



**November COVID-19 survey:  
What charities asked for help with**



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## 1. Introduction

Q8b In your view, what should OSCR and charity sector support organisations be doing to help your charity overcome the challenges that it faces because of the pandemic? Are there any other factors that you wish to bring to our attention?

There were around 1100 requests for help in the November survey. Overall the help requested from OSCR and third sector support organisations in November is similar to the help and support asked for in May. The most pressing and frequent requests for help related to annual returns (though that might be explained by the survey being published at the same time as a reminder for annual returns); funding and fundraising; and this was echoed in request for help in raising awareness and lobbying Scottish Government, UK Government and Local Authorities for support. Apart from the annual return there were fewer requests for help that were clearly directed at OSCR than in May, and many responses were either multiple requests or included further information. The requests and comments below are from the November survey.

## 2. OSCR specific help

### Annual Returns

Around a third of all the requests for help were about or included the annual return. The greatest number of these requests were for flexibility on deadlines for submission of annual returns and postponement of AGMs. There were also a number of charities who said extending time limits had been much appreciated and asked that it be continued.

A few charities asked for continued understanding with late submissions and one asked that OSCR be lenient towards major deficits in accounts submitted due to circumstances outwith the charity's control. Another said we just need to know that there will be understanding and empathy among those who see our annual report for the dilemmas we faced and how we tried to cope. A few said they had no money or way of raising funds to pay for production of annual accounts and that this was not a cost that grant funding organisations would consider.

Some charities also asked that reporting for small charities be as simple as possible; that we do not keep adding requirements to the Annual Report; OSCR forms and online input be simpler to understand and use. Support to move to electronic reporting was appreciated.

A few charities were concerned about OSCR's view of being inactive and asked for advice on completing the annual return and report when the last year has been virtually blanked out. As one charity put it

There is a crucial charity law issue where clear advice from OSCR is needed: if a charity's mode of operation means it simply cannot provide public benefit for months or years on end, is there is point where OSCR will need to consider whether it has ceased to be a charity? I realise you won't take hasty action on this, but I think some sort of statement from OSCR would help. If, for example, Covid restrictions were to continue for most of 2020 AND most of 2021, such that a charity might go through two years of filing accounts where the trustees report says that almost nothing has happened to advance the charity's objects, what will OSCR do?

Another charity suggested that the annual financial reports OSCR received should be examined to gain a better understanding of those charity sectors which are in trouble this year and are likely to fail during the next 12 months: and that help could then be focused on those charities in greatest need by identifying best practice/sources of income and targeting this information to those in need.

A grant awarding charity asked that OSCR keep two years of accounts on the website for every charity as some Trusts and Foundations want to go back further than just the most recently-published accounts when considering making a grant (and require it to be published).

A few asked for a lighter touch on regulation and more focus on helping charities; and one that OSCR recognise that not all trustees have Internet access and that this makes it very difficult to hold meetings.

### Making changes

There were a number of requests from charities for help with changing purposes and with governing documents, several asked for someone to be available to talk to on the phone if we need to make any changes.

One asked that OSCR allows the charity to change its original services freely and without long legal documents in this challenging time, it would offer charities a chance to survive. Situations always change so that the charities need to keep changing, and as one charity put it

A better sign posted place to get help with making changes or a help line to walk folk through the changes in one call rather than spending hours researching what needs doing. The charity said organisations were having to change their structures, in many cases, to function at all and serve their recipients; that organisation needed to adapt; and this might mean constitutions also needed to change. They also said making changes can be confusing and clunky to deal with, time consuming when urgency is needed, and taking hours they should be spending on servicing their beneficiaries. They felt this was especially necessary during lockdown and this awful Covid-19 when people wanted to help but Chairs had to say no until they could change their documentation (after hours of research and form filling).

There were other charities that asked for assistance with governance issues directly relating to constitutional documents.

## Guidance

### Generally

One charity said continued guidance from OSCR is crucial in order that charities feel that the regulator is on their side during difficult times. Several asked us to continue to advise all charities of the development in the government strategies and help with the tactical approach required; continue to give guidance on how to maintain services and governance in a changing situation; and one said we rely on OSCR to respond with advice on best practice to be followed.

### Specifically

- More guidance about specific rules etc surrounding village halls; and provide the Scottish version of the excellent village hall specific guidance provided by ACRE [Action with Communities in Rural England].
- We need guidance on matters specifically to our charity. It would be helpful to be able to speak to someone on the phone when we have specific queries. The guidance is general and we need reassurance when making changes to our policies, procedures or matters relating to our constitution or governing documents.
- Create support for encouraging Trustees to give at least 6 months' notice of any intention to quit AND to make an effort to try and find a replacement.

## Dissolution and removal from the register

Very small baby and toddler groups in our local area are looking at ways to remove their charitable status. A simple way to do this would relieve some of the stress they are feeling about completing annual returns as many of them are not even breaking even in terms of meeting hall costs. Anecdotal evidence suggests groups are struggling to find committee members specifically because of their worry about completing charity returns. A simple way for groups with a very small income (who may have been a charity for many years simply because it afforded them access to certain charitable funds) to de-register would be a massive help as many funding sources e.g. Awards for All only require them now to have charitable intent/ purposes.

A couple of charities asked that OSCR make it quick and easy to dissolve a SCIO.

## Communication

A number of charities asked OSCR for more communication, as one charity put it - for more reassurance through communications, it feels a bit like OSCR is business as usual.

## Charities asked for OSCR to

- Answer the phones
- Be more available to answer specific questions
- Include a dashboard/chat facility on the OSCR website to ask questions
- Keep supplying information in easily read formats - the newsletter is really helpful
- Share the experiences of charities
- Keep in contact, explaining what is possible in these times and actively encourage communication such as this survey
- Share the findings of the survey

## Raise awareness

- We feel OSCR should highlight the need for many different kinds of charitable support throughout this time and support charities in gaining the recognition for the gaps they are filling right now.
- It would be helpful if OSCR could give increased focus to those intermediate charities that are doing well and working hard but because they are not a 'corporate' charity often get overlooked for the good work they are doing.
- We need a collective voice to raise our concerns at the highest level. OSCR as the charities regulator can be this voice and can include charities in the planning and delivery process - making sure that small, local charities are heard at an equal level to national charities
- Support from OSCR in bridging ability to get government indemnity insurance in the same way as the film sector has done would be very helpful.
- Hope OSCR will be sympathetic to amateur operatic and dramatic groups and support efforts to lean on Govt to ensure such cultural life can continue.

## Linking

### A couple of charities asked for OSCR for help with

- More personal contact with organisations either through training or awareness for advice support
- Connectivity to the other charities to share how they operate in the difficult environment created by Covid 19

## Appreciation for OSCR support

There were also a number of comments expressing appreciation for OSCR support

- ❏ We think that OSCR has done a very good job in guiding us through the present situation
- ❏ The website has been very informative.
- ❏ We have found the telephone enquiry service to be prompt and helpful.
- ❏ Email briefings and guidance have been very informative
- ❏ We have appreciated the guidance on the website and through online webinars.
- ❏ Q&A sheets and online videos are very useful
- ❏ OSCR acted well to support online Board meetings, governance issues and raise awareness of them/support change.
- ❏ OSCR has been very understanding about issues such as not holding AGMs and so on
- ❏ Just your being there is helpful. When at our lowest ebb it was good to know there were people 'out there' who were trying to help all the charities involved.

## 3. OSCR and third sector support organisations

### Funders and fundraising.

The greatest number of requests for help and support from OSCR and other charity sector supporting organisations was around funding and fundraising.

- ❏ The biggest threat to charities at this time is a financial one so anything that can help offset the loss of income due to the impact of COVID-19

The most frequent asks were for help with

- identifying/finding funding sources including new sources of funding
- a central point/hub that identifies possible sources of funding
- making funding applications easier

There were requests for OSCR and charity sector supporting organisations to bring the attention of funders to the adaptation and survival strategies of charities which are creating new and different funding needs, and to work with them to ensure that

funding is going where it is most needed. One asked for partnership working to develop a funding strategy for charities to survive and thrive.

There were many requests for continued and future funding from Local Authorities, Scottish Government and UK Government, and for OSCR and third sector support organisations to keep lobbying, raising awareness and pressing for more and longer funding to be made available to the sector; for it to be easier and faster to access; and for the sector to be on a level playing field with business in terms of government support.

A few charities asked for help with reporting to funders and taking into account the differences in the way their monies have had to be spent.

## Banks

There were a number of charities who asked for help and support from OSCR and charity sector support organisations to 'tackle' the banks. A number of new charities were unable to open bank accounts preventing them from being able to apply for/be awarded grants or operate; there were problems with online bank accounts, as very few offer dual authorisation; and there was dismay from a couple of charities that CAF Bank had increased its charges. One charity said

☐ We have found the banks to be a major problem. Our local bank closed leaving us with a van service which is virtually dysfunctional. Our nearest bank is twenty miles away. We have to process cheques and cash and cannot easily pay bills by bank transfer since the bank will not help us with the authorisation of cheques which is necessary with any charity.

## Gift Aid

A number of charities asked for help over loss of income from Gift Aid and support for their issues be raised with HMRC in particular

- Direct Debits/ Standing Orders not eligible for Gift Aid
- The complexity of the claim form/process made it a difficult system to claim this back on donations or annual fees received.
- help with assessing Gift Aid

A couple of charities also asked OSCR and third sector support organisations to lobby for increase in Gift Aid.

One charity said they had to suspend GASDS [Gift Aid Small Donations Scheme] claims and that lack of GASDS money from HMRC was worsening their financial position. The charity said the GASDS Scheme criteria of holding 6 events in a building with at least 10 beneficiaries attending may not be met in 2020/2021 due to Covid19; and they asked if anyone is looking at temporary changes to the GASDS Scheme to waive those criteria for 2020/2021 tax year?



## Insurance

A number of charities told of difficulties with insurance. They were seeking ways to reduce the costs of insurance or to cover the cost, including from the government. Most were struggling to meet the costs of insurance, particularly for buildings (halls, shops, historic sites) due to loss of income. Some charities had increased insurance costs, due to for example more IT equipment or adapting to restrictions so that staff and volunteers were working off site. These charities were unable to carry out fundraising activities due to the restrictions and had found that the majority of funding does not cover these types of items. One charity said they expected that they will have to cease operations completely within 12 months unless we can reduce insurance costs. One charity asked if there were any plans to help charities recoup these costs.

One asked for support from OSCR in bridging ability to get government indemnity insurance in the same way as the film sector has done would be very helpful. Another charity asked if OSCR and third sector support organisations could try to get an insurance company to cover future epidemics, and recommend them to charities.

## Contracts

OSCR and the charity support organisations were asked to investigate tendering processes.

- The big charities are not connected with communities and operate as providers of services. As a result there is a loss of the expertise and innovation which comes from the small charities who understand their beneficiaries. This situation also leads to a perception of deserving and undeserving beneficiaries. We are at risk in the coming years of neglecting those who most need our help.

## Linking, sharing and networking

A number of charities asked for help with making links and opportunities for networking to share experiences and resources. These included a networking service to help facilitate cross charity cooperation, for example, charities with properties could assist others who need to find alternative venue due to their Local Authority hall being closed or those with kitchens could assist with making meals for local elderly people; or larger charities with greater assets in terms of staffing and technology could be encouraged to support smaller volunteer dependent organisations in the same field.

One charity asked for OSCR and the charity support organisations to create a network of contacts to widen the network of go-to advice and support for third sector organisations and charities. It would also create opportunities to create new partnerships. One good thing which has come out of all of this, has been that many of have become aware of each other and what we do. This, in turn, has led to us working together in creative and meaningful ways.

Several charities wanted help with ways to share examples of good and innovative practice that can overcome the difficulties we face; ideas to overcome difficulties from similar charities; information sharing Zoom meetings with small similar charities so that we can learn from each other; and share experiences with targeted organisation size specific help and advice.

One asked for help to encourage collaboration of all agencies; and another asked for sector consolidation of similar type charities, back office services, etc.

One asked OSCR and the charity support organisations to keep signposting and mapping the charities in each local community and neighbouring to empower local residents with what is available in their area.

## Communication

There were a range of requests for help with different types of communication around the ways in which information is provided and accessed as well as reaching different audiences.

- ❏ Continue to provide up to date information on restrictions so organisations are kept informed without having search for it
- ❏ Share the suggestions from this survey.
- ❏ Publicising Inspiring examples of success despite problems will motivate us all
- ❏ Information packs highlighting how similar organisations are dealing with similar issues.
- ❏ Communication to ask about wellbeing and position charities are in at the moment, there may be some vital advice that helps steer charities at this time.
- ❏ Consolidated information hubs that make it easy to access updated guidelines and information would be a tremendous help, instead of diving through mailing lists for ages
- ❏ Issue advice on a more regular basis
- ❏ Keep phone lines open with human beings at the other end! This is the best form of help, not just relying on websites; and understanding that not all charities, especially small ones, can make use of online methods
- ❏ More personal contact with organisations either through training or awareness for advice support or just to get a better view of the coalface
- ❏ Communications/paths to access the right sort of funding to allow charities to continue and even expand if the right conditions exist

*continued*

- ❏ Informed about any government grants/funds available
- ❏ Talk to volunteers. Many of whom may be struggling both financially and personally.
- ❏ Produce a series of short videos of case studies showing how volunteers have got involved in a variety of settings to encourage more volunteering; use social media and local press to publicise these, emphasising that the volunteer roles can be COVID safe.
- ❏ More media attention is required as to the amazing services charities provide and the loss to our communities if they can't survive.
- ❏ Make the public aware through advertising that charity shops are safe places to visit, that donations are quarantined for 72 hours and staff are fully trained to be COVID safe.

## Advice and guidance

The most requests from charities for guidance and advice related to restrictions. There were also a number of charities that asked OSCR and the charity support organisations for advice and guidance relating to governance, management and planning, some was general and some specific to their type of charities.

## Restrictions

Many charities asked OSCR and third sector support organisations to provide up to date information on restrictions with advice and guidance on how restrictions apply to charities, risk assessment and getting ready to restart.

Some charities asked for advice and guidance to help with risk assessments and understanding health and safety measures for staff/volunteers/users; one asked for templates for risk assessment for volunteers. They asked for guidance on rules and restrictions for charities including building use and management, hosting activities and events, and working with volunteers. One said we need better guidance on how and when we can re-start letting our halls; and another wanted clearer advice and support at local authority level on how a small village hall with limited space and users can safely open.

Other charities also asked for guidance on safe forward planning/restart; the transition to face-to-face services; group meetings and activities; and events, including fundraising ones.

## Governance


Some charities asked for more guidance on governance responsibilities especially if charities are working more flexibly and trying to respond to emergencies. Several said that the remote management of activities/volunteers/staff/services and/or projects was placing an increased demand on management time (which they felt was the priority), whilst also trying to keep up with the simultaneously increased demands of governance in continually changing circumstances. They asked for continued

guidance and help on governance in a changing situation which was felt to be crucial for them to be able to adapt to changing needs; and assistance with governance issues directly relating to constitutional documents.

## Planning ahead

Some charities asked for help with planning and going forward. They said it would be good to have advice on strategic planning for living with some form of restrictions going forward; continued advice for all charities of the development in the government strategies and help with the tactical approach required; and advice about new ways of working.

One charity said help charities and community groups 'future proof' and/or find ways to work successfully in a changed environment; and another asked for support for trustees to look at all options open to them would be very useful.

 We would like to be able to take our charity forward, so we can give a larger service, but we don't know how to do this. We need advice as our charity is drowning and there is demand.

## Management

A number of charities asked for help with management and for practical support in charity management. They said many small charities are often governed by a board of local volunteers who, although passionate and committed, don't always have the skills or resources necessary for effectively managing an organisation particularly those that employ staff; and if possible provide more support in regards to how to manage activities remotely.

## Guidance and advice for particular types of charity

Several charities asked for targeted advice to small, entirely voluntary community groups. They said simple guidance would be of real benefit as they felt a lot of the guidance available was aimed at well-established and structured charities and was too complicated for the majority of small volunteer groups.

A few charities asked for help with guidance for village halls in Scotland on what they can or can't do would be very helpful.

A couple of charities asked for clarity about guidance as it relates to small voluntary theatre groups.

## Training

There were many requests from charities for help with training, most of were for digital and IT training. These requests included training for online meetings, delivering activities, charity management and technical support. Other requests also asked for help with grant applications.

## Meetings

Most organisations had felt obliged to start or improve digital delivery. As one charity put it, many charities may have already worked through the options and found their own solutions but training would always be worthwhile in any case.

There were requests for training with online platforms to be able to host virtual meetings, for those who are less familiar with this type of application. A few charities asked for support and training with different kinds of online platforms for video conferencing such as Teams or Zoom; and one charity was sure Teams could do much more than they had already accessed. A few charities also wanted help with how to use social media and get the most out of them.

## Online working

Several charities asked for help with digital or online working and IT. These included advice on how to set up online presentations; training in the use of IT facilities and programmes for more effective planning, accounting and time controls; and training on how to deliver services online.

One also asked for ideas for boosting wellbeing and cohesion within the trustees, in the past we would have a face-to-face activity session to have a laugh and chat; and another asked for help with online fundraising, of which they had no experience.

## Technical support

Several charities asked for help with technical support information, training and use of IT equipment and technology training. One said they were in need of more technical assistance, devising their online website to streamline sales for their handmade merchandise.

## Training and workshops for trustees

Several charities asked OSCR and third sector support organisations to provide more online training, education and workshops for trustees including how to train volunteers online; and one asked that online training and workshops be given greater publicity via social media.

One charity said online courses were helpful and asked for them to be repeated at structured intervals to enable flexibility re participation?

A couple of charities asked for some online advice sessions to help charities navigate a lot of the challenges they're facing; and another asked for more online workshops on different topics with partner organisations.

## Other training

There were a number of requests for help which did not explicitly reference online training delivery. Several charities asked for training for trustees on charity management; developing policies and PVG guidance; volunteer management; and staffing and training. A couple asked for training on completing grant applications; and one for leadership training to help lead their team through COVID and beyond.

One charity asked for organisations to provide free training as it can be too costly for a small charity.

One charity asked OSCR and third sector support organisations to promote learning materials and training opportunities.

### Raising awareness and lobbying

There were many request from charities for OSCR and third sector support organisations to lobby, campaign, highlight the value of the sector and generally raise awareness of the need for funding; the need for restrictions to be relaxed (or better still removed) to enable group activities and fundraising to resume; and the essential work done by charities during the pandemic.

Charities asked OSCR and third sector support organisations to keep highlighting to Government, Local Authorities and funding bodies that there are many different types and size of charities, some of which had not been able to access funds or grants, and advocate for ongoing sectoral support. They also asked for regular communications from government about funding sources.

They asked for help to lobby and influence government to trust and respect the third sector and communities enough to take care of their community and their buildings; to highlight the value of the third sector and ensure governments are bearing in mind charities often take up the slack in communities where government agencies don't provide a full range of services or support; and the need for the work they do to support individuals and communities, which they have continued to provide during the pandemic.

Charities wanted help to highlight the importance of mid-longer term funding solutions to the government; and to press the Scottish Government to widen the criteria for accessing the Small Business Grant to include charitable organisations that did not qualify because they did not have a rateable value.

They asked for charity sector support organisations to urge government to consider the difficulties of rural area in getting funding for activities other than direct response to COVID 19; and to engage with Scottish Government to highlight where the support is best directed.

A charity which does not employ any staff and was not eligible for grant funding [at the time] asked that their financial difficulties be represented to the government as there are many groups working with children whose income had dried up completely.

Several charities asked OSCR and third sector support organisations to work with the government to make sure group activities can resume as soon as possible; and one asked us to lobby for removal of lockdown and meeting restrictions.

There were also a number of specific request for help: to demand the government create more open-air, safe, public spaces across Scotland, so that a variety of activities can be organised for a variety of people; promotion of the third sector for what it did during the pandemic to pick up the health and social care challenges; support charities to tell their stories; feedback to Government on these findings; and

we ask that OSCR and charity support organisations keep church charities at the forefront of consideration when balancing decisions are made for the wellbeing of society and of the nation, it is essential that church charities do not get relegated to being the last to come out of 'lockdown' and therefore socially marginalised.

One charity said campaigning and lobbying were the most obvious things OSCR and third sector support organisations could help with. They said as a small local charity they struggled with influencing policy when they had hungry members of their community looking for the food distribution services they ran to be open. Local and practical support are what they do, so anything that recognises and supports that would be very welcome.

There were some charities that asked for help with their local authorities. They asked that LAs be encouraged to provide more support to charities and community centres and help improve access or at least awareness of the temporary arrangements in place; a small local charity shop wanted the information from local government to be updated weekly in their local paper so the general public would be clear as to the restrictions in their area; and clearer advice and support at local authority level on how a small village hall with limited space and users can safely open. They also asked for lobbying of COSLA and churches to make available community lets for youth organisations.

One asked that charities challenges be highlighted to the Scottish Government and ask for them to insist local authorities and TSIs do more to practically help them. They said furloughed council workers, kitchens, vans and buses could have been deployed to help their own efforts. Whilst local authorities talked about what to do and how to do it charities were out there delivering with what resources they could muster.

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