

# PULSE SURVEY: NOT FOR PROFIT SECTOR



## EXECUTIVE SUMMARY

Moore UK have released the first results of their pulse survey, which is aimed at the not for profit sector, across the UK.

**The survey results showed that around 9 in 10 of both schools and charitable organisations are confident in their general outlook for the next 12 months. 88% of charities surveyed said that it had been easy to access additional grants, and 87% of schools said that updates and advice on Covid-19 had been easy to follow.**

While the general outlook for charities is positive looking forward, looking back, times had been trying. On average charities had 26% of their activities curtailed, while having seen on average 21% of their staff furloughed.

Around 1 in 2 of both charitable and educational organisations had made, or were planning to make redundancies. Of the schools or charities that said this, each one estimated that 1 in 10 of their staff would be or have been affected.

For schools, going forward, just over 3 in 4 of those working in the sector estimated a medium impact on their reserves from Covid-19, with around 1 in 4 estimating a high impact on their reserves as a result of Covid-19. Schools with a lower employee size (1-249 employees) were amongst the most likely to estimate a high impact on reserves.

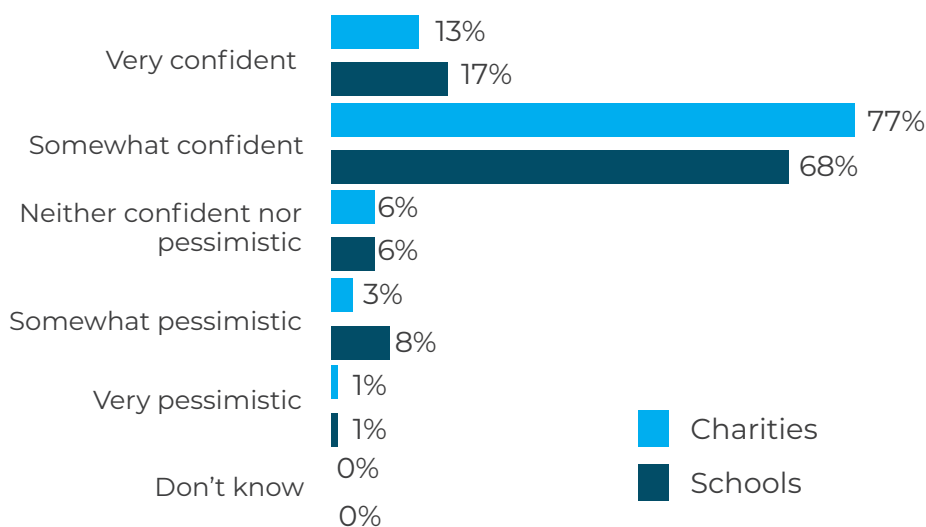
Around 8 in 10 of those working in the school sector believed both staff and student welfare would be impacted as a result of Covid-19. Though, despite this, similar proportions of around 7-8 in 10 were confident they had the correct procedures in place to cope with it.

Finally, for charities, around 2 in 3 were somewhat prepared for the entirety of their staff to work remotely, but only 1 in 3 said they were well prepared for this to happen.

## CONFIDENCE LEVELS

Going forward, the vast majority of both education and charitable sectors were confident in hitting their income targets over the next 12 months. As shown in the graph below, net confidence levels for charities stood at 90% while schools were almost as optimistic with 85%.

*"How confident are you about the general outlook for the next twelve months and about hitting your income targets?"*



Only 1 in 3 charities are well prepared to work remotely if another lockdown occurs

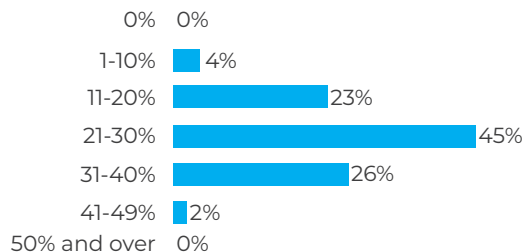
87% of education agreed that the DfE's updates and guidance for dealing with Covid-19 in an educational setting had been easy to follow.

## FURLOUGH AND CURTAILMENT

Despite a 90% confidence score on general outlook for charitable organisations, these organisations had on average 26% of their activities curtailed, and furloughed on average 21% of their staff, as shown in the graphs below.

### Charities : Furloughs and curtail rates

*Proportion of charities' activities that have been curtailed*

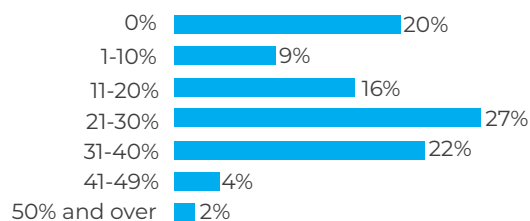


Average % of activities curtailed:

**26.20 (%)**

Slightly higher rates of curtailed activities in larger charities (27%)

*Proportion of staff that have been furloughed during COVID-19*



Overall mean score:

**21.29 (%)**

Slightly higher rates of furloughs in medium sized charities (22%)

## REDUNDANCIES

Over 1 in 2 of all charitable or educational sectors said they had made or were planning to make redundancies, with 63% of charities and 55% of schools reporting that they had made or are considering making redundancies. Medium-sized charities had made or were likely to make the most redundancies in percentage terms at 76%. Likewise, 72% of medium sized schools were also the most likely to implement or had made redundancies.

Across the board, these organisations reported that they were likely to make 11% of their workforce redundant. Larger charity organisations (those with 500+ employees) gave the highest average of staff to be affected at 12%. The same pattern emerged for schools – schools with the most staff (500+) gave an average of 13% to be affected.

### Redundancies consideration:

Charities:

**63%**  
say 'Yes'

Education:

**55%**  
say 'Yes'

**Vs.**

Proportion of  
staff that will be  
affected:

Charities:

**11%**  
of staff  
affected

Education:

**11%**  
of staff  
affected

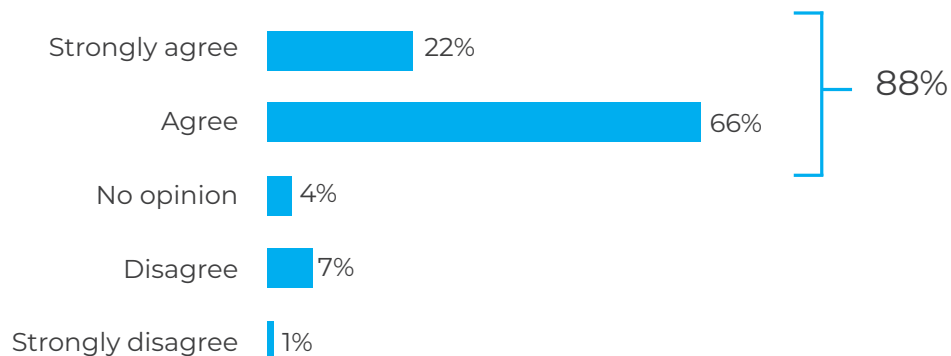
**Vs.**

## CHARITIES AND COVID-19

Less than a third of charitable organisations (29%) said they were well-prepared for their entire workforce to work remotely. Smaller and larger charities were the most likely to say they were well prepared for their staff to work remotely, however only 22% of medium sized said the same.

88% of charities felt that during Covid-19 it has been easy to access additional grants or monies during these times as shown in the chart below.

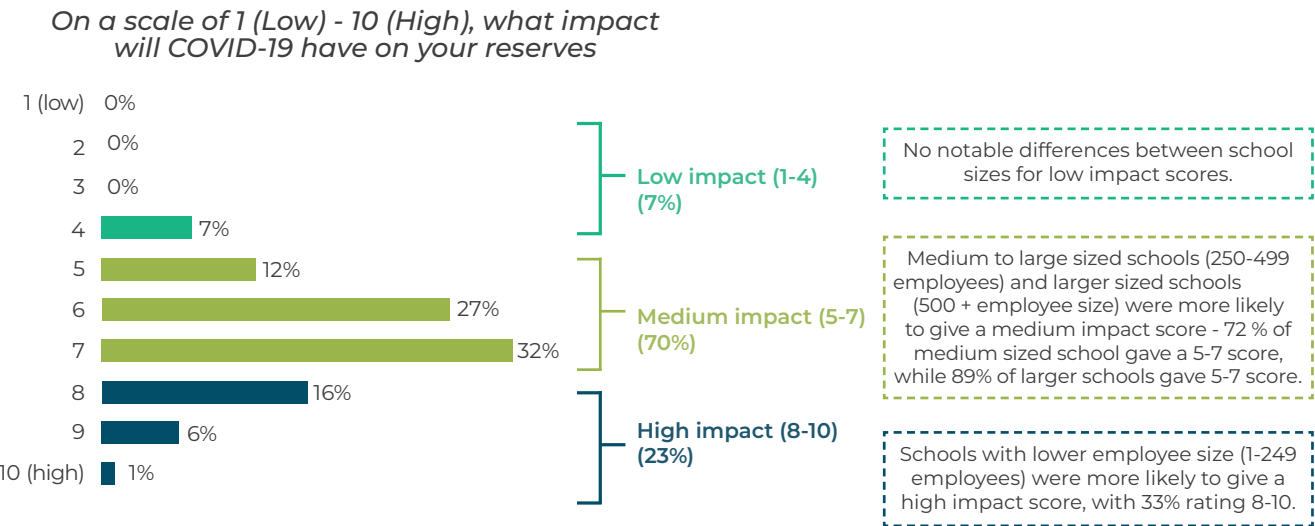
*'During COVID-19 it has been easy for charities to access additional grants of monies during these times'*



# EDUCATION: IMPACT ON RESERVES

Around 3 in 4 schools estimated a medium impact on their reserves, as a result of Covid-19 following 1 in 4, who estimated a high impact on their reserves going forward as shown in the chart below.

## Education: Impact on reserves



There were no notable differences between school sizes for low impact scores.

Medium to large sized schools (250-499 employees) and larger sized schools (500+ employee size) were more likely to give a medium impact score – 72% of medium sized schools gave a 5-7 score, while 89% of larger schools gave a 5-7 score.

Schools with a lower employee size (1-249 employees) were more likely to give a high impact score, with 33% rating 8-10.





# EDUCATION: STAFF AND STUDENT WELFARE

Similar proportions of those in the education sector believe staff and student welfare will be impacted going forward, but they feel confident in dealing with it. 78% believe staff welfare and 85% believe student welfare will be impacted due to Covid-19. In both cases, medium-sized schools led the way at 93%.

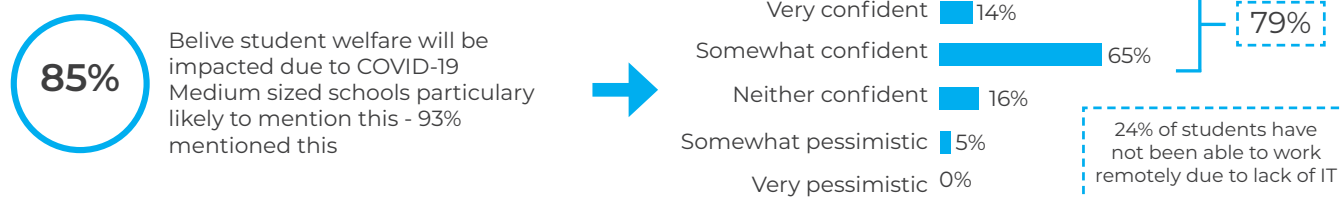
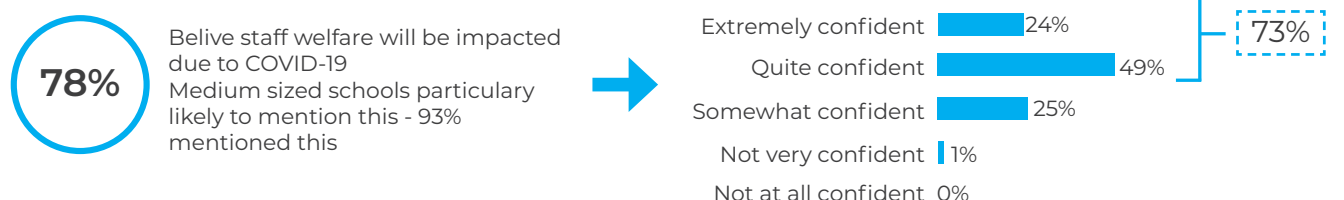
However, almost a quarter (24%) of school pupils have not been able to work remotely due to a lack of available IT equipment or home-schooling equipment.

73% of charities were confident that they have the correct procedures in place to deal with staff welfare and 79% confident on student welfare procedures as shown in the chart below.

Almost a quarter of school pupils were unable to work remotely due to a lack of IT equipment

## Education: Staff and student welfare

*"If yes, how confident are you that you have the correct procedures in place to deal with staff welfare?"*



## ABOUT MOORE

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