

Measuring the size and scope of the voluntary and community sector in the Liverpool City Region

Gerwyn Jones and Richard Meegan
European Institute for Urban Affairs
Liverpool John Moores University



On behalf of



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The Research Team

Gerwyn Jones is a Senior Research Fellow at the European Institute for Urban Affairs. He has a PhD in Geography from Liverpool University. He has worked in the urban and social policy field as a researcher for over 10 years, undertaking work for UK Government, the Economic and Social Research Council and European Commission. Recently he has been involved in researching the impact of recession and austerity on the voluntary sector as part of a wider ESRC funded project looking at recession and austerity in the cities of Bristol and Liverpool.

Richard Meegan is Professor of Economic Geography at the European Institute for Urban Affairs, Liverpool John Moores University. His research has ranged across urban and regional development, labour market change and the impact of economic restructuring and has been funded by central and local government, overseas planning and government agencies and a variety of research councils and foundations. He has also undertaken a substantial body of evaluation research for the European Commission and UK Government.

The European Institute for Urban Affairs is a research and consultancy group within Liverpool John Moores University with an international reputation for its work on urban and regional policy research and evaluation. It has conducted work for a wide range of prestigious clients including the European Commission, Government departments, Government Regional Offices, English Partnerships, Regional Development Agencies, local authorities, regeneration partnerships, the Economic and Social Research Council, Joseph Rowntree Foundation, voluntary organisations and the private sector. It has completed many influential reports over the past decade, such as the *State of the English Cities* Report for ODPM and *Second Tier Cities* in Europe for ESPON.

Foreword

I am delighted to be able to introduce this important research into the size and scope of the voluntary and community sector across the Liverpool City Region.

It has long been accepted that voluntary and community sector activity adds to the richness and quality of life at a local level. The range of activities and services is enormous - everything from volunteers running out-of-school activities to services helping the most vulnerable older people remain in their own homes, and this scarcely needs amplifying.

However, what has been lacking is independent and reliable data about the sector's reach and its economic contribution. This research report brings together for the first time data from different parts of the city region and clearly demonstrates that, beyond its social role, the sector is also an important economic player both as a major employer within the city region, and through the significant economic value of volunteering.

Along with colleagues from other voluntary and community sector infrastructure organisations working in the city region, we will now be considering the implications of this initial research, and how we can work with partners across all sectors to help the voluntary and community sector to flourish and grow further. If you would like to find out more about this, please do not hesitate to contact me.



Tony Okotie
Chief Executive
Liverpool Charity and Voluntary Services (LCVS)
T: 0151 227 5177

E: tony.okotie@lcvs.org.uk

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1. Executive Summary

1.1 Using secondary data and literature sources, the aim of this review is to answer the following questions in relation to the Liverpool City Region voluntary and community sector (VCS):

- How many VCS organisations are there?
- How many people are employed in the sector?
- What economic contribution does the sector make?
- What is the range of the sectors activities?
- What are the challenges and opportunities that the sector faces?

How many voluntary sector organisations are there in the Liverpool City Region?

1.2 We estimate that there are 8,638 voluntary sector organisations (VSOs) based in the City Region, a total made up 3,102 registered and some 5,536 ‘below the radar’ organisations.

How many people are employed in the sector?

1.3 We estimate a figure of 24,196 full-time equivalent (FTE) employees working in the sector in the City Region, with an average of 7.8 employees per registered voluntary sector organisation. This employment figure exceeds, for example, that of four of the City Region’s Local Enterprise Partnership’s seven targeted growth sectors.

What economic contribution does the sector make?

1.4 We estimate that the City Region’s VCS has a Gross Value Added (GVA) of £917.9m, or 3.7% of the City-Region’s total GVA. Based on this figure the voluntary sector’s economic contribution is comparable to the finance and insurance and information and communication sectors, within the Liverpool City Region and exceeds that of four of the seven growth sectors targeted by the City Region’s Local Enterprise Partnership.

What is the economic contribution of volunteering?

1.5 We estimate that volunteering in the Liverpool City Region has a GVA of £551m.

What roles do VCS organisations undertake?

1.6 The VCS plays a vital role in ensuring services are delivered to the parts of society where the private and public sectors cannot or will not reach. Compared to the national average, the Liverpool City Region has proportionally more organisations working in the following: capacity building; health; training; economic well-being; and community development. Compared to the national pattern, the Liverpool City Region also has proportionally more voluntary sector organisations fulfilling the following roles:

- Delivery of public services – 34% of organisations
- Community development and mutual aid – 31% of organisations
- Emotional support/befriending services –26% of organisations

- Providing advice to individuals – 27% of organisations
- Advocacy, campaigning, representation, information and research – 21% of organisations
- Providing staff and volunteers – 22% of organisations
- Help for people to access services and benefits – 20% of organisations
- Capacity building – 15% of organisations

2. INTRODUCTION

Aims of the research

2.1 The aim of this review is to measure the size and scope of the voluntary and community sector (VCS) in the Liverpool City Region - defined as the area of the Local Enterprise Partnership (LEP) and covering the 6 local authority districts of Halton, Knowsley, Liverpool, Sefton, St Helens and Wirral. Using secondary data and literature sources, it attempts to answer the following questions:

- How many VCS organisations are there in the City Region?
- How many people are employed in the sector?
- What economic contribution does the sector make?
- What is the range of sector activities?
- What are the challenges and opportunities that the sector faces?

Methodology and structure of report

What are we measuring - defining the voluntary and community sector?

2.2 We take the voluntary and community sector to denote the organisations that broadly operate between the market and the state and that are covered by terms such as 'Third Sector', favoured by the previous New Labour Government or 'Civil Society' as promoted by the current Coalition Government. Underlying these catch-all descriptions, however, is a diversity of institutions and activity that makes measuring the sector a difficult practical challenge. The 'sector' encompasses a number of overlapping 'sub-sectors' including:

- registered – and unregistered – charities – the charity sector (which includes the large organisations operating locally and nationally (like, for example, Barnardo's, the Royal National School for the Blind and Age Concern);
- more informal, generally relatively small, community groups and self-help initiatives – the community sector (like the Rialto Community Council and the Bridge Community Centre);
- not-for-profit organisations – the non-profit sector – using surpluses for the benefit of targeted beneficiaries including housing associations providing social housing on a non-profit basis (major social housing providers in the City Region, and especially Liverpool);
- religious institutions - the faith sector (like Faiths 4 Change, St Andrew's Community Network, the Tranmere Community Project and Churches Together on Merseyside);
- the social enterprise sector – that generates income from its socially-targeted activities (like Bulky Bob's, one of the city-region's Social Enterprise Network of over 300 social enterprises);
- the cooperatives and mutual sector – including Industrial provident Societies, consumer and worker cooperatives, cooperative consortiums, agricultural cooperatives and housing cooperatives (like the Eldonians).

2.3 The main source of statistics for the sector is the National Council for Voluntary Organisations and its annual flagship publication, *The UK Civil Society Almanac*, which brings together information from the Charity

Commission’s database, the Labour Force Survey, the Office for National Statistics and other sources (UK Statistics Authority, 2012).

2.4 The *Almanac* has definitions of both ‘Civil Society’ and the ‘voluntary sector’ and, as Table 2.1 shows, the difference in definition is reflected in both the numbers of organisations and employees reported upon nationally. The broader ‘civil society’ definition includes nearly five times the number of organisations and nearly three times the number of employees than the narrower ‘voluntary sector’ definition.

Table 2.1: Definitions of ‘civil society’ and the ‘voluntary sector’ – from the Almanac

Survey & coverage	Definition	Number of organisations covered/Employees
Almanac – ‘Civil Society’ UK wide	‘The body of organisations that exist between government, individuals and businesses.’ (p.3) This definition includes all organisations variously labelled third sector, the voluntary sector, the non-profit sector, the community sector and includes general charities, universities, faith groups, housing associations, companies limited by guarantee, employee owned businesses, independent schools, co-operatives, trade unions, trade associations and professional bodies, and political parties.	Approximately 800,000 organisations Estimated 2.3million employed in sector
Almanac – ‘Voluntary Sector’ UK wide	The Almanac’s voluntary sector definition ‘is based on the “general charities” definition.’ Starting with general charities ‘it excludes all those controlled by government, independent schools, and religious organisations and some others. Although many of these organisations have paid staff, a defining characteristic is their voluntary nature, whether governance through a trustee board, in finance through donations and grants, or in resources through the help of volunteers.’ (p.13)	Approximately 161,000 organisations Estimated 800,000 employed in sector

Sources: Kane et al 2014

Which sector definitions and data sources are we using?

2.5 Unfortunately the *Almanac* only provides data at national and regional levels. It does not include local authority level data to allow analysis at sub regional level. We, therefore, use *Almanac* data to set the national and regional contexts for city-regional analysis. For the latter, we use the *National Survey of Charities and Social Enterprises* (NSCSE) undertaken by Ipsos MORI for the Cabinet Office in 2008 and 2010. As Table 2.2 shows, its definition of the voluntary sector nationally is a reasonable match to that of the *Almanac* and, importantly, it provides data for English local authorities. The NSCSE thus allows the aggregation of data at the level of the Liverpool City Region and its constituent local authority areas.

Table 2.2: Definition of the ‘voluntary sector’ in the National Survey of Charities and Social Enterprises

Survey & coverage	Definition	Number of organisations covered/Employees
National Survey of Charities and Social Enterprises (NSCSE)	Organisations included are those ‘seen to service social, cultural and environmental objectives’ in England. Includes all registered organisations, including non-state schools, universities and higher education colleges, political parties and trade unions, where they are registered third sector organisations using one of the following forms – charities, companies limited by guarantee, community interest companies or industrial and provident societies.	Approximately 155,000-170,00 organisations Estimated 1.2 million full time equivalent employees

Source: Geyne-Rajme and Clifford 2012

- 2.6 For the purposes of this report, therefore, we will use the NSCSE’s definition of the sector when presenting data for the Liverpool City Region. We will also attempt to estimate figures for the smaller, less formally organised organisations that are not registered (Paxton and Pearce 2005, p.6). These are commonly referred to as ‘below the radar’ (BTR) voluntary sector groups. As McCabe (2010) defines: “‘...below, or under, the radar’ has become a short-hand term often applied to describe small voluntary organisations, community groups and more informal or semi-formal activities in the third sector... [The] term most commonly refers to activities or groups that do not have a recognised legal status and do not, therefore, appear on the Charity Commission or other regulatory registers or those that are registered but have low incomes or turnover”(p.1). These organisations are also included in our sector definition and, where estimates can be made, are included in our analysis of the sector within the Liverpool City Region.
- 2.7 At city-regional level, a number of ‘state of the sector’ surveys have been undertaken over the past six years. They add significantly to the local picture. Local surveys like these were recognised by the first NSCSE, which carried out three pilots with local CVS organisations and concluded that such surveys were the best way to identify 75% of the sector, particularly ‘below the radar’ organisations. Although we are not able to use these surveys to build a comprehensive picture of the sector in the Liverpool city region – as they were undertaken at different times, do not cover the entire city region and vary in their methodologies – they are used to verify the analysis, based on the NSCSE. The key findings of these surveys – undertaken by 4 of the 6 city-region local authorities – are summarised in Appendix 1.

The structure of the report

- 2.8 Section 3 sets the national and regional context using data from the *Almanac*. Section 4 presents our estimates of the size and scope of the sector in the City Region. Section 5 concludes by discussing the challenges and opportunities currently facing the sector.

3. THE NATIONAL AND REGIONAL PICTURE – WHAT DOES THE CURRENT EVIDENCE TELL US?

The national picture

Number of organisations

- 3.1 According to the latest *UK Civil Society Almanac*, there were 161,266 registered voluntary sector organisations operating in the UK during 2011/12 (Kane et al 2014), a decline of 2,407, or 1.5%, over the previous two years.
- 3.2 In addition to these registered organisations, there are several hundred thousand smaller, less formally organised – ‘below the radar’ – voluntary organisations, estimated to be in the region of 600,000 (McGillivray et al 2001).

Employment

- 3.3 Using Labour Force Survey figures, the latest *UK Civil Society Almanac* estimates that 800,000 people were employed nationally in the sector in 2012, an increase of 41% since 2002. During this period its share of the UK workforce rose from 2.1% to 2.7% (Clark et al 2012, p.73). Based on these figures, the voluntary sector workforce is estimated to be equivalent in size to those working in the restaurant and catering sector nationally (ibid, p.33).
- 3.4 And this is a conservative estimate. For instance, drawing on the *National Survey of Charities and Social Enterprises* (NSCSE), Geyne-Rajme and Clifford (2012) estimate that there are approximately 1,179,000 full-time equivalent (FTE) employees in the voluntary sector in England alone.

Assets & Income

- 3.5 The *Almanac* estimates the sector’s total income in 2011/12 at £39.2 billion, up from £29.4 billion ten years earlier, a one-third increase. Over three-quarters of this income came from two main sources: individuals (£17.4 billion, 44%) and Government (£13.7 billion, 35%). For the past decade, over 50% of this income has been ‘earned’ income, i.e. income which has been derived from selling goods and services (Kane et al 2014, p.41).
- 3.6 By 2011/12 the UK voluntary sector had net assets worth £105 billion, although a significant proportion of this asset base is concentrated amongst a small number of organisations – with just five charities owning around a fifth of the sector’s net assets (ibid, p.64).

Economic Contribution

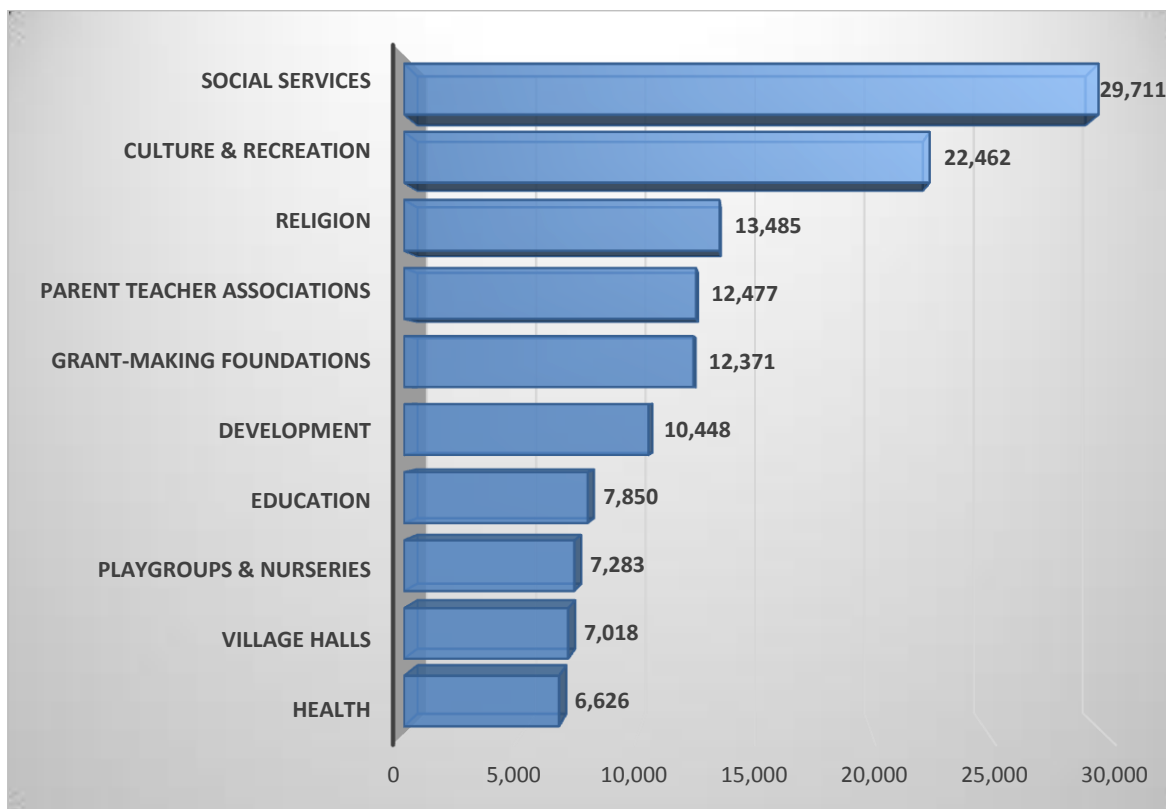
- 3.7 The sector’s output, as measured by Gross Value Added (GVA) is nationally significant – currently standing at £11.8 billion and making it larger, for example, than the agricultural sector, which has a GVA of £8.3 billion (Clark et al 2012).¹

¹ GVA is the difference between output and intermediate consumption for any given sector/industry. GVA therefore measures the contribution to the economy of each individual producer, industry or sector in the United Kingdom and is used in the estimation of GDP.

What the sector does

3.8 Figure 3.1 shows the range of activities undertaken by voluntary sector organisations. Nationally, a fifth of all organisations are involved in social service delivery, which includes: child welfare, youth services and welfare, family services, services for the disabled, services for the elderly, self-help and other personal social services. Culture and recreation organisations make up the second largest group, which includes theatres, museums, galleries, and sports clubs. Another significant activity is ‘Development’, which includes organisations providing services aimed at improving economic and social well-being.

Figure 3.1: Activities undertaken by voluntary organisations – top 10 national



Source: Almanac 2014

Volunteering – its economic, private and social value

- 3.9 An estimated 15 million people in the UK volunteer ‘frequently’, providing 2 billion hours of voluntary activity per year (ONS, 2013). This equates to just under one hour per week for every person over 16 in the UK, or 5% of the total hours worked in the UK by paid employees, and is equal to 1.25 million full-time equivalent (FTE) employees (Haldane 2014, p.4). There are around the same number of FTE volunteers in the UK as paid employees in the manufacturing, construction and real estate sector combined (ibid, p.5).
- 3.10 Andrew Haldane, Chief Economist of the Bank of England, has recently underlined the economic and social significance of volunteering, whilst also acknowledging that this contribution has traditionally been insufficiently measured or acknowledged:

“Whether seen from an economic or social perspective, volunteering is big business, with an annual turnover well into three-figure billions. But it a well-hidden jewel, whose social worth is rarely the subject of a public valuation” (Haldane, 2014; p.19)

- 3.11 Haldane emphasised the significant economic, private and social value that volunteering provides:

Economic Value: The contribution of voluntary activity, by UK adults, to the economy has been valued at £23.9 billion, or just over 1.5% of national GDP² (ONS 2013; cited in Kane et al 2014), making it a significant contributor to the UKs economy, producing twice as much value as the agriculture sector and approximately the same as the telecoms or the insurance and pension fund sectors (Haldane 2014, p.8). However, this figure only accounts for frequent and formal volunteering, and does not include informal volunteering (i.e. volunteering not done through organisations). The ONS estimate that informal volunteering contributes £18.6 billion to the UK economy (ONS, 2012, cited in Haldane, 2014, p.8). Adding both formal and informal volunteering together, the total annual economic contribution of volunteering to the UK economy is estimated at £42.5 billion.

Private Value: Volunteering provides a range of benefits to individuals, including: broadening life experience, boosting confidence, reducing stress, improving physical health and developing new skills (Low et al, 2007). Volunteering has also been shown to have a positive impact on mental health and enhanced well-being (Casiday et al, 2008; Fujiwara et al, 2014); as well as an individual’s skills and employability (YouGov, 2010).

Social Value: Work undertaken and commissioned by Pro Bono Economics (Oxera Consulting, 2013; Pro Bono Economics 2011), and others, has found that the social return on investment from the work of the voluntary sector amounts to significant multiples of the labour input cost – ranging from around £2.50 to well over £10 for every pound spent (Haldane 2014, p.14). A City of London study found that for every £1 a business invests in employability-related employee volunteering, the social return is £11.21 for society, saving the government and the public significant future financial resources (ibid, p.14).

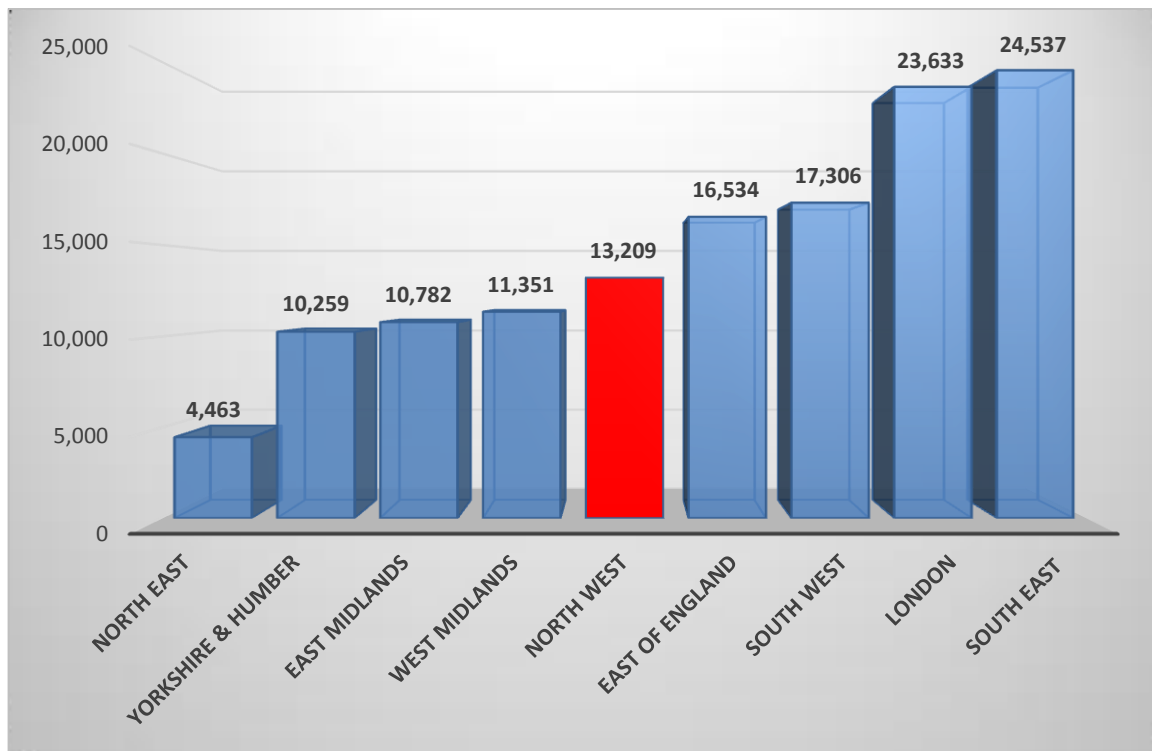
² GDP is defined as the total value of all goods and services produced within a country or region. Here it represents the monetary value of the goods and services created by volunteers.

The regional picture

Number of organisations

- 3.12 There are an estimated 13,209 registered voluntary organisations in the North West Region – the fifth highest of all the English regions; after London, the South East, South West and the East of England (Figure 3.2).

Figure 3.2: Estimated number of registered voluntary organisations by English Region



Source: Almanac 2014

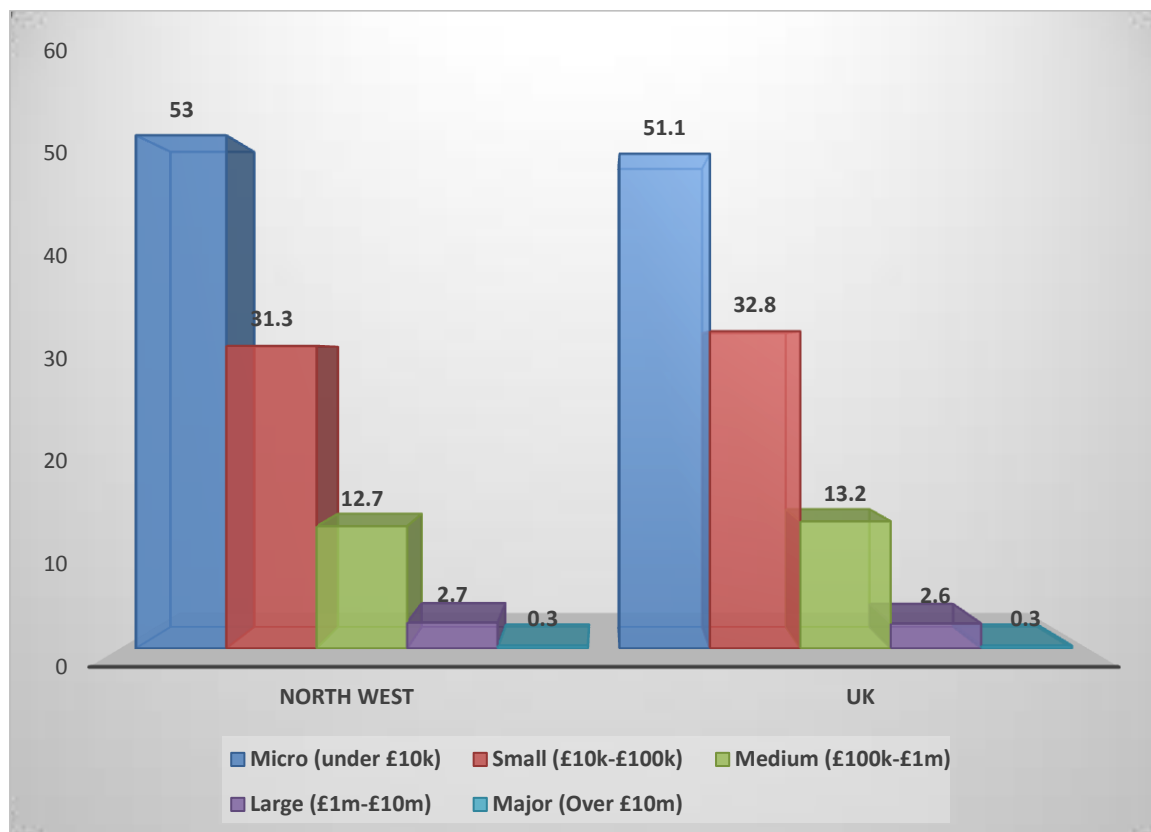
Income and Assets

- 3.13 The North West voluntary sector has an income of £2.5 billion – the fourth highest behind London, the South East and the South West. It has net assets worth £5 billion (Kane et al 2014).

Size of organisations

- 3.14 The majority of voluntary sector organisations in the North West have an income below £100,000, with over four-fifths of organisations being classed as either ‘micro’ or ‘small’. These figures broadly match the UK pattern (Figure 3.3).

Figure 3.3: Size of registered voluntary sector organisations – by proportion (%) in each income band



Voluntary Sector North West's regional portrait

3.15 Research undertaken by Voluntary Sector North West (2008) provided the following portrait of the sector in the North West region in 2008:

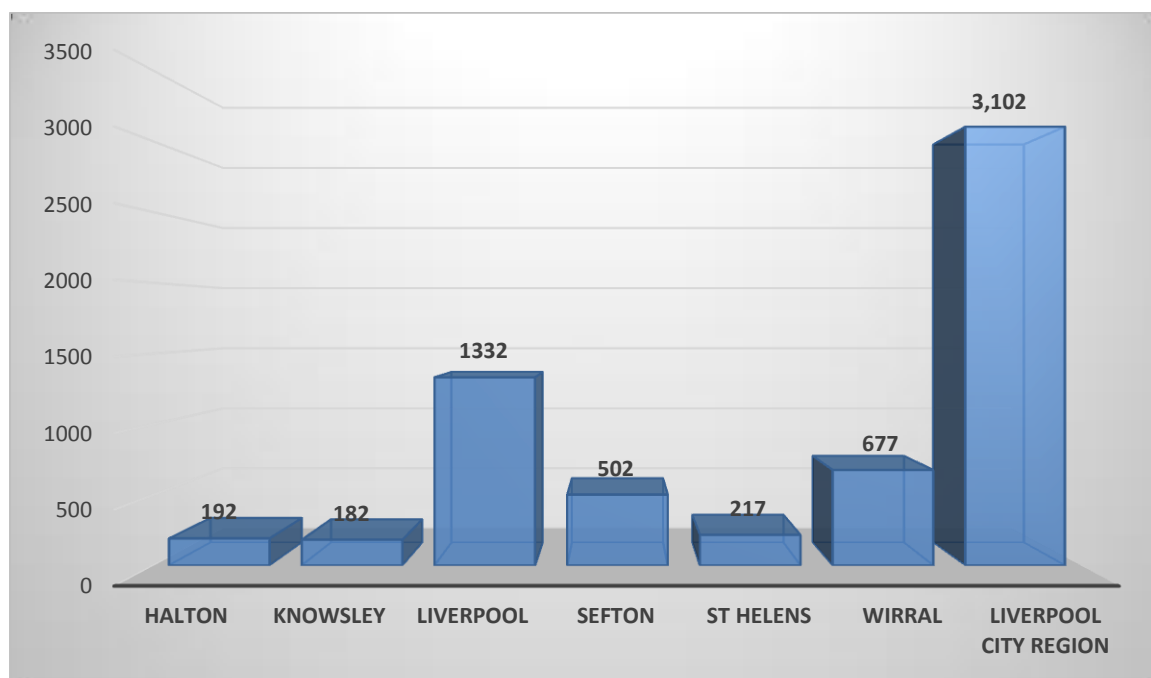
- at least 31,400 voluntary organisations (both registered and non-registered);
- total income of approximately £3,214m (in 2005);
- at least 64,000 people employed in the sector.

4. THE SIZE AND SCOPE OF THE VOLUNTARY SECTOR IN THE LIVERPOOL CITY REGION

Total number of voluntary sector organisations

4.1 The latest *National Survey of Charities and Social Enterprises* identifies 3,102 registered organisations in the city-region, ranging from 182 in Knowsley to 1,332 in Liverpool (Figure 4.1).³

Figure 4.1: Number of registered voluntary sector organisations in Liverpool City Region

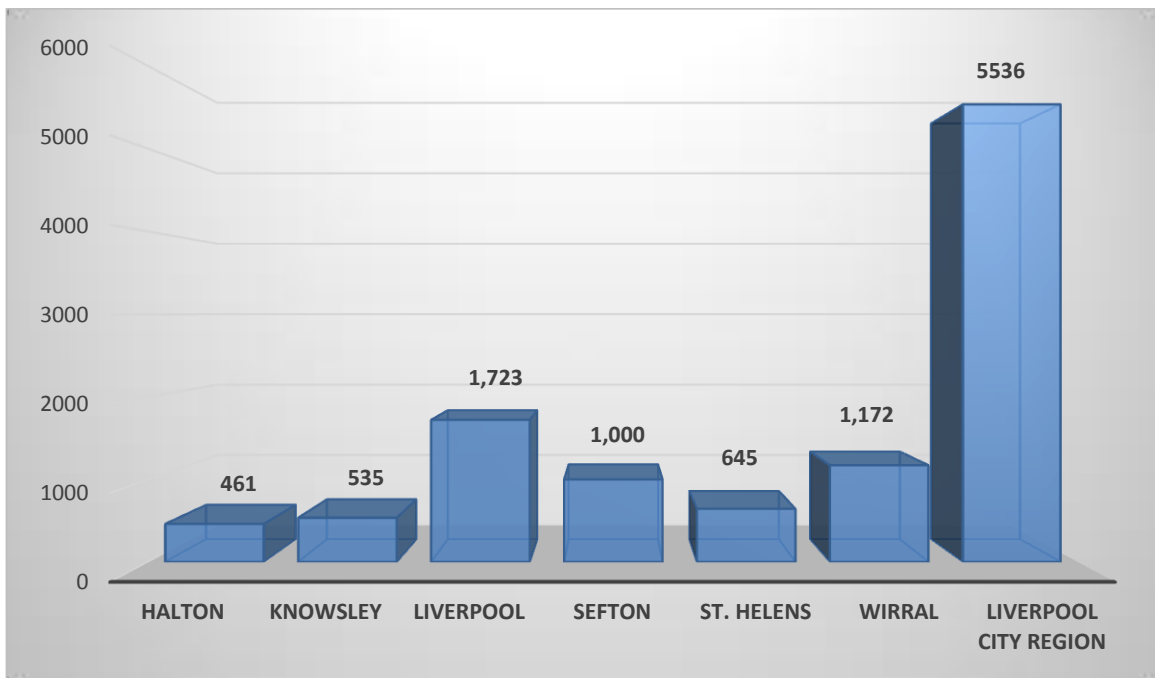


Source: Based on data from National Survey of Charities and Social Enterprises 2010

4.2 It is also necessary to estimate the number of ‘below the radar’ organisations in the City Region. Ideally, this estimate would be based on a local survey. Without the benefit of such a survey, we have used the population-based formula devised by Mohan et al (2010) and recently used in the *Greater Manchester State of the Voluntary Sector* study (2013). The formula assumes an average of 3.66 ‘below the radar’ organisations for every 1,000 population – which, when applied to the Liverpool City Region, produces a figure of 5,500 ‘below the radar’ organisations; ranging from 461 in Halton to 1,723 in Liverpool (Figure 4.2).

³ It must be recognised that some boundaries between local authorities are porous in some instances. For example, VCS groups located within the Sefton postcodes of L20-L22 may have been counted in the Liverpool figures in the NSCSE. However, it is not possible to measure the extent to which this has occurred.

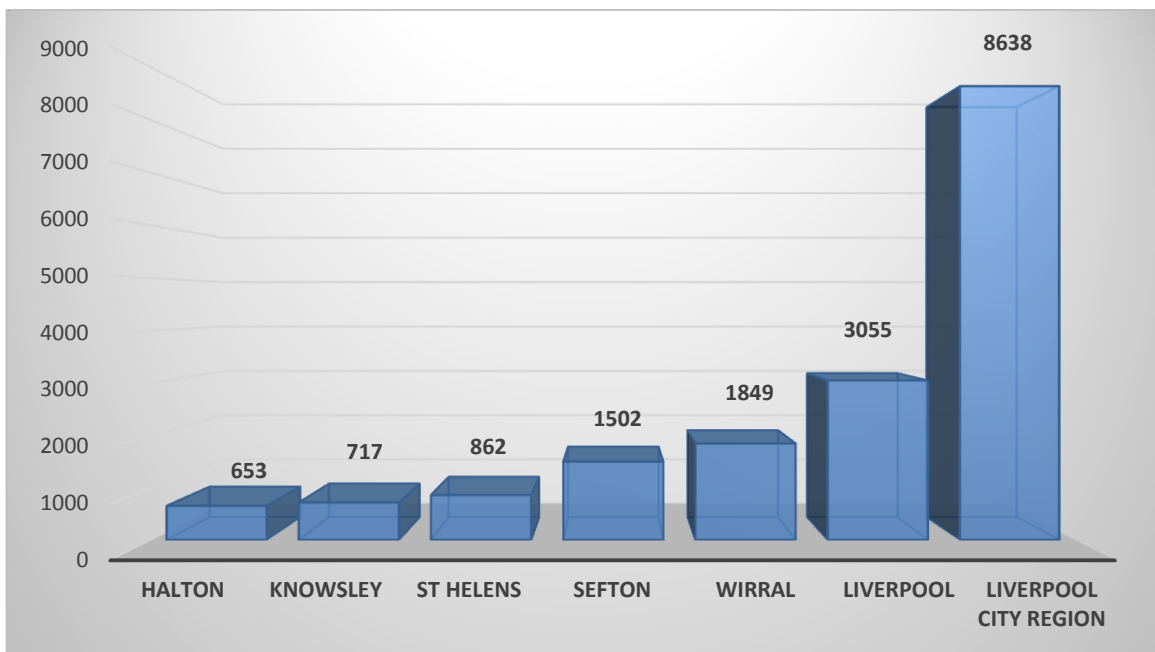
Figure 4.2: Number of 'below the radar' voluntary sector organisations in Liverpool City Region



Source: Calculation based on mid-year population estimates 2013 at 3.66 'below the radar' organisations per 1,000 population

4.3 Adding together the estimated registered and 'below the 'radar' organisations gives a total figure of 8,638 VCS organisations in the City Region; ranging from 653 in Halton to 3,055 in Liverpool (Figure 4.3).

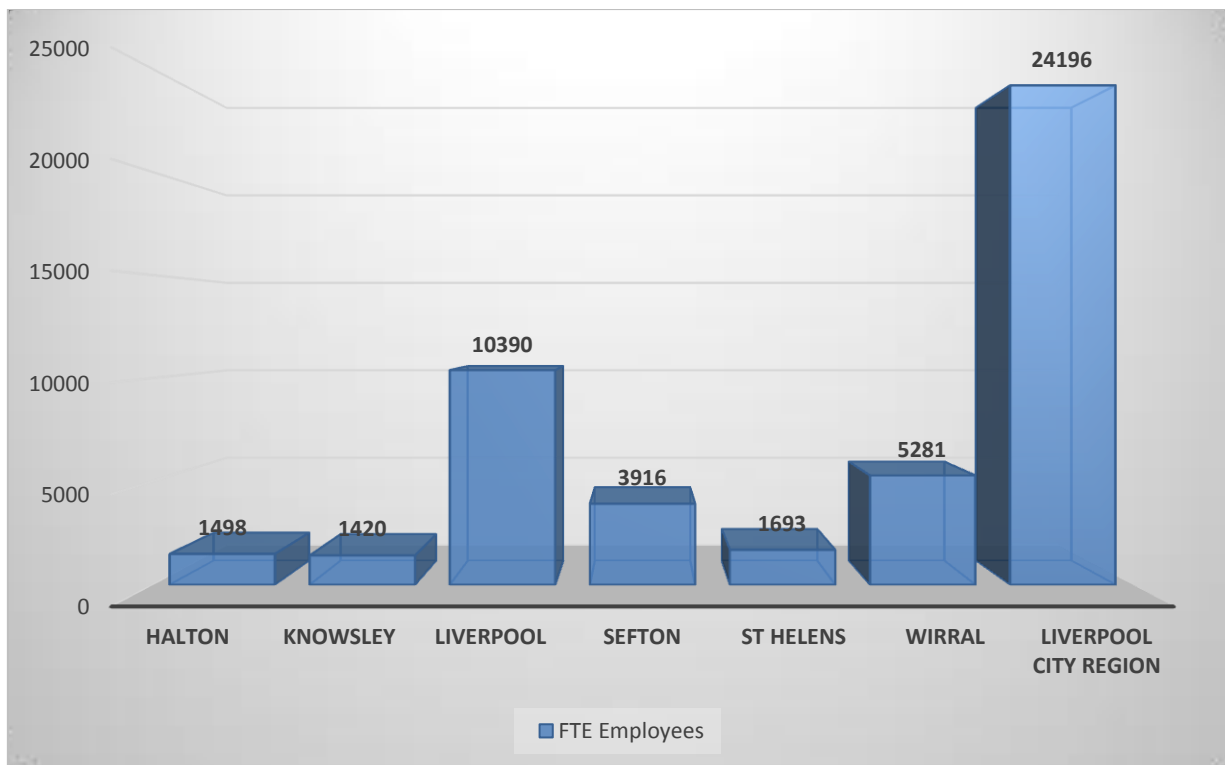
Figure 4.3: Total number of voluntary sector organisations in Liverpool City Region



Voluntary sector employment

- 4.4 To estimate employment in the sector we use the regional formula devised by Geyne-Rajme and Mohan (2012). Using data from the NSCSE, they calculated that voluntary sector organisations in the North West have, on average, 7.8 FTE employees. The figure does not include volunteers and those working within ‘below the radar’ organisations⁴. Applying this formula to the latest NSCSE data, we estimate that there are 24,196 FTE employees working in the registered voluntary sector in the Liverpool City Region.
- 4.5 Figure 4.4 shows how this figure is distributed across the City Region. Liverpool has 43% of the total voluntary sector workforce, followed by Wirral with 22%; Sefton 16%; St Helens 7%; and Halton and Knowsley with 6% each.
- 4.6 As Table 4.1 shows, compared to their respective shares of FTE, this distribution is higher in Liverpool, Sefton (marginally) and the Wirral, and lower in Halton and Knowsley. Compared to their respective shares of total population, the VCS FTE distribution is significantly higher in Liverpool, and marginally higher in the Wirral; but lower in all the remaining LAs.

Figure 4.4: Voluntary sector full-time equivalent (FTE) employees in the Liverpool City Region



⁴ BTR organisations have not been included here as they predominantly have an income below £5,000 and will not be employing people, but will be operated by volunteers instead.

Table 4.1: Share of total FTE employment and share of voluntary sector FTE workforce

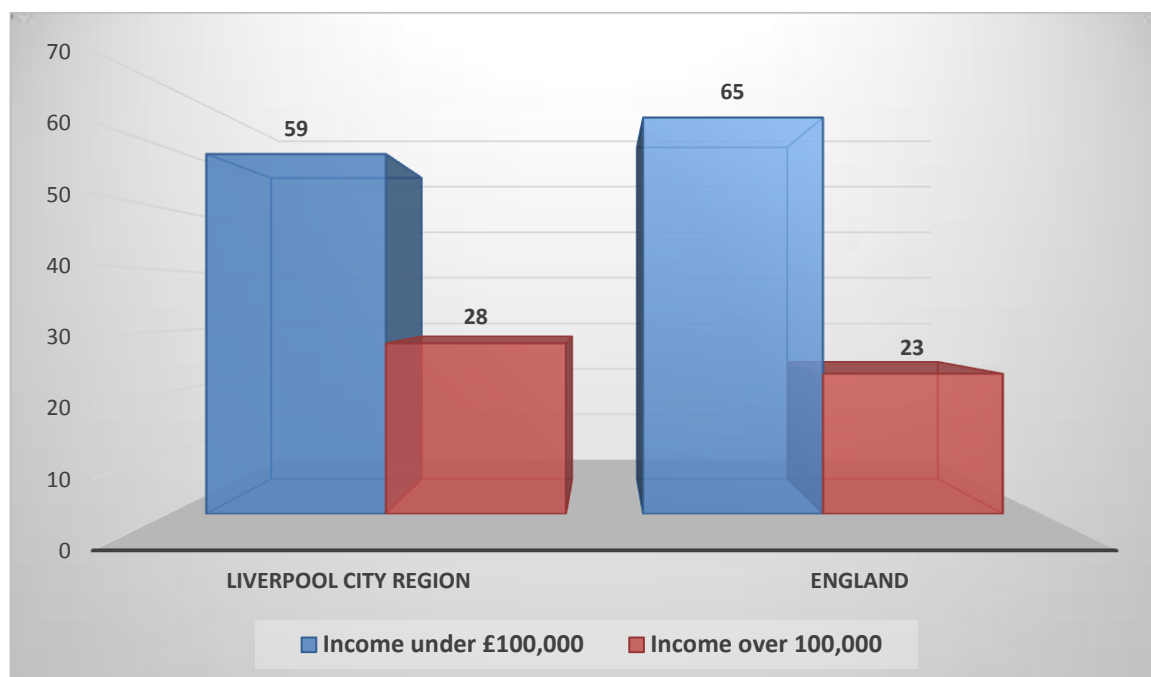
Area	% share of population	FTE Employment 2013	% share of Liverpool city-region FTE	% share voluntary sector FTE workforce
Halton	8	47,700	10	6
Knowsley	10	50,500	10	6
Liverpool	31	191,500	39	43
Sefton	18	73,000	15	16
St. Helens	12	51,800	11	7
Wirral	21	80,200	16	22
Liverpool city-region	100	494,700	100	100

Source: Calculations based on BRES and 2010 NCSCE; population taken from mid-year population estimates 2013

Income

- 4.7 A local survey would be needed to gauge the total income of the sector more accurately. The NCSCE does, however, give an indication of the distribution of income by size of organisation. Figure 4.5 compares Liverpool City Region with England. Matching the national pattern, most Liverpool City Region voluntary organisations are either 'micro' or 'small' in size with an annual income below £100,000. This finding is echoed in local state of the sector surveys (Appendix 1) which confirm that the majority of the sector is made up of smaller organisations.
- 4.8 However, these figures do suggest that the city-region has relatively fewer 'micro' or 'small' organisations than nationally. 65% of organisations in England have an income below £100,000, compared to 59% in the Liverpool City Region.
- 4.9 Conversely, the Liverpool City Region has a higher share of organisations with an income above £100,000 - 28%, compared to 23% nationally (Figure 4.5).

Figure 4.5: Income distribution of voluntary sector organisations (%)



Source: Based on data from National Survey of Charities and Social Enterprises 2010. 12% of Liverpool City Region organisation's provided no answer; 11% of organisations in England provided no answer.

The economic contribution of volunteers

- 4.10 In the absence of a primary survey we do not have accurate figures on the numbers of volunteers working within the Liverpool City Region and their economic contribution. We can, however, make a number of approximations using the *Manchester state of the voluntary sector study* (2013) and recent work by the ONS (2013) looking at the value of volunteering to the UK as a whole.
- 4.11 Based on these studies, there are two main ways of placing a value on the contribution of volunteers to the economy. The first is to value the output (GVA) that they produce, and the second is to value their input, or how much it would cost to pay someone to do the same job. The latter is the approach preferred by the ONS (2013, p.3).
- 4.12 We can estimate the number of volunteers in the Liverpool City Region to be around 12% of the total City Region population. This figure is derived based on the *Manchester state of the sector study* and the most recent British Household Panel Survey in 2008 (see ONS 2013, p.17), both of which found that 12% of their respective populations, volunteered. Based on this proportion, there are approximately 181,512 volunteers in the Liverpool City Region (total population 1,512,600).
- 4.13 In terms of the hours these volunteers work, we use the findings from the *Manchester state of the voluntary sector study* and Community Action Wirral research (see Appendix 1). Both surveys showed that each volunteer contributed on average 3 hours per week. Applying this figure to the estimated number of volunteers in the Liverpool City Region gives a figure of 544,536 hours per week.
- 4.14 Using the above figures we can value the output and input of volunteers to the city region economy. For output, we multiply the number of FTE volunteers by the GVA per employee figures for the Liverpool City Region averaged across three public sectors: public administration and defence, education and health and

social work. On this basis, we estimate that economic contribution of volunteering to the Liverpool City Region economy some £551m per annum.

4.15 For labour input, we provide two figures, one based on the national minimum wage (low estimate) and the other based on the median wage (higher estimate) for the North West. The true figure is likely to lie somewhere in between these two:

- Based on the current adult minimum wage of £6.50 per hour, it would cost £184m per year to employ staff to do the work provided by volunteers in the Liverpool City Region.
- Based on the median gross hourly wage of £12.30 for the North West, it would cost £348m per year to employ staff to do the work provided by volunteers in the Liverpool City Region.

Economic contribution of the VCS – GVA

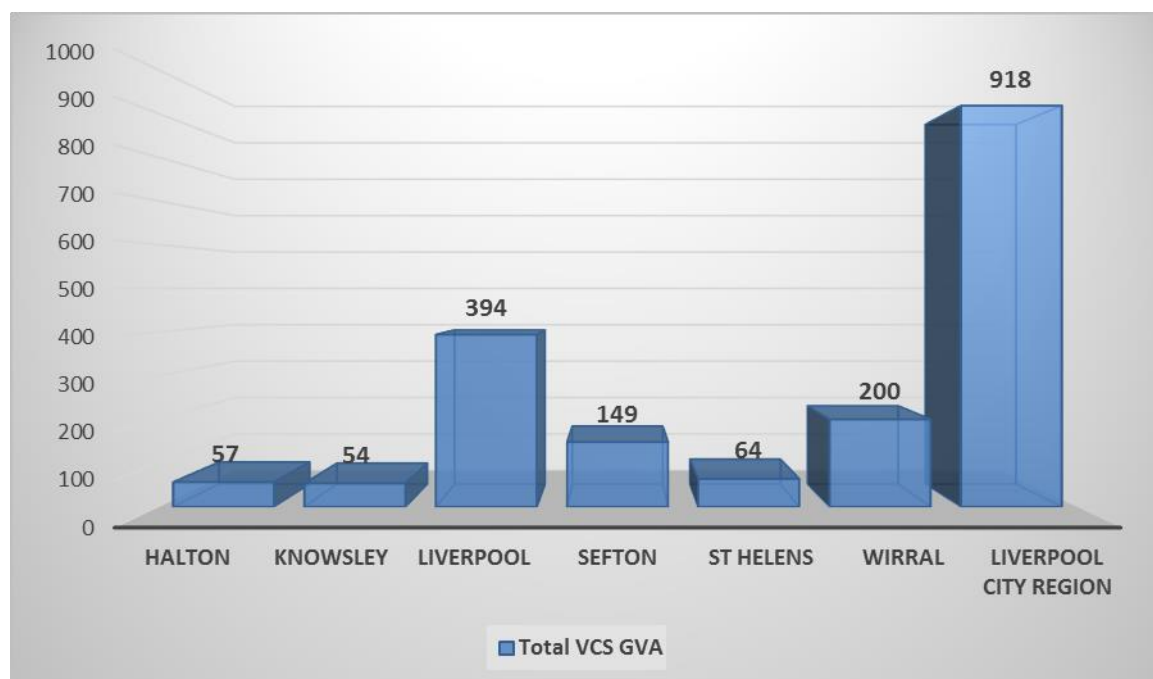
4.16 To estimate GVA we have adapted the methodology used in the *Greater Manchester State of the Voluntary Sector* study (2013). That study estimated city-regional GVA by applying North West regional average GVA per employee data. Our estimate is based, instead, on GVA per employee figures for Liverpool City Region averaged across three public sectors: public administration and defence, education and health and social work. On this basis, we estimate that the city-region's voluntary sector contributes some £917.9m in GVA - 3.7% of the city region's total GVA.⁵ This economic contribution is close, for example, to that provided by the finance and insurance and information and communication sectors, each with a GVA of £1.2bn.

4.17 Adding together the economic contribution of paid staff together with that of volunteers, we can estimate that staff and volunteers working in the sector across the Liverpool City Region, contribute some £1.5 billion worth of GVA to the economy. This figure is very close, for example, to that of the *Greater Manchester State of the Voluntary Sector* study, which estimated that staff and volunteers contributed £1.7 billion worth of GVA to the Manchester economy – research which was based on a primary survey of the sector.

4.18 Figure 4.6 shows the distribution of GVA, based on the economic contribution of paid staff, across the City Region, ranging from £54 million in Knowsley (6% of the total) to £394 million in Liverpool (43% of the total).

⁵ As with the employment estimates, this GVA figure does not include the economic contribution of 'below the radar' voluntary organisations. To include these would require a primary survey of the sector in the city-region.

Figure 4.6: VCS Total GVA (£m), Liverpool City Region



4.19 Table 4.2 compares, for each LA, the voluntary sector’s percentage shares of GVA with total population and working age population. It shows that Liverpool, due to its higher concentration of voluntary sector organisations and employees, performs strongly, with its share of GVA significantly higher than its share of population. Wirral also performs marginally stronger.

Table 4.2: % share of total population and % share VCS GVA

Area	% share of population	% share of working age population (16-64 years old)	% share Voluntary sector GVA
Halton	8	8	6
Knowsley	10	10	6
Liverpool	31	33	43
Sefton	18	17	16
St. Helens	12	11	7
Wirral	21	20	22
Liverpool city-region	100	100	100

Source: Population taken from 2013 mid-year populations estimates, Nomis

Performing as strongly as the LEPs 'growth sectors'

4.20 Based on our estimates, the sector's contribution to the City Region's employment and GVA compares favourably with that of a number of the growth sectors identified by the City Region Local Enterprise Partnership. As Table 4.3 shows, more people are employed in the sector and GVA is higher than in each of the SuperPort, Digital and Creative, Advanced Manufacturing and Life Sciences sectors.

Table 4.3: Total employment and GVA of Liverpool City Region Growth Sectors & Voluntary Sector

Sector	Employment	GVA (based on 2010 £m)
Liverpool City Region Growth Sectors		
Low Carbon	43,000	1,632
SuperPort	23,000	779
Digital & Creative	17,000	858
Advanced Manufacturing	16,000	761
Life Sciences	3,000	170
Financial & Professional Services	90,000	5,400
Visitor Economy	49,000	1,062
Voluntary sector	24,000	879⁶

Source: Figures for 'Growth Sectors' taken from Oxford Economics (2014) *Liverpool LEP Economic Outlook*, Final Report and Data Appendices

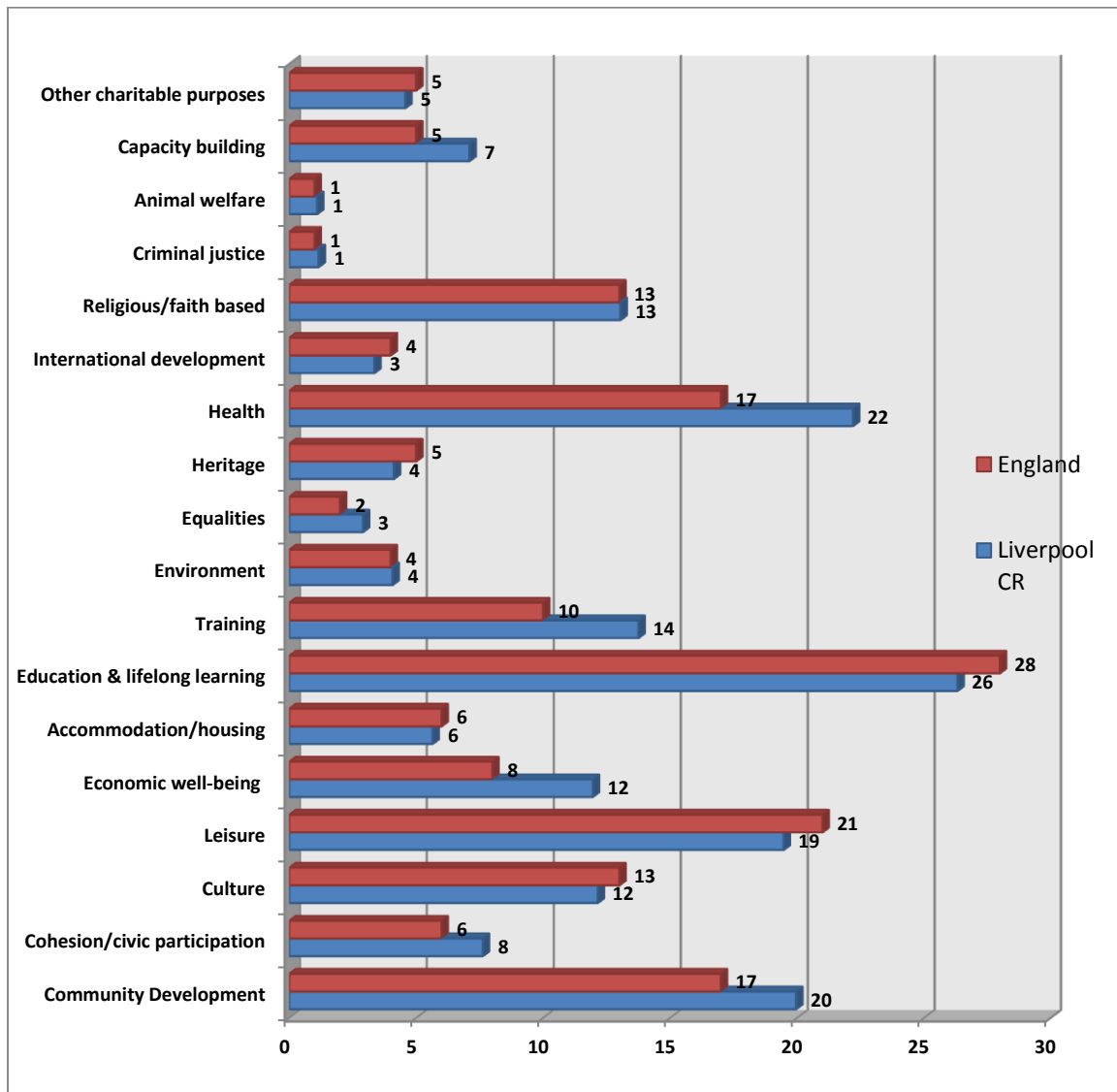
⁶ Total GVA for the voluntary sector has been adjusted from 2011 prices to 2010 prices to ensure it is comparable with the Oxford Economics LEP data, which are in 2010 prices. The GVA figure reported in this table therefore differs from the £917.9m figure found elsewhere in the report, which is based on 2011 prices.

What does the VCS do?

Main areas of work

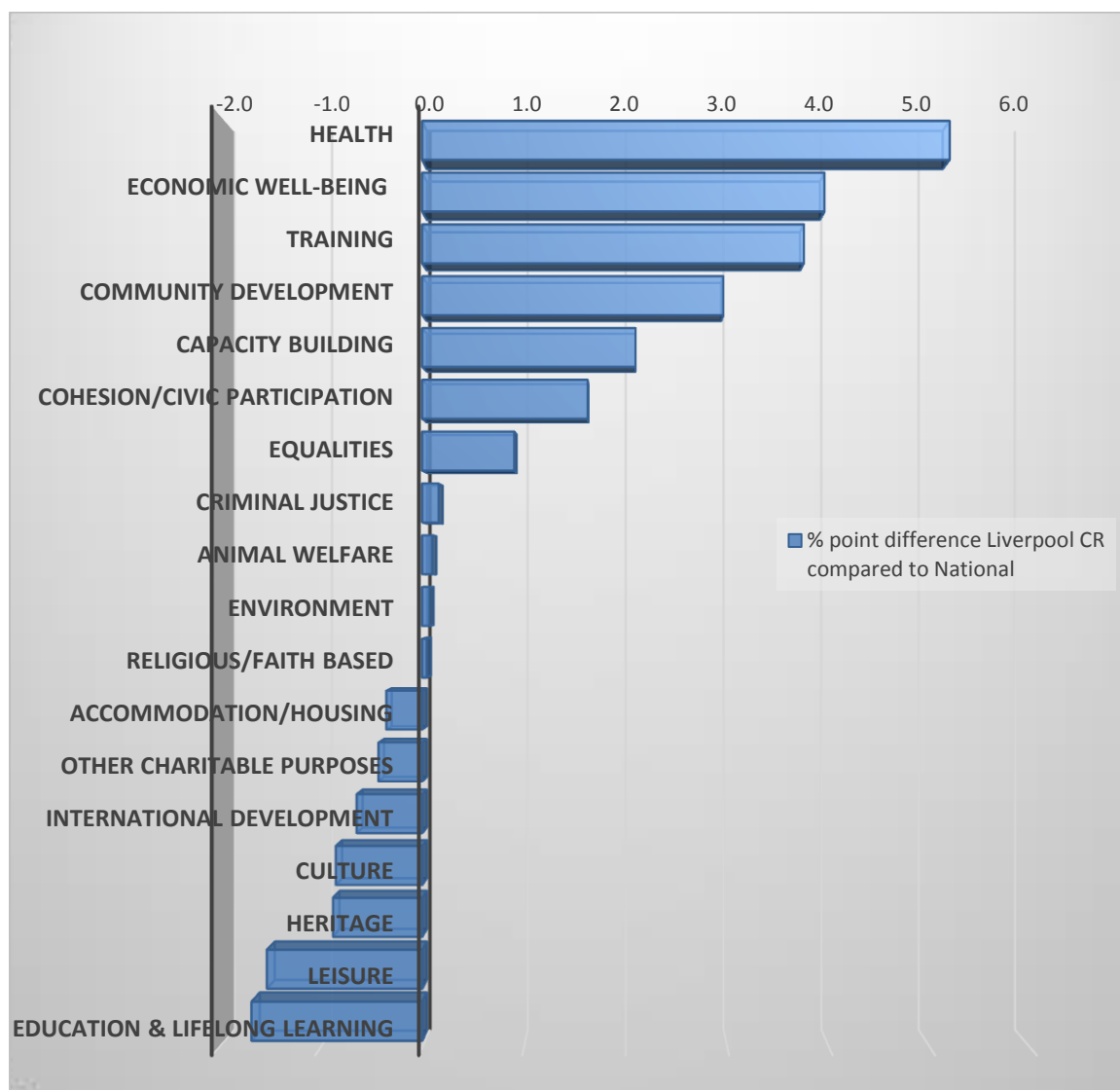
4.21 As part of the NSCSE organisations were asked to identify the main broad areas in which they work. The findings from the 2010 survey suggest that the Liverpool City Region has proportionally more voluntary organisations working in the following areas: health, economic well-being, training, community development, capacity building, cohesion/civic participation, and equalities (Figures 4.7 and 4.8).

Figure 4.7: Voluntary sector organisations main areas of work – Liverpool City Region and England



Source: Based on data from 2010 National Survey of Charities and Social Enterprises

Figure 4.8: VCS main areas of work: % point difference Liverpool City Region versus National



Source: Based on data from 2010 National Survey of Charities and Social Enterprises

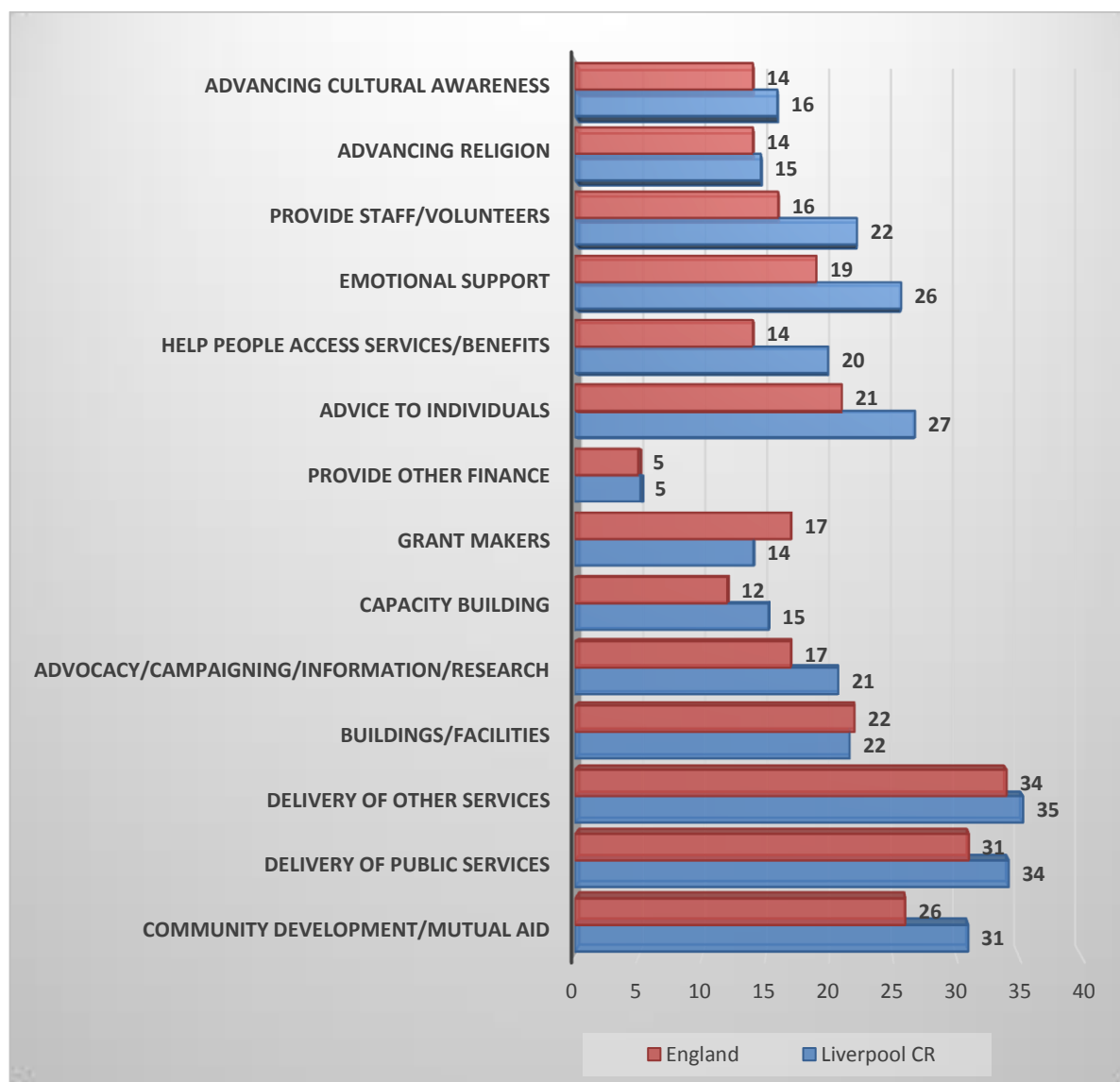
Main roles undertaken

4.22 The NSCSE survey also asked organisations to self-select the various roles they undertake in the work they deliver. Figure 4.9 demonstrates the wide range of roles undertaken by the sector. Both nationally and in the Liverpool City Region, voluntary sector organisations are particularly prominent in two areas – the ‘delivery of public services’ and the ‘delivery of other services’ – with around a third of organisations involved in both. Public service delivery encompasses the following: health care, day centres, counselling, community safety, education, childcare and social housing. ‘Other’ services include: business services, financial services, leisure, retail, manufacturing, community support, sports coaching and recreation.

As Figures 4.9 and 4.10 show, compared to the national pattern, Liverpool City Region has proportionally more voluntary organisations involved in:

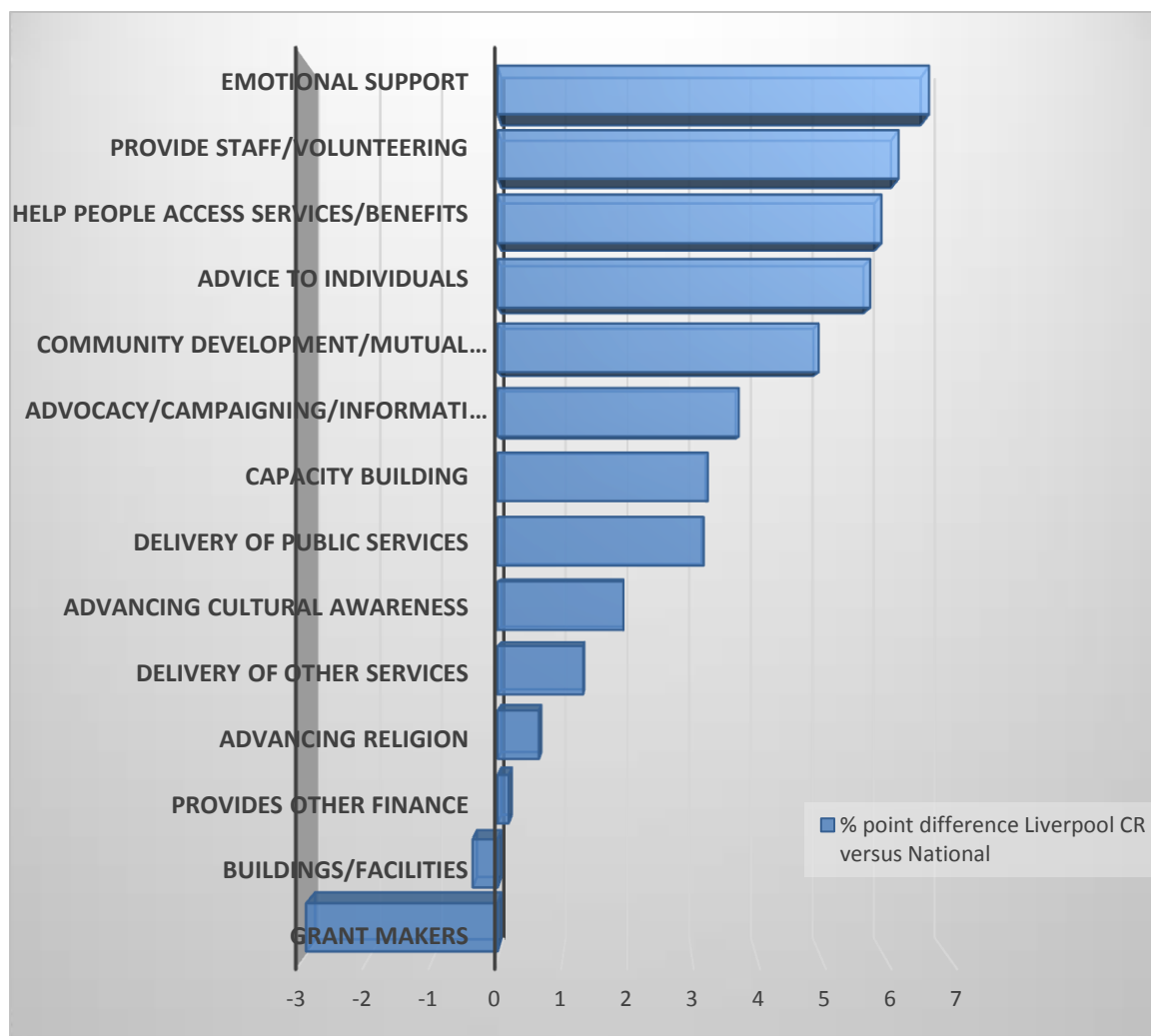
- the delivery of public services – 34% of organisations (for example, Nugent Care and Personal Service Society);
- community development and mutual aid – 31% of organisations (such as Alt Valley Community Trust and the Bridge Community Centre in Liverpool)
- emotional support/befriending services – 26% of organisations (for example, Merseyside Domestic Violence Service; Knowsley Domestic Violence Support Service; St Helens MIND and the Zero Centre, Wirral)
- providing advice to individuals – 27% of organisations (for example, HEAT and the Whitechapel Centre in Liverpool; the Citizens Advice Bureaux);
- advocacy, campaigning, representation, information and research –21% of organisations (such as Sefton Advocacy, Asylum Link Merseyside, Steps to Freedom in Liverpool and the Merseyside Employment Law Unit);
- providing staff and volunteers – 22% of organisations (for example, the Volunteer Centre Liverpool);
- helping people to access services and benefits –20% of organisations (for example, Asylum Link Merseyside and Merseyside Welfare Rights); and
- capacity building – 15% of organisations (for example, including all of the Councils for Voluntary Services and Merseyside Network for Change).

Fig 4.9: VCS roles - Liverpool City Region and England



Source: Based on data from National Survey of Charities and Social Enterprises (2010)

Figure 4.10: VCS roles: % point difference Liverpool City Region versus National



Source: Based on data from National Survey of Charities and Social Enterprises (2010)

5. CHALLENGES AND OPPORTUNITIES FOR THE LIVERPOOL CITY REGION VCS

- 5.1 Sitting between the state and the market (Fyfe 2005), the voluntary sector is inevitably affected by developments in the other two sectors as well as facing its own internal development pressures. Currently the sector's operation is fundamentally affected by the pressures of recession and austerity.

Challenges

The scissors of public spending cuts and increased demand for voluntary sector services

- 5.2 The sector's role in service delivery has grown significantly in the past decade and earned income has become the main source of income. By 2009/10, it accounted for 55% of total income. A large part of this increase came from earned income from statutory sources (or contracting work for public sector bodies), which increased by 157% between 2000/01 and 2009/10. Total income (voluntary and earned income) from statutory sources had reached £13.9 billion by 2009/10, a real term increase of 61% since 2000/01. However, the funding environment for the sector has changed radically since 2010. Although the voluntary sector featured – albeit briefly – at the forefront of political debate through the 'Big Society' and 'localism' agendas, this trumpeting of its important role did not protect it from the cuts associated with the austerity programme. Nationally, between 2010/11 and 2011/12 total income from government to the voluntary sector fell by £1.3 billion, or 8.8%, in real terms, which is a higher percentage than the reduction in total government spending. Organisations involved in social services and employment and training received particularly deep cuts (Kane et al, 2014; pp 45-46).
- 5.3 If the overall picture is one of funding cuts, there are also aggravating factors in areas such as the Liverpool City Region. First, the contribution of statutory sources to the sector varies considerably according to geography, beneficiary group type, and levels of deprivation (Clifford et al 2010; Civil Exchange 2012; Mohan 2011; Pattie and Johnston 2011; Power 2011; Stott and Longhurst 2011). The *National Survey of Third Sector Organisations* (NSTSO) showed a marked North-South contrast amongst registered organisations: with 42% of registered VCOs in the North West and North East receiving public funding compared with 33% of their counterparts in London and the South East. The survey also showed that registered organisations in the most deprived parts of the country were nearly four times more likely to report public sector funding as their most important source of income than organisations in the least deprived areas (Clifford et al 2010).⁷ Figures A2.1 and A2.2 in Appendix 2 show the picture across the City Region.
- 5.4 Alongside this pattern of greater reliance on public sector funding, is the second exacerbating factor. Cuts in funding from central government have been unevenly distributed across local authorities and, on the whole, those in disadvantaged areas have experienced relatively greater revenue spending cuts (see Figure A2.3 in Appendix 2). Liverpool and Knowsley rank 3rd and 4th, respectively, in the local authority rankings of *per capita* expenditure cuts; four out of the City Region's six local authorities are ranked in the top 25 and the other two in the top fifty in these rankings.

⁷ Liverpool and Knowsley are in the top 1% of the 326 local authorities in the Index of Multiple Deprivation; Halton in the top 10%; St Helens and Wirral, the top 20% and Sefton in the top 30%.

- 5.5 Thirdly, a significant increase in the demand for services is compounding the effects of the spending cuts (Davidson and Packham, 2012; Church Urban Fund, 2012; Jones et al, 2013; CAB 2012). For example, a survey undertaken by Davidson and Packham (2012) of over 200 community and voluntary groups in the North West showed that well over two-thirds (68%) of groups noted there had been an increase in demand for their services, between 2011 and 2012. For groups working with the most disadvantaged and vulnerable clients (for example, those with disabilities, homeless people and victims of crime), this figure was much higher, with four-fifths of these groups stating there had been an increase in demand for their services. Similarly, the Church Urban Fund (2012), which gives grants to small community-based organisations in the 10% most deprived areas of England, revealed that 78% of the 250 groups that had completed its survey had reported a rise in demand for their services over a twelve month period, between 2011 and 2012.
- 5.6 Figure A2.4 in Appendix 2 shows the cumulative impacts of the welfare budget cuts per head of population. Again, the impact of welfare reform in the Liverpool City Region is measurably worse than the national average. Five of the Liverpool local authorities appear in the top 50 worst affected authorities, with Knowsley and Liverpool appearing in the top 10 (Beatty and Fothergill, 2014; p.72), indicating that the demands placed on the VCS within the City Region are likely to be particularly acute.

Opportunities

- 5.7 Paradoxically, notwithstanding this gloomy picture on funding, current social and economic circumstances reinforce the value of the voluntary and community sector. However, to some extent, the opportunities currently open to VSOs depend on awareness and acknowledgement of their importance and the potential they offer for further development. But the significance of the sector frequently goes unrecognised.
- 5.8 As we have argued in this report, the economic contribution of the sector to the City Region economy is significant. Based on our estimates, the sector's contribution to the City Region's employment and GVA compares favourably with that of a number of the growth sectors identified by the City Region Local Enterprise Partnership. More people are employed in the sector and GVA is higher than in each of the SuperPort, Digital and Creative, Advanced Manufacturing and Life Sciences sectors.
- 5.9 The figures do not include the economic contribution of volunteers working for registered organisations and those involved in 'below the radar' organisations. Our estimates here for the City Region, as those that have been undertaken nationally by the ONS, show that it is significant. Nationally, the contribution of 'formal' voluntary activity, by UK adults, to the economy has been valued at £23.9 billion, or just over 1.5% of the UKs GDP. Adding 'informal' volunteering to this, produces a figure of £42.5 billion. We estimate that volunteering in the Liverpool City Region has a GVA of £551m. Within the city region, Halton CVS have calculated that the working hours of volunteers contribute around £61,360 per week or £3,109,720 a year to the local economy. On the Wirral, the work of volunteers is estimated to contribute £36,733,536 annually to the economy (Appendix 1).
- 5.10 As noted earlier, the Bank of England's Chief Economist described voluntary activity as 'a well hidden jewel' (Haldane 2014, p.19) and said that its economic and social contribution cannot be ignored. Voluntary sector organisations frequently supplement and/or add value to the delivery of public or private sector bodies. They foster and support volunteering. They are able to build capacity in local groups and community organisations.

- 5.11 They can also make a significant contribution to governance at neighbourhood, local authority and City Region levels not only because their 'reach' often extends to groups that public sector bodies find harder to engage, but also because they are well positioned to gain insights into the causes of problems and the impact of public policy. Again, however, this dimension has frequently been neglected, especially at City Region level. With only a few exceptions, so far Local Enterprise Partnerships have seldom or only peripherally engaged with the voluntary and community sector (Escadale 2013; Cox et al 2013; McInroy and Jackson 2014). A recent review of the strategic economic plans of England's 39 Local Enterprise Partnerships' concluded: "...few LEPs took the initiative to engage meaningfully with civil society and citizens, while local voluntary organisations...were seldom mentioned" (Cox *et al* 2013 p.4). Similarly, Escadale analysed the degree to which the voluntary and community sector was an active member of LEP boards or sub groups (see Table A2.1 in Appendix 2). Only five of the 39 LEPs were shown to have concerted VCS involvement.
- 5.12 McInroy and Jackson (2014) have gone a step further and have ranked LEPs' economic and place resilience on the basis of economic performance, board composition and social strategy. As they argue: "For LEP areas to be resilient their economic performance needs to be predicated upon an approach to composition and social strategy, which considers both economic and social growth...social inclusion, improvement in health outcomes, and reduction in poverty and general development of social capital...Social growth and anti-poverty has not been a significant consideration of LEP activity, to date, and for resilience we believe they must be." (p.1) To measure individual LEP performance to date in terms of resilience, they use a number of indicators, including the extent of VCS representation on boards, SME representation, public sector representation and the percentage of European Investment Framework funding allocated to social inclusion activities. Table A2.2 in Appendix 2 shows the results, with the scores from each of these indicators giving an overall rank. Liverpool City Region LEP is ranked 32nd out of the 39 LEP partnerships.
- 5.13 The estimates in this report of the economic and social contribution of the VCS in the Liverpool City Region would suggest that the lack of engagement with the VCS in the LEP's structure and strategy is very much a missed opportunity.

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Appendix 1. Summary of main findings from recent VCS surveys in the Liverpool City Region

Four of the city-region's Councils for Voluntary Services have undertaken state of the sector surveys, at various times over the past six years: Halton CVS, Liverpool CVS, Sefton CVS and Community Action Wirral.

The main findings from each these studies are summarised below:

Halton:

- 111 organisations responded to its survey in **2009**;
- Over half the respondents employed at least one person, with a total of 272 FTE jobs;
- The sector was made up of predominantly small and medium sized organisations, with nearly two-thirds having an income below £100,000.
- Volunteer working hours contributed £61,360 per week or £3,109,720 a year to the Halton economy
- In terms of service delivery, the most popular areas, where at least a tenth of organisations were involved, comprised: voluntary and community organisation support, religion, health, social services, young people's services, education and research, and housing.
- Main income source: 27% of organisations from direct fundraising; 22% from Halton Borough Council and 19% from membership and admission charges.

Liverpool:

- 527 organisations responded to its survey in **2008**;
- A total of 6,067 FTE jobs were reported by respondents; 8,759 volunteers and 1,969 volunteer committee members;
- The total income of those surveyed was £156,743m;
- Like Halton, the local sector was made up of predominantly smaller organisations, with an income below £100,000.
- In terms of the work undertaken by organisations, the most popular categories comprised: education and training (16%); community and economic development (11%); health and social care (10%); youth work (9%); sports and recreation (9%); and arts and culture (9%).

Sefton:

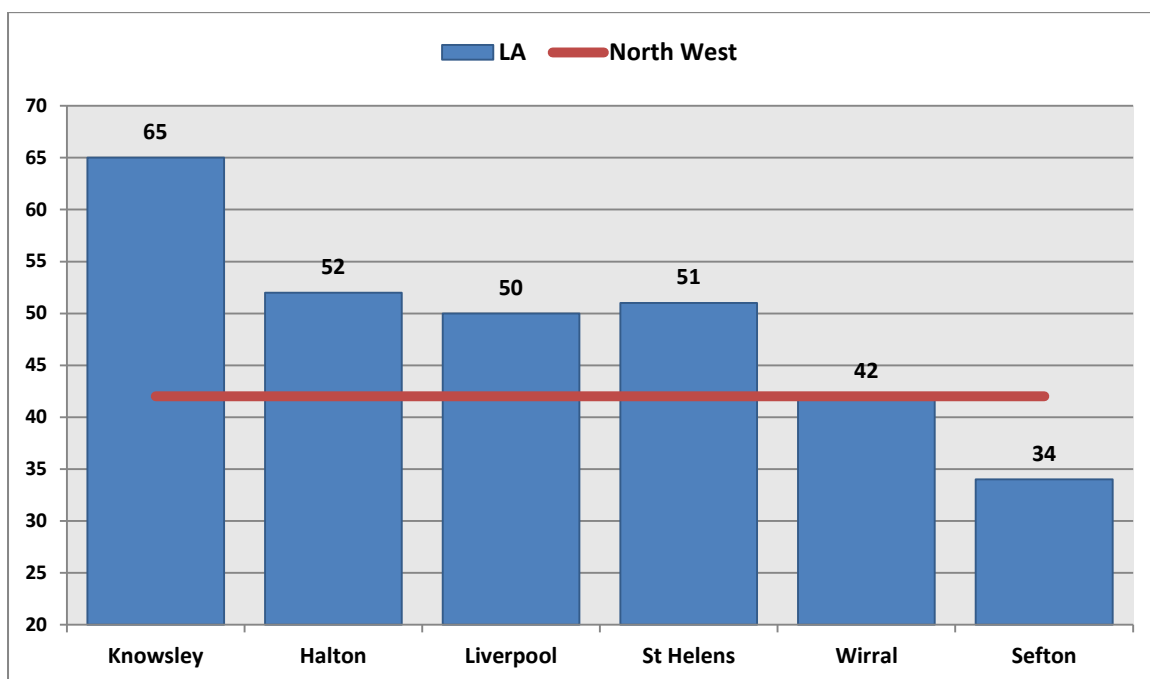
- 820 organisations responded to its survey in **2009/10**;
- A total of 4,122 FTE jobs were reported by respondents; 13,770 volunteers and 3,368 volunteer committee members;
- The majority of organisations, two-thirds, had an income below £100,000
- The main areas of work activity identified by respondents include: children and families (27%); young people (26%); older people (23%); Information, Advice and Guidance (18%); and health (18%).

Wirral:

- 670 local groups responded to a survey in **2013**;
- The majority of organisations, nearly 70%, had an annual income below £100,000; while a tenth had an annual income over £1m.
- Estimated to be 26,600 volunteers on the Wirral, averaging 3 hours of volunteering per week.
- The annual contribution of volunteers to the Wirral economy is estimated to be £36,733,536.

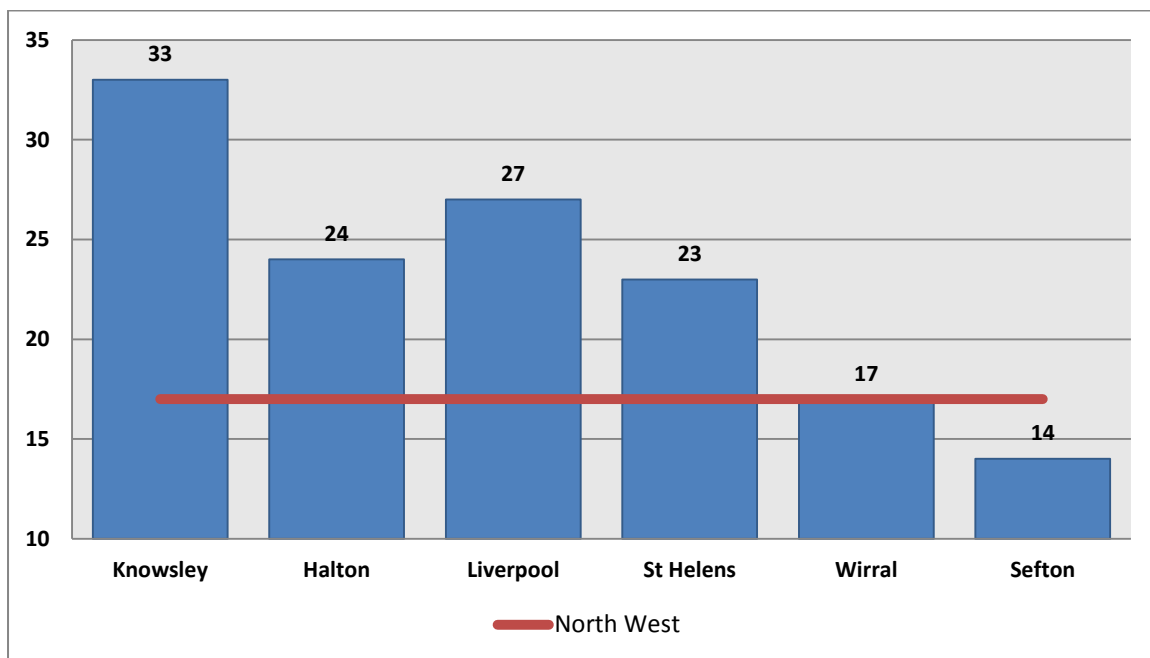
Appendix 2: Challenges and Opportunities for the Liverpool City Region VCS

Figure A2.1: Voluntary sector organisations receiving public funding



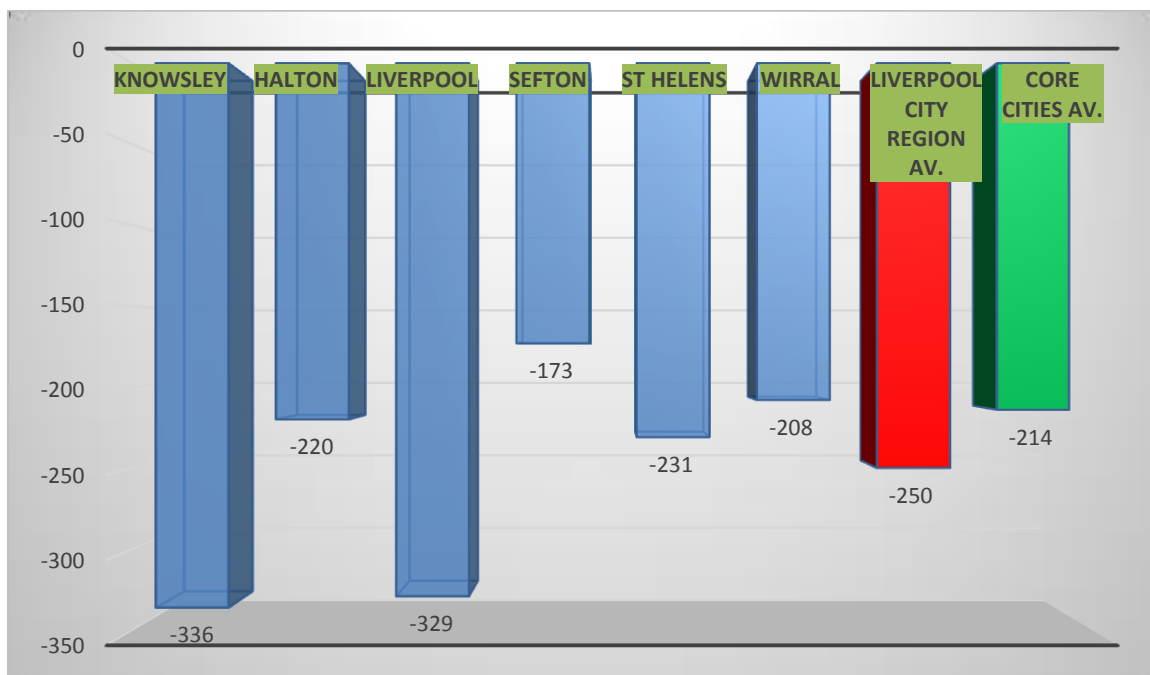
Source: Data taken from Clifford et al 2010

Figure A2.2: Voluntary sector organisations stating public funding most important funding source



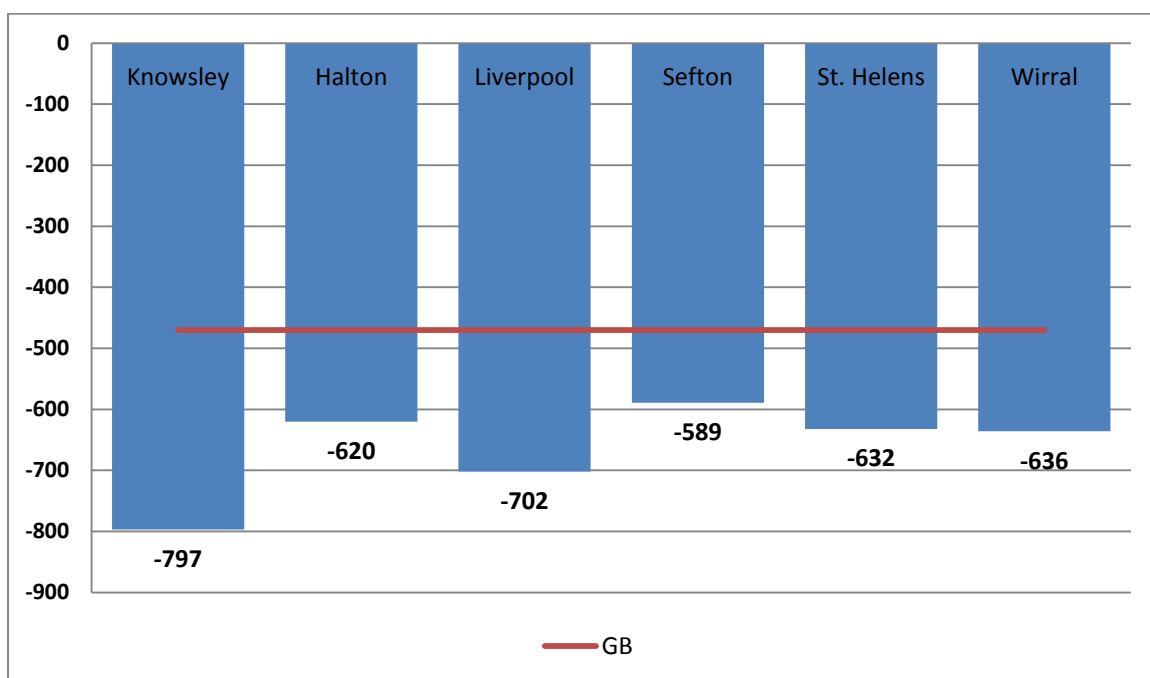
Source: Data taken from Clifford et al 2010

Figure A2.3: Cumulative Reduction in Revenue Spending Power 2010/11 to 2014/15, £s per person



Source: Newcastle City Council 2013

Figure A2.4.4: Total Impact of Welfare Cuts 2010/11-2014/15: Financial loss per working age adult (£)



Source: Beatty and Fothergill 2013

Table A2.1: Summary of VCSE involvement in LEPs (up to December 2013)

Local Enterprise Partnership	VCSE on Board	Formal VCSE rep on board	VCSE on subgroups	Concerted VCSE involvement
Black Country LEP			*	
Buckinghamshire Thames Valley LEP				
Cheshire and Warrington LEP	*	*	*	*
Coast to Capital LEP				
Cornwall and Isles of Scilly LEP			*	
Coventry and Warwickshire LEP			*	
Cumbria LEP	*	*	*	*
Derby, Derbyshire, Nottingham & Nottinghamshire LEP (D2N2)	*	*	*	
Dorset LEP	*	*	*	
Enterprise M3	*	?	?	
GFirst LEP	*	?	?	
Greater Birmingham and Solihull LEP			*	
Greater Cambridge/Greater Peterborough Enterprise Partnership	*	?	*	
Greater Lincolnshire LEP (GLLEP)			*	
Greater Manchester LEP				
Heart of the South West LEP	*		*	
Hertfordshire LEP				
LEP Humber			*	*
Lancashire LEP			*	
Leeds City Region LEP	*		*	*
Leicester and Leicestershire LEP	*	*		
Liverpool City Region LEP			*	
London Enterprise Panel	*		*	
New Anglia LEP				
North Eastern LEP	*			
Northamptonshire Economic Partnership	*	*		
Oxfordshire LEP				
Sheffield City Region LEP			*	
Solent LEP			*	
South East LEP				
South East Midlands LEP (SEMLEP)	*	*	?	
Stoke-on-Trent and Staffordshire LEP	*	*	*	
Swindon and Wiltshire LEP			*	
Tees Valley Unlimited	*		*	
Thames Valley Berkshire LEP	*	*	*	*
The Marches LEP				
West of England LEP			*	
Worcestershire			*	
York, North Yorkshire and East Riding LEP	*		*	

Source: Taken from Escadale 2013

Table A2.2: LEP Resilience Ranking – Composition and Social Strategy

LEP Name	LEP Overall Rank
The Marches	1
Gloucestershire	2
Northamptonshire (draft)	3
Stoke and Staffordshire	4
North Eastern (draft)	5
Swindon and Wiltshire	6
Dorset (draft)	7
Cumbria (draft)	7
Leicester & Leicestershire	9
York, North Yorkshire and East Riding	10
Thames Valley Berkshire	11
West of England	12
South East Midlands	13
Coast to Capital (draft)	14
Tees Valley	15
Derby, Derbyshire, Nottingham and Nottinghamshire (D2N2)	15
Oxfordshire	17
Cornwall and Isles of Scilly	17
The Black Country	19
Greater Birmingham & Solihull	20
Greater Cambridge and Peterborough	21
Humber (draft)	21
Cheshire and Warrington	23
Sheffield City Region	24
Greater Manchester (draft)	24
Greater Lincolnshire	26
South East	26
Hertfordshire (draft)	28
Heart of the South West	29
New Anglia	30
Buckinghamshire Thames Valley	21
Liverpool City Region	32
Worcestershire (draft)	33
London (draft)	33
Coventry & Warwickshire	35
Solent LEP	35
Leeds (draft)	37
Enterprise M3 (draft)	38
Lancashire (draft)	39

Source: Taken from McInroy and Jackson 2014