EXPLORING THE IMPACT OF COVID-19 ON WILTSHIRE'S VOLUNTARY & COMMUNITY SECTOR – PART II

WESSEX COMMUNITY ACTION

February 2021

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VCS Covid-19 Impact Survey Results

Executive Summary

For a period of just 3 weeks in December 2020 and immediately after the second national lockdown, Wessex Community Action carried out a follow-up survey to the one undertaken in May 2020[1]. The aim of this survey was to learn about the continued impact and ongoing restriction of the Covid 19 pandemic on the sector's beneficiaries, volunteers, staff and finances and build on the previous survey findings.

This time the questionnaire was developed in consultation with Community First and Wiltshire Community Foundation and with support of officers from Wiltshire Council, who all have an interest in how the Voluntary & Community Sector in Wiltshire is managing. Whilst the questionnaire was expanded to include partners' interests, the aim remained the same and care was taken to ensure enough overlap with the May survey questions for comparison to identify continued themes and patterns.

Charities and not for profit groups from across Wiltshire were invited to complete the survey. A total of 116 responses were received from people in senior positions (trustees, management committee members or senior staff) with a good overview and understanding of their organisations. Organisations tended to be smaller, 75% had an annual turnover of under £50K, providing health and wellbeing activities (39%) or sport, leisure and recreation (28%), benefitting older people (41%), people from a specific geographic area (38%) and children and young people (35%). 22% of respondents were responsible for managing a building, facility or open space.

The report highlights findings from national surveys and research, which used alongside the information presented below, provides valuable evidence of the emerging needs in Wiltshire. The findings will be useful in discussion with stakeholder groups including local and national statutory bodies, local authority, health care providers, funders and those that advocate on behalf of the voluntary and community sector. Informing and influencing policy, service delivery and funding to ensure the sector has the support it needs now and in the future. It may also prove to be useful to local VCSE organisations to inform their own service development and grant applications.

The results show that:

- **More organisations are delivering services and support than in May 2020 (75% compared to 33%), but many (73%) at a reduced level of delivery compared to pre-covid levels. The proportion of organisations reporting changes to service delivery remains consistent with the May 2020 survey results (around 70%).**
- The take-up of technology and switch to delivering services "virtually" has been one of the most significant developments resulting from the Covid-19 pandemic, enabling organisations to engage and in some instances extend their reach. 28% are using virtual technologies to deliver face to face services remotely, 22% are delivering small group activities virtually and 41% and 37% are providing support via telephone and email However, some organisations have been unable to connect with some or all of their service users (11% - 16%).
- **24% of organisations have seen an increase in demand for their services.**
- Of all the groups responding, 53% reported increasing demand for befriending and mental health and wellbeing care and 26% for essential food supplies. It is, therefore, not a surprise that groups are seeing more people with anxiety needs (51%), older (41%) and isolated people (39%), those that are excluded digitally (25%) or are in some other way marginalised (20%) or in financial crisis (21%).

[1] The full May 2020 survey report can be found at https://www.wessexcommunityaction.org.uk/wp-content/uploads/2020/06/VCS-CV-19-Impact-Report-Final-pdf.pdf

- **The survey specifically asked groups if they had seen an increase in demand from residents that identify with the Equality Act 2010 protected characteristics. 17% confirmed they had, with 40% of these seeing increased demand from people with disabilities and 20% from people of faith. However, only 30% of all organisations undertake any equality, diversity or inclusion monitoring.**
- To manage changing demands, groups are calling for more funding (44%), more volunteers (44%) and help with finding new ways of working (29%). However, of great concern, is that 36% of groups have seen a reduction in volunteer numbers and 62% have seen a reduction in their income levels, with 2% reporting they are at risk of imminent closure.
- **The number of organisations with staff on furlough has decreased from 34% in May to 12% with staff still furloughed and 13% able to bring back some furloughed staff. 9% of organisations have had to make redundancies, however this may have been counteracted by the 8% who have recruited additional staff members. However, the net impact on staffing levels depends on the numbers concerned.**
- A similar proportion of organisations (55%) report the pandemic has had a significant impact on their income compared to the May survey.
- **The reduction in income has mainly been attributed to cancelled fundraising events (56%), loss of trading income (47%) and a reduction in donations from individuals (26%)**
- Looking forward, a sense of optimism prevails. Groups are looking forward to being able to return to face-to-face support, but not to lose the benefits and advantages that technology has enabled. A “blended” service in the future will support organisations physically re-engage those currently unsupported or excluded whilst maintain the reach achieved through virtual methods. Groups also feel positive about the recognition and value volunteers have received as a result of the pandemic.
- **However, support is needed particularly around funding, recruiting and managing volunteers and adapting to new ways of service delivery if the sector is to meet growing demand and survive and thrive in the future.**

In comparison to the May 2020 survey findings, we see a largely consistent picture with organisations reporting broadly similar impacts on service delivery and income. Fewer organisations have staff still on furlough, but service delivery remains below its pre-covid levels, demand for services is growing and volunteer numbers and income have declined. This raises concern for future sustainability of the sector and availability of support for Wiltshire’s communities.

Key Messages and Comparisons with National Surveys[2].

Furthermore, the impact felt locally is not too dissimilar to that being reported by National surveys. Nationally, as in Wiltshire, more organisations are experiencing a deterioration of the financial position and demand for services is increasing. Where Wiltshire differs from the National experience relates to volunteer numbers. Where nationally, staff and volunteer numbers are reported to have stabilised, locally, organisations are reporting declining volunteer numbers. Whether this is as a result of an older age profile of volunteers locally or for other reasons, the cause is unknown and something worthy of further exploration. Staff and volunteer burnout and loss of funding have been highlighted as significant threats for the coming year.

The second area where the Wiltshire experience differs slightly from the national picture is with regard to organisations at risk of closure. 7% nationally reported being likely or very likely not to be operating next year compared with 2% at risk of imminent closure locally. The reasons for the difference in proportion could be due to organisation size and structure or that other parts of the country have been hit harder than Wiltshire with more and longer local lockdowns, but the overall trend shows a reduction in closures both

[2] NCVO and partners *Covid-19 impact barometer & Ecclesiastical Charity Risk Barometer*

nationally and locally. In May 2020, 22% of organisations in Wiltshire expected to close, and in the last month the national figures have halved from 14% in October to 7% in November 2020.

National research has also found 80% of organisations feel more prepared for lockdowns than in March 2020, but preparation for lockdowns could be improved with more notice, greater sector specific guidance provided in advance and more access to emergency funding. Though not specifically covered within the Wiltshire Voluntary Sector Impact Survey, some of the national findings resonate with local organisations' experience which were expressed during the Wiltshire Voluntary and Community Sector Forum Recovery event[3], these include:

- **The speed of change.** The rapid change in environment and new, unchartered territory lead to a rapid response by organisations and included; changing policy, practices, ways of working, radical shifts in processes and practices to be better able to work remotely.
- **Strategic planning aided organisations to cope better –** whether organisations implemented plans or took the opportunity presented by lockdown and the suspension of services to undertake strategic planning or the prioritisation of strategic goals, the focus on strategy has helped organisations more able to manage.
- **Supportive funders –** Rapid changes to grant giving processes and availability of emergency funds have supported the survival of many organisations and funded groups that have developed good relationships and had open dialogue with funders have been able to respond, adapt and continue to deliver under their grant agreements.
- **Good Communication -** both internally and externally, good communication has been vital to keep staff and volunteers connected whilst working remotely and in developing mutual support across organisations.
- **Support from the whole sector**. Local and national infrastructure organisations, flexible and responsive funders, strong relations with their communities, have all helped organisations to adapt and respond.

[3] Wiltshire Voluntary and Community Sector Forum Recovery Event Report

Introduction

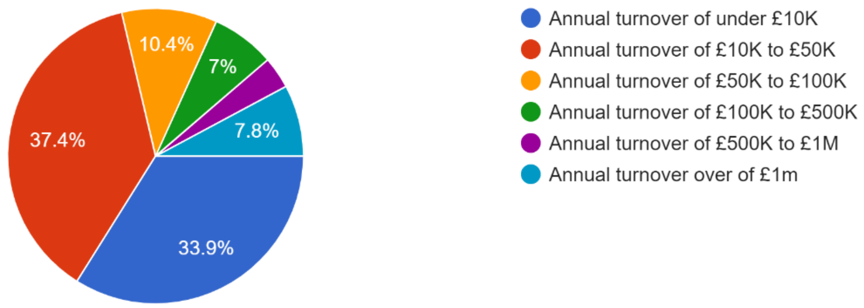
WCA circulated an online survey in December allowing 3 weeks for organisations to respond. The survey deadline was the 21st December. The survey was used to try to gain a wider understanding of how the continuation of restrictions resulting from the pandemic are impacting Wiltshire's Voluntary & Community Sector's (VCS) beneficiaries, volunteers, staff and finances and build on the May 2020 survey findings.

The survey questions were developed in consultation with Community First, Wiltshire Community Foundation and Wiltshire Council Officers who also distributed it to their contacts within the VCS Sector. WCA also sent the survey using the same distribution list as used in May.

The follow up survey received responses from 116 organisations (4.6%), slightly below the May response rate of 162 or 6% of the sector. There are many possible reasons for the lower rate of return; Survey fatigue is a real possibility, there have been many national and local surveys to establish how individuals, businesses and organisations are faring. Availability of staff and volunteers to complete the survey may also be a factor. Whilst the 2nd lockdown has not been as restrictive as the 1st and furloughed staff have returned to work, local VCS organisations are working hard to meet increased needs and demands so may not been available or had time to respond. Finally, the timing of the survey may have contributed to lower responses as many people's attention turns toward Christmas.

The survey was completed by people in senior positions with a good overview and understanding of their organisations (trustees, management committee members or senior staff). Their main beneficiaries included older people (41% of respondents), people from a specific geographical area (38%), children and young people (35%), families (22%) and rural isolated communities (22%), provided health and wellbeing activities (39%), sport, leisure and recreation (28%), a club, support or social group (18%), advice, information, advocacy or counselling service (14%) or manages a buildings, facilities or open space (22%).

The organisations responding tended to be smaller with 75% had an annual turnover of under £50K.



The information gathered from these organisations aims to update our understanding, developed from the May 2020 local survey results, of the current position and impact of the continued restrictions and where possible and appropriate to do so draw comparisons with national research.

Results

Current status of your organisation

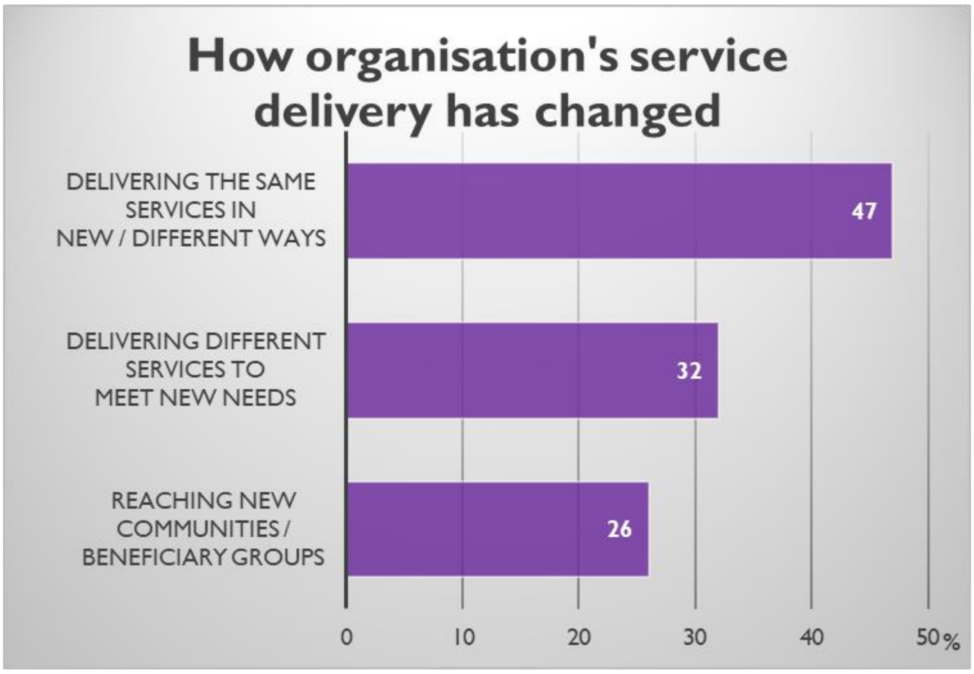
66% of respondents to the May survey had stopped providing any services, so it is encouraging to see this proportion reduced to 24% that are either temporarily (21%) or permanently closed (3%).

Just under three quarters (73%) of organisations and groups run their activities and services from community venues such as village halls, community centres, sports clubs etc. Many multi-purpose community facilities provide essential services such as post-offices and pre-schools and have been able to remain open through the second lockdown. However centre managers have been faced with the task of interpreting the changing government guidance and advising their users which activities can continue. Many volunteer committees have found the uncertainty and lack of clarity brought about by the changing guidance, difficult to navigate, so it is, again, encouraging to find nearly two thirds (63%) of organisations operating out of community venues to have re-opened.

Whilst more organisations have been able to remain open and providing services and support, 73% reported operating at reduced level of service delivery (compared with pre-covid), with just under 10% operating above "normal" levels. There have been many changes to service delivery, those enforced to manage the spread of the pandemic, in response so organisations can continue providing services and support to beneficiaries needs and those necessary in order to survive this crisis. The following looks in more detail at the changes to services, delivery methods and demand.

Changes in services & engagement

In line with findings from the May 2020 survey, 74% have changed the way they deliver their core service. This is a marginal increase from the May, where 70% stated they had to completely change service delivery, and is in line with national findings where 75%[4] anticipate Covid-19 to have a moderate or significant negative impact on delivering their objectives next year. The chart below, provides an overview of how organisation's service deliver has changed.



[4] NCVO and partners *Covid-19 impact barometer – (January 2021)*

It shows, 32% of organisations delivering different services. This is below the proportion of organisations nationally[5] that have reported an increase in their range of services, 43%.

The main changes reported, focus on making sure face-to-face activities (where they were allowed under government guidelines) are Covid secure and that service delivery can be delivered remotely, including the take-up of digital technologies to provide online services, nationally between 80%[6] and 92%[7] of the sector have moved to providing services online.

An example of how organisations have responded and diversified, engaging new users comes from Goldies, a registered charity providing singing and activity sessions for older people who are socially isolated and people with learning difficulties and dementia.

Goldies stopped all face-to-face activities during the National Lockdown and launched their first digital service "GoldiesLive" a free weekly online sing-a-long accessed through YouTube, Facebook and a new easy access website www.goldieslive.com which now also shares health and wellbeing information from other age awareness organisations.

Prior to Covid, Goldies aimed to combat isolation by bringing communities together, however, the focus has shifted to bringing fun into people's houses and offering opportunities for contact via Facebook, email and the office phone line. The charity is looking to develop the service further by offering small group Zoom sessions.

GoldiesLive has connected with more people, over 4000 people engage with the service either through FaceBook, YouTube or via the website. They have seen an increase in men taking part compared to their normal daytime, face-to-face activity. However, only approximately 20% of their existing users access as many do not want to use a digital service.

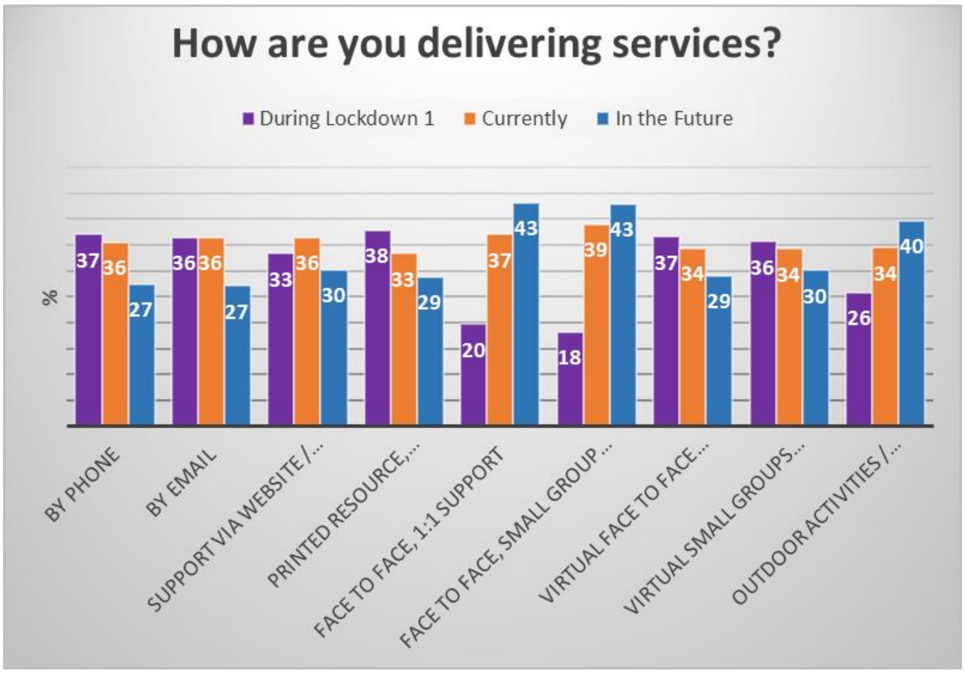
It is also worth noting, that during the period between the lockdowns, 22% of organisations in Wiltshire were unable to offer any of their "normal" or "usual" services. The reasons for this are unclear and we must be careful not to make any assumptions about whether or what services these organisations were able to provide without further information. These organisations may have successfully diversified and transformed their services or they may be the 24% of organisations which remained temporarily or permanently closed. Either way, there are the implications for beneficiaries and whether they are they still being supported? There may also be consequences for these organisations' future sustainability.

Across Wiltshire, the survey found 11% of organisations have been unable to connect with their existing users with a further 16% unable to connect with some of their beneficiaries and 7% have prioritised who they work with, suggesting that some beneficiaries may not be getting the support they used to receive or need.

Reviewing how service delivery has changed since March 2020 and looking forward, the trend shows a return to face-to-face and a reduction in the more remote and virtual service delivery methods that came about to overcome the restrictions of Covid. However, looking at the chart below, a larger proportion of organisations in Wiltshire envisage a return to face to face support, compared with the proportion that

[5] NCVO and partners *Covid-19 impact barometer – (January 2021)*
[6] *Ecclesiastical Charity Risk Barometer - (December 2020)*
[7] NCVO and partners *Covid-19 impact barometer – (October 2020)*

foresee a reduction in virtual delivery, suggesting a more "Blended" approach in the future. The idea of "blending physical and virtual" has also been highlighted within the Voluntary and Community Sector Forum Recovery event held in December 2020.



There appears to be a fairly constant use of website, with phone and email support tailing off, perhaps as these could be considered more time consuming and costly activities.

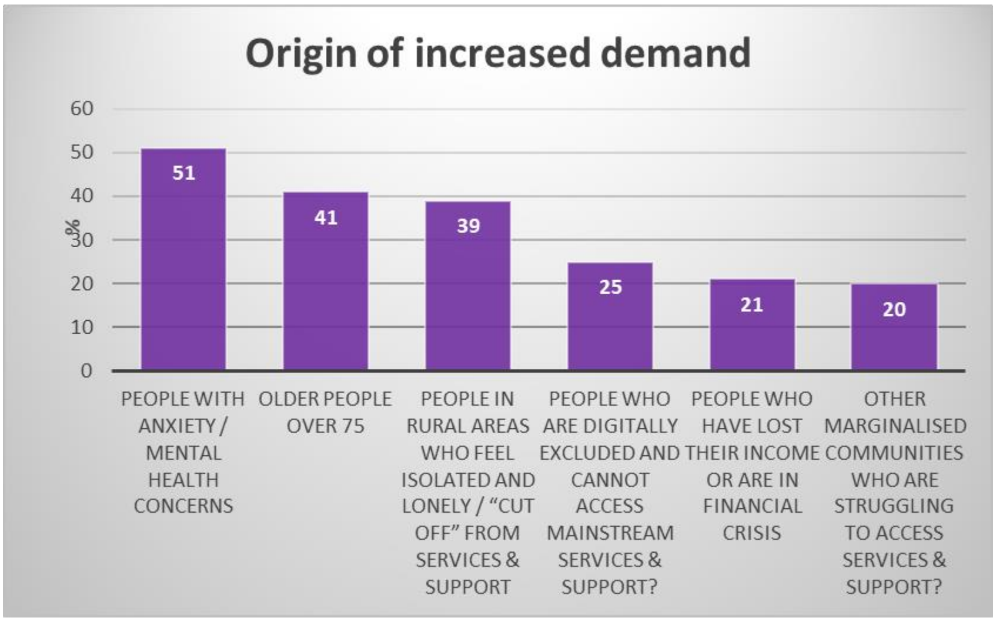
Changes in demand

A quarter (24%) of organisations have seen an increase in demand locally, compared to just over half (53%) reporting an increase nationally[8]. The top 3 areas of extra demand were;

- Befriending services and supporting people's mental health and wellbeing. (53% of responses)
- Signposting to relevant support. (36%)
- Help with essential food supplies (26%)

The following chart shows which groups have contributed to the increase in demand for services. Given "top" areas of extra demand, it is not surprising that demand is arising from groups in the population who have been more affected by the consequences of the pandemic e.g. social distancing, shielding, Lockdowns, furlough and redundancy.

[8] NCVO and partners *Covid-19 impact barometer – (January 2021)*



In the next 6 months as many organisations expect demand for services to continue to increase as those who don't know (40%). Uncertainty has been an underlying issue for everyone. The figure nationally is 50% expect an increase in demand for their services over the next month.

Although 45% of organisations feel they will be able to manage the impact of additional demand on their organisations', the remainder are calling for help with;

- More funding 44%
- More volunteers 44%
- Help with finding new ways of working 29%.

Staff & Volunteers

In May 2020, 34%[9] of Voluntary and Community sector staff have been placed on furlough. The figure now is lower, with 12% of organisations able to bring all furloughed staff back to work, 13% able to bring some furlough staff back to work and 12% with staff still furloughed.

Almost as many organisations that have had to make redundancies (9%) have recruited additional staff (8%) meaning that overall the number employers by the charity sector in Wiltshire has remained fairly consistent / constant. However, the number of employees concerned is not specified, so it is unclear at this point whether there is a net decrease or increase in employment in the sector and we will have to see what happens to those employees that remain on furlough (12%). This relatively constant picture is similar to the national position.

	Wiltshire		National	
	increase	decrease	increase	decrease
Staff level	8%	9%	17%	13%
Volunteers	11%	36%	20%	19%

The NCVO Barometer[10] highlights a relatively stable employment position with 49% reporting the same number of paid employees compared to previous month. In Wiltshire, perhaps due to the relatively smaller

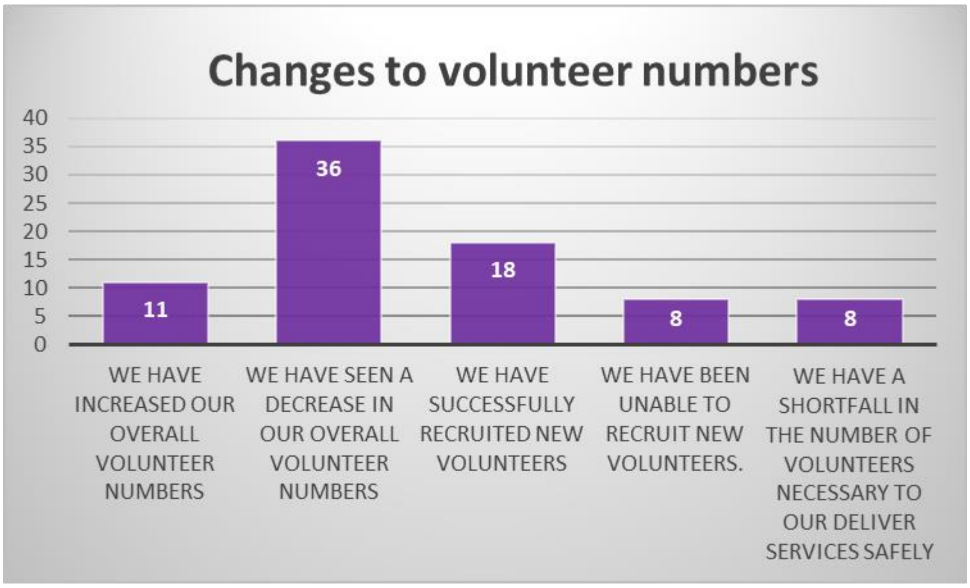
[9] Wiltshire VCS Covid-19 Impact & Resilience survey, Wessex Community Action June 2020.
[10] NCVO and partners *Covid-19 impact barometer – (January 2021)*

size and voluntary nature of local organisations, the proportion reporting changes in staff and volunteer levels is below the national average in all areas, except for the reduction in volunteer numbers.

Understanding why a third of organisations have reported a reduction in volunteer numbers is essential, especially when volunteers are in such high demand and are identified as a key means to meeting additional demand both now and in the future. However, unfortunately there is nothing in the survey that will shed any light on the reasons for reductions in the volunteer workforce.

Volunteers

Just under half of organisations (46%) have maintained the number of volunteers supporting their organisation and service. Those that have reported changes have seen a reduction in volunteer numbers (36%) and given 44% of organisations have highlighted the need for additional volunteers to meet changing demand, this and the fact that 8% have been unable to recruit and 8% have a shortfall in volunteers needed for safe service delivery is a concern for the sector.

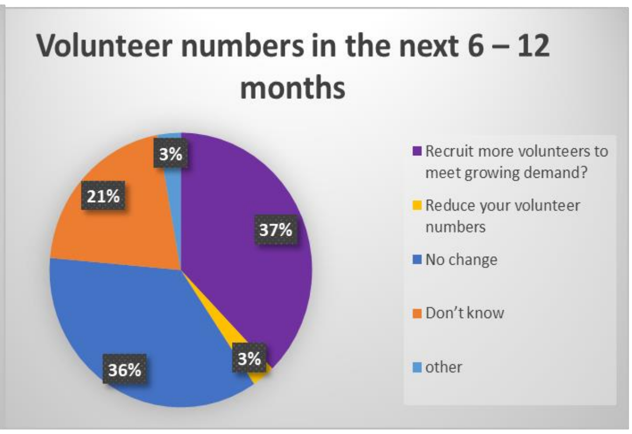


There has been much about how Covid has changed the demographic of volunteering and concern expressed around the age of volunteers and the impact of Covid-19 on older people. However, the survey found that for 70% of respondents, the profile of volunteers had not changed. The main changes that had been observed by volunteer involving organisations are:

- More working age (pre-retirement) (18%)
- More volunteers from the immediate area / local community (10%)
- More young people (16 – 24 yrs) (5%)

Looking forward (next 6 – 12 months)

There is some optimism in the next 6 – 12 months with only a relatively small anticipated reduction in staff and volunteer numbers (2% redundancy and 3% reduction in volunteer numbers), despite the fact that 73% of organisations are currently operating below their pre-covid levels of service delivery. The anticipated reduction in staffing levels is likely to be partly as a result of financial concerns but also a reflection of the changed operating environment, working practices and skills required e.g. reduced face to face, reduced travelling, increased take up of technology that can save time and reach more people.



It would appear that the reported increase in demand for services (24%) is more likely to be met by recruiting additional volunteers, (37%), though where organisations are looking to recruit (13%), half of these are likely to be on fixed term or part-time contracts.

Overall, the responses provided show a relatively stable position in terms of staff and volunteers, 55% of employers and 36% of volunteer involving organisations do not foresee any changes in levels of staff and volunteers. Given the uncertainty, changes in demand, service delivery and financial concerns (see below), this offers some encouragement and optimism.

It is also worth noting, that whilst the sectors response to increased demand is to recruit volunteers, there is already considerable demand for volunteers to support the fight against Covid and support residents which raises the question as to where additional volunteers will come from, particularly as the number of staff on furlough is reducing, as more people are able to work from home.

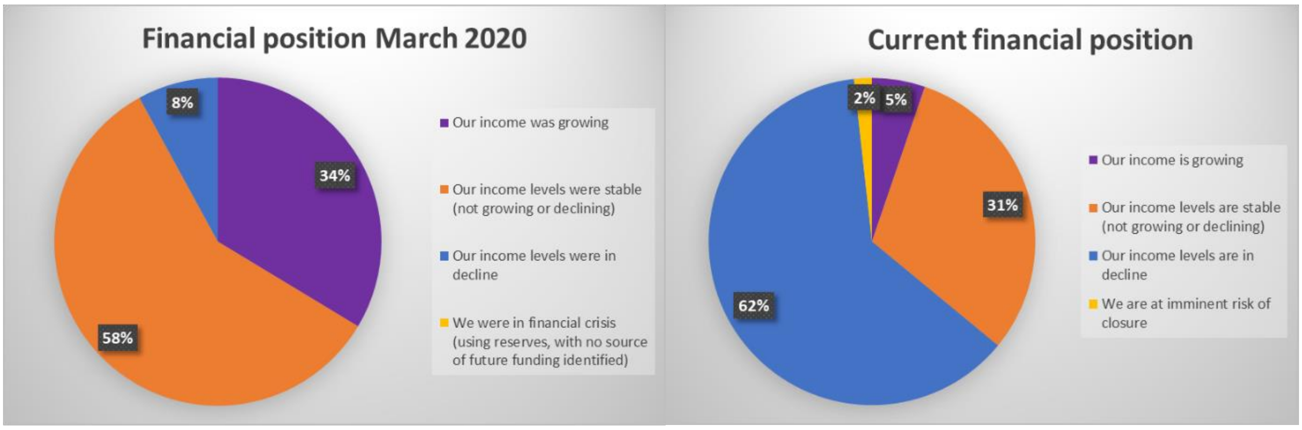
The national survey by Ecclesiastical[11], showed 44% of responders identified staff burnout as a major concern which was echoed locally by the Wiltshire Voluntary and Community Sector Forum Recovery Event held in December 2020, particularly with respect to volunteer fatigue.

Funding & Income

In the first Wiltshire VCS Impact survey (May 2020), over half of organisations reported a high impact on their current and projected income. The situation has not changed, a similar proportion, 55% reporting a high impact on their projected income. Furthermore;

- The proportion of organisations whose income was growing dropped from 34% in May 2020 to just 5% in December
- Those with stable income levels has dropped from 58% to 31%.
- And more organisations are experiencing declining income, 8% in May to 62%, with 2% at risk of imminent closure in December.

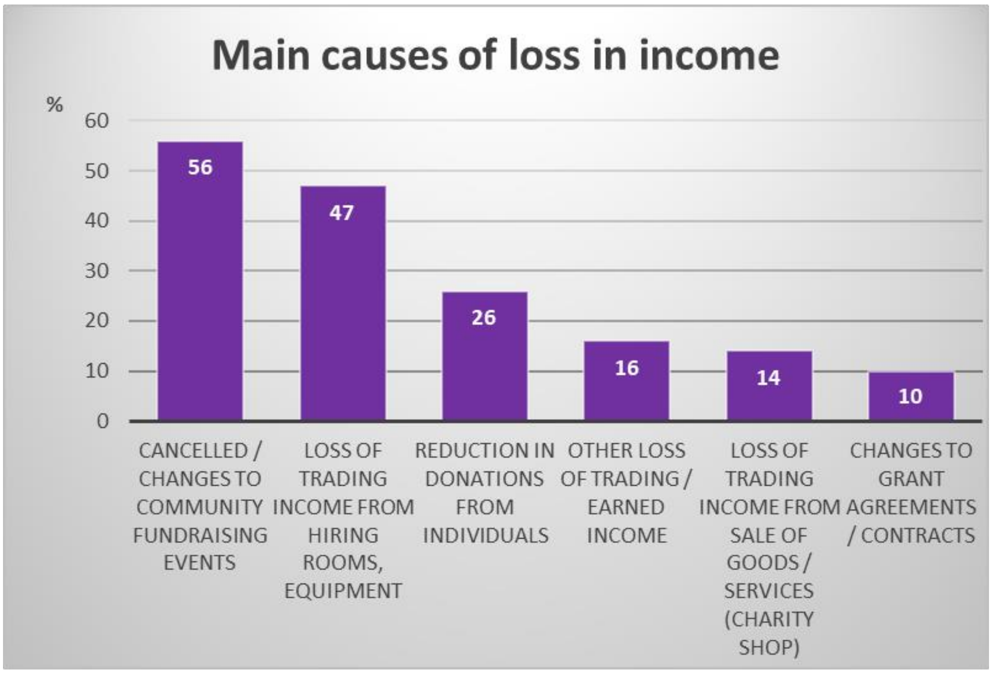
[11] *Ecclesiastical Charity Risk Barometer - (December 2020)*



Looking at the national position, (though please note differing timescales[12]), NCVO report that in the last month;

- 27% saw their financial position in the last month improve, 5% locally reported growing income.
- 46% reported a stable financial position in the last month, 31% locally reported stable income.
- 26% reported a deteriorating financial position in the last month, 62% locally reported declining income.

When asked for the reason behind the declining income in Wiltshire, the responses are not surprising, other than perhaps the third highest reason "Reduction in donations from individuals" (see chart below). This may be as a result of high-profile national campaigns such as Captain Tom diverting individual's donations away from local causes, or organisations not having the online donation tools available or individuals lack of confidence or skills to make online donations or it may reflect the economic impact Covid has had on people's disposable income as a result of furlough, redundancies and availability of casual work.



[12] The national figures relate to a change over a 1month period (October to November), whereas the local survey reports the position in March and December.

Looking at funding in more detail, at in particular the access to grant funding, 54% applied for grant funding in the last 6 months and were successful and a further 9% have applied and are awaiting the outcome. However, 14% could not find suitable grants, this may have been as a result of some funders diverting mainstream funding towards supporting the effects of the pandemic or organisations not knowing where to look for opportunities.

We know locally that Wiltshire Community Foundation responded quickly, flexibly and positively to supporting local groups. Generally, it was stated that the flexible response by other funders was also positive, with groups acknowledging and benefitting from the availability and turnaround of grants. However, there was a perception expressed by some that fewer checks may have resulted in duplication and wasted funds (but there is no evidence at this time to collaborate this). Respondents also commented on the eligibility criteria of some the support packages, particularly from central and local government (Business Support Grants) which may have resulted in some organisations being at a disadvantage, (again, as further research and review is undertaken around funding this will become clearer).

"Social enterprise sector has had less options than charities and business so much more competition for limited pots"

"As the building is Church owned we do not pay rates so missed out on the £10,000 grant that other halls in the locality received. A fairer distribution of this fund would have been welcomed"

As identified above (page 7) more funding is needed to support growing demand, but also to support recovery post Covid. Whilst grant funding has been made available, much of this has been project focussed or "restricted" which does not provide organisations with the flexibility of unrestricted funds that income from trading and fundraising activities provide and where organisations report the greatest reduction in their income.

"Whilst our funding reserves are currently sufficient, we have concerns about extra costs post Covid and how rapidly our reserves will be drained."

In addition, the funding response, whilst providing organisations a lifeline, grants have typically been smaller and for a limited timeframe to address immediate needs. However, to aid recovery, a longer-term view would provide many organisations, particularly the smaller groups, "space" to look to the future and plan, rather than continue to respond to the challenges Covid has presented.

Nationally[13], 55% of charities identified the loss of funding as a threat for the coming year. As one respondent locally highlighted in the following there is continued uncertainty around fundraising activities which has a direct impact on service delivery.

"Planning for 2021 has been difficult as we don't know what we will be able to deliver in terms of fundraising events, I believe 2021 may be hard income wise as imagine level of emergency funding available will tail off but the usual income streams may not recover to pre covid levels for some time"

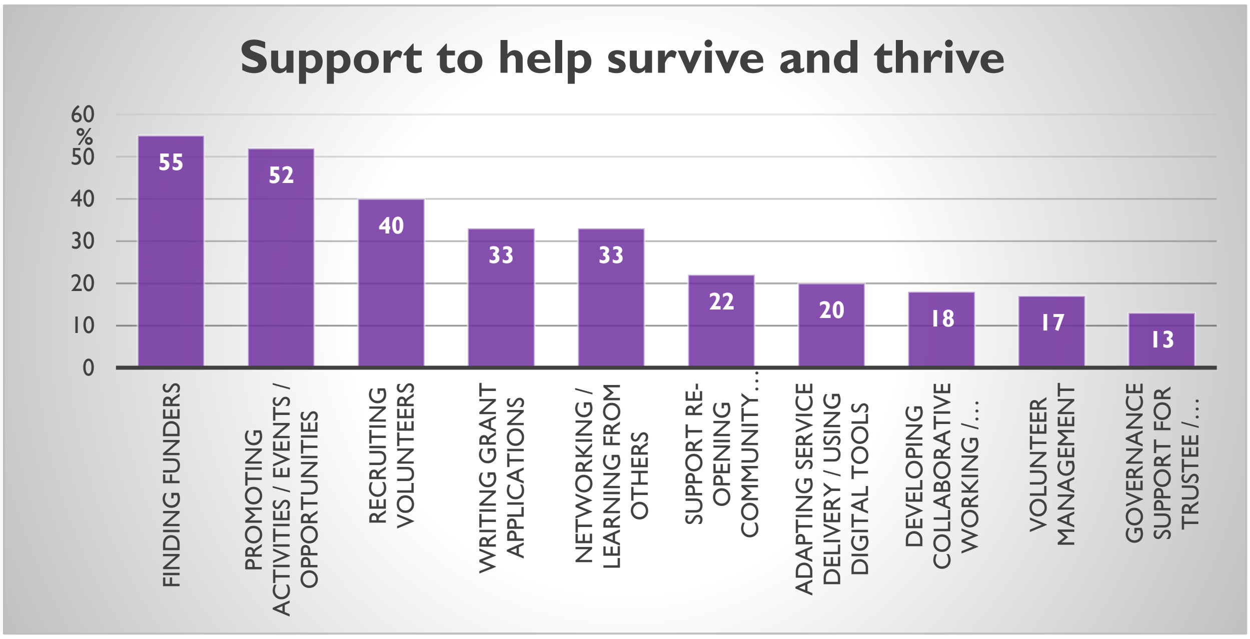
The Future & Support needs

Reflecting on the past 9 months, groups have faced many challenges and it is apparent yet there may still more to come. As writing this, the nation is in its 3rd National lockdown, with restrictions almost as severe as the first in March 2020, but with the hope that the vaccination programme offers. But even this presents its own challenges as volunteers are called upon again to support the over-stretched capacity of our National Health Service. Fortunately, it would appear that many of the service developments and implementations from the 1st lockdown have meant the required community response has been significantly lower, therefore reducing the burden and concern for local groups. But continued restrictions and uncertainty about when it

[13] *Ecclesiastical Charity Risk Barometer - (December 2020)*

will all end is a concern and is impacting organisations' ability to plan, raise funds and meet the growing demands arising from the impact of the pandemic on local communities.

As highlighted from this survey and in discussion during the Wiltshire Voluntary and Community Sector Recovery event; fundraising, volunteers, mental health and digital inclusion are key challenges and concerns going forward, but by working together they have been and can continue to be addressed.



As well as the many challenges the pandemic has presented, the sectors agility and innovation has resulted in many positives, particularly around take-up of technology, an increased sense of community and recognition of volunteers.

"It has allowed us to re-evaluation the service and look at different ways of working"

"People's take up of technology (Zoom and the like) has been unbelievable and they would never have done it without the pandemic imperative. This is particularly true of the "elderly". That has transformed things and will transform society post covid. However, everyone misses real face to face interaction!"

"There seems to be an increasing recognition of the role of volunteers and the need to deploy them appropriately and use their skills properly"

Leaving a feeling of hope and optimism for the future and realisation of the aspirations to Re-start and Reconnect.

"To take the best of what we've learned forward and return to our service."

"To promote the positives and continue to support people to be seen as equal members of their community with much to offer."

Conclusion and closing observations

The two local impact surveys have highlighted and quantified the impact of Coronavirus on local voluntary and community sector to date, identifying the immediate threat as well as some of the emerging longer-term challenges. From the survey results, along with feedback via the voluntary and community sector forum, 1:1 discussion with local groups, partners and stakeholders it is possible to conclude that sector has responded and adapted quickly to meet the challenges presented by the Covid pandemic. It has been supported by an army of volunteers and flexible funders, particularly local grant giving organisations, and the lasting legacy arising from the pandemic, is likely to be the adoption of technology and digital delivery, a renewed sense of community and increased recognition of volunteers and volunteering.

However, organisations are facing many challenges. Many are yet to fully re-open and safely deliver services to match pre-covid levels and / or to reach and reconnect with existing service users who may be digitally excluded. Demand is increasing from isolated communities, those facing financial hardship and from people with mental health and wellbeing needs, and at a time when the income and staffing resources required to meet these challenges are limited. Moreover, it is likely that the continued social distancing and repeated lockdowns are intensifying the difficulties and pressure faced by organisations and communities. Yet there is still much that remains unknown or requiring further investigation.

Reports from services providers suggest changes to the demographic of service users. Communities who were "just about managing" prior to coronavirus have now hit crisis point and the range and complexity of needs appears to be changing as more people experience loneliness, isolation and mental health needs. However, the whilst the impact on communities and their resulting needs are beginning to emerge, the full extent remains relatively unknown and it likely to take time to present.

In order to respond to and address changing user needs, organisations may need to further adapt services and time and resources to plan are needed. Whilst funders fully and flexibly responded and volunteers came forward, local organisation are calling for more help. Specifically, with funding, recruiting volunteers and help to develop new ways of working including digital skills and technology, strategic planning and leadership.

Funders and commissioners have fully responded to the immediate needs presented with a range of support packages, accessible criteria and quick turnaround. Commissioners and funders provided a safety-net for many service providers through discussion and agreeing new terms. However, many longer-term development projects were put on hold and the emergency funding met immediate needs with small, short term, project focussed funding pots. This has resulted in a lack of availability of longer-term, larger funding opportunities that enable strategic planning, build capacity and develop sustainability. This is the type of funding that is needed to fully support the sectors recovery.

To date, staff and volunteers have gone above and beyond to support their communities and service users and to meet the additional needs presented by the pandemic. Many have worked additional hours, without a break and taken on new roles and ways of working with limited support. Although tools and resources have been made available to address and manage stress, many small and medium sized organisations have not and do not have the capacity to implement. As a result, staff and volunteer burnout is a real threat to the sector.

Furthermore, recruiting additional volunteers may not be easily achieved as the "supply" of potential volunteers is constrained e.g. as people returning to work (the Furlough scheme is due to end at the end of March 2021). In response, local voluntary and community groups may need to look at developing greater flexibility within the volunteer roles required and engage with underrepresented groups. Support to achieve this is likely to be required.

Groups and organisations have relied heavily on connecting with users through digital means, often with limited knowledge or understanding of the technology or skills. The learning curve organisations have been on has been steep, but organisations have risen to the challenge and achieved positive outcomes. Going forward, to sustain and build on the digital revolution that has occurred within the sector, these foundations need to be underpinned by ensuring the appropriate hardware, software and knowledge is in place.

The learning from the first lockdown has made the second and third lockdowns easier to navigate and reduced the impact on organisations. This demonstrates the value of sharing and embedding the learning and experience to date, but these "emergency" situations are unlikely to go away, and time spent planning for future emergencies now will reduce subsequent impacts. However, time, space, change management and leadership skills for future planning has to be made available or created and operating with overstretch resources makes it difficult. Coming together to collectively share the lessons learnt and the experience available can spread the benefits and support those less able to create the time, space and skills required.

The past 12 months have been a time of tumultuous change and the outlook is an ever-changing landscape which we will need to continue to watch, explore, understand and share. In spite of all the uncertainty and adversity, an undercurrent of optimism and hope for the future remains.