the over-reliance on government funding for these services that have left the sector with very little power of their own to increase wages for their staff. Pay parity legislation, pay equity agreements for these large workforces and fast-tracking immigration for nurses were measures taken by government late last year to help rectify this strain put on employers, which we hope will create more consistency and more positive comments from respondents in future surveys.

With 45% of respondents reporting an increased number of staff and a further 44% stated that they have the same number of staff, it's clear that the gap in service coverage continues to grow year on year.

SERVICE DELIVERY

The provision of services has stayed consistent across all years of the survey

Results between 2020 and 2022 are strikingly similar, even with the addition of new categories on the 2022 survey.



Demand for services is beyond organisational capacity

Despite respondents' rising challenges in workforce capacity, the demand for services and programmes, alongside their usage, continues to rise with each survey, causing some evident distress and alarm among respondents. Respondents reported overwhelming increases (for one respondent 400%) in the demand for their services while also noting no increases or even cuts to their funding.

The pandemic's impact on clients left respondents acutely aware of a rising complexity of need, due to the compounding of factors such as food insecurity, spiralling debts and mental anguish hurting relationships within households. Many respondents noted that static funding levels left their staff and volunteers often working overtime or unpaid to maintain the same level of service, which was creating distress and exhaustion among teams throughout the workplace.

Just under three quarters of survey respondents report increased demand, with a further 18% reporting demand was 'about the same'. Despite the sizeable proportion having about the same demand in terms of numbers of clients, these respondents were clear that their caseloads had become very much more complex and their clients are struggling more. This was frequently explained by the cost of living increasing at a faster rate than wages and

benefits. Almost two thirds of the surveyed organisations report more people are using their service compared to two years ago.

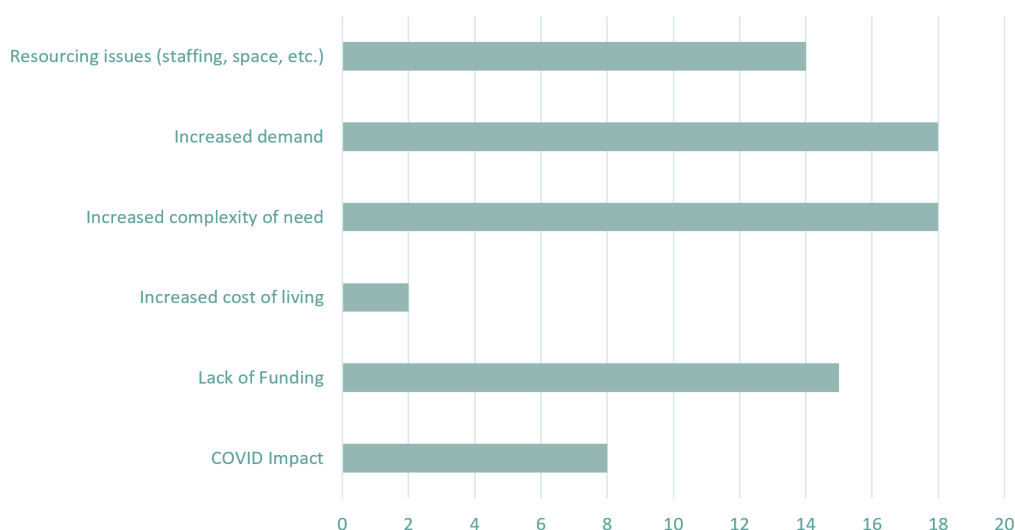
Among the comments from respondents was awareness that Covid was impacting more than just their own sector, and poor outcomes in other sectors, such as not enough mental health services, or low access to public health services in some regions, was impacting their own sector's general workload. Respondents also noted that waiting times have increased in general for public services, which exacerbated the complexity of each individual case but also increased the frequency of people presenting in crisis or with other pressing social issues such as housing inaffordability and food insecurity.

There were a significant amount of respondents that commented on this heightened complexity of need among clients, such as emerging mental health issues compounding evident poverty and family harm issues.

Clients appear to be generally presenting with more complex issues and at a later stage than they would in the past. One respondent noted that families that have usually worked in a space where they have a constant state of turmoil in their lives have now been pushed to the limits, with the increased cost of living having a huge impact.

“High and complex needs, combined with higher numbers of whanau seeking our support puts pressure on my team. Most of the whanau we are supporting now, are either involved with Oranga Tamariki or have been. Due to pay rates, 1 or 2 of the team will be looking for alternative mahi in the new year and recruitment is always difficult so I am concerned about our ability to operate during that time.”

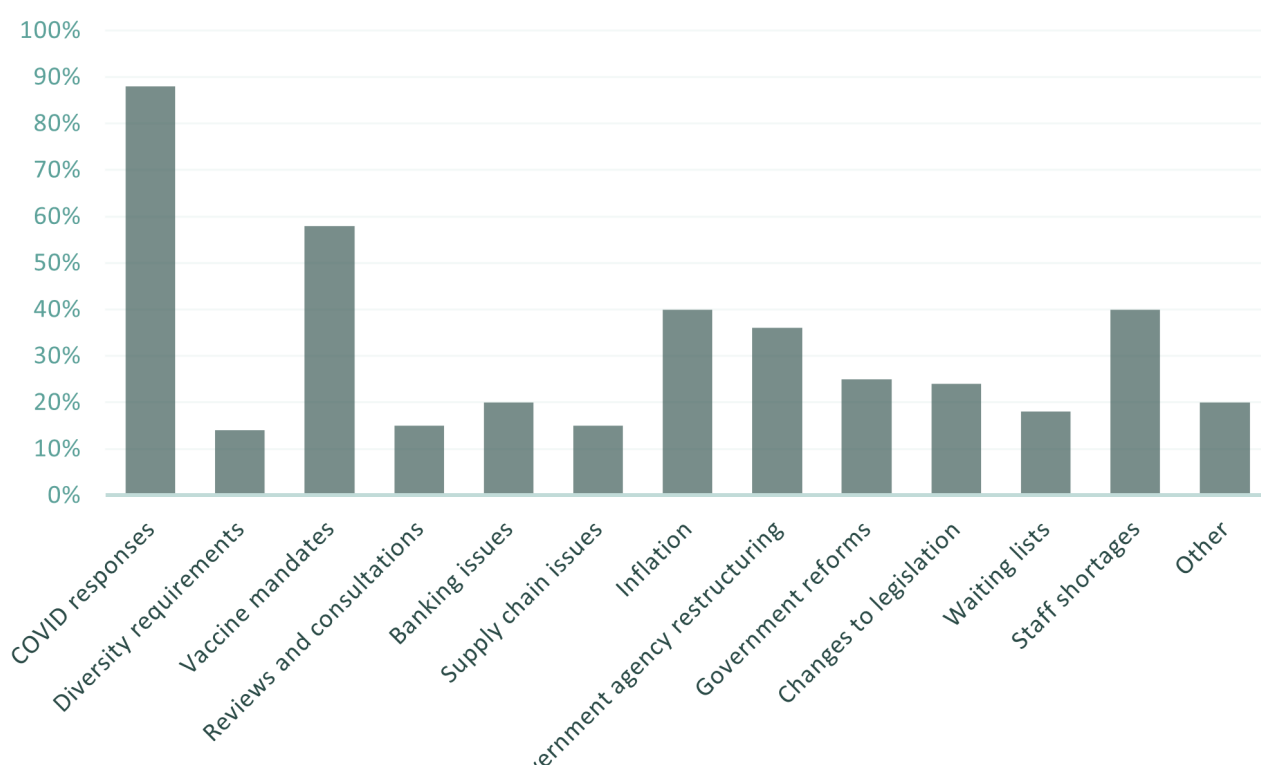
Respondents were given the opportunity to comment on their organisation's ability to deliver services. There were 58 responses in total that covered a wide array of issues, the graph below representing the topics mentioned most often in comments.



Covid and its tail central among emerging issues or challenges

Respondents were asked to identify emerging issues or challenges for their organisation over the last two years. As would be expected, COVID response was the most selected option (77), followed by Vaccine mandates (51), Inflation (35) and Staff shortages (35). All of the above options could be said to be part of Covid's "tail", ie further conditions following as aftermath of Covid's initial impact.

Comments from respondents were clear how their most selected option had flow-on effects far-reaching for their organisations, on budgets, human resources and the complexity of need among their clients.



What is consistent among respondents is that there is a huge demand for social cohesion and services that cannot be met. Difficulties recruiting staff to meet contract requirements was one factor consistently spoken of, but so too the increased demand from clients.

Respondents expressed their stress as employers and managers, with much empathy for the stress evident among their staff. Funding was repeatedly identified as inadequate to meet the demand, with flow-on impacts for both their clients' complexity of need and for staff recruitment and retention.

Sector sees opportunity in partnerships and collaboration.

Respondents were asked to identify what opportunities were there for their organisation over the last two years. The front runner among respondents was 'Partnerships and collaborations' (69%), followed by 'Increased community involvement' and participation by people with lived experience' (57%).

Interestingly 'Te Tiriti o Waitangi responsiveness' (38%) was third most chosen among respondents, and 'Increased diversity' (32%) the fourth. Despite the challenges of Covid it would appear the sector is committed to greater Tiriti agency, seeing value in partnerships: enhanced community engagement; addressing gaps in representation among its staff and leadership.



Exodus of staff (younger in particular) once borders opened. Hiring staff in an NGO environment/high competition, we can't match the salaries.

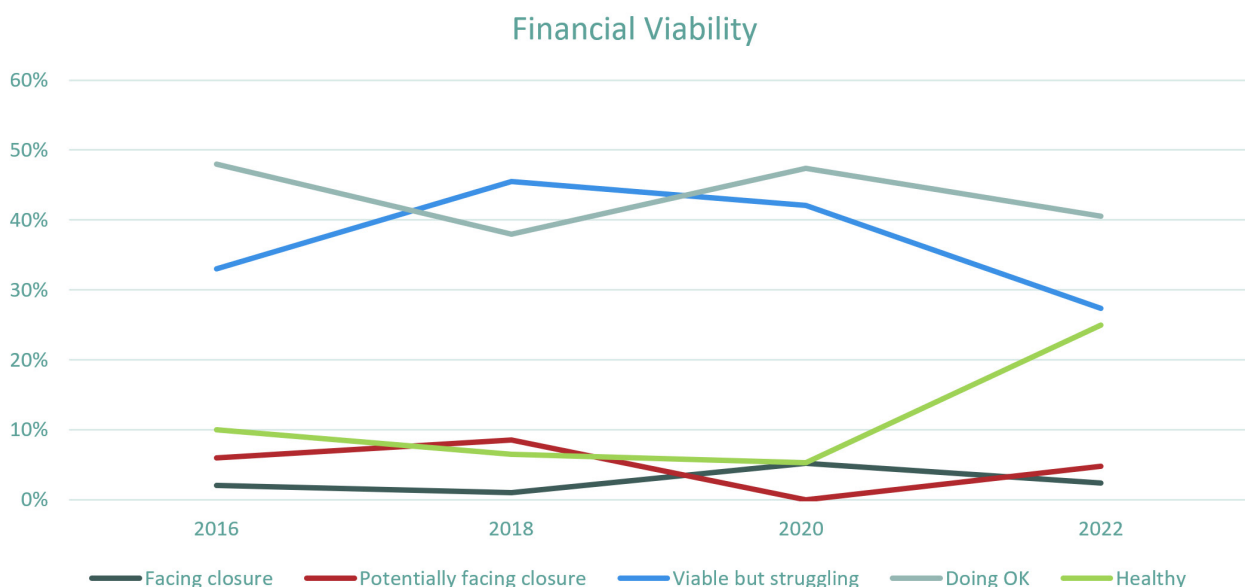
FINANCIAL VIABILITY

Only around two thirds 'Healthy' or 'Doing OK'.

When asked to compare their current financial status over the last 2-6 years, it was an almost even split across all respondents between Better off (39%), About the same (30%), and Worse off (29%). This is positive despite so many changes to government contracting noted by respondents in 2020. There has been a slight decrease in respondents across the ten years of survey results that say they are potentially facing closure or facing closure, and more notable decrease in the proportion who are viable but struggling. Conversely, there's been a sizeable increase in the proportion of respondents that say they are financially healthy.

It's important to reflect that 2022's survey size is smaller than previous years and some of the drop in responses would come from those entities that faced closure in previous years. It would figure then that proportions recalibrate toward better off among the entities still responding to our survey. This survey captures the voices of those entities as they face closure, their loss often due to government discontinuing funds. It should be particularly disparaging when among respondents facing closure we see one identifying as a "35 year old violence prevention charity" and the cause long term "government underinvestment" despite the launch by this government of a family and sexual violence prevention strategy.

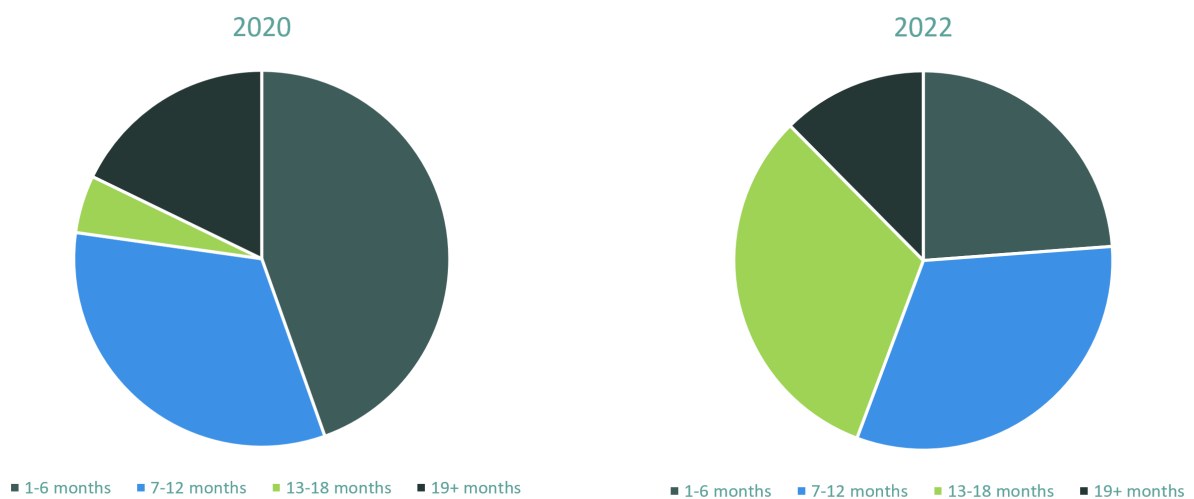
It is impossible for us to report on entities that no longer exist but conversely, it is vital that we acknowledge that 1-8.5% of respondents over 10 years have reported they face closure or potentially face closure, while anywhere from 27-45.5% have reported they are struggling to remain viable.



Interestingly, the number of respondents using their reserves to fund service delivery has risen slightly to 37%. This is an alarming point about the loss of financial viability. While this is lower than results from the first surveys, it is an increase from the 2020 results and doesn't align with the increase of organisations stating that they are 'Doing OK' or 'Healthy' from a

financial viability perspective. Despite a significant increase in organisations saying they are Doing OK, indications are that the financial viability of the Sector is declining based on the number who are using reserves to service delivery. For those organisations using reserves, there was a shift in forecasting that these reserves would last them longer than previous survey results. With rising cost of living and wage increases through legislation over the past couple of months, this perception could be erroneous.

Another significant factor is that for government-contracted entities, financial viability is often only known for 12 months out as this is the duration of many funding grants received. Some respondents' financial stability is therefore often based on assumptions that their main funders (government agencies) will continue to fund them again in 12 months' time. The precarious nature of this financial viability is worsened by the short or even late timeframes within which government agencies inform providers of contract renewal. In 2022 for example, correspondence from Oranga Tamariki to providers announcing a review of contract levels came after the deadline for many of those contracts' renewal.

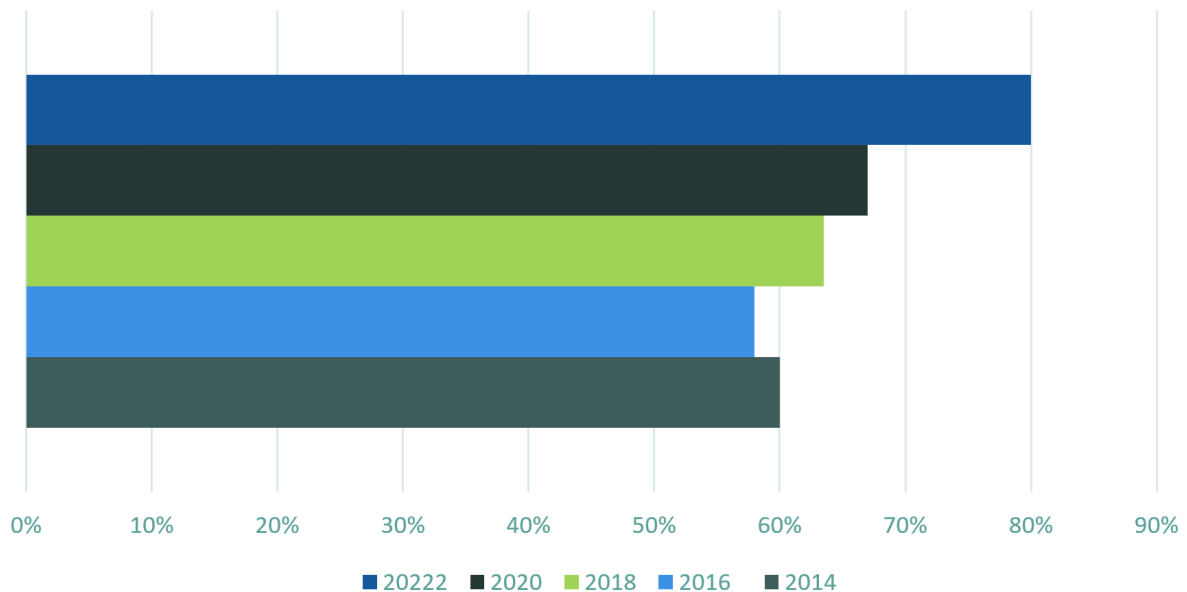


Another contradiction to the “healthy” status of so many was the mention among some respondents their financial inability to pay more than minimum wage for most of their staff. Many respondents expressed stress and anxiety in their comments about their inability to give pay-rises beyond living wage and subsequent loss of staff during times of heightening demand. Respondents spoke of their increased work to source more regular funding from more diverse sources if they were to be able to pay staff what they were worth.

Most paid employees are receiving wage increases

Despite some stress at not being financial capable to afford wage increases, it is good to see the majority of respondents find the means to be good employers and give people a decent living. In a sizeable increase on previous years' data, 80% of respondents reported increasing wages for paid employees. But even among respondents reporting they had increased wages, the stress and anxiety around business sustainability remained.

Respondents able to offer wage increases for paid staff



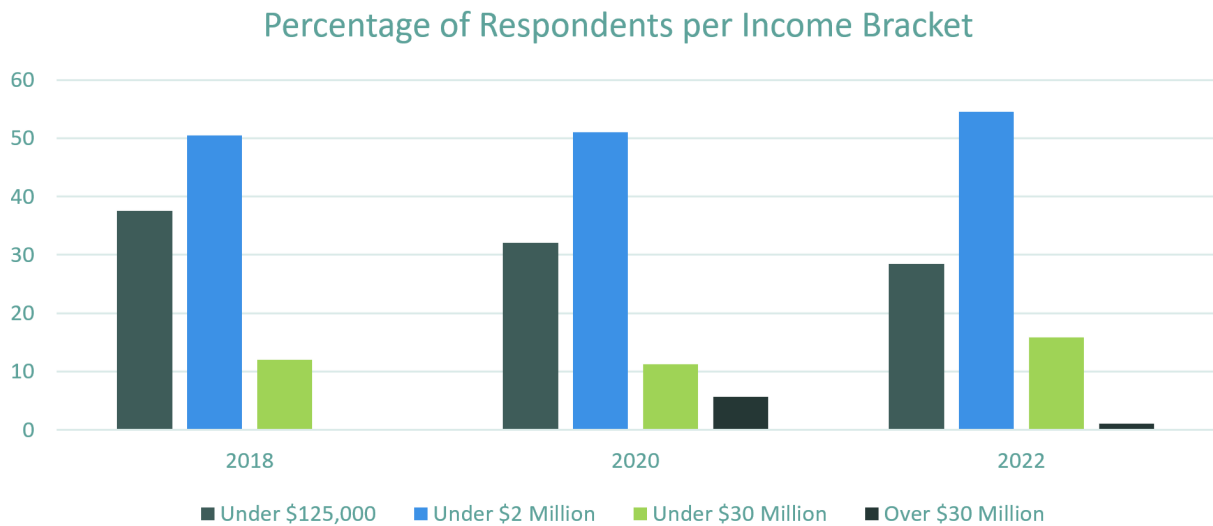
A quarter of respondents have restructured in the last two years

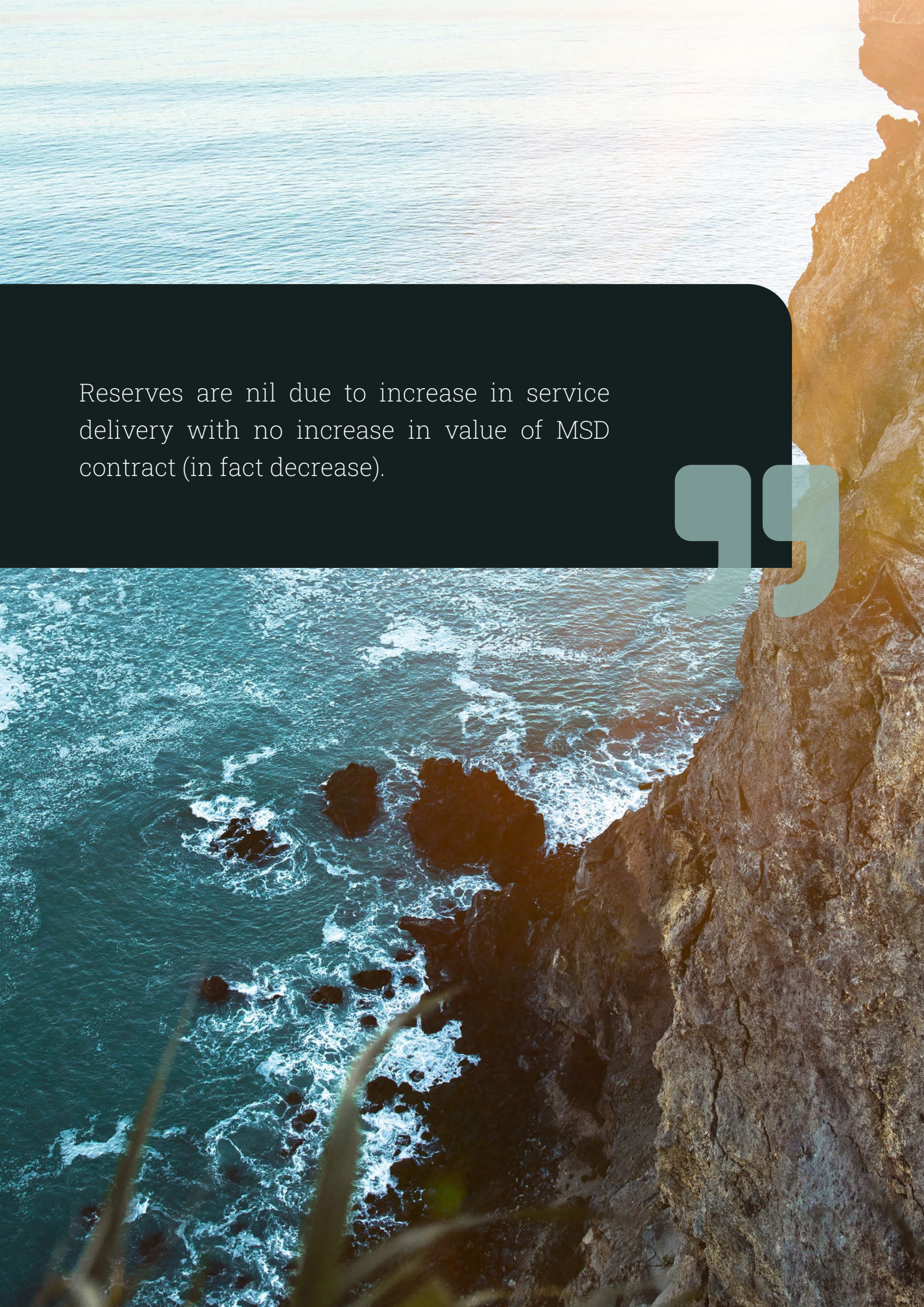
When asked if the organisation had restructured in the last two years, 26% confirmed that they had. This is over a quarter of the sector and is still alarmingly high. Respondents reported they needed to restructure in response to Covid, to meet Government demands on the way they conducted their services. Interestingly, 2022's results are not as high as we have had in the past.

The sector has always reported in these surveys high rates of restructure in response to government changes in funding and contracting.

Income

Percentages reported for each income range are slowly trending upwards since the original data collection for this question in 2018. This could be associated with an increase in business stability over time, the impact of inflation, but as likely an indication that the smaller sample size we had this year trended towards the higher income brackets.





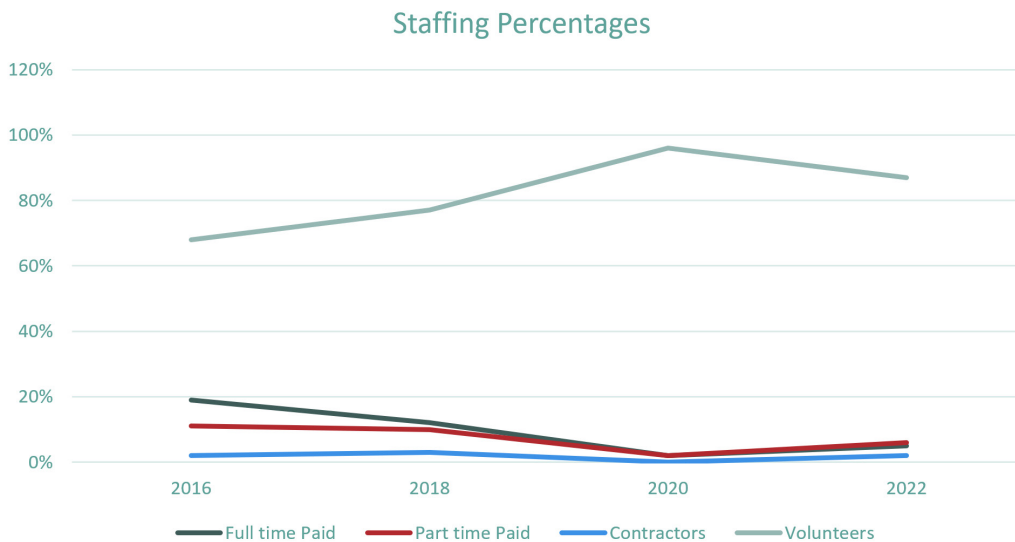
Reserves are nil due to increase in service delivery with no increase in value of MSD contract (in fact decrease).

HUMAN RESOURCE

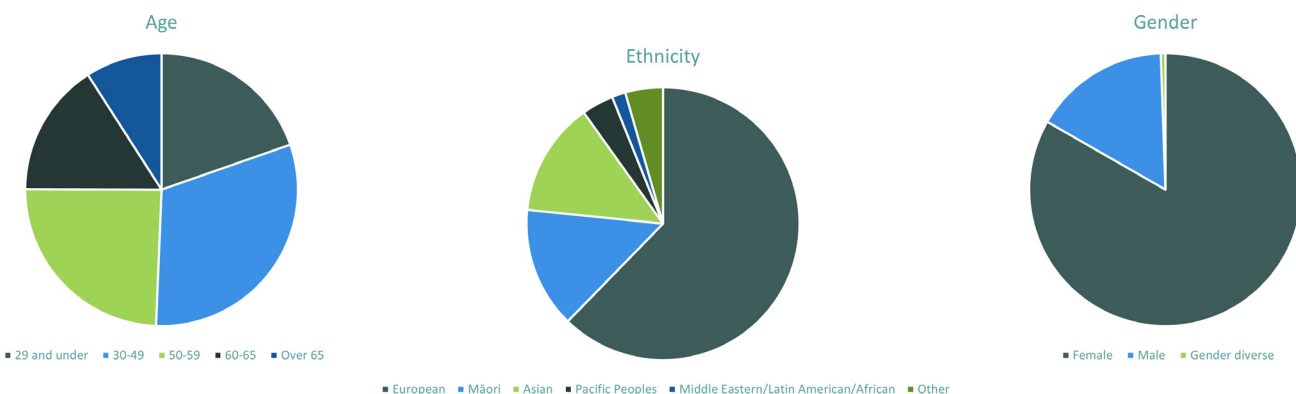
People in the sector increasingly volunteers, unpaid

Looking at Staffing Categories Over All Respondents

Over the last 8 years of data collected for this survey there has been a steady shift upwards in the number of volunteers and a decrease in the number of paid staff or contractors. This is an alarming trend given Covid 19's impact on volunteering in New Zealand: while emergency response entities have turn-outs of volunteers during crisis-response, during Covid many community organisations struggle to keep enough volunteers to continue their services and programmes. This increase in volunteers' proportion of the sector's workforce precedes Covid's impact, however Covid has hurt the sector's capability to hire paid staff at all, which would also explain why the increased reliance on volunteers has continued.



Demographic questions were added for the first time this year. It will be a useful metric to measure over time to observe trends in these spaces. It is worth noting that not all respondents provided answers to these questions, so data is presented as total number of staff rather than percentages. Some observations from the data are that the sector is quite age-diverse and also significantly predominantly female.

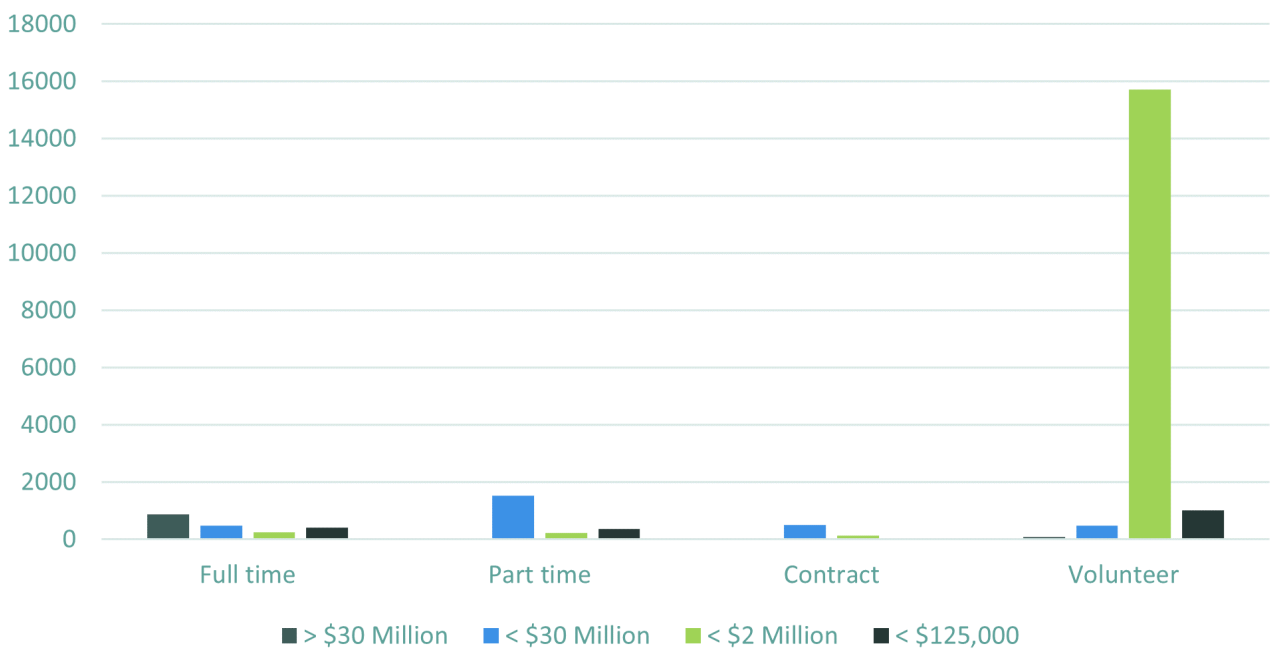


Employee/Volunteer Breakdown Split into Income Brackets

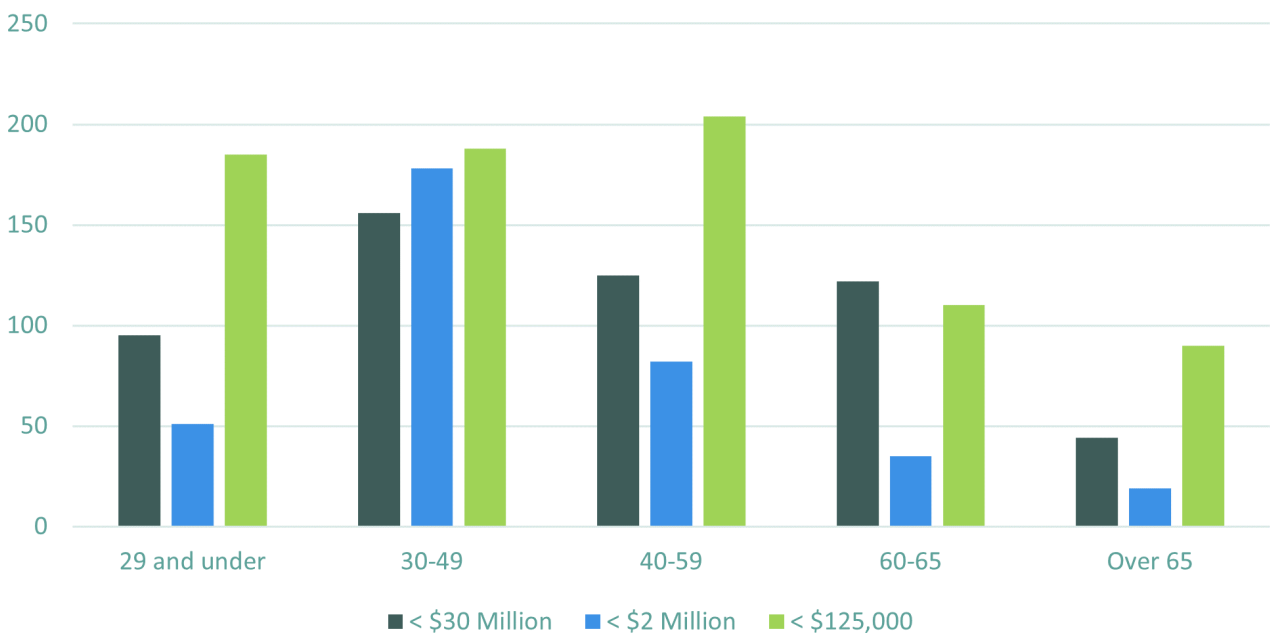
Interestingly, when you divvy up results split into income brackets, you get a slightly different view on this data. High income entities employ far higher proportions of paid staff and fewer volunteers. It is only among the entities earning less than \$2million that we see volunteers outnumber paid staff in great quantity. Interestingly, there is diversity of staff where the majority European across all income groups of entities.

Note that no demographic data provided for the > \$30 Million income bracket.

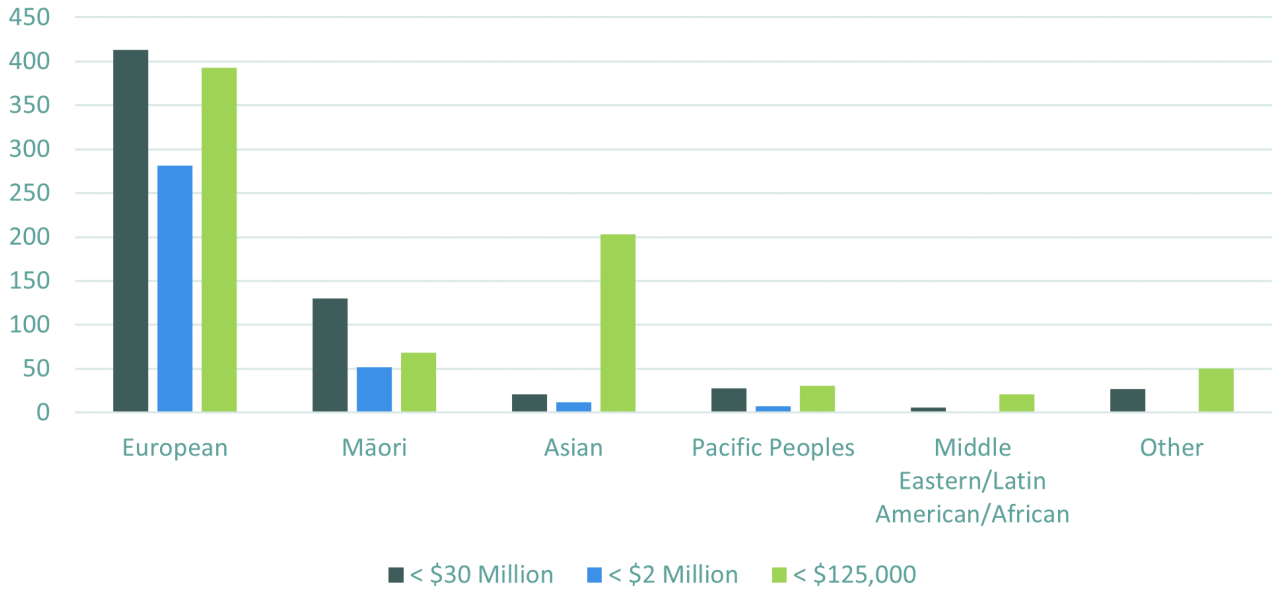
Staffing by Income Bracket



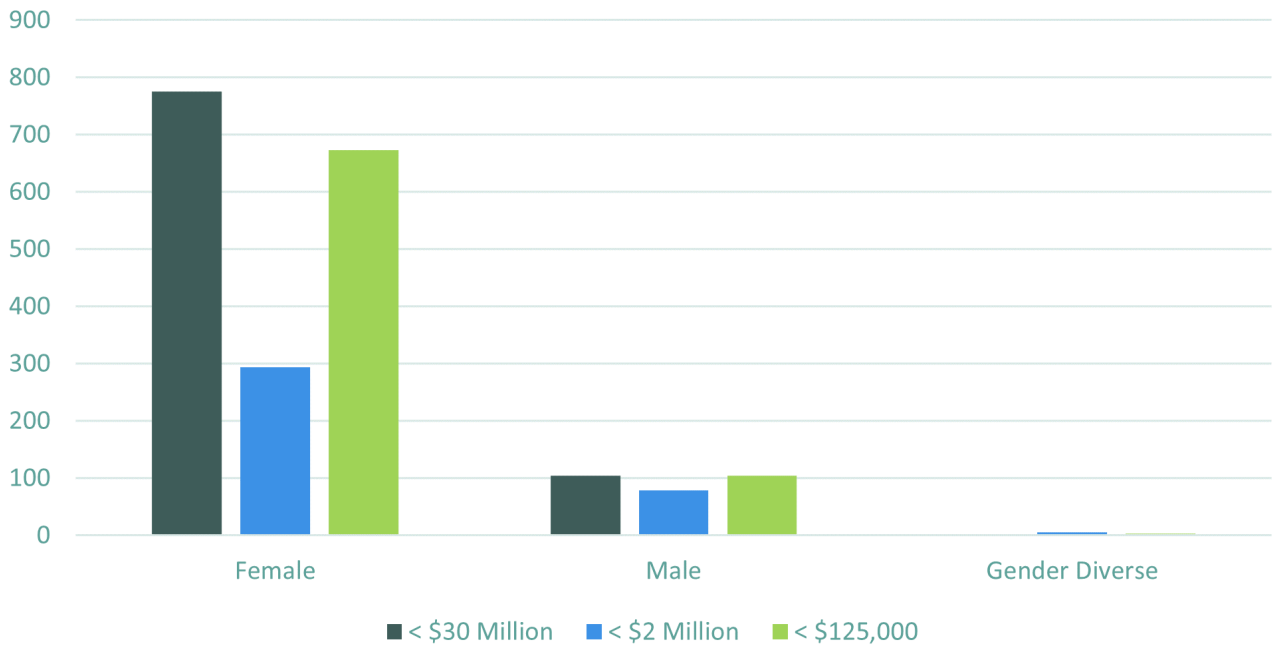
Staff Age by Income Bracket



Staff Ethnicity by Income Bracket



Staff Gender by Income Bracket

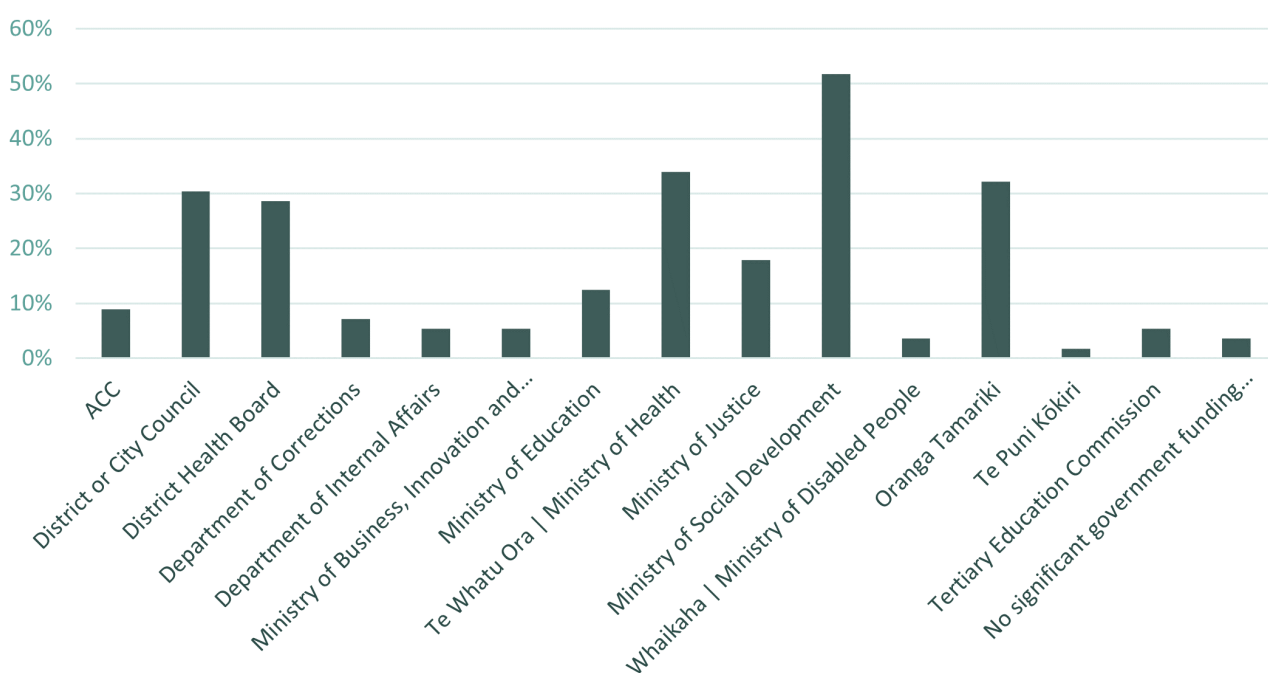


GOVERNMENT CONTRACTS

Despite Covid, little change to Government contracts

Sixty-four percent (64%) of respondent organisations receive government contracts (not including Lottery or COGS grant funding). These respondents were asked a series of questions about their experience with government contracts over the last 2 years.

When asked who their main contract was with, fifty-three percent (53%) indicated MSD.



Changes in quantity or amount

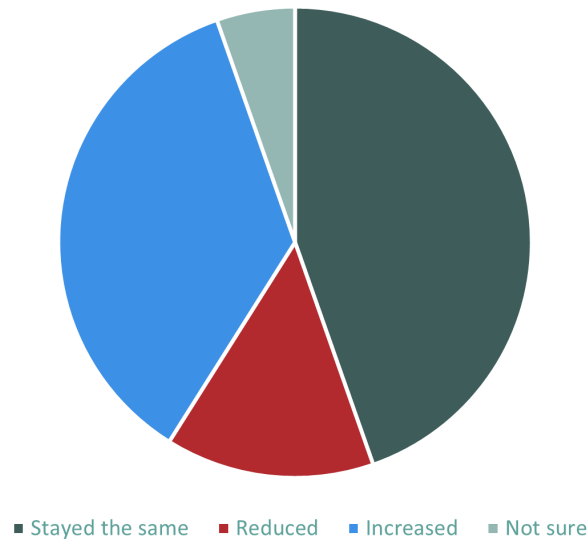
When asked if the number of government contracts for an organisation increased, stayed the same or reduced in the last two years, 37.5% indicated an increase in the number of contracts, but this was often explained by the one-off Covid grants awarded to many without application at the beginning of the financial year.

“We received a significant increase in funding as a response to Covid, but the increase was limited to three years, and so our contracted funding will decrease next year, leaving us with a projected budget deficit. We already supplement our contracted funding with applications for philanthropic grants, but we will have to increase these applications next year to be able to deliver the same service.”

While there has been increased demand and the noted heightened complexity of need among clients, it is disappointing to see that 44.6% of respondents indicated no funding increase in their government contracts, beyond one-off Covid grants.

When looking at the value of their contracts, 35.7% stated an increase, 44.6% stated no change, and 14.3% even stated a reduction in value.

Changes to the value of government contracts



Contract specifications

While funding levels saw little change, specifications in government contracts have significantly changed for almost a third (31%) of 2022's respondents, however those reporting significant change continues to decrease when compared to previous surveys.

When asked to give details about the significant changes, comments revealed a mixture of impact, as well as some hesitance about changes to come.

“Higher levels of due diligence - which take up a lot of time.”

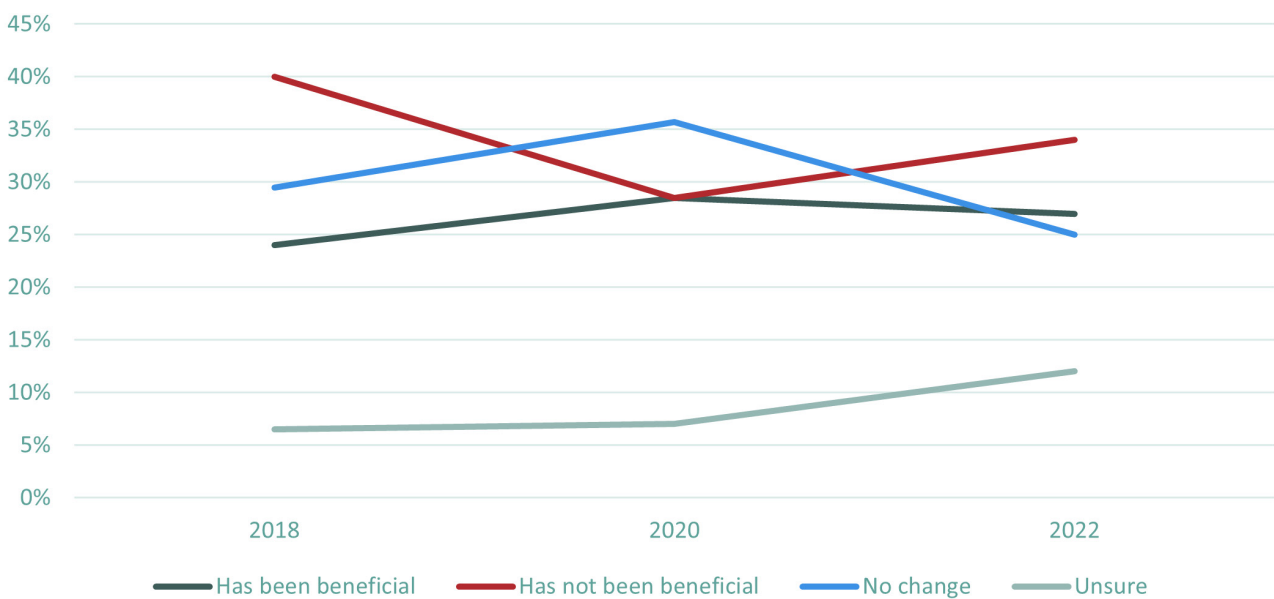
“We have a contract review with OT coming up and given the changes already implemented with other NGOs, I expect to see some significant changes.”

Are changes benefiting organisations?

Perceptions continue to remain split, but are starting to trend towards a drop in perceived benefit and an increase in those answering as “Unsure”. In 2022, 27.7% organisations who see the overall impact of changes in government contracting as being of benefit to their organisation, 34.5% as being of no benefit to their organisation, and 25.4% who experienced no changes in government contracting.

“We spend more time being compliant and having to deal with the changes than spend this time more usefully in supporting people and improving their lives. Most of the time what is reported does not make any sense to us.”

Perceived benefit of government contracts over time



Serving beyond capacity

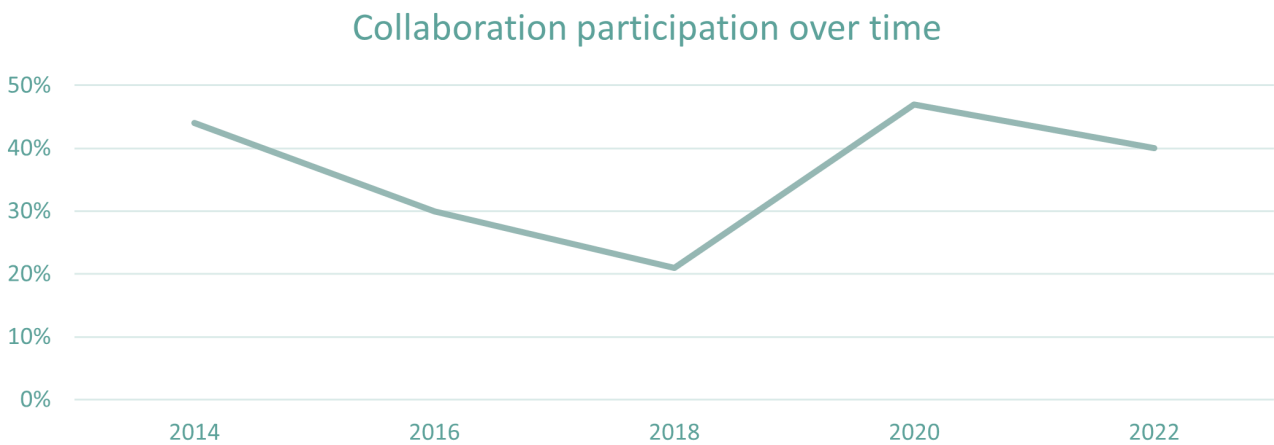
A whopping 60% of respondents state they overdeliver more services to meet demand than they are contracted for. This continues to be an unfortunately common occurrence reflected across all surveys.

While down from the 78% reached in 2020, over delivery remains a common strategy to deal with the dilemma of (unfunded) increasing demand. Respondents acknowledged the duty-of-care amongst their staff and volunteer workforces, to deliver beyond means rather than walk away and endanger people, often children.

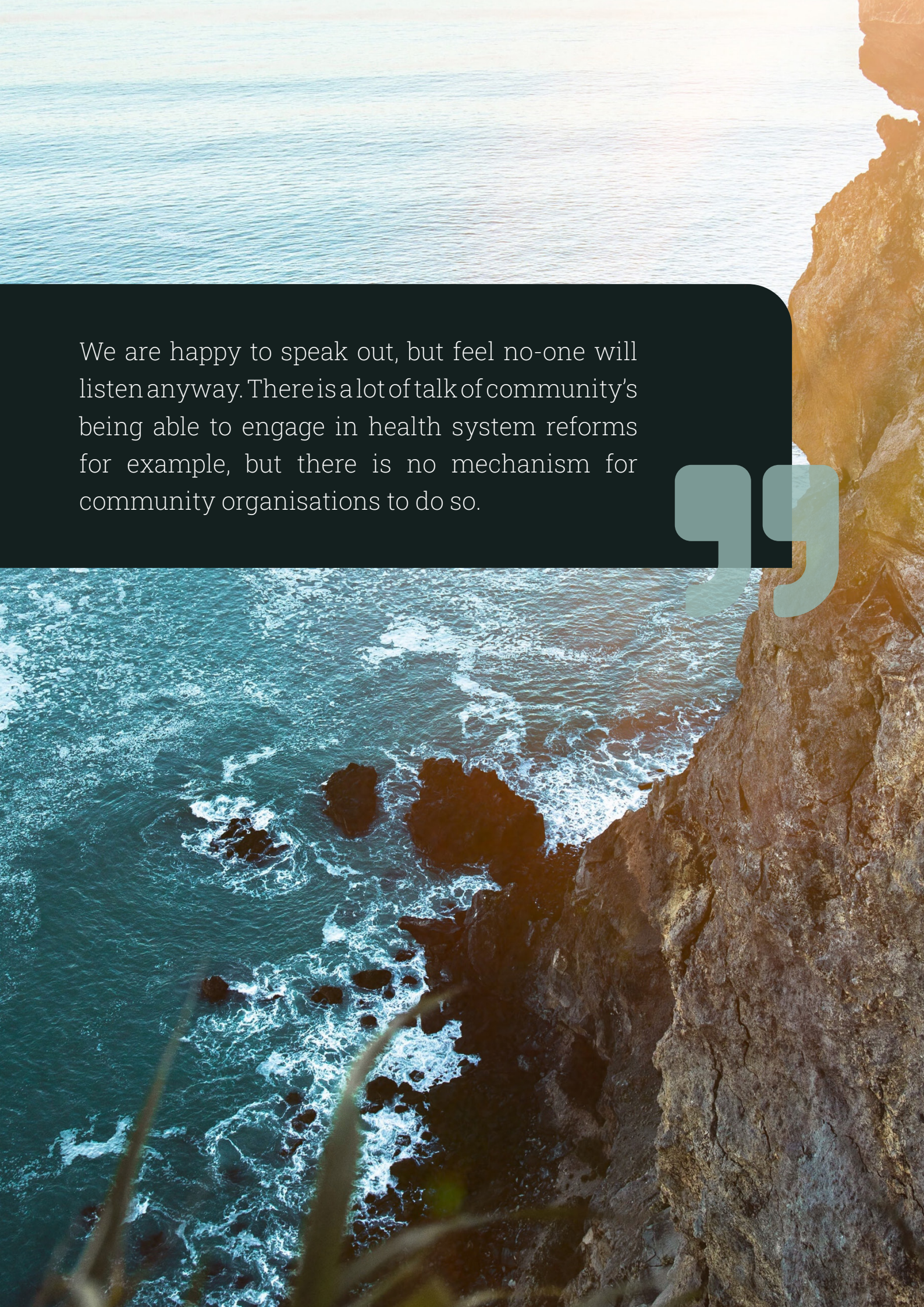
Collaboration

The proportion of respondent organisations that have worked on a collaborative tender or funding proposal in the past two years has dropped slightly to 40%.

This is despite the high number of respondents valuing collaborating and partnerships, so it is likely to indicate that organisations are learning and becoming more discerning about the partnerships they form. It may also indicate the sector's adaptation to a persistently competitive environment for funding applications. This last point may create tension among potential partners that they would otherwise collaborate with.



There may be less collaboration, but it may be to ensure that collaborations embarked on are more successful on the outset. For those who did participate in the collaborative tender process, success rates are at an all-time high hovering at 64% in 2022 compared to 45% in 2020.

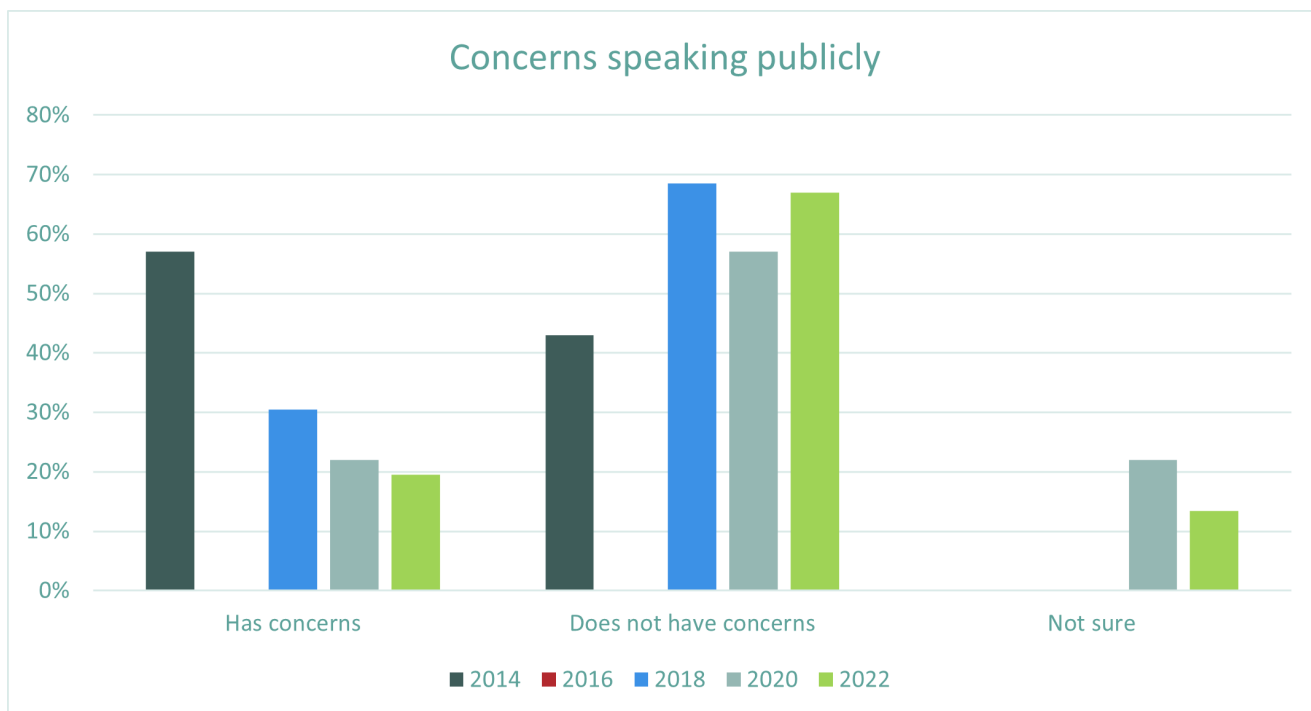


We are happy to speak out, but feel no-one will listen anyway. There is a lot of talk of community's being able to engage in health system reforms for example, but there is no mechanism for community organisations to do so.

CONCERNS ABOUT SPEAKING PUBLICLY

More confidence to speak, less confidence that it's heard

Comfortingly, the number of respondents who had concerns about speaking out publicly has dropped to an all time low of 19.5%. A vast majority of respondents (67%) report that they have no concerns about speaking out. The remaining 13.4% fall into the uncertain category of "Not sure" – this is also at a much lower level from 2020's results.



15 respondents added an additional comment to support their answer. The reasoning provided covered a few different variables, Concern for funding (6 responses), Protecting government relationships (5 responses), Concern about eroding their reputation (5 responses).

Some responses referenced being comfortable with speaking out, but not being inclined to do so because there is no available forum, or they feel they wouldn't be listened to. One response from a peak-body entity noted that their intentions to speak out about one agency's funding cuts to the sector were hindered by the hesitancy of their smaller, regional members.

APPENDIX A: SURVEY QUESTIONS

1. What part of the community sector does your organisation work in? Select only one.

- Arts, culture, sport and recreation
- Education and research
- Health
- Social/community services
- Environment
- Development and housing
- Law, advocacy and politics
- Grant making and fundraising
- International development
- Religion
- Business and professional services
- Other (please specify)

2. What kind of services or activities does your organisation provide? Select all that apply.

- Arts and culture
- Child protection
- Community services
- Counselling
- Disability services
- Drug and alcohol
- Education
- Employment support
- Environment
- Family support
- Family violence
- Financial planning and support
- Health
- Housing support
- Justice
- Mental health
- Migrant/refugee services
- Older people's services
- Peak Body/Umbrella Group
- Sexual violence
- Sport and recreation
- Youth services
- Kaupapa Māori services and/or advice
- Other (please specify)

3. Are you a registered charity? Select only one.

- Yes
- No
- Not sure

4. Please select your annual income range for the last financial year. Select only one.

- Under \$125,000
- Under 2 million
- Under 30 million
- Over 30 million

5. Please rank in order your sources of income from the list. 1 being your highest source of income, 2 your second highest and so forth. Use the text boxes for each item to provide a rank number.

- Donations
- Fundraising
- Koha
- Central government
- funding
- Local government
- funding
- Philanthropic groups
- Self-generated income e.g. service fees
- Commercial activity
- Membership fees
- Investment income
- Sponsorship
- Iwi funding source

6. How many employees, contractors, and volunteers do you have in your organisation today?

- Number of full-time paid employees (30+hrs/wk and on your payroll)
- Number of part-time paid employees (up to and including 30hrs/wk and on your payroll)
- Number of contractors (people who are paid, but are not on your payroll)
- Number of volunteers

7. Do you have more, the same, or fewer staff now than you had two years ago? Select only one.

- More staff
- Same number of staff
- Fewer staff

8. How many paid staff do you employ within the following age ranges? Please skip if you are unsure or prefer not to say.

- 29 and under
- 30-49
- 50-59
- 60-65
- Over 65

9. Please indicate the total number of your paid staff by gender. Please skip if you are unsure or prefer not to say.

- Female
- Male
- Gender diverse

10. Please indicate the ethnicity of your paid staff. Please skip if you are unsure or prefer not to say.

- European
- Māori
- Asian
- Pacific Peoples
- Middle Eastern/Latin
- American/African
- Other (please specify)

11. Have you restructured in the last year? Select only one.

- Yes
- No

12. If you answered yes in the previous question, what was the primary driver of the restructuring? Select all that apply.

- To improve our financial position
- Wanted to change or improve the way we work
- Pressure from funders or external agencies
- Growth
- Prefer not to say
- Not sure
- Other (please specify)

13. Has your organisation increased paid employee wages and salaries in the last 2 years? Select only one.

- Yes
- No
- Prefer not to say
- Not sure

14. Do you have more, the same, or fewer people using/joining your service/s now than the last two years ago? Select only one.

- More people
- Same number of people
- Fewer people

15. Rate the impact of the following on your organisation in the last two years.

- Health and Safety Act compliance
- Relationship with government agencies
- Charities financial reporting standards compliance
- Tendering for contracts
- Pay equity
- Data collection and reporting
- Attracting volunteers
- Attracting governance members (board/committee)
- Recruiting paid staff
- Increased complexity of issues with the people you work with
- Having nowhere to refer people with high needs
- Increased competition
- Increased collaboration
- Te Tiriti o Waitangi responsiveness

16. Has the demand for your services and/or activities increased, stayed the same, or reduced in the past two years? Select only one.

- Increased
- Stayed the same
- Reduced

17. Do you have any comments to make about your organisation's ability to deliver services and/or activities? I.e. changes to complexity of need, main issues clients bring, etc.

18. What emerging issues or challenges have impacted your organisation in the past two years? Select all that apply.

- COVID responses
- Diversity requirements
- Vaccine mandates
- Reviews and consultations
- Banking issues
- Supply chain issues
- Inflation
- Government agency restructuring
- Government reforms
- Changes to legislation
- Waiting lists
- Staff shortages
- Other (please specify)

19. What have been the opportunities and what has gone well? Select all that apply.

- Te Tiriti o Waitangi responsiveness
- Partnerships and collaborations
- Increased community involvement and participation by people with lived experience
- Increased diversity
- Other (please specify)

20. Has your organisation worked on a community-led tender or funding proposal in the past two years? Select only one.

- Yes
- No
- Not sure

21. If you answered yes to the previous question, was the community-led tender or funding proposal successful? Select only one.

- Yes
- No
- Not sure

22. Does your organisation have any government contracts with a central government agency (e.g. MSD) or local government (e.g. council). Select only one. NB: Please do not count funding from Lotteries or COGS as government contracts.

- Yes
- No
- Not sure

23. With whom are your main government funding contracts? Select all that apply. NB: Do not include funding from Lotteries and COGS here.

- ACC
- District or City Council
- District Health Board
- Department of Corrections
- Department of Internal Affairs
- Ministry of Business, Innovation and Employment (MBIE)
- Ministry of Education
- Te Whatu Ora | Ministry of Health
- Ministry of Justice
- Ministry of Social Development
- Whaikaha | Ministry of Disabled People
- Oranga Tamariki
- Te Puni Kōkiri
- Tertiary Education Commission
- No significant government funding contracts

24. Has the number of government contracts for your organisation increased, stayed the same or reduced in the last two years? Select only one.

- Increased
- Stayed the same
- Reduced
- Not sure

25. Have the specifications in your government contracts changed significantly over the past two years? Select only one.

- Yes
- No
- Not sure

26. Has your organisation over-delivered on any of your contracted services in your last contract period i.e. provided more outputs/outcomes than you are contracted to deliver? Select only one.

- Yes
- No
- Not sure
- Not applicable

27. If yes, by how much did your organisation over deliver? Select only one.

- Up to 10%
- Between 11-25%
- Between 26-50%
- Over 51%

28. Are your government contracts outcome based? Select only one.

- None
- Some
- Most
- All
- Not sure

29. Has the time it takes to administer and/or report back on your contracts increased, stayed the same, or reduced? Select only one.

- Increased
- Stayed the same
- Reduced
- Not sure

30. Has the value of your government contract/s increased, stayed the same, or reduced?

- Increased
- Stayed the same
- Reduced
- Not sure

31. Have changes in government contracting been of benefit to your organisation? Select only one.

- Yes
- No
- Hasn't changed
- Not sure

32. What was the overall impact of contracting changes, if any, on your organisation in the past two years?

33. How would you describe the current financial viability of your organisation? Select only one.

- We are facing closure as we are not financially viable
- We may be facing closure due to financial viability
- We are viable but struggling to make ends meet
- We are doing okay financially
- We are in a healthy financial position
- Not sure

34. Compared to two years ago, are you better off, the same, or worse off financially? Select only one.

- Better off
- About the same
- Worse off

35. Are you currently using organisational reserves to fund service delivery? Select only one.

- Yes
- No
- Not sure

36. If you are using your reserves, how long can you sustain this? Select only one.

- 1-6 months
- 7-12 months
- 13-18 months
- 19+ months

37. Do you have any other comments to make about your organisation's financial viability?

38. Does your organisation have concerns about speaking publicly on or about the issues you are facing? Select only one.

- Yes
- No
- Not sure

39. If you answered yes to the previous question would you like to tell us why you feel like this?

40. Anything else you want to comment on that has not already been covered in this survey?

41. Are you willing to participate in a phone interview or focus group to help us elaborate on some of the issues raised in this survey?

- Yes
- No

42. If you answered yes to the previous question, please provide a phone number below:



Some contracts are 150% by volume over what we are funded to provide, but we have an informal unspoken rule **never to turn people away that ask for help.**