

**‘And What About Wales?’
UK Charities’ Presence in Wales and the Impact of COVID-19**

**Research Paper
2021**

1. INTRODUCTION AND METHODOLOGY

This paper seeks to assess the extent to which UK charities¹ are reducing their presence here in Wales, as a result of the COVID-19 pandemic. This follows anecdotal evidence provided to Wales Council for Voluntary Action (WCVA)² and Wales-based funders from individual charities and other stakeholders. The paper also seeks to establish the potential impact of UK charities reducing their Wales teams on the voluntary sector³ in Wales and the actions – if any – WCVA or Welsh Government should take in response.

In summary, we will explore the:

- impact of COVID-19 on UK charities working in Wales
- scale of the reduction – if any – to UK charities’ capacity in Wales, including any changes to where strategic decisions relating to Wales are made
- emerging impact on local and community partners in Wales, particularly in relation to national policy discussion, networks and advocacy groups (often chaired by UK charities)

¹ When we say ‘UK charities’ we mean any charity based elsewhere in the UK that also operates in Wales. Some of these will be UK-wide, others will operate in Great Britain, or in England and Wales only.

² Wales Council for Voluntary Action (WCVA) is the national membership organisation for the voluntary sector² in Wales; they work with the Third Sector Partnership Council (TSPC) networks, representing 26 categories of third sector interest, the 19 county voluntary councils (CVCs) through Third Sector Support Wales and other development agencies and networks (e.g. the Health, Social Care and Well-being Planning Group), to provide a support structure for the sector in Wales.

³ According to WCVA the voluntary sector in Wales comprises over 8% of the paid Welsh workforce.

- ability of UK charities to provide services that are adequately tailored to Wales.

We have conducted qualitative and quantitative research in conjunction with WCVA staff, including one-to-one, one hour, online interviews with employees from 15 separate UK charities, with a range of charitable purposes, including health and social care, education, international development, environmental, social justice and more. The charities themselves vary from a complement of hundreds to two members of staff in Wales, with incomes ranging from tens of thousands to millions.

Those interviewed included eight head of Wales or national director roles, two directors covering Wales and a region of England, and two senior managers working within teams in Wales. We spoke with representatives from:

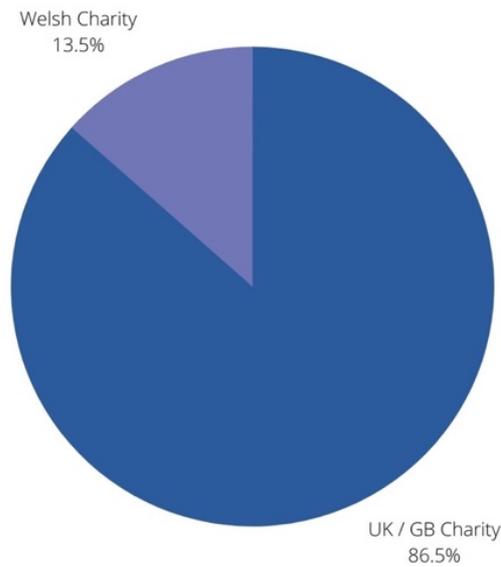
- nine UK-wide charities
- three charities working across all nations, except Scotland
- one charity working across Great Britain (no presence in Northern Ireland)
- two independent charities working in Wales, but with strong partnerships with sister organisations that are well-known to UK audiences.

All of the interviewees we spoke to are part of a 'Wales team' that either works to a corporate, organisational strategy or has a partnership agreement; all teams have access (of varying degrees) to a range of central services, such as IT, HR, communications, marketing, policy and research etc. All organisations work in Wales to deliver some or all of the following:

- service provision
- fundraising
- campaigns and influencing, directed at Welsh Government, the Senedd, the public sector and private sectors across Wales.

[All interviewees and survey respondents took part in this research anonymously; the content of this paper has been written with that in mind.]

We also sought to capture the wider views of individuals working in the voluntary sector across Wales, by developing an online survey that was circulated widely on WCVA's social media accounts.



Fifty-three people took part in the online survey between March and April 2021. Almost 90% of survey respondents work for UK charities, and from a plethora of sectors. The below graph outlines the breakdown of roles held by survey respondents.



2. SUMMARY OF FINDINGS

There is no question that COVID-19 has impacted on all charities in one way or another, as evidenced by the new COVID-19 Voluntary Sector Impact Barometer, by Nottingham Trent University, the National Council for Voluntary Organisations (NCVO) and Sheffield Hallam University. However, much of **our research into the impact of COVID-19 on UK charities' behaviour in Wales has proved inconclusive**, owing to a wide range of opinions held by interviewees and survey respondents.

This short piece of research does not indicate an **obvious, widespread trend in UK charities reducing their capacity and resources – solely – in Wales**, and directly as a result of COVID-19. This means we have been **unable to verify anecdotal evidence** provided to WCVA and Wales-based funders from individual charities and other stakeholders.

Certainly, **many UK charities are restructuring or reconsidering their presence in Wales (though our survey says as many are not), including 11 of the 15 interviewees**, with:

- seven going through a restructure at the time of interview (though one pre-dated COVID-19)
- three had restructured or had reconsidered their presence in recent years (well before COVID-19)
- one had been through a restructure in recent years, but was also looking at further reductions in headcount, as a direct response to COVID-19
- four had not been through a restructure, although one charity had issued a vacancy freeze across all teams by September 2020.

Survey respondents believe staff working in service provision would be most at risk, followed by communications, marketing and fundraising. However, the **majority of interviewees who had experienced radical organisational restructures as a result of COVID-19, felt the Wales team had been treated proportionately**, with one leader of the opinion that their own team had been fortunate in comparison to other departments across the UK.

The Welsh Senedd's Equality, Local Government and Communities Committee similarly concluded in its Inquiry, 'Impact of Covid-19 on the voluntary sector', that some UK charities had been restructuring and/or reconsidering their level of presence in Wales for some time, the process of which was accelerated once the impact of the pandemic hit.

Only two interviewees had endured dramatic, disproportionate cuts during the pandemic, and neither were able to solely attribute them to the COVID-19 fallout. Both interviewees suggested that they had failed to win the argument to keep roles in Wales or to move central functions to Wales, complaining their respective organisations did not understand devolution, let alone its importance.

In addition to those already experiencing cutbacks, **one – as yet unaffected – charity also expected a future grant cut as a direct result of COVID-19, inevitably leading to “challenging fundraising targets”.** But again, this was part of root and branch cuts rather than ones directed solely at Wales.

No formal title amendments were logged during our 15 interviews, though the following changes were experienced by four people since March 2020 (though not directly as a result of COVID-19) – all worth noting:

- **an outward facing, de facto leadership role made redundant, with the role absorbed centrally**
- **one leader lost the majority of their team, leading to the nature and capacity of the role changing significantly**
- **one leader's role was changed to a lower tier** within the organisation as part of a restructure with some existing areas of work centralised e.g. programme and intervention design.
- **one vacant leadership role considered for incorporation into a director of nations role,** though ultimately rejected following justification by staff members within the Wales team.

Interestingly, despite the perception among charity workers that ‘other charities’ are leaving Wales, very few believed their own charity would do this. **Half of all survey respondents and most interviewees said their charity had been in a stable position ahead of the pandemic,** and they had not previously faced challenges and uncertainties.

Almost 90% of survey respondents felt their charity had responded well to COVID-19, though eight of the 15 people interviewed felt their charity had endured huge problems as a result of COVID-19. Many interviewees described the pandemic as the biggest struggle facing their charity’s history. For example, one charity has lost millions of pounds, resulting in a 40% drop in income in Wales alone and long-term cost savings over the next few years.

With the furlough scheme still live, it may be too soon to determine the full impact of COVID-19, which suggests the need for further research once the furlough scheme ends.

Interestingly, the growing use of technology, like Microsoft Teams and Zoom, has prompted a culture shift, prompting the argument for more decentralisation. Certainly, **the impact of online working on staff in Wales is undeniable, helping them to communicate with other teams across their respective organisations, including the possibility for some of career progression, for the very first time.**

Views were largely split on the impact of the media's reporting of the differing COVID-19 restrictions in each of the home nations on their working environment. Four in ten survey respondents felt it had not made any difference to the way HQ views the role of the Wales Office, with devolution continuing to either be poorly understood or somewhat better understood but only at "a very shallow level". Yet many interviewees could point to improvements, like the introduction of organisational wide staff briefings. For one charity they now had one UK-wide group on the curriculum, with each nation feeding in properly, rather than it being a bolt on: "and what about Wales?"

Six of the 15 interviewees said that the senior team were engaging sufficiently with Welsh issues, while five said it was adequate. Only three interviewees thought the engagement was poor and one person thought their organisation did well lower down, but that the senior team struggled.

There was real concern among a handful of interviewees that UK charities do not respect devolution. Other interviewees were less critical – they see no malice in it – though **interviewees who do meet regularly with their chief executives or who work on an equal footing with a sister organisation, do appear to be more content with their organisational structures, processes and arrangements**

Yet, UK charities are seen as important to the success of the voluntary sector in Wales; with ten of the 15 charity workers we spoke to firmly of the opinion that no other charity could do the work they do – "not even other UK charities". **Similarly, ten of the 15 interviewees also said they felt the resources in the Wales team were proportionate to other nations and regions,** with several pointing to England being much bigger than the other

nations, and so this explained the disparity in team size. Survey respondents were less positive.

Overall, it is felt that the voluntary sector in Wales enjoys wide-ranging benefits in having UK charities in the voluntary sector in Wales, but some interviewees also perceive a ‘flipside’. Other interviewees complained of UK charities being undervalued in the devolved nations: with Wales-only charities suspicious of their income and Welsh Government dismissive of their contribution.

Pan-Wales services are seen as something UK charities can deliver well, because smaller organisations often have limited infrastructure that is localised. **It is also thought a great deal of partnership work in the voluntary sector is spearheaded by UK charities,** with some feeling they have a role to play in bringing local charities together into a pan-Wales grouping, helping smaller charities get in front of Ministers etc. **Consequently, there appears to be some concern that, should capacity and staff shift to London from Wales, the level of influence in joint partnerships could diminish.**

However, **we had a mixed response when we asked those interviewed whether partnership work would be severely impacted if UK charities reduced their presence in Wales,** with eight interviewees saying it would be severely impacted and seven feeling they would continue because they had worked collaboratively and sustainably. **But most, if not all, interviewees saw real benefit in coming together to pool resources,** not least because they have been extraordinarily successful in influencing policy and legislation.

With widespread cuts likely in the future, several interviewees expressed concern that it would be policy and advocacy activities that would be first impacted. Most concern lies in the voluntary sector’s ability, without UK charities, to take a holistic approach and kick-start structural shifts, because of the perception that smaller, Wales based charities have limited policy, influencing and campaigning roles.

Almost 90% of survey respondents believed that WCVA and/or Welsh Government have a role to play in stopping UK charities from reducing their presence in Wales. Some interviewees were more sceptical and questioned the need for it, believing it was “up to charities themselves to make their model work”.

WCVA is seen as the voice of the sector and, regardless of interviewees' views of the organisation – whether they see them as remote or excellent – many believe they have a role to play in challenging charities who wish to reduce capacity in Wales. A range of suggestions were offered by one or more interviewees, listed on page 33.

The same proved true of Welsh Government. Regardless of their views about Welsh Government, many felt it was appropriate that Welsh Government intervene, the suggestions offered by one or more interviewees are listed on page 34.

Worth noting is the suggestion by one interviewee, who called for the introduction of legislation requiring charities in receipt of Welsh Government funds to adhere to strict guidelines and spend them solely in Wales. This was not a view considered by most. The suggestion of offering financial incentives for UK charities appeared to be more popular, but as many interviewees felt this to be contentious.

3. BACKGROUND

In January 2021, WCVA was keen to determine the extent to which UK charities were reducing their presence in Wales as a direct result of COVID-19, following reports that some charities had already pulled out of the country. Carys Mair Thomas, a freelance communications consultant based in Cardiff, was therefore commissioned by WCVA to develop this short research paper.

It was clear at an early stage that the pandemic had impacted on the UK voluntary sector; a new COVID-19 Voluntary Sector Impact Barometer “Respond, recover, reset: the voluntary sector and COVID-19”– the largest research project of its kind by Nottingham Trent University, the National Council for Voluntary Organisations (NCVO) and Sheffield Hallam University – found in October 2020 (as part of its first results) that two in five charities and community groups reported a deteriorating financial situation.⁴ In March 2021, the monthly survey found 59% of charities expected demand for their services to grow in the coming month, and 68% believed the pandemic would have a negative impact on their objectives over the next year.⁵

In response to the pandemic, the Charity Commission and Community Foundation Wales announced in March 2021 their new Revitalising Trusts Programme to provide £25million to charities in Wales.⁶

Ahead of the pandemic, in summer / autumn 2019, Community Foundation Wales had interviewed more than 100 community groups and charities across Wales as part of their report entitled *Loud and Clear, Our big funding conversation with the third sector in Wales*. It found 91% of organisations considered their biggest challenge to be funding, specifically the need for more core funding.⁷ This means they would struggle to deliver their core services, but also their capacity for joint campaigning work with other charities.

⁴ *Largest study of voluntary organisations reveals devastating financial impacts of Covid-19*, Nottingham Trent University Press Release, 26 October 2020 <https://www.ntu.ac.uk/about-us/news/news-articles/2020/09/largest-study-of-voluntary-organisations-reveals-devastating-financial-impacts-of-covid-19>

⁵ *Charities in Britain feel the pinch as finances suffer while demand rises*, The Financial Times, 21 April 2021 <https://www.ft.com/content/40e2cedf-2ce7-442e-925f-fd64904e6ede>

⁶ *Plans to release £25m from dormant foundations in Wales*, The Civil Society, 25 March 2021 <https://www.civilsociety.co.uk/news/charity-commission-and-community-foundation-wales-aim-to-release-25m-from-dormant-foundations.html#sthash.s0b3n3Tj.dpuf>

⁷ *Loud and Clear, Our big funding conversation with the third sector in Wales*, Community Foundation Wales, November 2019

The Welsh Senedd's Equality, Local Government and Communities Committee held an Inquiry into the 'Impact of Covid-19 on the voluntary sector' and published its report in February 2021. It is worth fleshing out some elements in detail below.

The Committee concluded that the voluntary sector in Wales had been facing a challenging and uncertain period ahead of March 2020, following evidence provided by:

- Hafod on the on-going impact of years of austerity and public sector cuts
- the Co-Production Network on simultaneous funding cuts and increase in demand for services
- the National Lottery Community Fund on the ongoing uncertainty around leaving the European Union, and how the UK Shared Prosperity Fund (the replacement to EU Structural Funds) would work.

The Committee felt this resulted in some UK charities restructuring and/or reconsidering their level of presence in Wales for some time, the process of which was accelerated once the impact of the pandemic hit.⁸

In terms of the impact of COVID-19 itself, St John Ambulance Cymru told the Committee they were facing "a projected loss of income for 2020 in excess of £2.5m, whilst demand for our services was continuing to increase". The British Heart Foundation in their evidence to the Committee described closures "dramatically" reducing their income and ability to support "life-saving research." The RNIB said they were projecting a "potential funding gap" as a result of "reduction in fundraised income across the board" [...] "cancellation of challenge and mass participation events, postponed face-to-face fundraising activities and reduced legacy income".⁹

Of particular interest is evidence submitted to the Inquiry by The Moondance Foundation and concerns that:

- three cancer charities had made 'the Head of Wales' position redundant
- some UK charities were creating a director post to cover all devolved nations.

In light of this evidence, Committee members were particularly worried about its impact on devolved areas, such as health and education; the ability of UK charities to advocate on behalf of beneficiaries in Wales when they had either limited or no Welsh presence; and the ability of a future Senedd or MSs to hold

⁸ *Impact of Covid-19 on the voluntary sector in Wales*, Equality, Local Government and Communities Committee, Senedd, February 2021 (pp.12-13) <https://senedd.wales/media/d4jh52zz/cr-ld14075-e.pdf>

⁹ *Ibid.* (p.33)

Welsh Government to account, presumably without the detailed briefings provided by UK charities.¹⁰

WCVA also expressed similar concerns that, if UK charities reduced their presence in Wales, it would compromise their ability to contribute to policy development, create meaningfully co-produced policy and programmes, including on-the-ground activities at regional or local level.¹¹

The Committee's Inquiry Report lists 20 recommendations in total. For the purposes of this paper, it is worth noting the following five recommendations, calling on the next Welsh Government to:

- monitor any significant shift in the voluntary sector's presence in Wales to enable a future Welsh Government to engage with these charities¹² and encourage them to reinstate a Welsh presence when they are in a position to do so
- work with the Third Sector Partnership Council to ensure the forthcoming digital strategy for Wales fully reflects the work of the voluntary sector and the move to digital service delivery
- build on the Third Sector Resilience Fund and provide funding to increase the resilience of the sector and its ability to play its part in immediate support for communities during the recovery
- maintain the current third sector infrastructure, and look to identify how these structures can be improved and made even more robust
- make representations to the UK Government regarding the impact of current international obligations in relation to State Aid rules on support to the charity retail sector.¹³

The pandemic has also brought into sharp focus the politics of devolution across the UK.¹⁴ For Angie Contestabile, a policy and public affairs professional based in Wales, this matters in terms of the decision-making employed by UK charities in times of crisis.

In December 2020, in an Institute of Welsh Affairs blog, called "Wales' Third Sector On The Brink", she argues that, as a result of not taking seriously

¹⁰ Ibid. (pp.13-14)

¹¹ Ibid. (p.13)

¹² Meaning those charities that have pulled out any substantive staffing or offices from Wales.

¹³ Ibid. (pp.5-7)

¹⁴ *Covid pandemic highlights Wales' devolved politics*, Felicity Evans, Political editor, BBC Wales Online News, 29 September 2020 <https://www.bbc.co.uk/news/uk-wales-54328474>

devolution and their work in Wales, when UK charities are faced with loss of income, “many significant jobs disappear from Wales, with some charities either centralising services in England and managing Wales from there or getting rid of Wales-specific jobs and services completely”. She argues that Welsh Governemnt should establish a strategy that ensures continuity of the voluntary sector in Wales and insist that, when UK charities receive money, they are “required to demonstrate that they are committed, long-term, to investing back into Wales [...] in order for them to effectively support and represent their clients in Wales”.¹⁵

This issue has also been picked up by Joe Saxton, founder of nfpSynergy, who has also been considering the extent to which charities are adapting to structures, strategies and staffing to respond to devolution. He has developed a basic quiz to determine a charity’s devolution credentials, offering solutions relating to their constitution, governance, PR and political activities, and fundraising (listed in the appendix).

¹⁵ *Wales’ Third Sector on the Brink*, Angie Contestabile, Institute of Welsh Affairs, 11 December 2020
<https://www.iwa.wales/agenda/2020/12/wales-third-sector-on-the-brink/>

4. KEY FINDINGS

4.1 UK charities working in Wales

In this section we seek to flesh out to what extent UK charities in Wales are seen as important contributors to the success of the voluntary sector in Wales. We are interested in learning how those in Wales employed by UK charities perceive the work of their organisation – and of other charities – in Wales and the distinct challenges they face as a Wales team working within a UK charity.

4.1.1 Benefits for Wales

The majority of interviewees were careful to talk about the need for a mix of different organisations – “a rich tapestry” – to secure a successful and vibrant voluntary sector, naming several excellent Welsh specific charities, like Tŷ Hafan. But most, if not all, saw UK charities as important to the success of the voluntary sector in Wales.

They are able to make a significant contribution to Wales because of their long histories, greater brand recognition, larger resources and capacity in comparison with smaller, Wales-only charities. For some, pan-Wales services are something UK charities can deliver well, because smaller organisations often have limited infrastructure that is localised. Few, if any, can replicate the cost benefits and economies of scale of UK charities: “buying products just for Wales is far costlier compared to the purchasing power across all four nations”.

“We can innovate and share good practice more easily across the sector and run localised partnerships, which promote and secure better outcomes for beneficiaries in Wales.”

In fact, of the 15 interviewees we spoke to, ten said their work could not be undertaken by other charities, unless it continued in-house and centrally. Many of the charities we spoke to are uniquely positioned, in terms of size and scale; “not even other UK charities” could replicate the work of the respective organisations of 10 interviewees. Only two interviewees said work would “carry on as normal”, though much of their work is commissioned and admitted that another organisation would then simply go ahead and win the tendering process.

“Other charities can do more of the generalist work we do, but they would struggle with our specialisms – this couldn’t be replicated elsewhere.”

A great deal of partnership work in the voluntary sector is spearheaded by UK charities. Many charities do elements of the work, with lots of crossover, but not all of it, or they simply do not have the resources to deliver pan-Wales. One interviewee said: “they [a local charity] have started to dabble in public

affairs, but it's not their remit. There would be attempts to fill the gap, but those institutions just don't have the infrastructure: they have two part-time officers, in comparison to my team of four."

This is not to question the quality of the content that other charities would provide, but they simply do not have the same trusted, credible brand that immediately opens doors: "we've got gravitas so we can get a meeting with the Minister by ourselves or as the group, and we invest a lot of time to drive forward the policies."

One charity spoke of recently starting a forum and their passion in co-working and taking as much of a back seat as possible. For some UK charities, they feel they have a role to play in bringing local charities together into a pan-Wales grouping, helping smaller charities get in front of Ministers, despite being able to get that meeting by themselves.

Interviewees named one or more of the following benefits from having UK charities working in the voluntary sector in Wales:¹⁶

- access to vital infrastructure and international networks to enrich and inform policy and campaigning work
- backroom support like research and communications, to enable "bigger, strategic shifts" in policy and legislation developed in Wales
- agility to "deliver big and complicated projects quickly and under pressure" and resilience to deliver on joint partnerships in times of crisis
- work at scale and drive down costs, thereby delivering what would be ambitious projects to schools and health boards etc. at a reduced price
- draw on a trusted household name and brand to increase awareness and profile for campaigns, fundraising and volunteering opportunities
- lever in relationships with corporate partners, like Google or Amazon
- access to charity retail, leading to volunteering opportunities to combat loneliness etc. and affordable goods for people living in poverty.

"Some of the curriculum and legislative changes simply wouldn't have happened without us. True we worked in partnership with similar organisations but we are a trusted and credible charity, so our evidence base has clout and we are taken seriously. It's hard for a politician or civil servant to argue with a knighted professor."

A handful of interviewees also commented on the economic contribution of their charity to Wales, with their work in wealthier areas, such as South East

¹⁶ These are listed only, and are not weighted according to importance.

England, offsetting the cost of working – or the losses made – in Wales. One interviewee said that it costs the charity £1.8-2million to work in Wales, meaning the charity’s fundraising (elsewhere in the UK) subsidises its presence in Wales.

4.1.2 The flipside

Three interviewees were careful to draw attention to Wales “in its current form”, with one stating “it is not so much that the success of the voluntary sector depends on UK charities, but that it would be a problem in the sector if we didn’t have their capacity. If they themselves created independent organisations in Wales, then that would be great.” Another interviewee said: “why should Wales depend on charities established beyond its borders, as they haven’t been established with Wales’ specific needs in mind.”

“When it works well, it can be very effective, but it [UK charity] can be a barrier in having the freedom to solve the specific challenges facing Wales.”

Concerns were also raised by a minority of interviewees that colleagues in other parts of the charity viewed Wales “as piggy-backing off the UK-wide office”. Yet several interviewees pointed to the benefits of working in Wales for the charities themselves: “you have to have a presence in Wales to deliver for Wales” or “you have to have that army of local volunteers”.

“It works both ways; we benefit from the London office and the expertise they have, but they also benefit from our local knowledge. And that’s not to say expertise doesn’t exist in Wales.”

Despite viewing UK charities as important stakeholders in the voluntary sector in Wales, one interviewee described them as “potentially dangerous, because there is no accountability”. As a result, they would like to see the introduction of legislation requiring charities in receipt of Welsh Government funding to adhere to strict guidelines and spend those funds solely in Wales. Given Welsh Government “can be reliant on UK charities to deliver specific services and support for vulnerable people”, they want new legislation to guard against situations like the controversial case in 2001, when the Children’s Society announced the withdrawal of operations from Wales, resulting in approximately 120 redundancies and the loss of 13 projects providing advocacy, family support and anti-poverty work.¹⁷

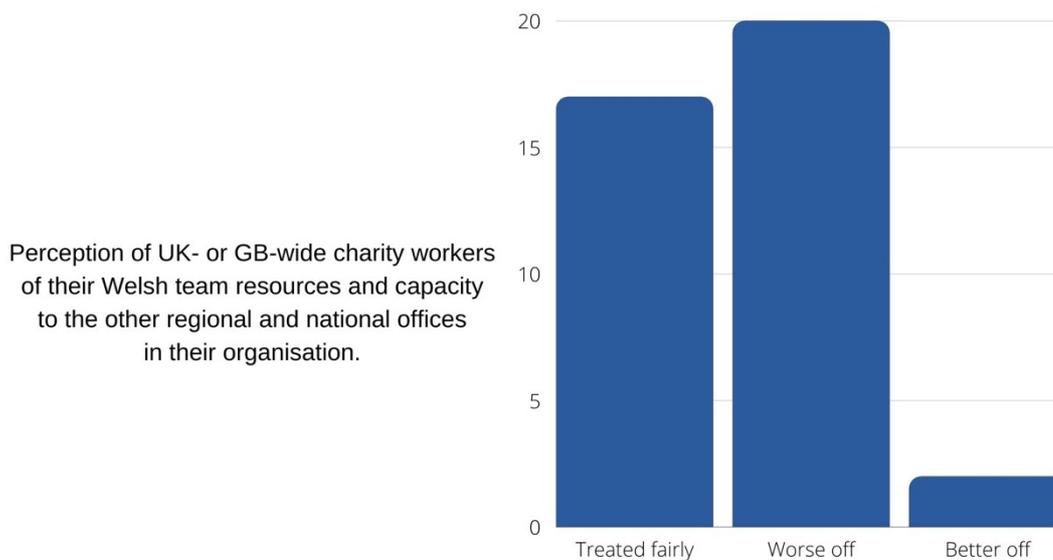
¹⁷ *Society chief attacked by MPs* BBC Wales News, 18 December, 2001
<http://news.bbc.co.uk/1/hi/wales/1718053.stm>

Another “flipside” for many interviewees is the inability of some central teams to see the unique challenges facing Wales, with many unaware or disinterested in devolution and Welsh language needs. One survey respondent working for a Wales-based charity said: “UK charities expect the smaller and poorer indigenous charities in Wales to bear the burden of Welsh language provision and deal with the Welsh Parliament and Government, while they focus on England”.

Conversely, three interviewees felt UK charities could be undervalued in the devolved nations, with Wales-only charities suspicious of their income and Welsh Government dismissive of their contribution.

4.1.3 General resources and capacity of Wales teams in UK charities

Ten of the 15 interviewees said they felt the resources in the Wales team were proportionate to other nations and regions. While most survey respondents, as seen below, felt ‘worse off’ than other nations and regions, but almost as many believed they are treated fairly.



Several interviewees pointed to England being much bigger than the other nations, and so this explained the disparity in team size. Both interviewees who are responsible for Wales and South West England were of the opinion that, on the basis of population, Wales is doing “very well” in terms of resource and capacity.

That said, several people – including those using the metric – challenged the ‘per head’ metric and offered other factors in way of calculating fair team sizes, including the:

- opportunities and organisational successes in Wales
- level of beneficiary need.

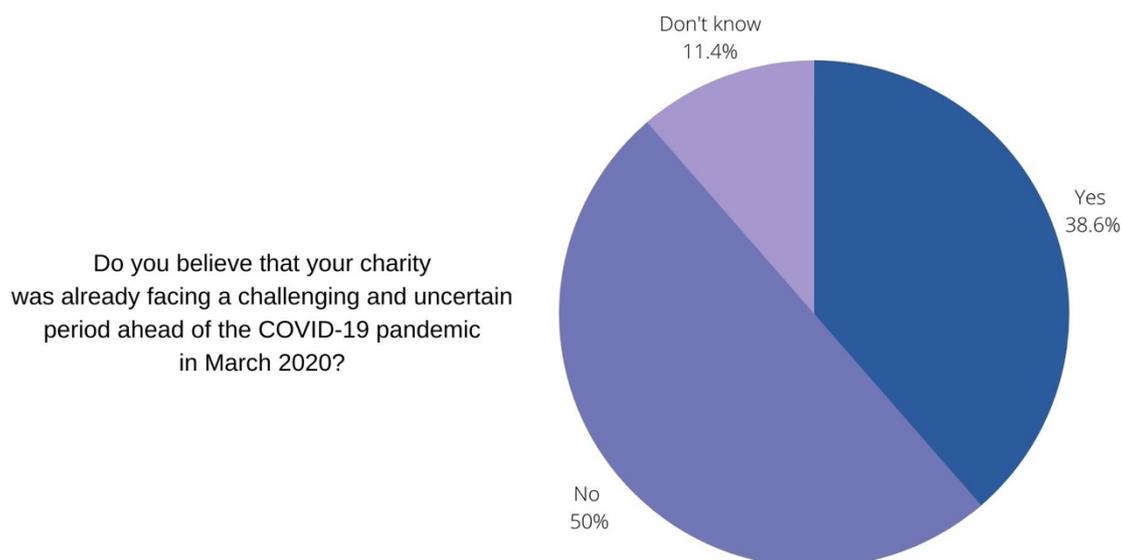
For one interviewee, the insufficient numbers of staff in the Wales team is “simply unfair, when strategy is set in London and staff working and living in London are focused on life there. It’s difficult to replicate all the charity’s activities in Wales, because it’s not just a simple case of ‘Welshifying it’, because we also need to respond to activities and policies unique to Wales”.

Where staff teams in other nations are bigger, this is not necessarily as a result of natural bias against Wales: it could be down to the ability of staff to attract or be approached with unrestricted funds for a specific project, funded by the devolved administration, or as one interviewee suggested: “Scotland gets more resource and capacity probably because of their Director’s character and visibility”.

4.2 COVID-19 and its impact on charities

4.2.1 Before COVID-19

Half of all survey respondents, as seen below, said their charity had not been facing challenges and uncertainties ahead of the pandemic.



Most interviewees agreed, describing their charities as being “unbelievably

strong”, “raising millions of pounds”, “setting up innovative projects” and “committing to more and better services”.

Only three interviewees spoke of struggles ahead of the pandemic, with one saying that, in recent years, their income had halved, which had required a significant restructure. For one charity, with a significant retail arm, it had been challenging to “maintain enough profit” for the past number of years, but that income through fundraising had remained strong.

Of the three charity workers who said their organisation had been struggling or the two who said their organisation had been treading water pre-pandemic, they offered up one or more of the following reasons:

- the voluntary sector had “been hollowed out” by austerity and a series of public sector cuts
- struggles to secure sufficient unrestricted income since 2008, because people had less money to give to charities as a result of austerity
- ‘charity bashing’ by the press and UK Government, leading to misgivings about the salaries of charity workers, such as chief executives
- changes in public opinion relating to poverty and anti-immigration etc.
- larger fundraising events proving less popular and an increasing trend among members of the public to support local fundraising
- specific organisational challenges, including publicly known mismanagement and governance issues.

Only one interviewee spoke about the challenges of Brexit for their specific sector.

4.2.2 The challenges of COVID-19

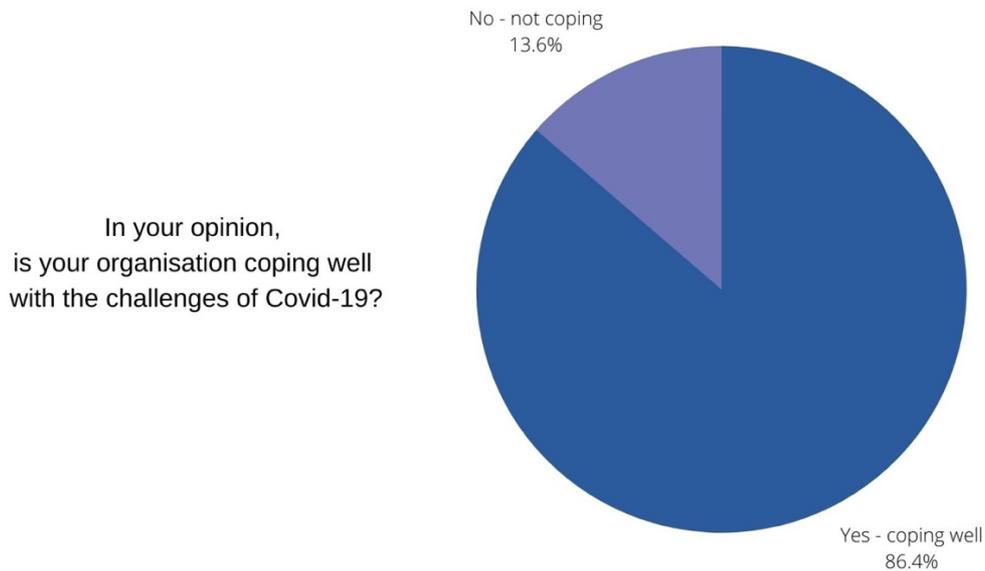
Interestingly, almost 90% of survey respondents felt their respective organisations had been doing well in response to COVID-19 (see overleaf pie chart), with a more mixed response from interviewees – eight seeing huge problems and seven feeling their respective charities had been resilient and able to absorb the shock of COVID-19.

“It’s been an absolute nightmare, and I don’t think people understand how much charities have been hit, because of the scale at which we operate.”

Of those survey respondents who felt their organisation had not been coping well, the majority put this down to general funding problems. Other reasons included specific cuts in public services, financial uncertainty from EU withdrawal, merger, ageing volunteers and the recent floods.

Many interviewees consider the pandemic as the biggest struggle facing their charity’s history, pointing to the impact of lockdown:

- on retail and subsequent closure of shops
- insufficient State aid subsidies, particularly for larger charities
- cancellation of events, like London Marathon, and more localised charity swims and runs etc.



One charity that lost millions of pounds as a direct result of COVID-19, suffered a 40% drop in income in Wales alone, and saw 80% of staff, at one stage, on furlough: “we’ve had to cut our cloth accordingly”, which will result in long-term cost savings over the next few years.

“Our income went through the floor and we had to let go a third of our workers across the UK; we predict a 40% loss in income over the next three years.”

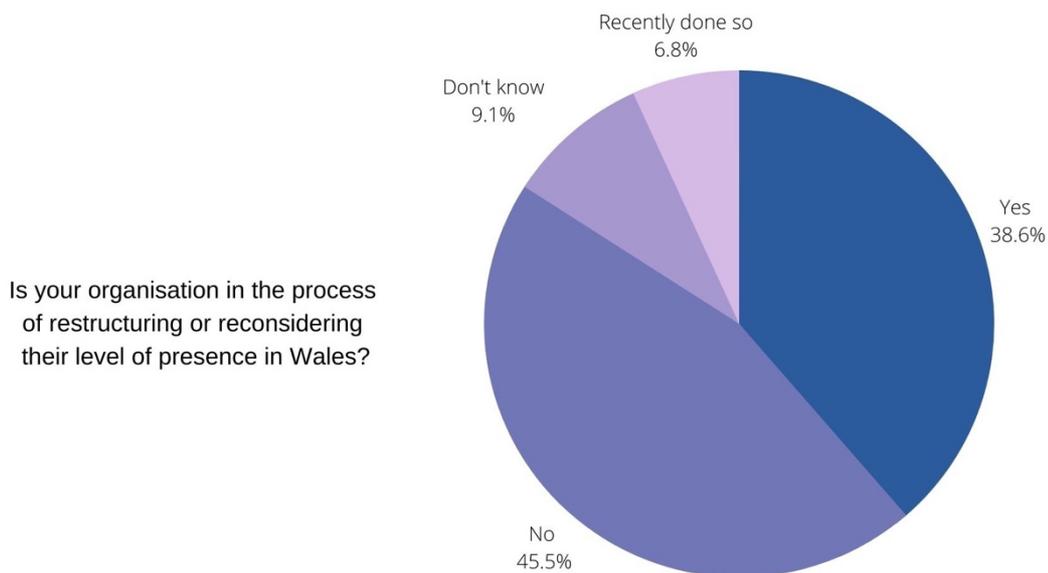
“We had to utilise Government grants and furlough, but very minimally in Wales because staff, by and large, work on the frontline and are tied up to commissioned and contract delivery – so they were already paid for.”

Those who fared better, seemed to be those charities that could better prepare themselves for the new world order, because they did not need to scramble to shut retail or cancel large-scale sponsorship events. On the basis of our interviews, the most resilient charities appear to be those with core funding and/or

commissioned services. These funders tended to be more understanding and flexible in their approach to agreed outputs, which meant charities were less likely to use the furlough scheme for any length of time or make redundancies.

4.2.3 The response to COVID-19

On the basis of our survey, there are as many as there are not of UK charities restructuring or reconsidering their presence in Wales (or that have recently done so).



On the basis of our interviews, the situation is bleaker with 11 out of 15 charities affected, with:

- seven going through a restructure at the time of interview, though one pre-dated COVID-19
- three had restructured or had reconsidered their presence in recent years (well before COVID-19)
- one had been through a restructure in recent years, but was also looking at further reductions in headcount, as a direct response to COVID-19
- four had not been through a restructure, although one charity had issued a vacancy freeze across all teams by September 2020.

This has resulted in UK charities losing hundreds of posts, inevitably impacting on teams across Wales either directly (redundancies, job freezes, grant cuts – albeit proportionately) or indirectly (reduced backroom support at their disposal).

“We’re haemorrhaging money at the moment, but it is unlikely we’d leave.”

The majority of interviewees who had experienced radical organisational restructures as a result of COVID-19, had felt they had been treated proportionately: “the Wales team has endured proportionate cuts following a root and branch review of the organisation, based on savings across the piece, losing capacity in all areas, but seeking to safeguard those roles closely delivering our charitable purpose.”

One interviewee, whose organisation had cut a third of its staff, said the Wales team had been fortunate, losing only one staff member due to retirement and a job freeze: “certainly not a third of my staff”.

Of the interviewees that reported little to no change in organisational capacity up until spring 2021, there had been one instance where a future grant would be reduced by a third as a direct result of COVID-19. This would inevitably mean that, unless “challenging fundraising targets” were met in the future, staff paid from unrestricted funds would need to be “looked at” (largely meaning staff in leadership, policy, campaigns or advice work).

Only two interviewees had seen their Wales teams dramatically cut during the pandemic, with both expressing real frustration at the short-sighted decisions of the senior leadership teams:

- the first experiencing wholesale cuts across all functions, with the exception of public affairs and advocacy
- the second, conversely, losing their public affairs and advocacy function.

Interestingly, despite both restructures taking place during the pandemic, neither related solely to the COVID-19 fallout. In fact, the first was delayed and then accelerated because of COVID-19 and the second occurred while the charity’s income and headcount increased: “they just want to centralise influencing and public affairs in London”. Both said recent events had only accelerated the process or been used as an excuse to reduce presence in Wales, with one interviewee saying it had been “brewing pre-pandemic”.

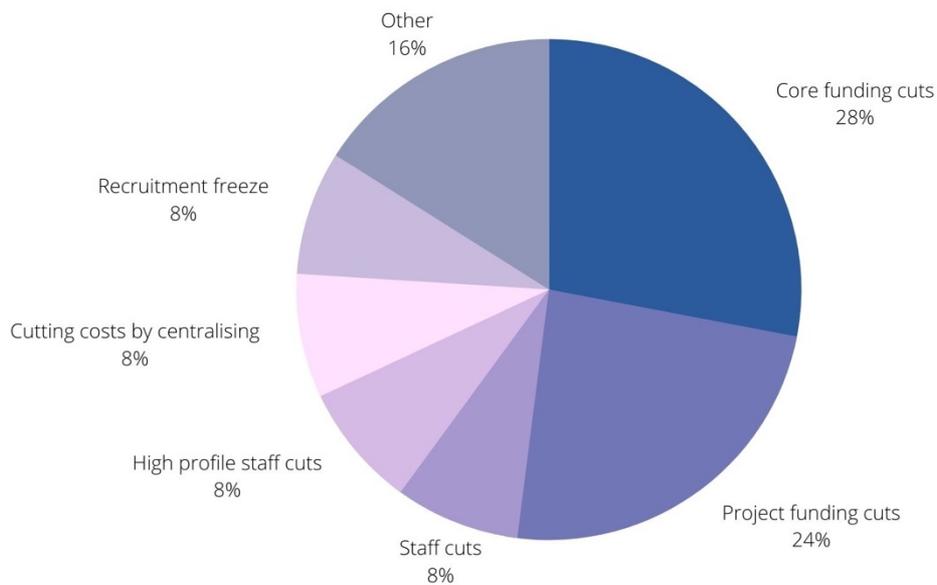
In terms of leadership roles, there were no title amendments, but the following changes did occur during the pandemic (though not directly as a result of COVID-19):

- an outward facing, de facto leadership role was made redundant, with the role absorbed centrally
- one leader had lost the majority of their team, which means the nature and capacity of the role had changed significantly
- one leader's role was changed to a lower tier within the organisation as part of a restructure with some existing areas of work centralised e.g. programme and intervention design
- one vacant leadership role was considered for incorporation into a director of nations role, though this was ultimately rejected following justification by the Wales team.

Both of the interviewees holding a leadership role in Wales and a region of England did not share any misgivings about the role, despite a Wales only leadership post having previously been part of the organisation. One said: “this has gone backwards and forth” but that since the merger “I have to work across two sets of legislation but that is manageable”. Interestingly, the same interviewee said “there is a uniqueness to Northern Ireland and it is desperately needed” when the merger had created a comparable post for Scotland and Northern Ireland, but also included a dedicated Northern Ireland post underneath.

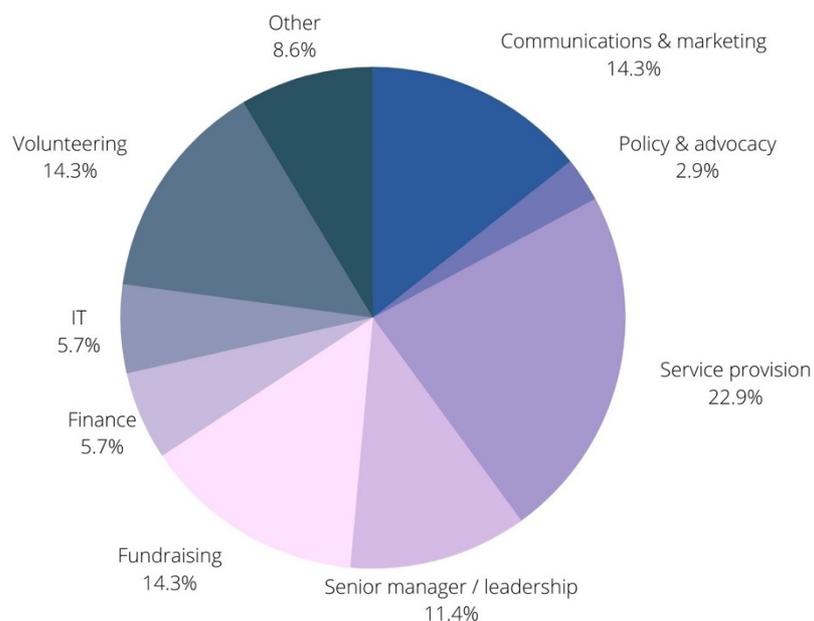
Neither of the organisations dramatically affected by a restructure or a presence reconsideration, won their argument in relation to central functions, like a social media officer, being moved to the nations. One interviewee said that, “given how fragmented the UK has become in recent years, the restructure offered the ideal opportunity to reorganise the charity across the nations, but they continued to focus on HQ and England”. Both interviewees complained that their respective organisations did not understand devolution, let alone its importance.

Survey respondents, when asked about the cause of the problems for their teams in Wales, pointed to funding issues, as seen below, with core funding cuts proving most troublesome, followed by project funding cuts.



Voluntary sector workers, who do not work for UK charities, also perceived core and project funding cuts as the reason that UK charities were struggling. It is also thought that there has been a downturn in volunteering.

When restructures occur, survey respondents working in UK charities consider all areas to be on the table, as demonstrated below, with service provision appearing to be most at risk, followed by communications, marketing and fundraising.

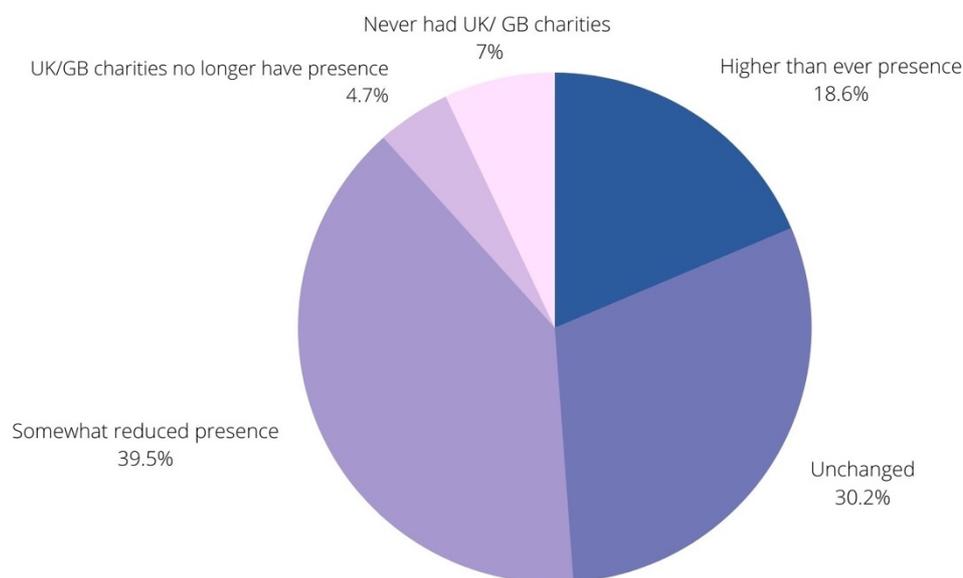


Sixty percent of other survey respondents (those who do not work in UK charities) perceive the COVID-19 pandemic to have led to a reduction in UK

charities' abilities to provide their work in Wales, specifically in relation to service provision and face-to-face contact.

4.2.4. Impact of UK charities on other charities in Wales

The voluntary sector in Wales thrives on partnership working, with UK charities often chairing national policy discussions or local networks. When we asked all survey respondents, both in UK and Wales based charities, to what extent the 'presence' of UK charities had been impacted by the start of the pandemic in March 2020, we had a mixed response. Certainly most people thought their presence had reduced somewhat, but the second most popular answer was that there had been no change in presence.



We received the same inconclusive response when we asked those interviewed whether partnership work would be severely impacted if they reduced their presence in Wales. Eight interviewees said their advocacy work, including forums, would be severely impacted without their input, with seven believing the forums would continue, mainly because they had worked collaboratively and sustainably, and “the world doesn’t stop with one person and one organisation – the conversations will continue”.

That said, most if not all interviewees (as outlined earlier) saw real benefit in coming together to pool resources, not least because they have been extraordinarily successful in influencing policy and legislation. One charity said they were keen to invest more time in Welsh Civil Society – to do more of it, not less.

Most interviewees, despite many saying that the activity would continue without them, spoke of their role in kick-starting the activity, with themselves bringing a lot of the strategic direction, capacity and resource, while local, smaller charities provided knowledge and skills related to on-the-ground, lived experience.

“The quarterly forum wouldn’t have happened without us: we offered the idea, created the strategy, provided the high-level data.”

One interviewee had already experienced the failure of one forum, when their organisation had changed strategic direction: “this happened pre-Covid. We were moving away from it strategically as an organisation, and we offered money, handed it over to a Wales-wide organisation, and yet it still came to a screeching halt. It’s a real shame, because that was a forum desperately needed for what would be considered a high agenda item in any forward-thinking country”.

Some interviewees also pointed out that most Wales-based and UK charities are already stretched, struggling to keep their heads above water in terms of delivering their own core work, so they have little capacity or resource to pick up other new work.

Where partnerships involve the support of several UK charities, the convenor role of a partnership largely falls to the organisation that has sourced unrestricted funds and therefore the freedom to take it on: “it’s all about where the next – rare – grant is coming from”. With widespread cuts likely in the future, several interviewees expressed concern that it would be policy and advocacy activities that would be first impacted.

Should capacity and staff shift to London, then there was also a view that the level of influence in these partnerships would diminish, because influencing MSs would not be seen as important as influencing MPs. This is where “beneficiaries – with specific diseases or issues – would suffer consequences in not getting their interests represented sufficiently in wider, umbrella advocacy campaigns”.

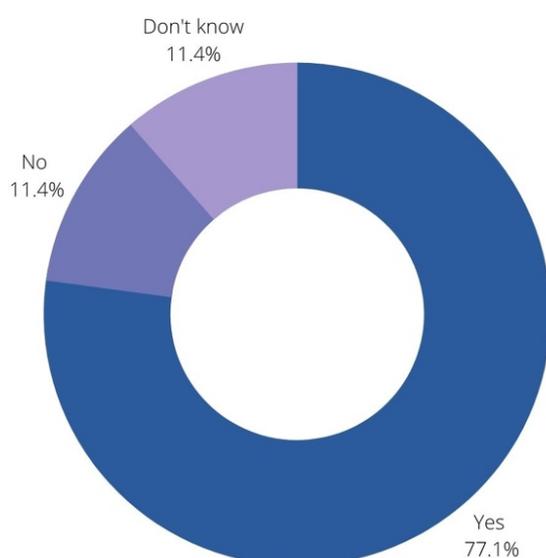
If a reduction were to occur, it is felt that those pulling out of Wales with service delivery contracts would see other organisations stepping in, as that would be covered by core funding. Most concern lies in the voluntary sector’s ability, without UK charities, to take a holistic approach and kick-start

structural shifts, because of the perception that smaller, Wales based charities have limited policy, influencing and campaigning roles.

4.3 New ways of working

4.3.1. Impact of online working

Almost 80% of survey respondents felt that new technology would see UK charities re-think their approach to national and regional work. One suspects this is in relation to the way charities can incorporate more digital and remote working into the every day, and move away from traditional office working rather than reconsider their presence in Wales. Most interviewees felt this “very unlikely”, and the growing use of technology, like Microsoft Teams and Zoom “rather strengthening the argument for more decentralisation”.



With more and more people working from home, including the widespread use of Zoom, Microsoft Teams, and other technology, do you think your organisation is re-thinking its approach to national and regional work?

“Yes, it’s possible we might not have an office in Cardiff in the future, but I’m 100% certain we’ll have a staff in Wales, working in Wales, for Wales. That’s a given.”

The impact of online working on staff in Wales is undeniable: “it puts everyone on an equal footing”, helping staff in Wales to get their message across to teams across their respective organisations. As one interviewee

said: “It took a pandemic for the penny to drop. We’re all squares on the screen now, we’re all the same size, and I can now voice my opinion on matters that aren’t just about Wales.” No more “feeling like people are eye-rolling at you” or receiving “apologies for forgetting to book a spider phone” or promising to “send on notes because the spider phone is playing up”.

Several interviewees spoke of technology prompting a culture shift, with weekly staff briefings becoming the new normal and now being invited to leaving drinks of staff outside the Wales team. One interviewee said that there is now “a more positive and enthusiastic ethos, with more bouncing off of ideas”.

“It’s not just me dialling in anymore and that’s really rubbed off on the organisation and we’re now doing more joint working. Before Covid, you weren’t at the table, having those incidental chats while making coffee or bumping into people in the corridor. You were literally not there.”

This has led one interviewee to consider the possibility of career progression for the very first time: “In my time here, geography has been a big factor in who has been given promotion. People in London, new to the organisation, would overtake me after just six months in post. I can see that changing in the future”.

For another: “I’m much more relaxed about our border – we can deliver in Wales for Wales without staff themselves sitting in the boundaries of Wales. Equally, Welsh experts can move into central roles as a secondment or for career progression, without uprooting themselves and their families from their homes in Wales. We can have a balanced transfer of people into the centre and vice versa, and on an ongoing basis.” Yet several interviewees said that you needed to employ local people to provide local services, not only for Welsh language needs but also in matching accents, as that can be comforting for beneficiaries and to see that the organisation is relevant to them.

Many felt that this hybrid model of working should continue, saving thousands of pounds for charities. Several were reconsidering their office space – either abandoning it, finding a nominal office, or looking to set up shared office space with meeting rooms and hot desks, potentially in buildings where they could learn from other organisations, such as the private sector.

“After a year of being stuck in flats and with more and more people moving out of London, we’re getting questionnaires asking what we would like as employees. But our leadership team sees this as a way of being healthier and getting out of cities etc.”

When – if – things return to normal, one interviewee is keen the level playing field becomes a permanent feature: “I’m worried it would return to the way it was. There now needs to be a concerted effort by everyone to ensure this happens, such as creating conferencing suites with quality microphones for example.” Another interviewee fears the impact on team work and how they

will seek to rebuild their team after being apart for so long, without face-to-face Christmas get-togethers or social activities and meeting new staff for the first time, without the traditional induction, where you're welcomed properly.

4.3.2. Impact on individual workload

In terms of the amount of work facing interviewees since the pandemic, it has – by and large – created a significant shift, with one calling the impact “horrendous – I’m on back-to-back calls and it’s difficult to separate work and personal time”. While there have been fewer emails and more online calls, which many have felt to be “more draining”, there has also been less transport time: fewer trips to their headquarters, other offices or partnership meetings across Wales.

“There has been less travel, but more calls. I’d say Covid has taken 25% out of people’s batteries.”

“Business continuity plans have been regularly reviewed. I’m now a risk assessment expert, and in order to create Covid-secure ways of working for each service, I need to understand the health and safety of each building, which is also reviewed every time we go in and out of lockdowns.”

For some, the amount of work has not changed but its nature has altered dramatically, meaning they’ve had to change the way they do things significantly in order to meet the needs of beneficiaries. One interviewee said COVID-19 has resulted in more additional emotional impacts among beneficiaries – most of whom have been

shielding – leading to additional casework for staff. One charity has seen a 70% increase in calls from beneficiaries seeking counselling. This has led to new programmes of work either needing to be developed or existing interventions shifted online.

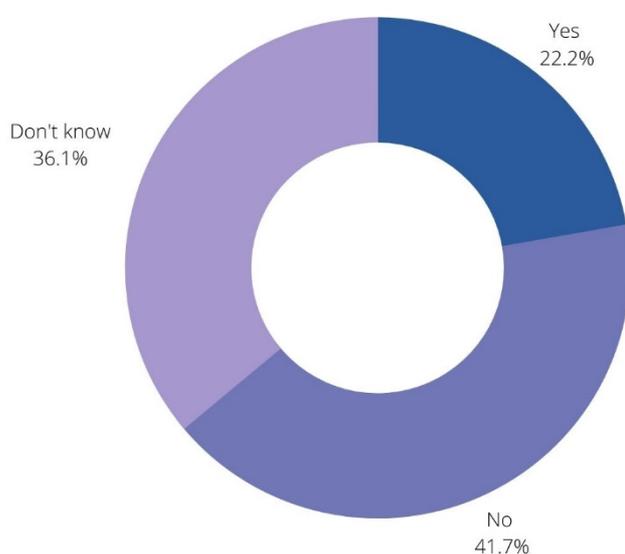
For those dealing with restructures or the centralisation of services, it has meant “working out a new normal to look at how we access central hub services, like communications”. This includes focusing on internal processes, creating proposals to save roles and drafting up new budgets, on top of their day job.

A minority of interviewees have seen their workload reduce, either through structural changes and a reduction in responsibilities, or because the charity itself has insisted on putting staff wellbeing first. Those who have seen their scheduled events cancelled have focused on backroom activities, like getting their house in order in terms of files and projects, and developing strategies etc.

4.3.3. Impact of devolution

With COVID-19 restrictions differing in each of the home nations, it is widely accepted that the media had changed the way it reports domestic news. We wondered whether this had impacted on the way UK charities now work in Wales.

Over half of all interviewees believed it had impacted positively on the working environment of their respective organisations, but the remainder felt it had not, with devolution continuing to be poorly understood. Only one interviewee reported no real change, mainly because “they were already really good”.¹⁸ The diagram below demonstrates that four in ten respondents felt it had not made any difference to the way HQ views the role of the Wales Office.



The COVID-19 pandemic has led to greater awareness about the different devolved administrations in the UK. Do you believe this has impacted on how HQ views the role of the Wales Office?

“I’m really tired of having spent my entire adult life saying ‘that’s not the case in Wales’.”

Many interviewees said it had only helped marginally, and at “a very shallow level” as they were still experiencing challenges in getting staff on the other side of Offa’s Dyke to understand national

differences: “I was in a meeting the other day and someone talked about the UK curriculum.” For charities where the bulk of policies and laws have not been devolved: “it hasn’t changed anything organisationally – they work with an international lens and so their focus lies elsewhere”.

¹⁸ Eight interviewees reported an improvement in understanding; six reported no change and understanding remained poor, and one reported no change at all.

“It’s made my life easier. Both myself and my equivalent who covers Scotland and Northern Ireland are happy, because it’s highlighted the differences. Before Covid, we felt they didn’t believe us”

Many interviewees could point to improvements, because the “tangible, practical difference is clear for everyone to see and, as an organisation, we’ve had to know those differences in order to comply with different legislative frameworks”.

Prior to the pandemic several interviewees said there had been no regular, organisational-wide staff briefings, but these had now become a standard feature. Another said that, previously, there had been separate curriculum groups for each nation, but now the charity had one UK-wide group, with each nation feeding in properly, rather than it being a bolt on: “and what about Wales?” And in attending more meetings, it means that staff in Wales can break free from being “just the Welsh voice – I have more to offer than just an update on what happens in Wales”.

Six of the 15 interviewees said that the senior team were engaging sufficiently with Welsh issues, while five said it was adequate. Three interviewees thought the engagement was poor and one person thought their organisation did well lower down, but that the senior team struggled.

“Our new leadership is keen that we work across the four nations and use a four nations approach.”

The majority of interviewees said this depended, by and large, on the character and personality of the director or chief executive, “Our CEO ‘gets it’ – he’ll always talk about England and the devolved nations”, and who could then bring other members of the leadership team along with them. Reasons that they would be more engaged is because they had either worked at a devolved level previously, were closely linked to devolved nation or had worked in an international setting.

Some interviewees saw CEOs participating in ‘Welsh events’ as a sign of their commitment, but another interviewee said this could also be simple window dressing – “they’ll shake the hand of the Welsh Language Commissioner, but then not fund the Welsh Language Scheme properly”.

“Lower down the organisation, like in communications, they think ‘I don’t need to know this because she’ll do it’ (meaning me!). And I say ‘no, you need to come on this journey with me. It shouldn’t always be my job to talk about this’.”

For others, staff at senior level do not need much explaining but that it is different at an operational level: “they get the countries’ bit, it’s now persuading them that Manchester, London and South West are also different; that piece of work feels like Wales ten years ago.” Another interviewee said: “when working in Northern Ireland, the communications team are far more

cautious about the work they do there, because of the political sensitivities, so they bring on board the team from Northern Ireland sooner.”

There is real concern among a handful of interviewees that UK charities do not respect devolution, and that “as it matures, bigger charities need to start taking notice”. For one interviewee, their organisation truly believes that a patient’s needs in London is the same as a patient’s needs in Swansea and so the work can be done from London: “they’re very much focused on England and Westminster; the Board views Wales with some hostility”.

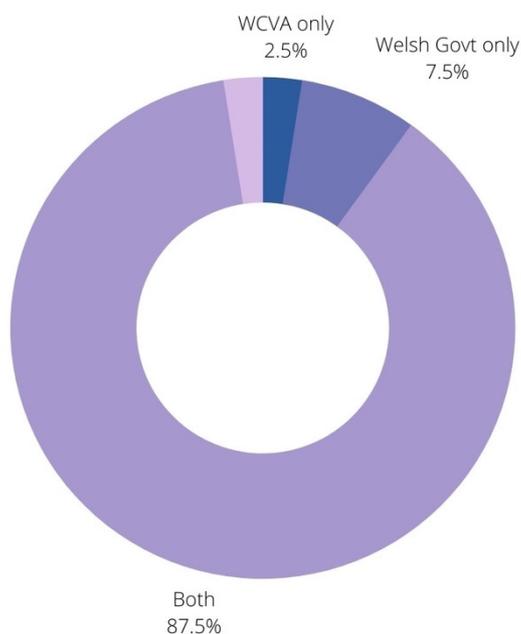
Other interviewees are less critical. Despite the “gravitational pull” of Westminster and “trustees being slightly England-centric”, they see no malice in it: “after all, they have an interest in us delivering our charitable purpose” and “while there may be no Welsh trustees, this is also the case for Scotland and Northern Ireland”. For these interviewees, it is up to them, in their Welsh teams, to “do what’s appropriate for Wales”.

Interviewees who meet regularly with their chief executives or who work on an equal footing with a sister organisation, where there is ‘no reporting relationship’ and have parity, appear to be most content with their organisational structures, processes and arrangements. This is also the case when the role overseeing the Wales team – one level up from the Head of Wales role or similar - understands the context, legislative opportunities and restrictions of each nation, and the impact on staff.

“For the Chief Executive, I’d say they view us as a small, team – similar to say the finance team – rather than as a discreet country.”

4.4 Role of WCVA and Welsh Government

Almost 90% of survey respondents – either working in Wales only or UK charities – believe WCVA and Welsh Government have a role to play in maintaining their presence in Wales.



Do you think WCVA or Welsh Government have a role to play in supporting UK charities to maintain their presence in Wales?

One interviewee said that the Senedd also had a role to play. Only a minority of those interviewed questioned the need for this, believing it was “up to charities themselves to make their model work”.

“The Welsh Government should do everything they can, because we employ stacks of people.”

4.4.1. WCVA role

While one head of nation was keen to commend WCVA’s work in response to COVID-19, “they have been excellent”, a small group of interviewees also viewed WCVA as a remote organisation: “WCVA is a very operational contact, and we’re not engaged in a strategic way with them.” However, several mentioned that they perceived WCVA to be a body more for Wales-based charities than for UK charities.

That said, most believe WCVA as the voice of the sector – both for workers and beneficiaries – have a role to play in challenging charities who wish to reduce capacity in Wales. For one interviewee, it was “very much up to WCVA to decide this, but that they shouldn’t do anything more than they would for a Wales-based charity.”

Interviewees suggested one or more of the following interventions for WCVA to pursue in relation to this matter:¹⁹

- demonstrate the impact of existing UK charities, including international charities, in Wales and offer up success stories and good practice examples of those using Welsh Government funding well
- provide briefings and training to staff in UK charities (both in Wales and further afield) on why they should work in Wales, such as deprivation figures, legislation, policies in Wales, like the new curriculum, the Wellbeing of Future Generations Act etc.
- a “PR job” on the achievements of the Wales voluntary sector in the UK press – as a way of promoting the Wales brand in England
- push UK charities to spread senior positions across Wales, rather than in their headquarters
- bring people together and share good practice, such as providing mentoring support to individuals from Wales who wish to put themselves forward as board members or trustees at UK charities
- set up a consultation to better understand how UK charities view their work and aspirations in Wales
- facilitate conversations on funding and bid support for projects and programme work in Wales.

4.4.2 Welsh Government role

Several interviewees expressed frustration at the UK and Welsh Governments for simultaneously leaning on the voluntary sector to provide essential services and consultation responses, but also failing to appreciate the amount of capacity needed to do this well. For one interviewee: “[Welsh Government] generally maligns us, side-lines us and only asks us for things when it wants something. I don’t think they hold the voluntary sector in the esteem that they should; they don’t understand the amount of work that happens in local communities, and they need to change the way they commission and co-produce services.”

Interviewees suggested one or more of the following interventions for Welsh Government to pursue in relation to this matter:²⁰

¹⁹ These are listed only, and are not weighted according to importance.

²⁰ These are listed only, and are not weighted according to importance.

- scrutinising UK charities, and asking tough questions of those who receive funds, particularly those claiming to be working across the whole of the UK, yet beneficiaries in Wales rarely see them locally
- introducing new legislation to ensure UK charities in receipt of public funding stay in Wales, as is the case in Scotland
- create new guidelines that ensure UK charities in receipt of funding for a post must invest their own money for continuation of the role once initial funding comes to an end
- offering a package of support, including quality broadband, free courses for charities or office space, as well as benefits of a new digital strategy, such as community hubs
- introducing mechanisms whereby Welsh Government consultations with charities are formally built in to the process
- demonstrating the impact of existing UK charities in Wales, including benefits to the economy and the environment,
- raising the profile of existing UK charities instead of always throwing a spotlight on local and Wales based charities.

“I don’t think Welsh Government should beg charities to stay – I wouldn’t want anything to be done that fuelled the attitude that we were the poor relative.”

Offering financial incentives for UK charities to remain or return to Wales did gain traction with a number of interviewees, but it is seen to be contentious. For one interviewee, smaller charities should be prioritised and they would worry about finding appropriate criteria to reward the right organisation. They were also concerned about how sustainable it would be if the only reason a charity would be in Wales was because of a financial package. There were also concerns raised that “taking cash from governments would compromise our position to do scrutiny” and “create blurred lines”.

One interviewee was incredibly concerned about smaller charities in their sector, fearing they would no longer exist once the furlough scheme – “or the Prevent Redundancies Scheme” – ends in September 2021. They suggested that research of this kind should take place at that point.

APPENDICES

Governance

Do you have trustees who represent/come from the different nations in which you work?

1. Yes, and it's built into our constitution/processes
2. Yes, and it's done informally
3. No, not really

Structure

Do you have an individual/team who is responsible for the work in each of your countries in the UK?

1. Yes, and they have full responsibility for our work in each country
2. Yes, but HQ still line manage some of the staff in each country
3. We don't have staff in country

Strategy

Does your strategic plan look at the activities in the nations of the UK where you work?

1. Each country has its own part of the strategic plans
2. Each country gets a mention when it is relevant for the wider plan
3. All of our strategic and business plans are by discipline or goal not geography

Management

When did your CEO last visit the nations of the UK where you work (Covid aside)?

1. Our CEO meets in person or virtually with devolved staff several times a year
2. Our CEO meets devolved staff when there is a specific need or purpose
3. Our CEO is a very busy person

Budgetary

Are your budgets devolved to the nations where you work?

1. All expenditure is handled at the country level
2. Some budgets are held in country and some by HQ
3. All budgets are held by the functional teams

Legal & Constitutional

How are you legally structured in the countries where you work?

1. We are a separately registered charity in each country where we work
2. We have a separate advisory council or equivalent in each country, but one charity
3. We are one big happy charity united under a single trustee board

Branding and names

How does your brand strategy account for devolution?

1. We have separate and distinct names/brands in each country
2. We have the same name but plonk 'Cymru' or 'Scotland' at the end
3. We have one name and one brand across the countries where we work

Politics

How does your public affairs and campaigning account for devolution?

1. We consider how each aspect of our work fits within the different laws in each country and lobby accordingly in each nation
2. We have a UK policy, but take some notice of how it may play in each nation
3. We have one UK-wide political strategy, regardless of whether it applies in each nation

Publications

How do your publications take account of devolution?

1. We always check that the information in our publications applies across all the nations and fits in with local laws, including the Welsh and other languages
2. We add in something in all our publications warning people to check it applies in their nation.
3. We have one set of publications for the whole of the UK.