



The Charities Regulator Survey of Charities

An Amárach Briefing on behalf of:



**An Rialálaí
Carthanas**
**Charities
Regulator**

Research Methodology



- Amarach Research was commissioned by the Charities Regulator to gauge the current position of the sector
- The online survey was distributed to over 17,000 charity / sector contacts by the Charities Regulator and hosted by Amarach Research
- In total, 899** completed surveys were achieved, a response rate of 5.1%
- Fieldwork ran from the 17th November 2022 to 5th January 2023
- Comparisons are drawn with the 2020 research findings where possible

Notes for this Report:

Rounding may impact on single code question totals (+/- 100%)

* Denotes new statement/question in 2022

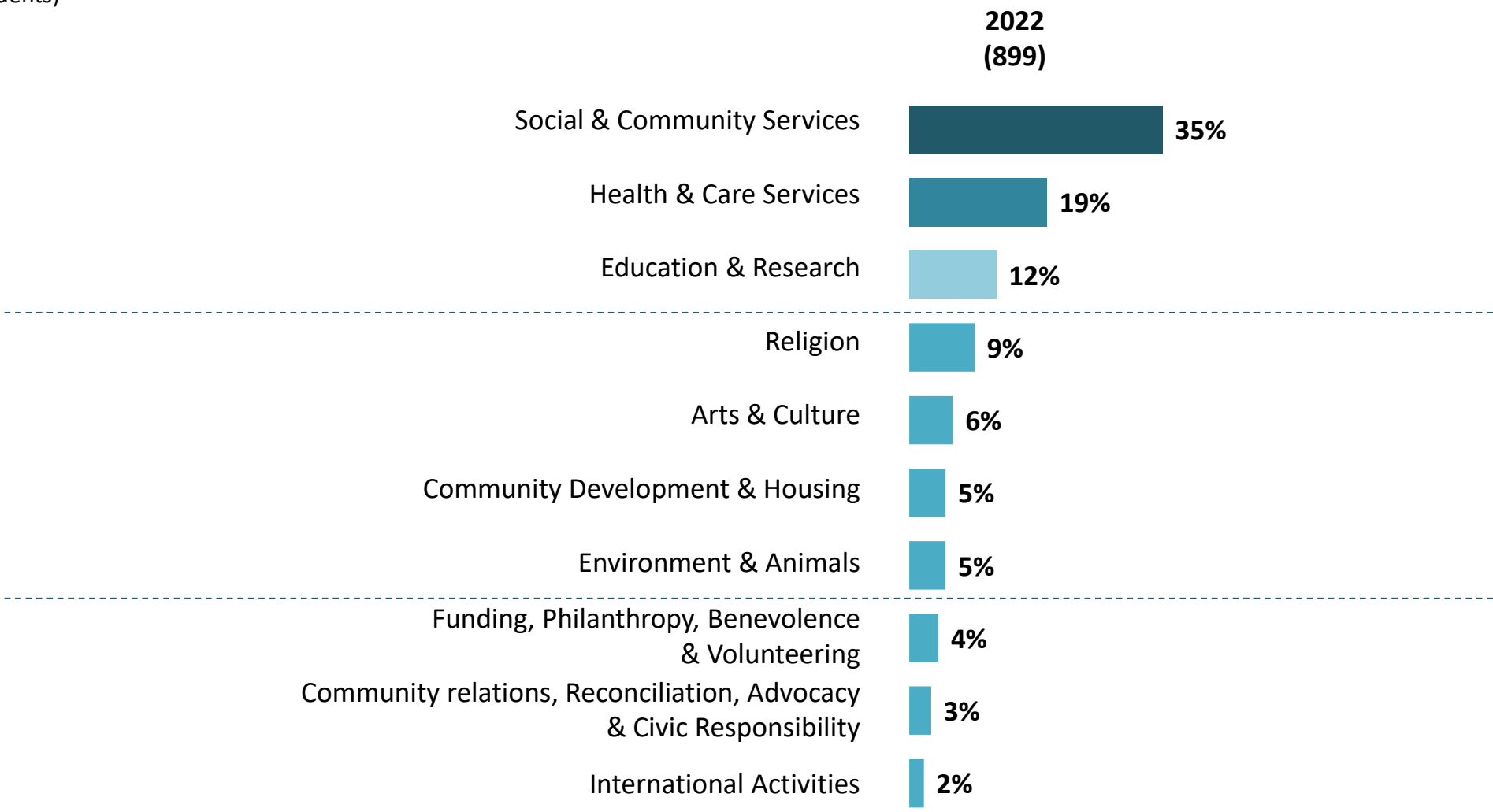
** Most of the survey participants (60%) classified themselves as charity trustees, a significant increase since 2020 (51%) which may be a contributing factor in some of the reported differences between the two studies.



The Charity Sector

A broad range of charities participated with charities providing Social & Community services most widely represented

(Base: All respondents)

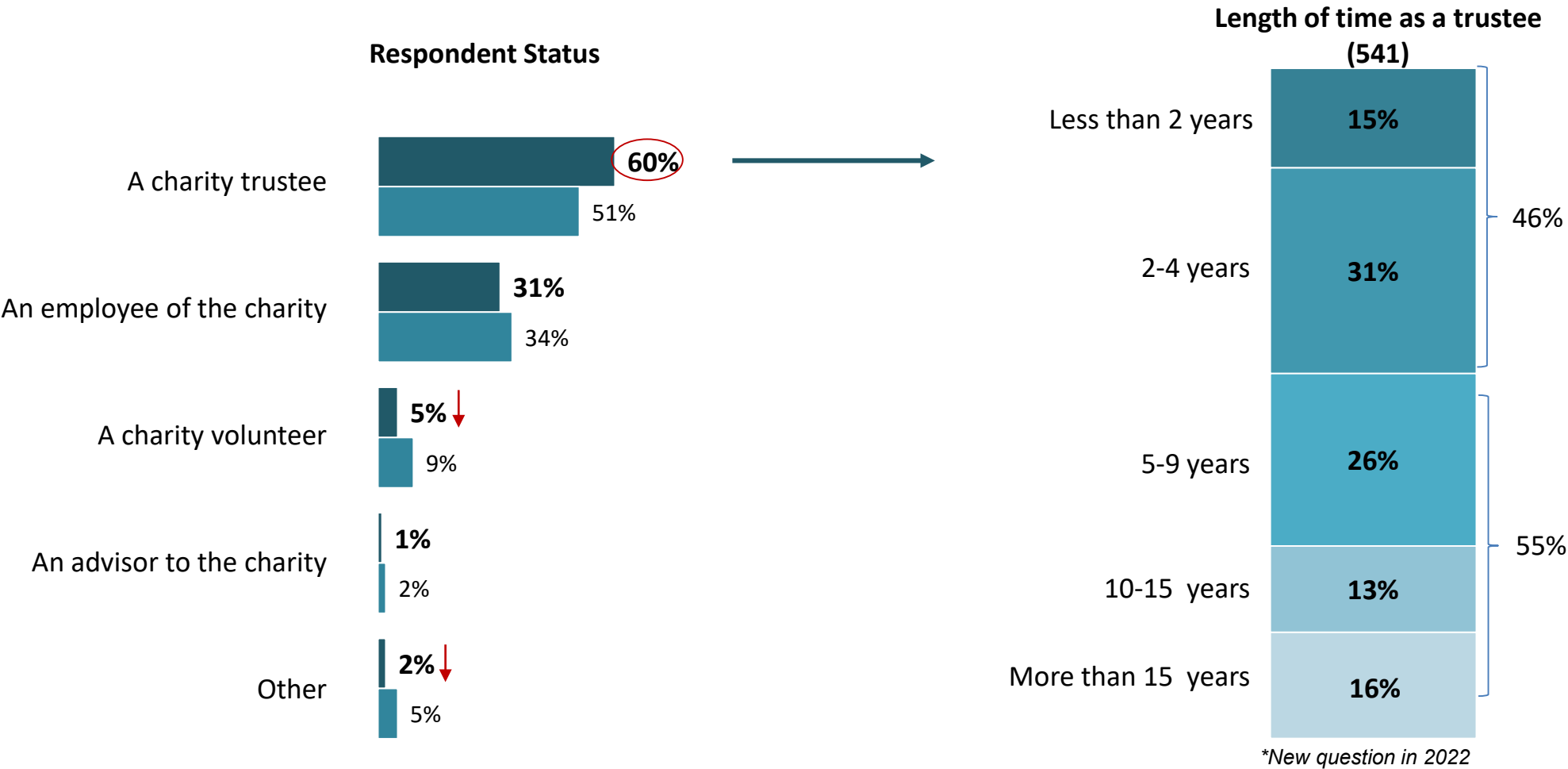


*New question in 2022

6 in 10 survey participants are charity trustees and over half of these (55%) have been a trustee for more than 4 years

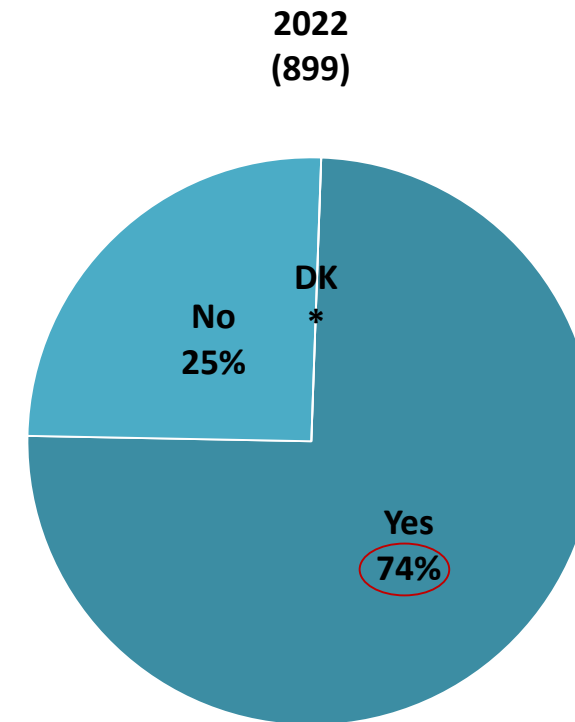
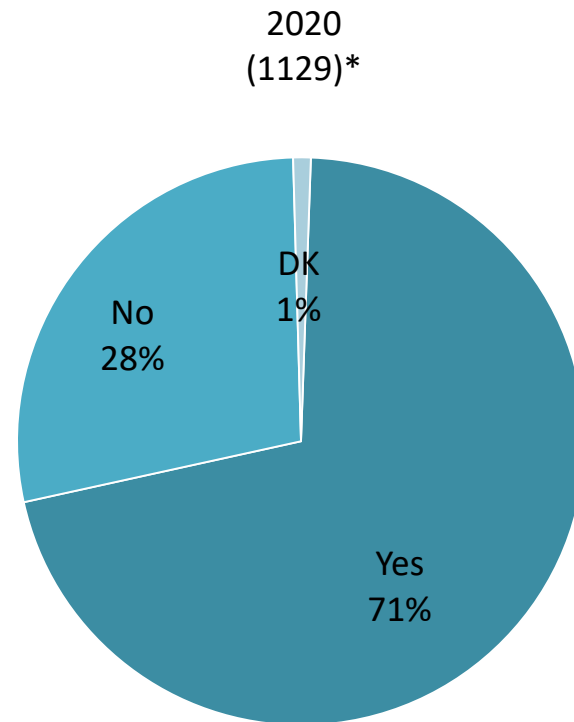
(Base: All respondents)

2022 N=899
2020 N=1240



Three quarters of survey participants said their charities use volunteers, showing an increase since 2020

(Base: All respondents)



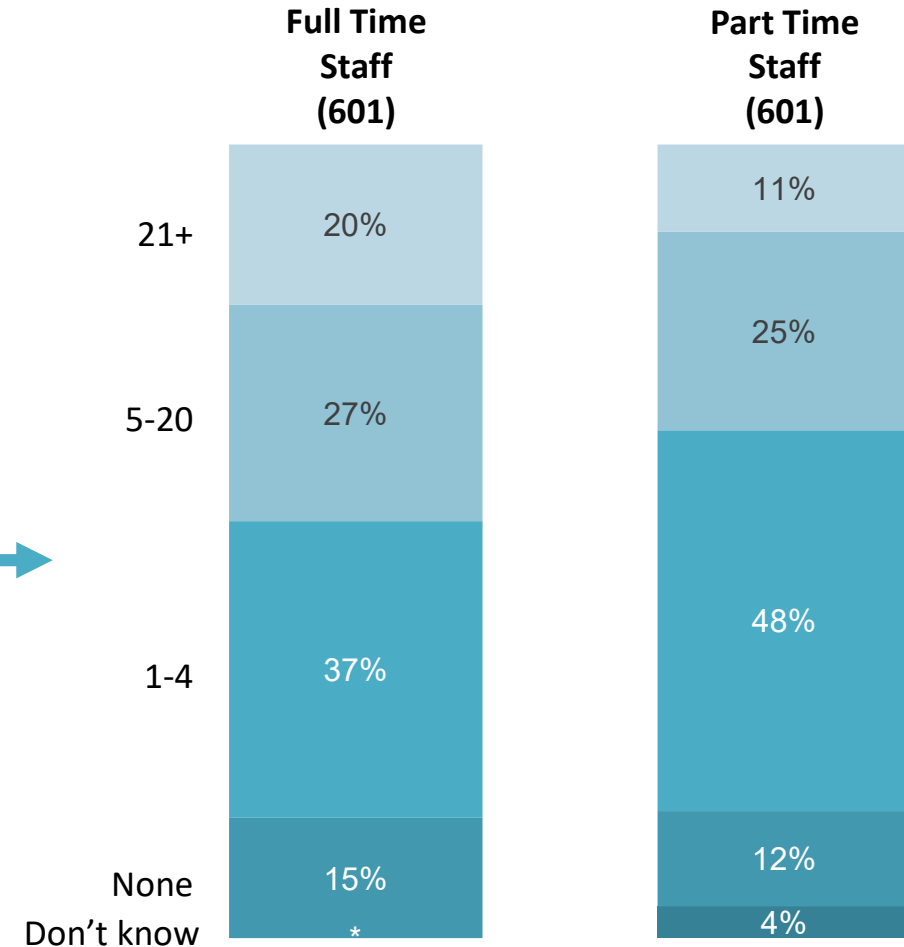
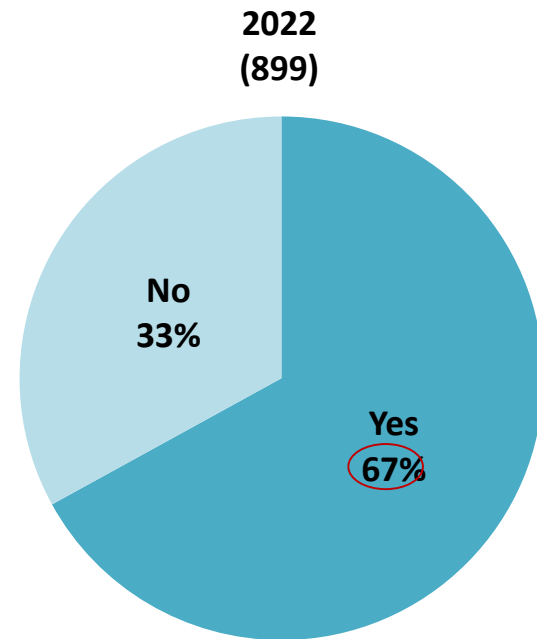
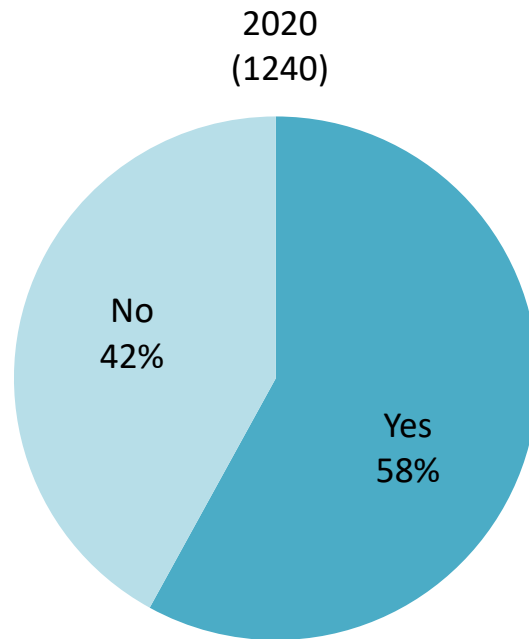
* Question not asked of volunteers in 2020

Q2. Other than charity trustees, does your charity have volunteers?

The proportion of charities with paid employees has also increased. 1 in 5 survey participants said their charity employs more than 20 full-time staff

(Base: All respondents)

Any paid employees?



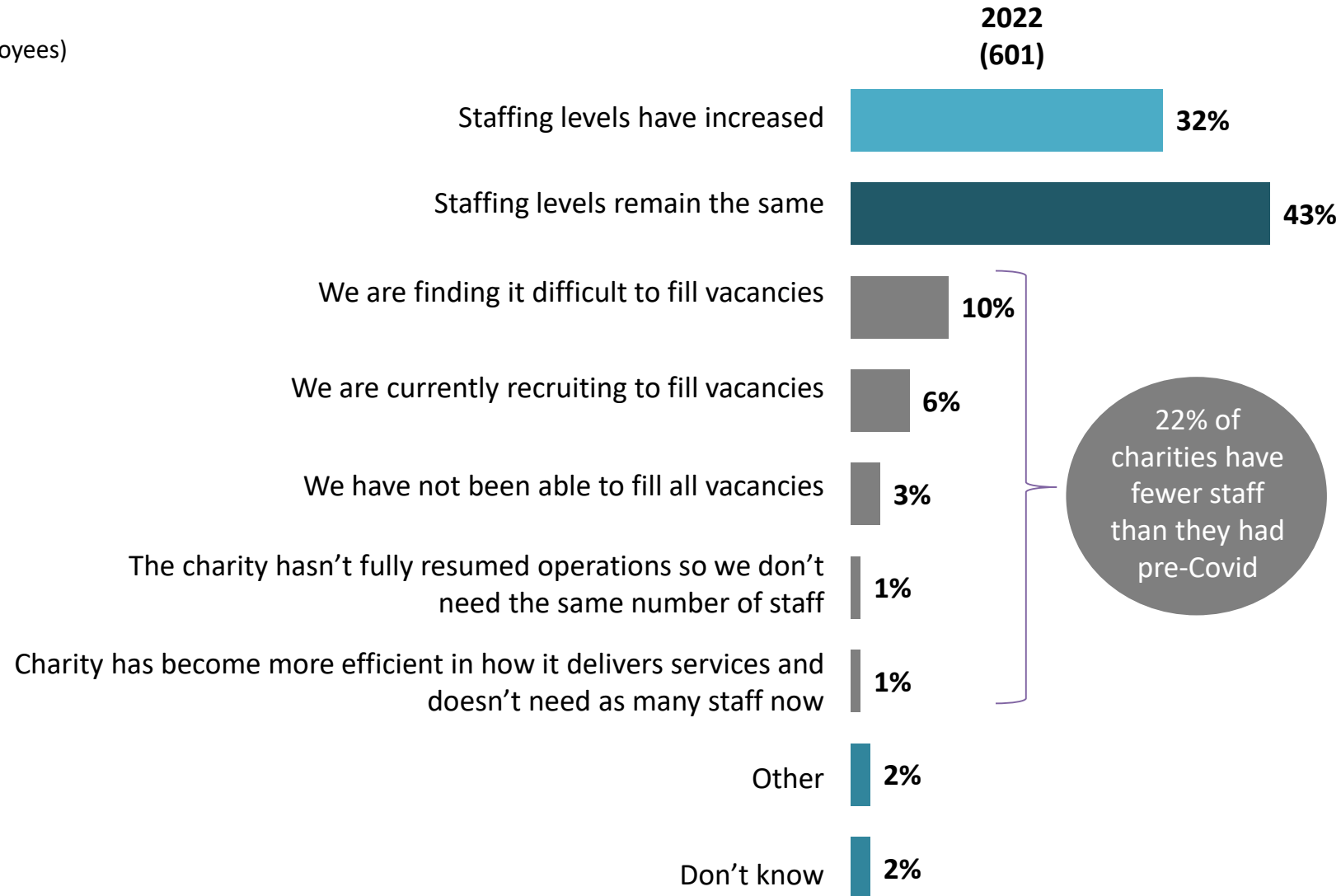
* = Response given by less than 1% of respondents

*New question in 2022

Q3 Does your charity currently have any paid employees? Q3a/b Approximately how many paid full-time/part-time employees does it have?

Three quarters of survey participants reported their charities had the same or an increased employee headcount compared to pre-Covid staffing levels

(Base: All with paid employees)

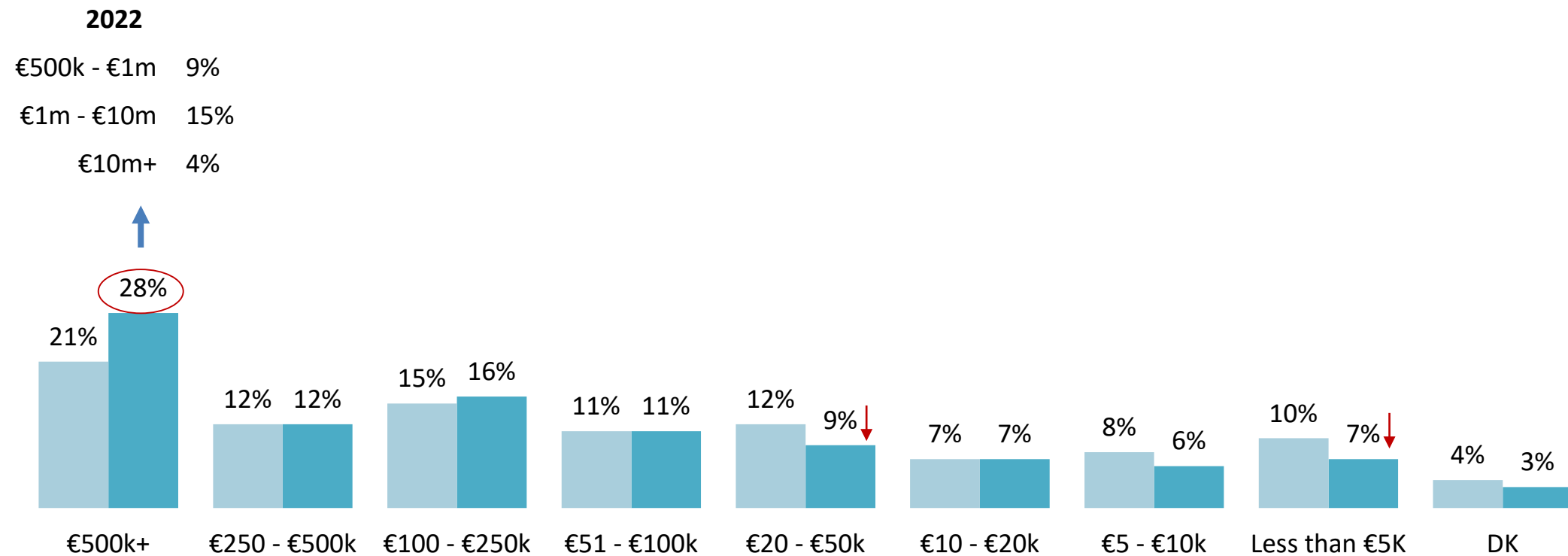


*New question in 2022

Most survey participants (68%) reported having an annual income of less than €500k and 1 in 5 (20%) reported an income of less than €20k per annum

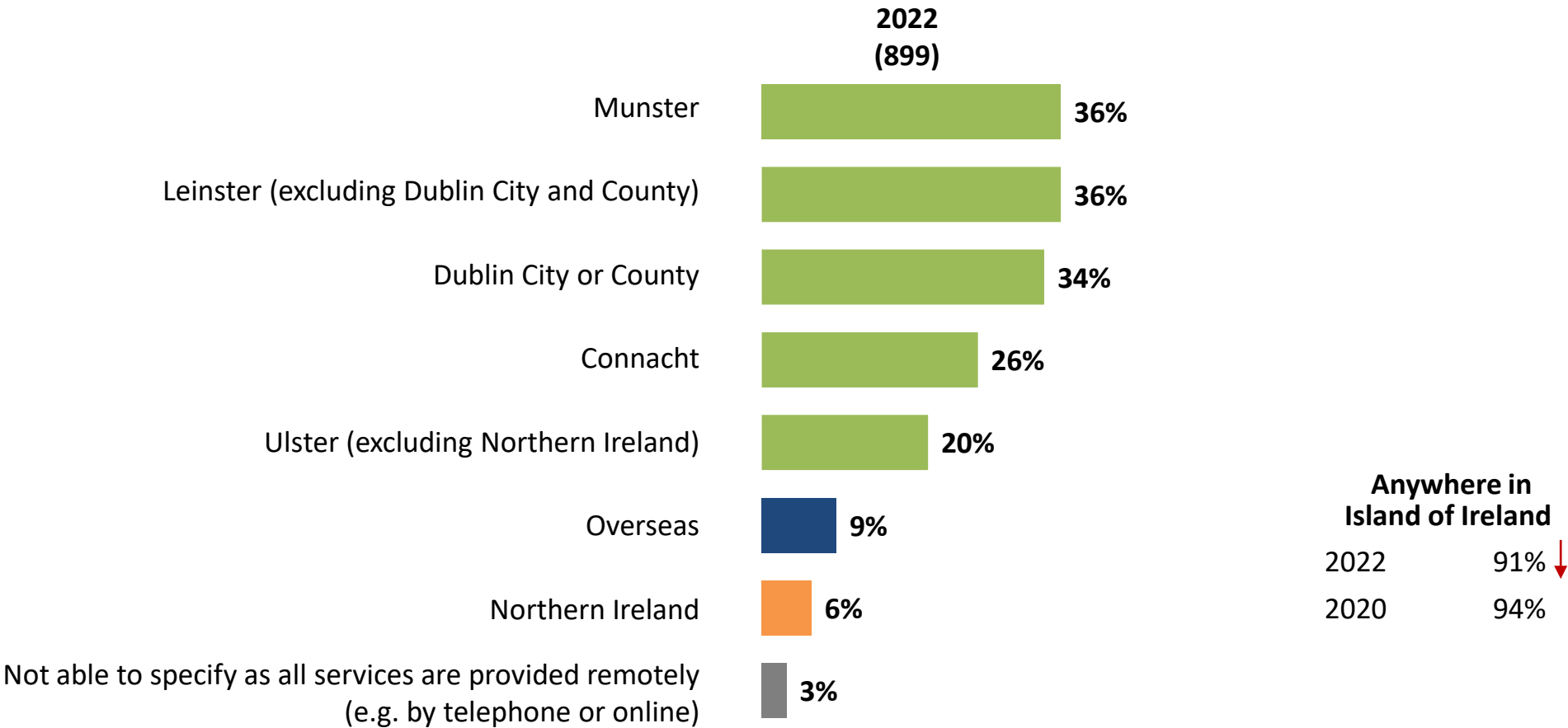
(Base: All respondents)

■ 2022 N=899 ■ 2020 N=1240



9 in 10 survey participants said they provided services within the island of Ireland

(Base: All respondents)

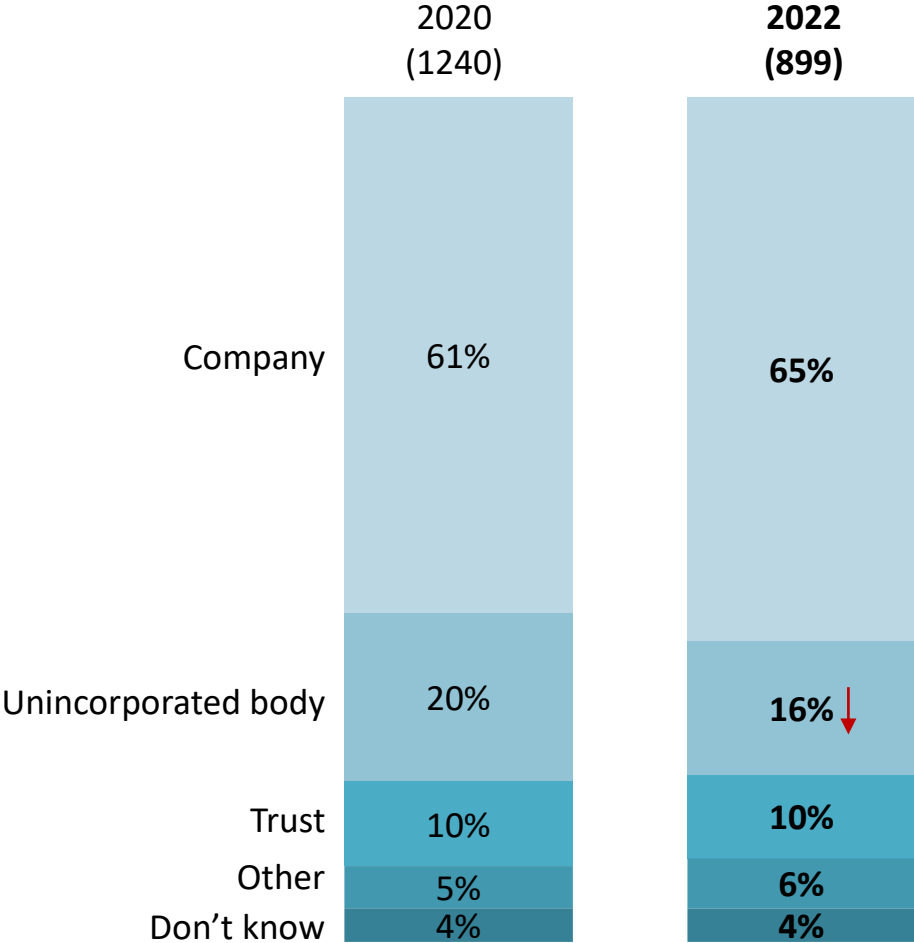


* Question change in 2022

The most common legal form for charities as reported by survey participants continues to be a company followed by an unincorporated body, though this has dropped slightly in 2022

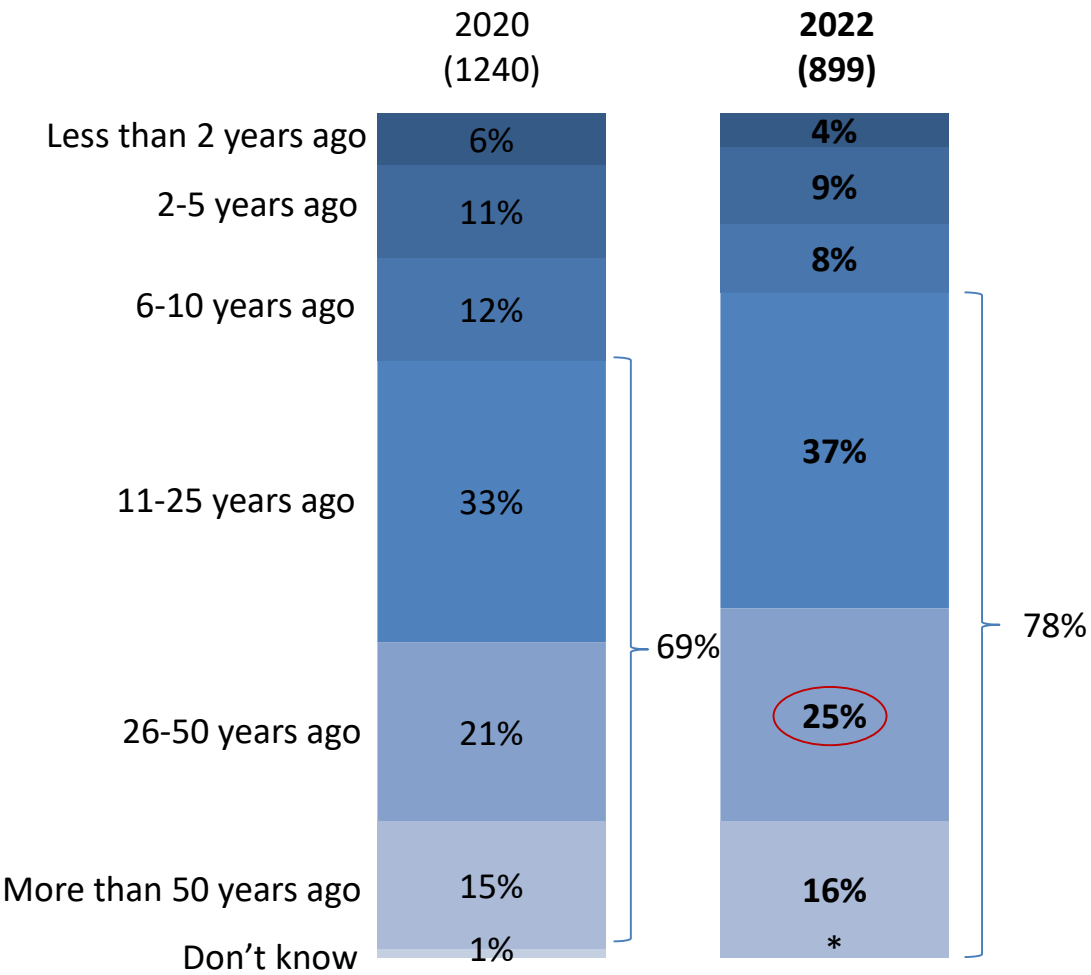


(Base: All respondents)



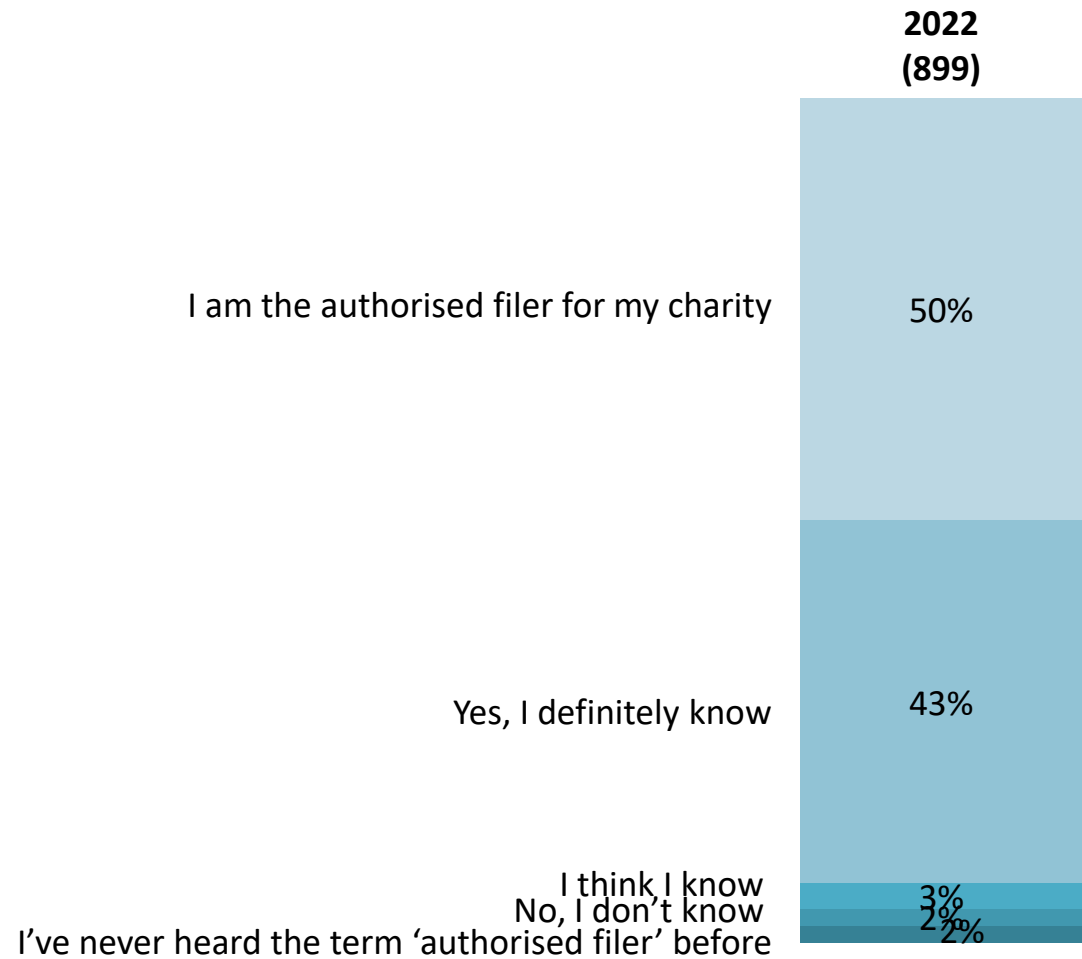
The proportion of survey participants who said their charities were in operation for 11+ years is considerably greater in 2022 (78% vs 69%)

(Base: All respondents)



Half of those who completed the survey are the authorised filer for their charity. Just 1 in 14 (7%) were unaware of their charity’s authorised filer.

(Base: All respondents)



*New question in 2022

Q22: Do you know the identity of the authorised filer for your charity (i.e. the person(s) in your charity, or the external advisor, who is responsible for filing your charity’s annual report and updating charity trustee and other details on the Register

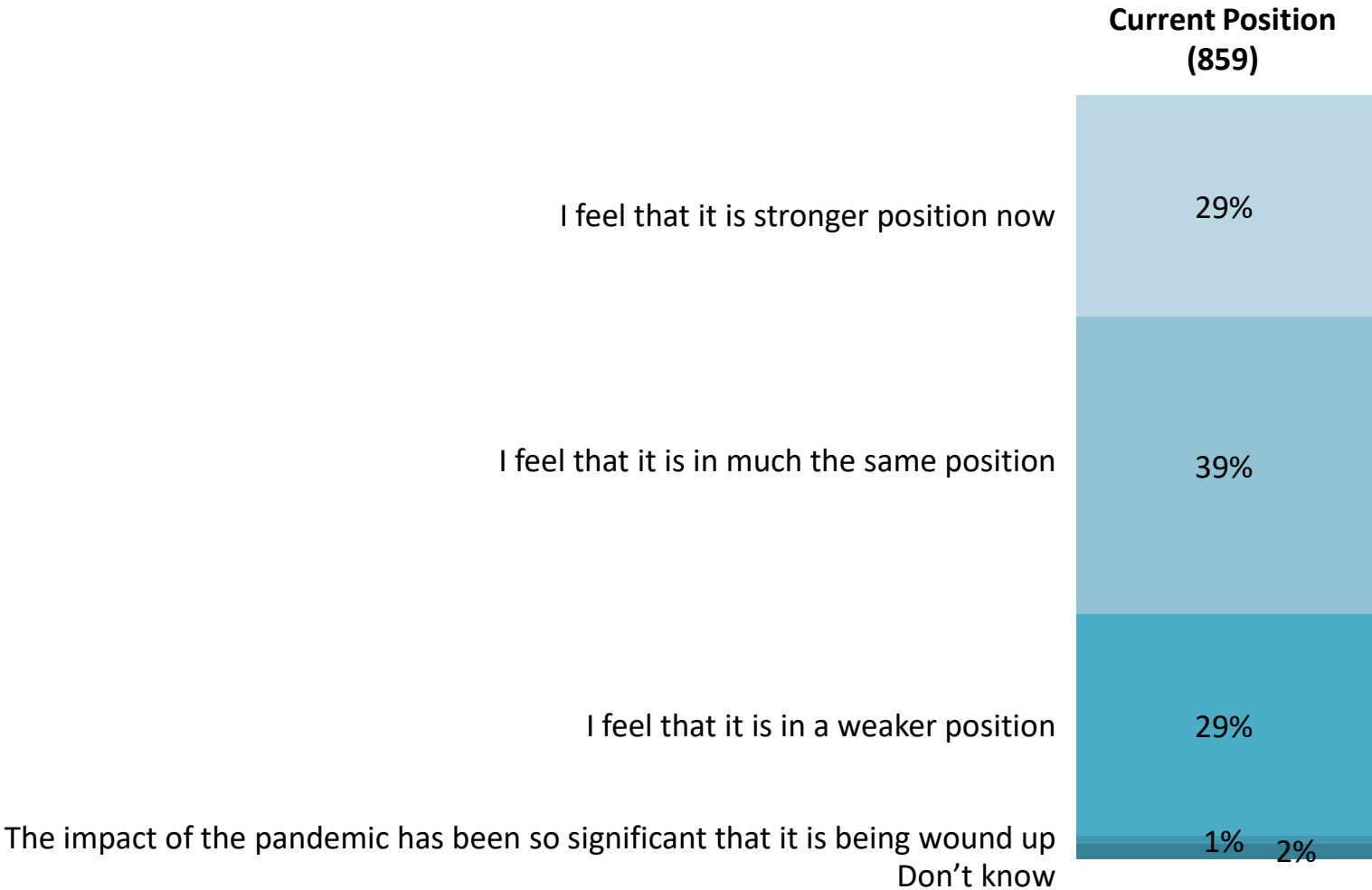
Charity Operations



- 10 principles of operations that good charities have:
- Constructive partnership - Mutual benefit
 - Strategic thinking - Culture of inquiry
 - Independent-mindedness - Values of transparency
 - Integrity - Sustaining resources - Results-oriented
 - Customer learning
- Common small business
- 1) Lack focus of the mission
 - 2) Complacency
 - 3) Inorganic activities
 - 4) Multiple services
 - 5) Mismanagement
 - 6) Low staff morale
 - 7) Limited resources
 - 8) No self-reliance
 - 9) Lack of self-employment
 - 10) Unfulfilled

Survey participants reported their charities as having had mixed experiences over the past couple of years. 4 in 10 report being in the same position as they were pre-Covid, while 3 in 10 report being in a stronger position and the same proportion feel their charity is now in a weaker position

(Base: Charity established more than 2 years)

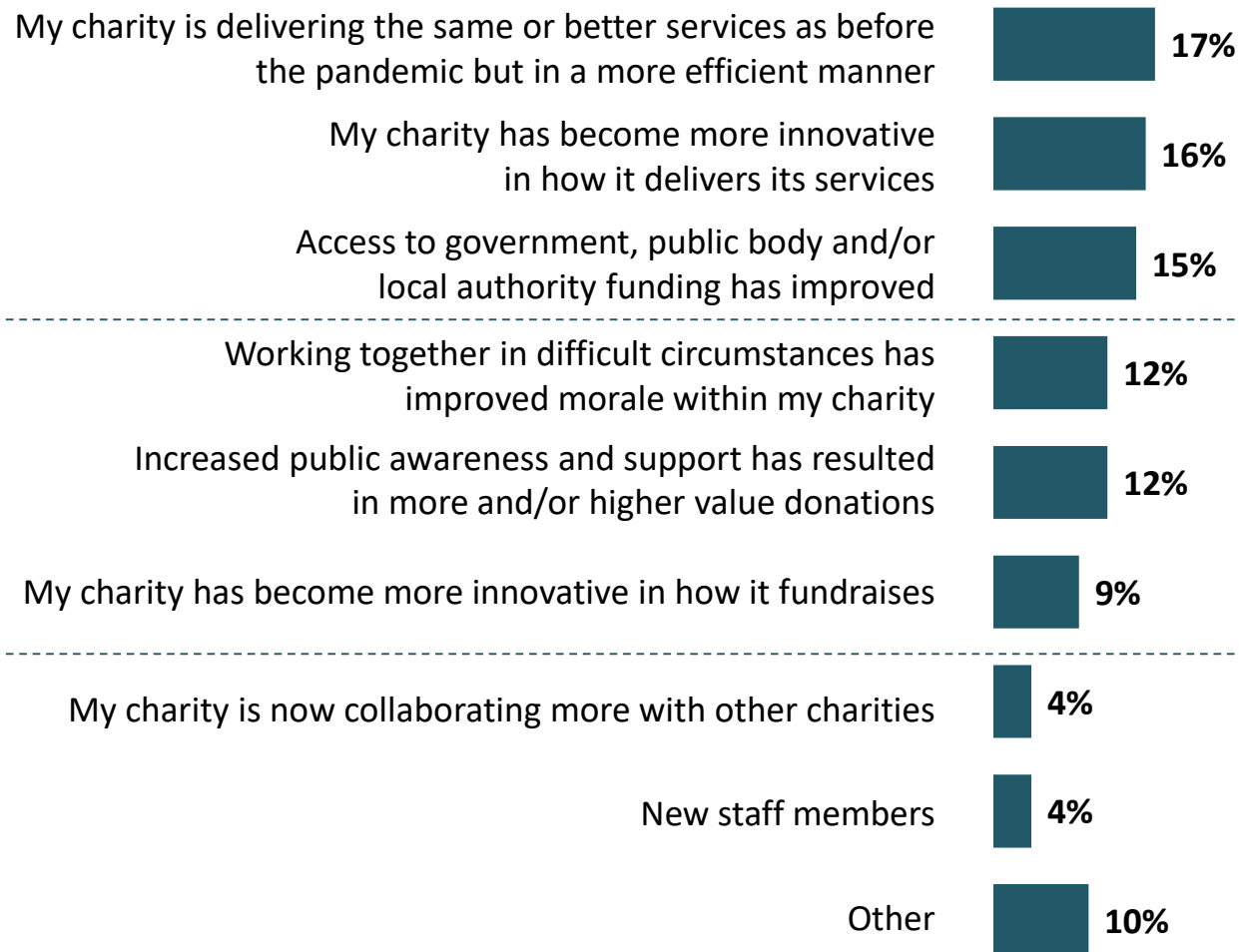


*New question in 2022

Survey participants reporting that their charities are in a stronger position post-pandemic attribute this to increased efficiencies, innovative service delivery and access to public funding

(Base: All charities in a stronger position)

Stronger Position (250)

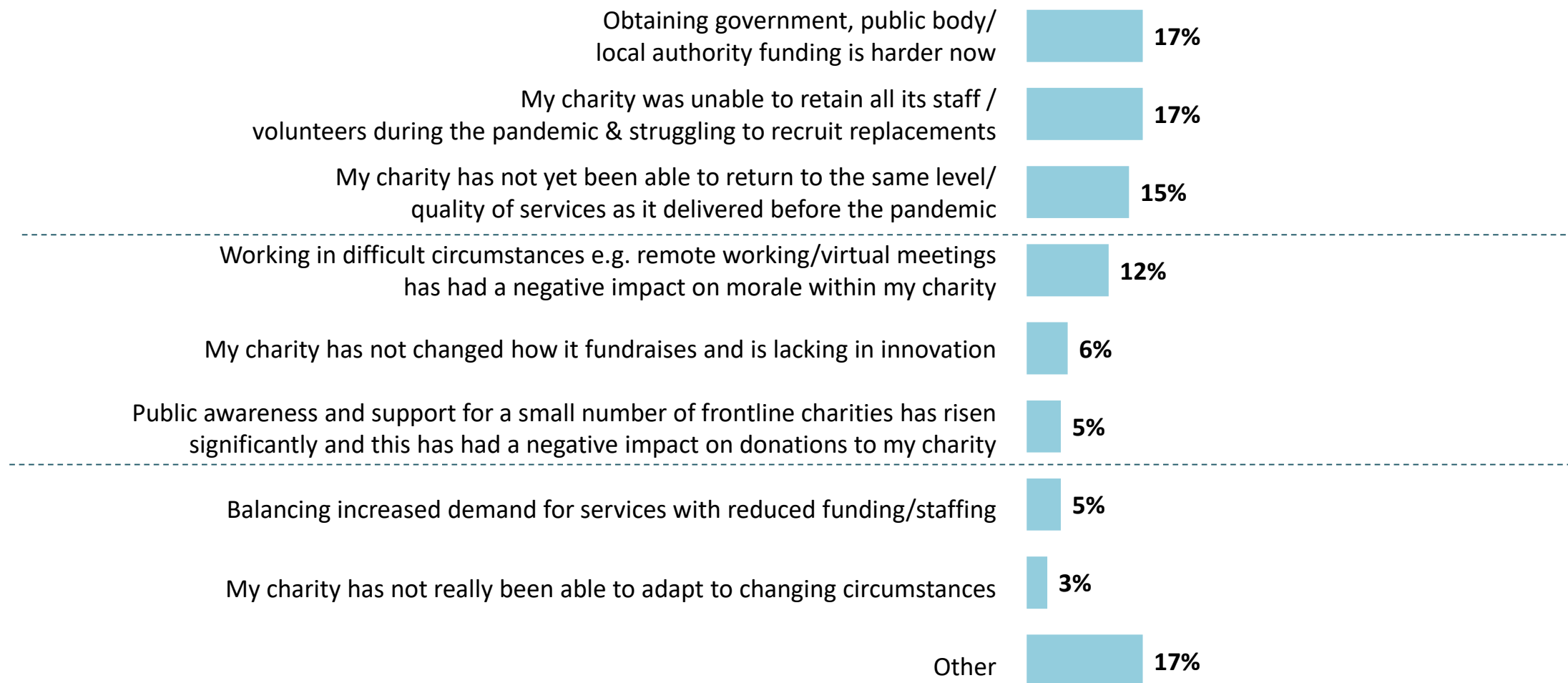


*New question in 2022

Conversely, those reporting that their charities are in a weaker position attribute this to reduced public funding, staffing losses and the (related) inability to return to full service delivery

(Base: All charities in a weaker position)

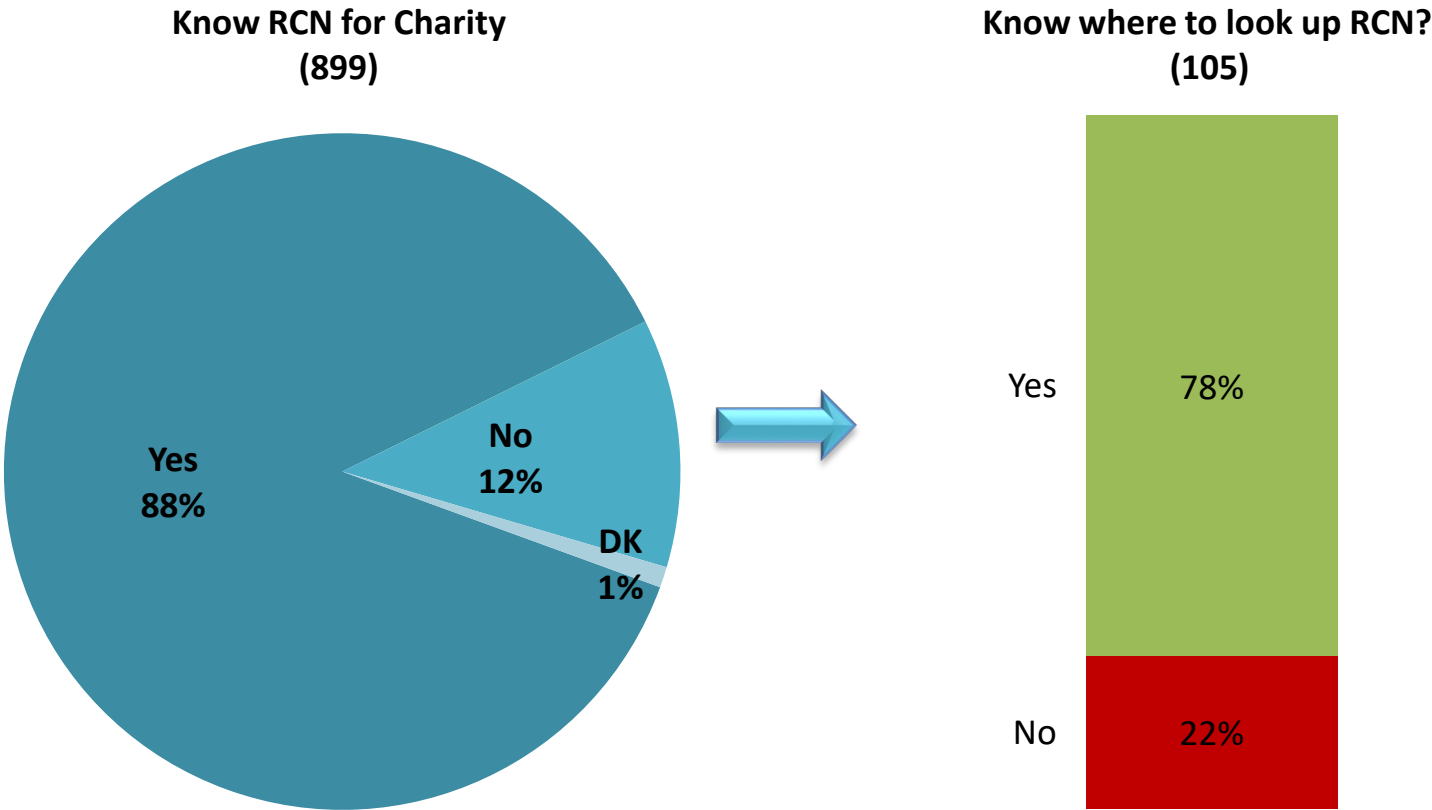
Weaker Position (247)



*New question in 2022

Survey participants have good awareness of their charities Registered Charity Number (RCN)

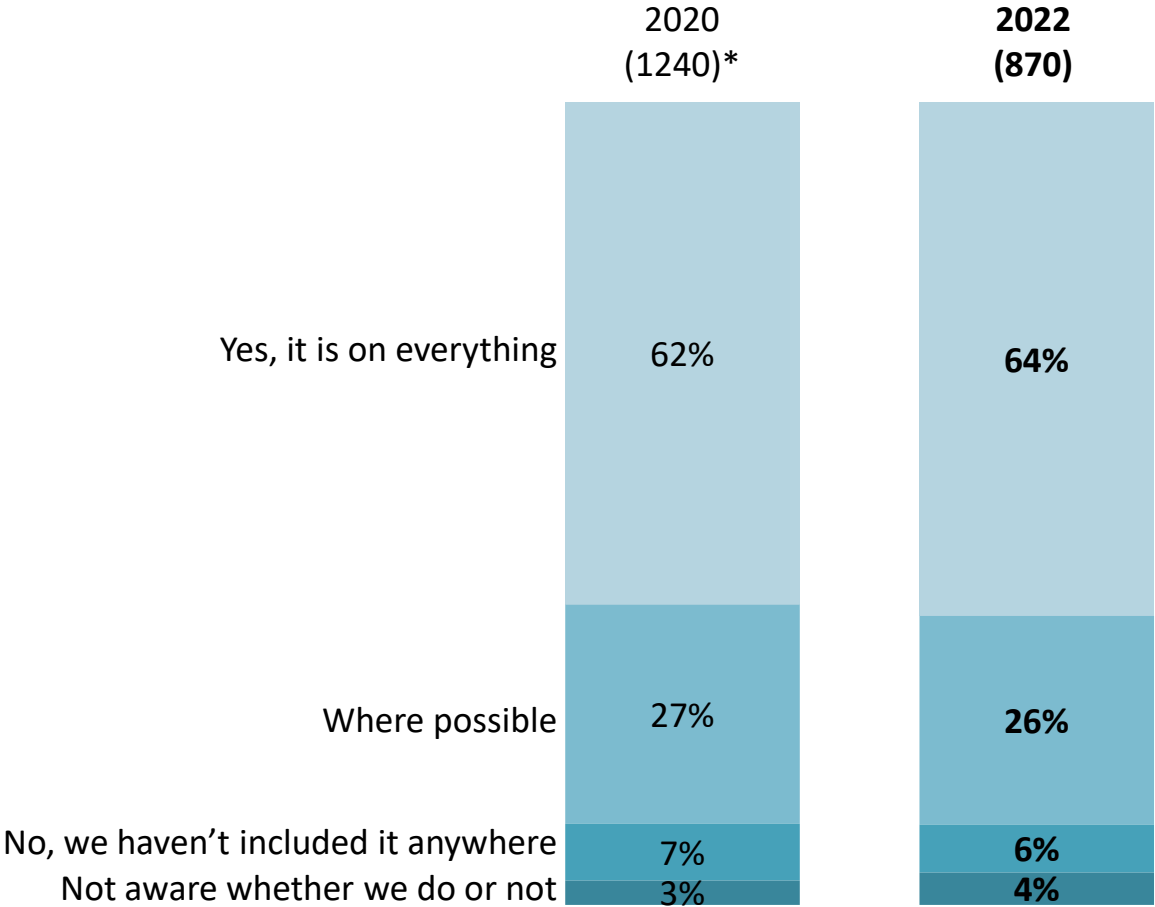
(Base: All respondents)



*New questions in 2022

A consistent 9 in 10 survey participants said their charities display their RCN on everything or wherever its possible to display it

(Base: All aware/know where to find RCN)



*Asked of all respondents in 2020

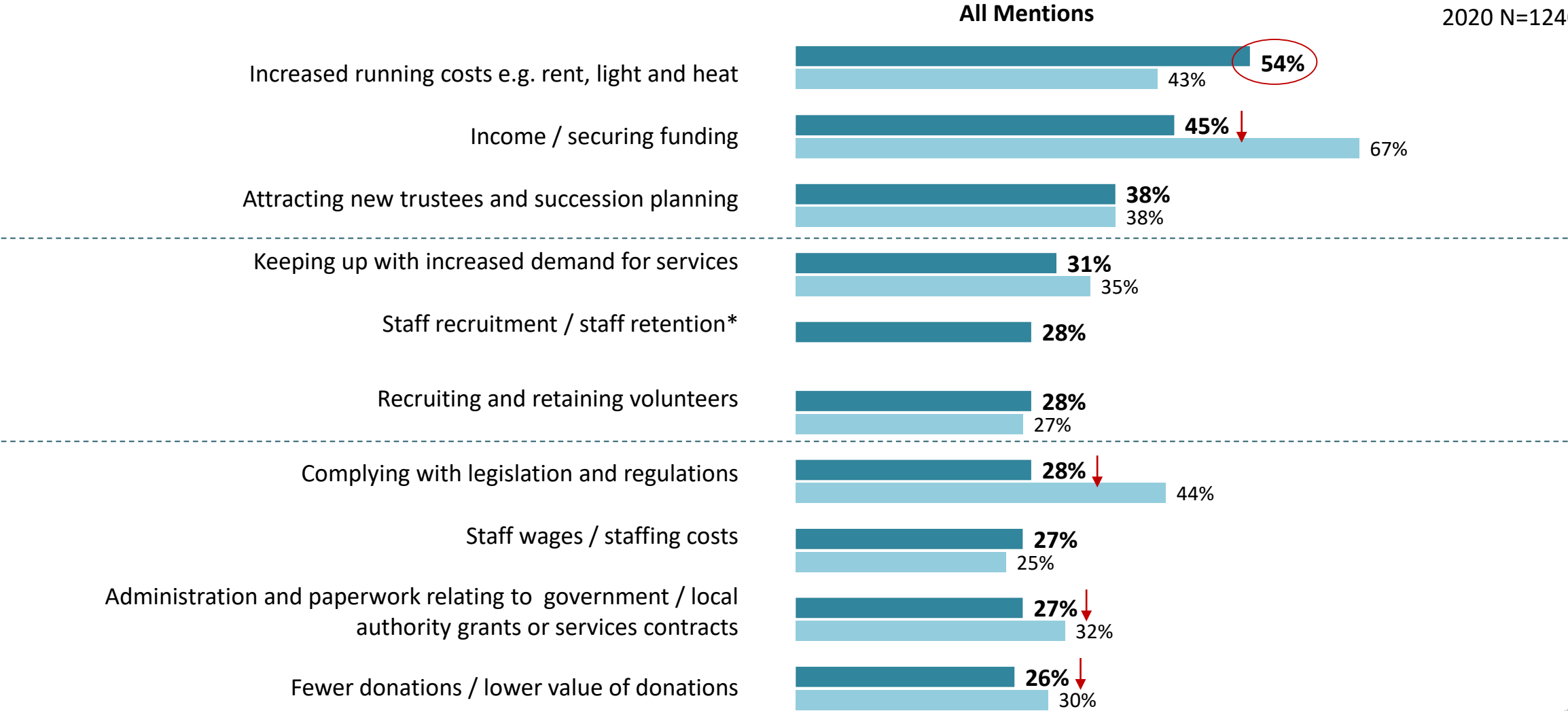


Increased running costs are reported to be the greatest challenge facing charities in the past 12 months, surpassing funding, with a significant decrease in those citing legal and regulatory compliance as challenge

(Base: All respondents)



2022 N=899
2020 N=1240



*New statement in 2022

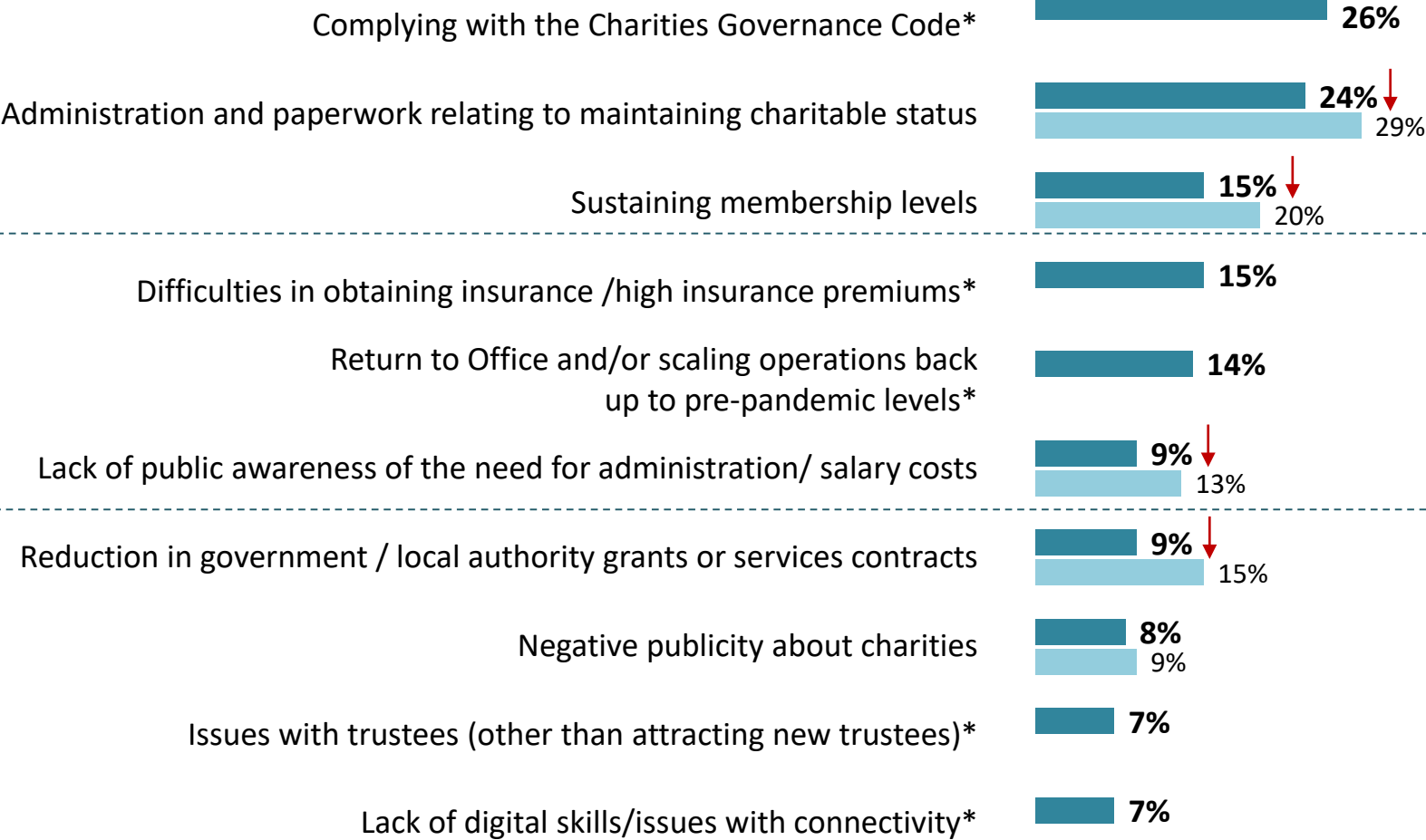
Q10. In this question we'd like you to focus on the issues your charity has faced in the last 12 months. Select the 5 issues which have been the greatest challenge to your operations since October 2021



Challenges relating to compliance and/or administration are recorded at lower levels in 2022

(Base: All respondents)

All Mentions



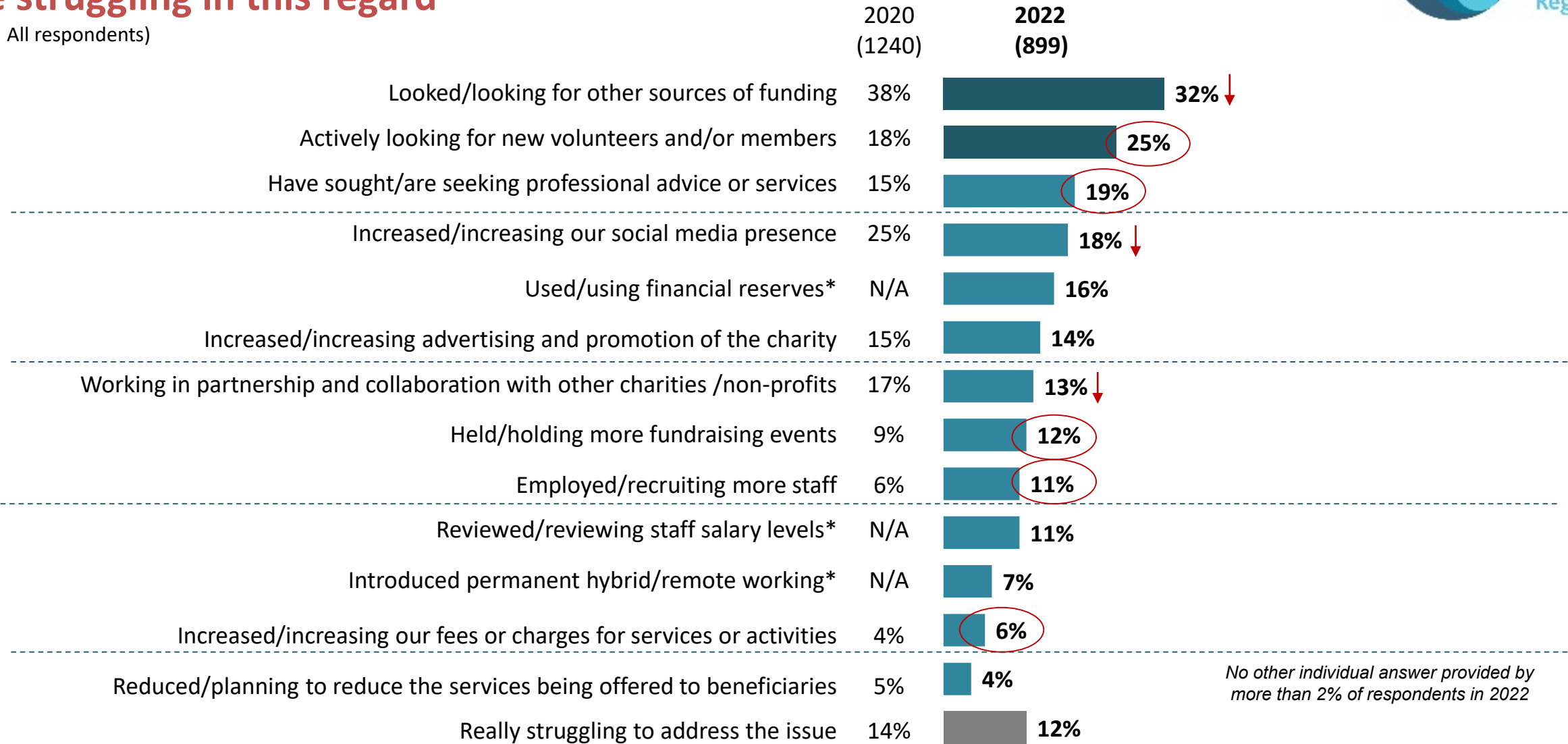
*New statement in 2022

Q10. In this question we'd like you to focus on the issues your charity has faced in the last 12 months. Select the 5 issues which have been the greatest challenge to your operations since October 2021

Survey participants reported that their charities have looked for new funding, volunteers and sought professional advice to address challenges, though 1 in 8 are struggling in this regard



(Base: All respondents)



No other individual answer provided by more than 2% of respondents in 2022

*New in 2022





Funding

Survey participants reported that their charities rely on a diverse range of funding sources with government/public funding increasing significantly since 2020 and a drop in traditional fundraising



(Base: All respondents)

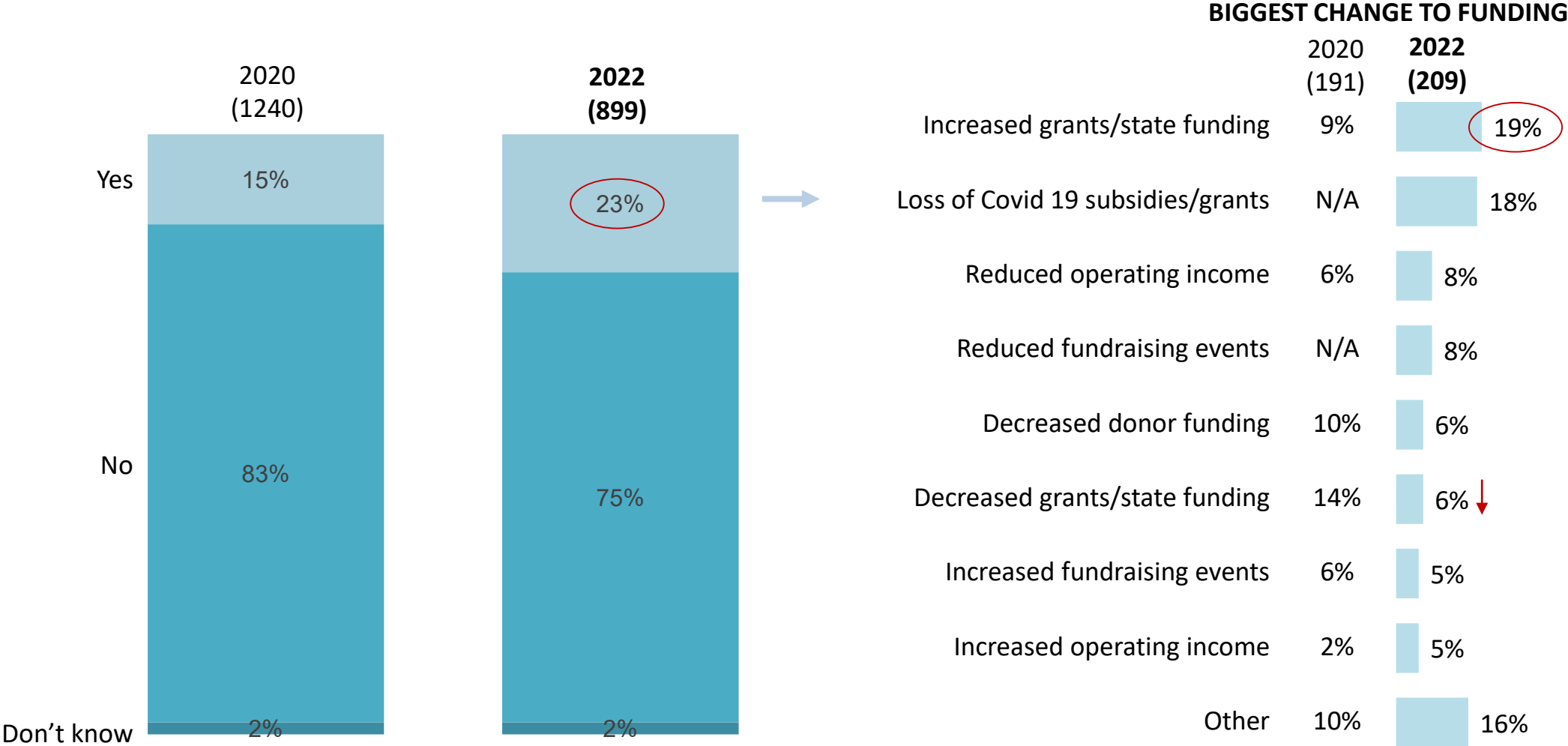


* Question change in 2022



1 in 4 survey participants reported that their charities' main funding sources have changed with mixed impact

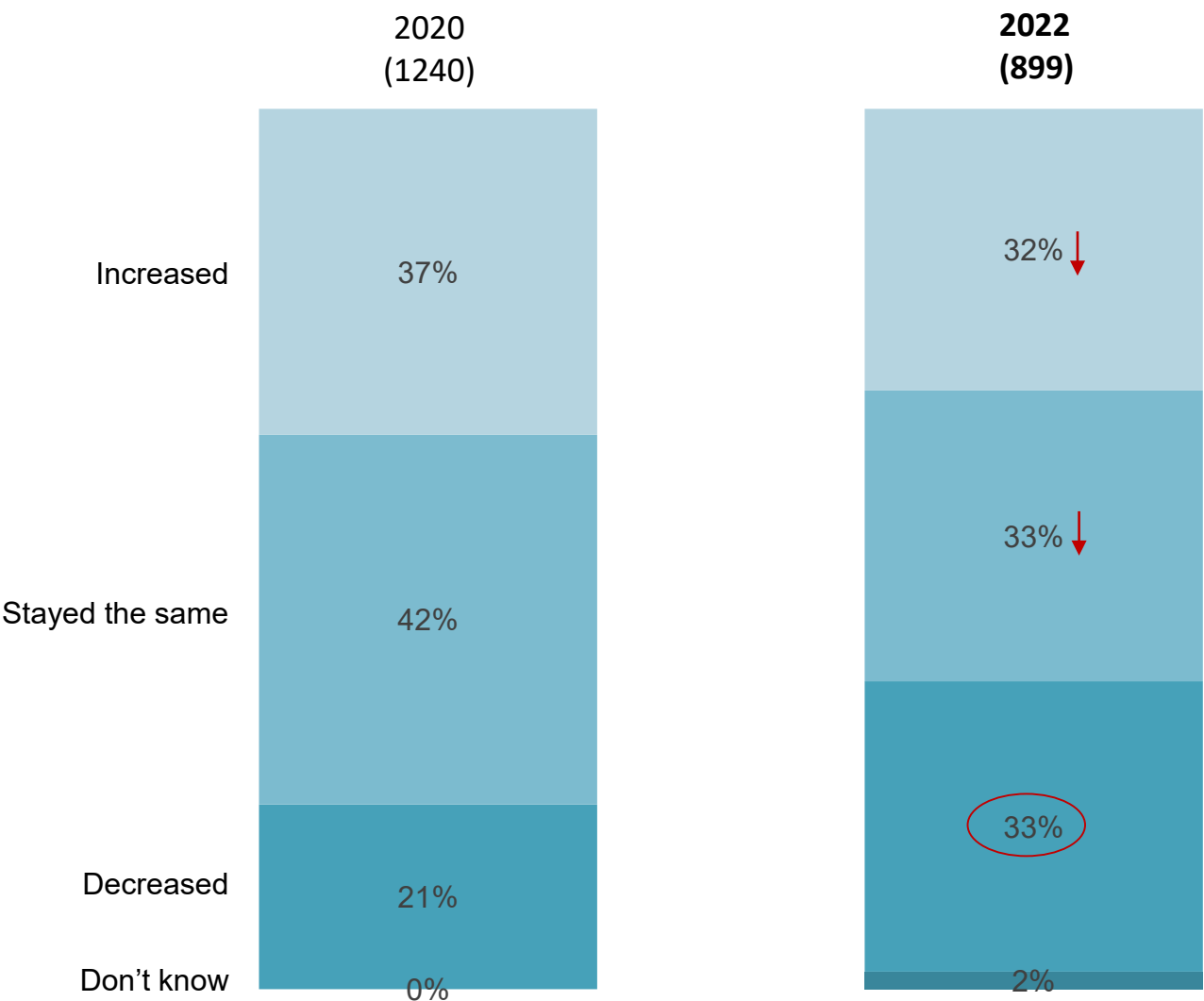
(Base: All respondents)



No other individual answer provided by more than 3% of respondents in 2022

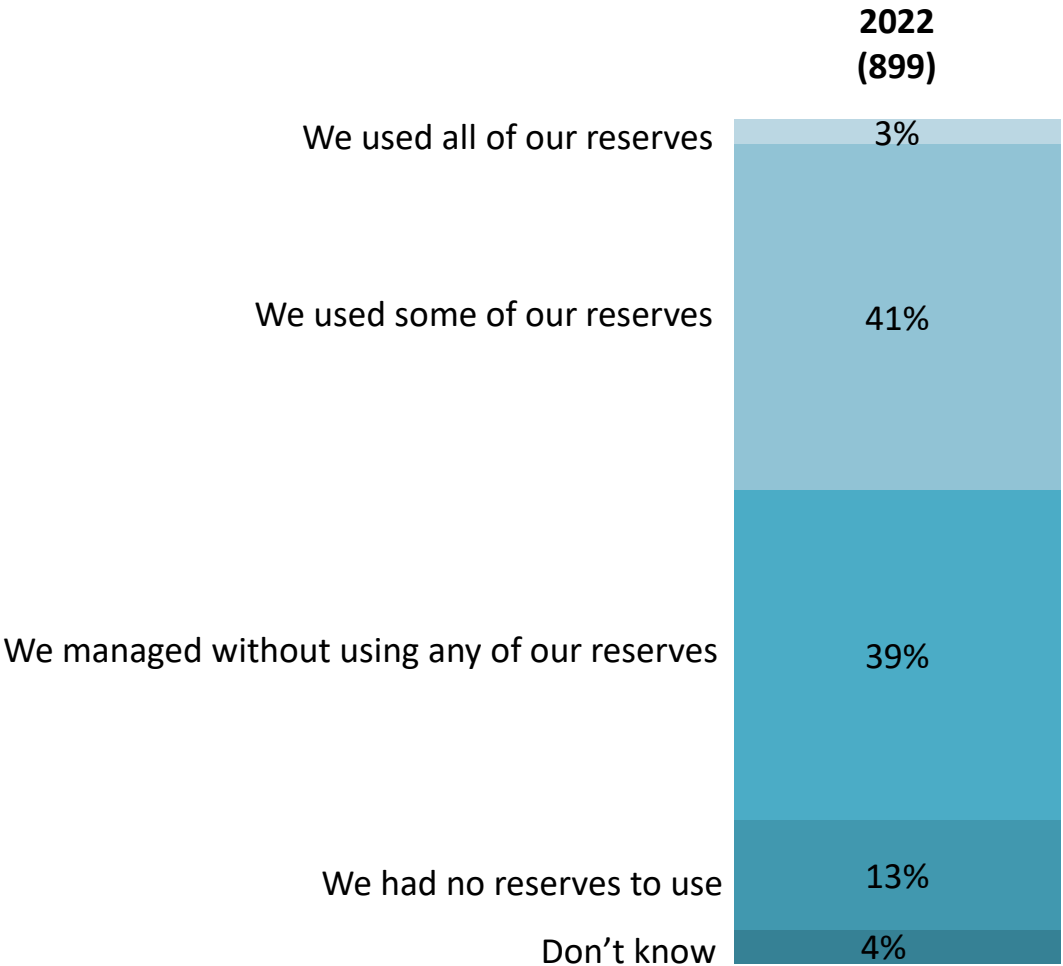
Survey participants reported that their charities have experienced considerable changes to their funding in the last 2 years

(Base: All respondents)



4 in 10 survey participants reported that their charities (44%) have had to use some or all of their financial reserves to continue operating since the onset of the pandemic

(Base: All respondents)



*New question in 2022

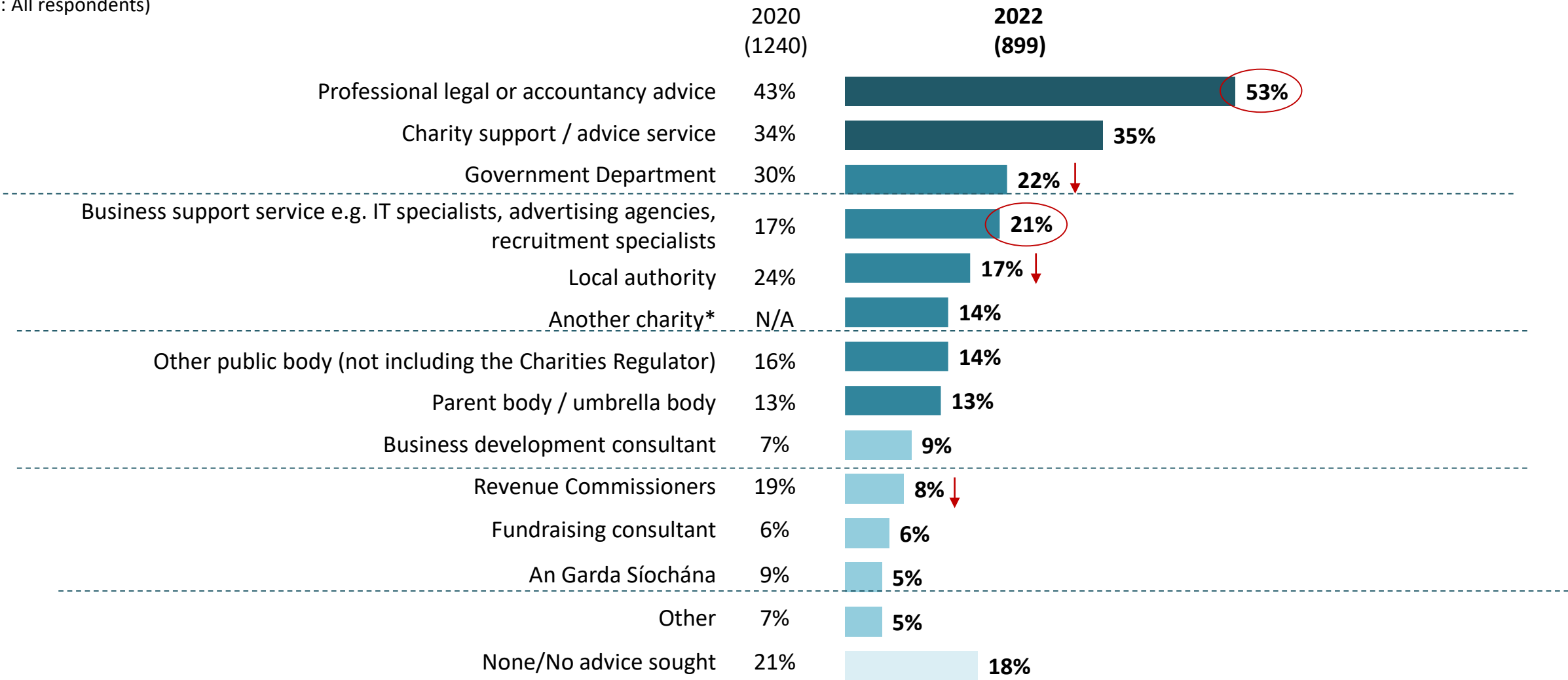
Q15: In terms of finances, has your charity needed to use any of its financial reserves in order to keep operating since early 2020?

Sources of Advice & Guidance



Demand for professional advice and business support services increased over the past year while approaches to local authorities and other public bodies decreased

(Base: All respondents)



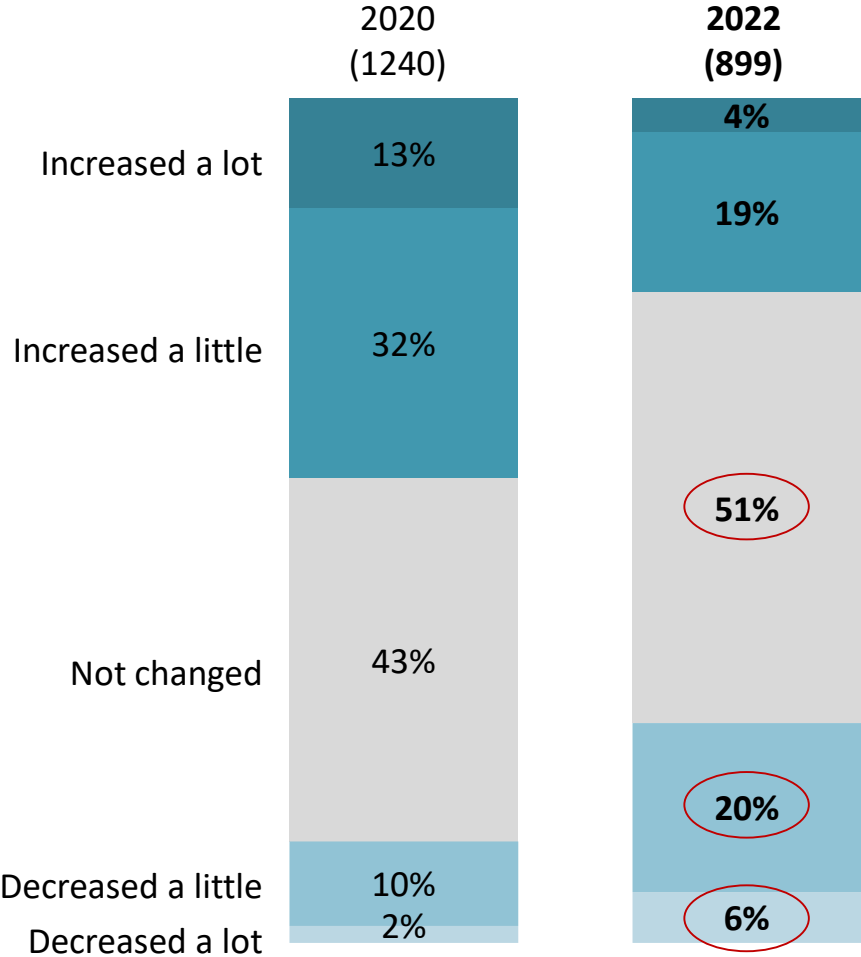
*New response option in 2022



Public Trust & Confidence

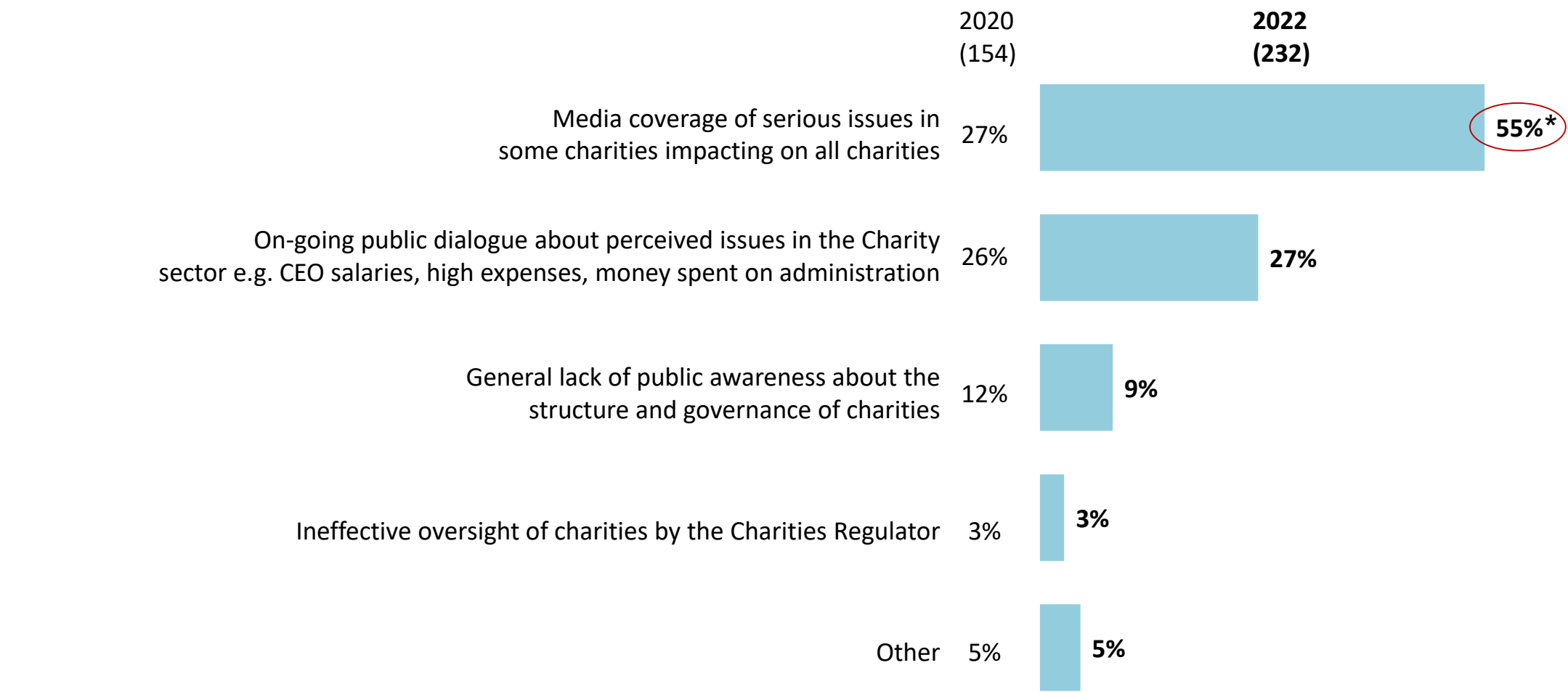
While half the survey participants believe public trust & confidence in the charity sector has not changed, 1 in 4 feel this has reduced, representing a significant change over the last two years

(Base: All respondents)



Those who believe public trust has declined, cite media coverage as the main cause of this change

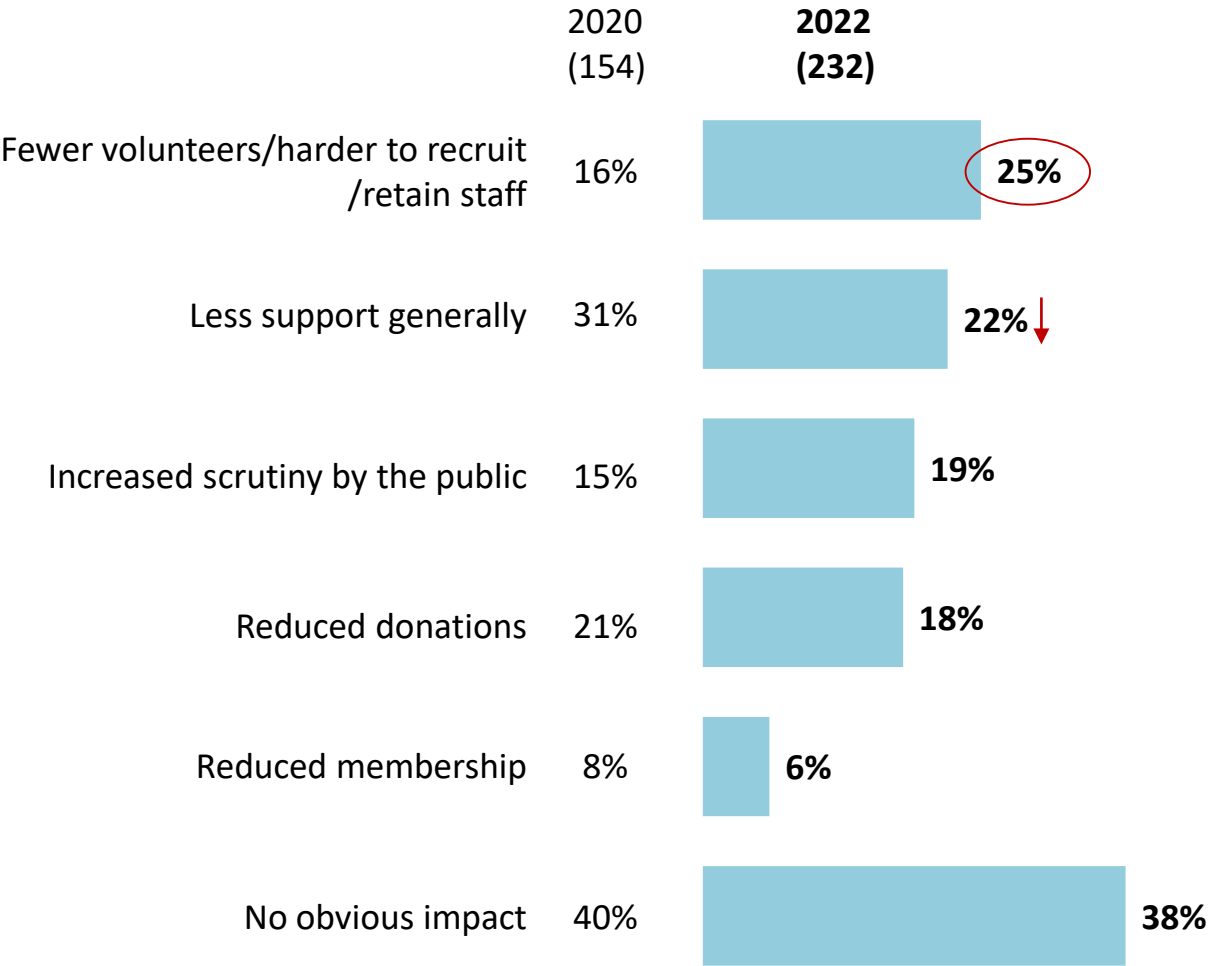
(Base: All who believe public trust and confidence has decreased)



*'Negative media coverage about charities generally' was recorded at 21% in 2020. This response option was removed in 2022 and may account for the increase in Media coverage above (55%).

For those who have been impacted by lower trust levels, fewer volunteers and difficulty recruiting/retaining staff is most widely mentioned, up 9%pts since 2020. However 38% reported no obvious impact to their charity.

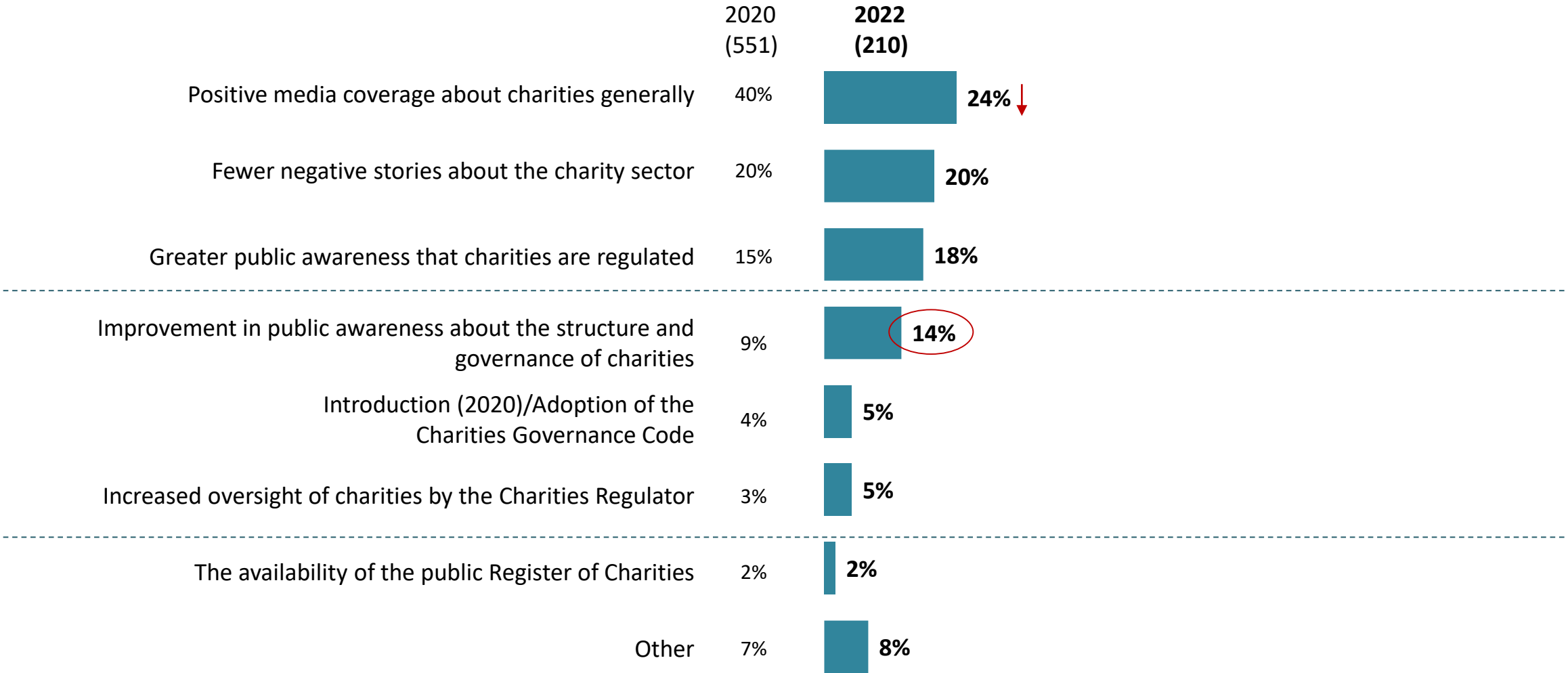
(Base: All who believe public trust and confidence has decreased)



Positive media coverage was most widely mentioned by the 23% who feel there has been an increase in public trust and confidence. An improvement in public awareness of the structure and governance of charities was also noted.

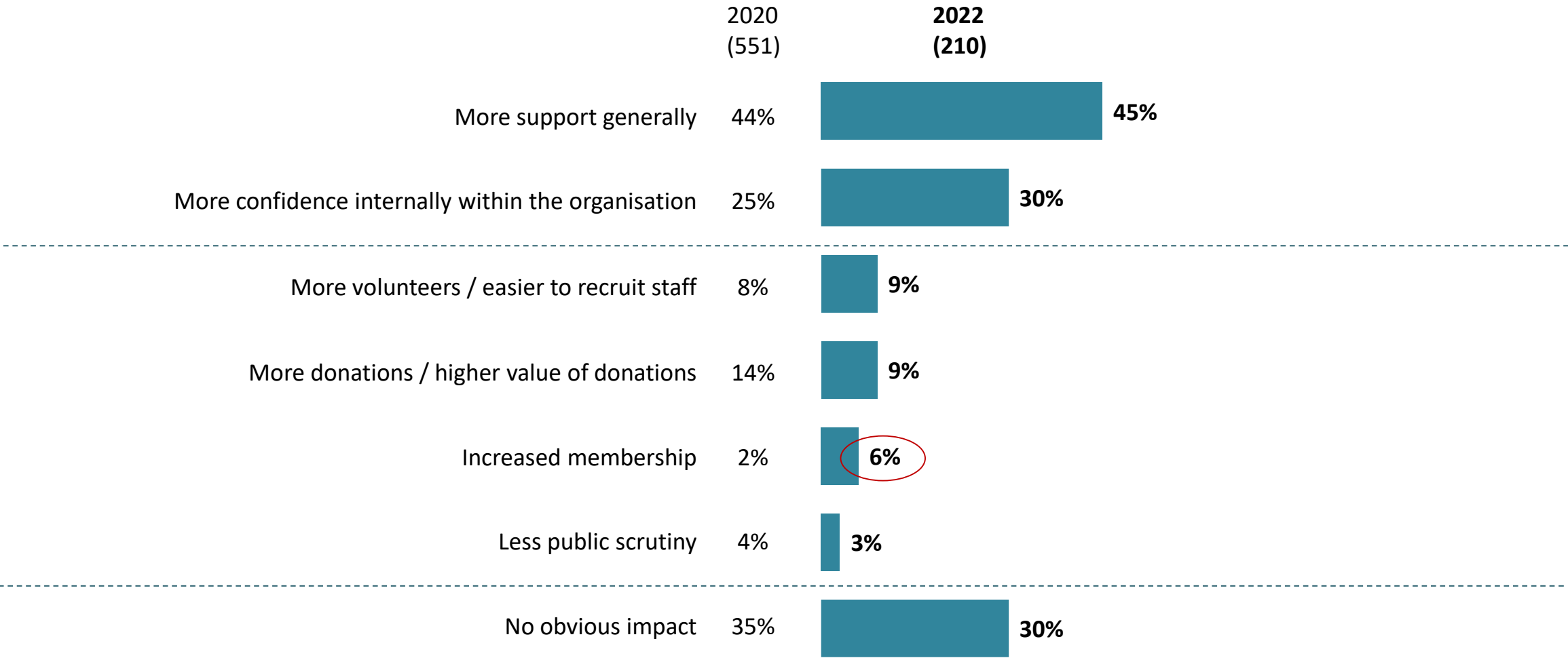


(Base: All who believe public trust and confidence has increased)



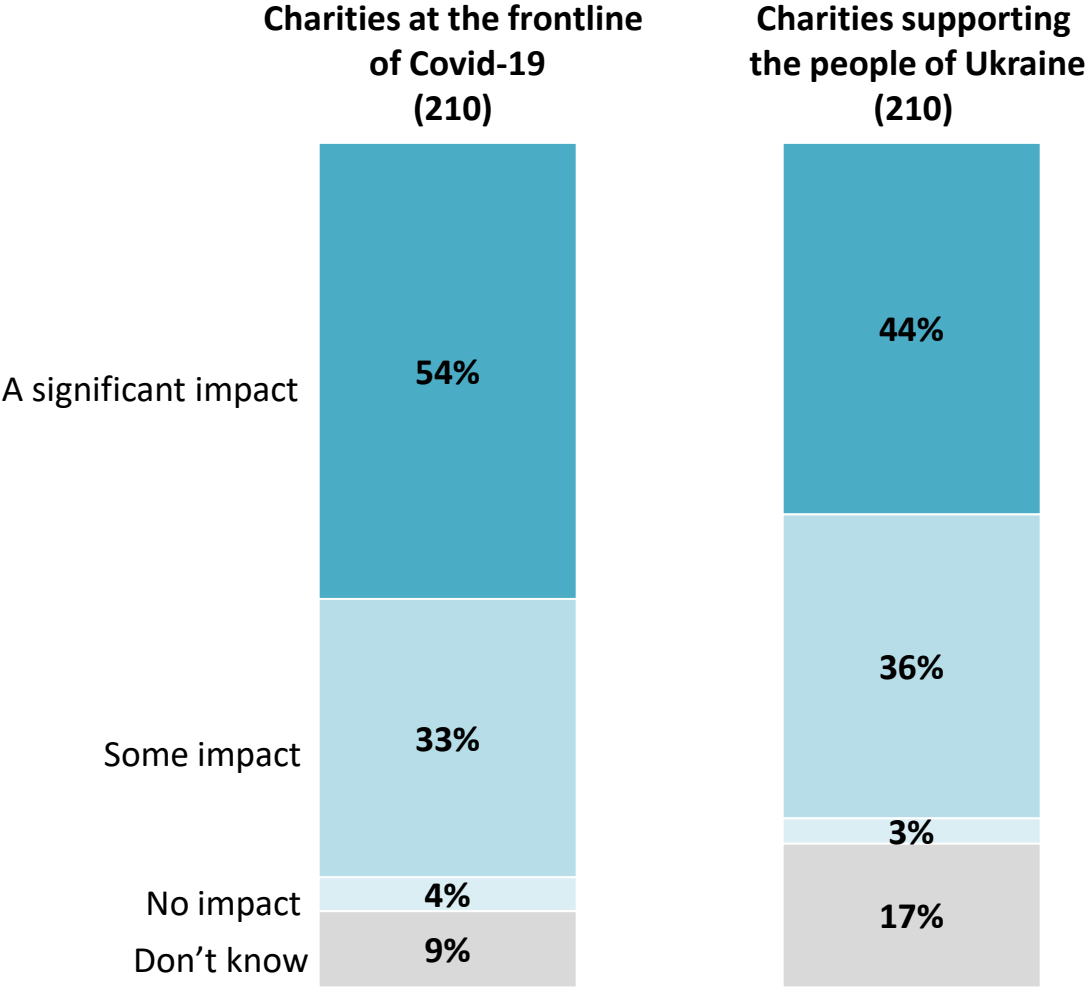
As was the case with decreased trust, increased trust has no obvious impact for a cohort of charities though the confidence it generates within an organisation cannot be overlooked

(Base: All who believe public trust and confidence has increased)



Survey participants cited the work done by charities during Covid-19 and in support of the people of Ukraine as having a positive impact on public perceptions of the sector

(Base: All who believe public trust and confidence has increased)



*New question in 2022

A hand is pointing at a digital interface. The interface features several glowing blue icons and text labels. The icons include a set of scales of justice, a document with a checklist, and a document with a single line of text. The text labels are 'COMPLIANCE', 'REGULATIONS', and 'STANDARDS'. The background is dark blue with a grid of glowing lines.

COMPLIANCE

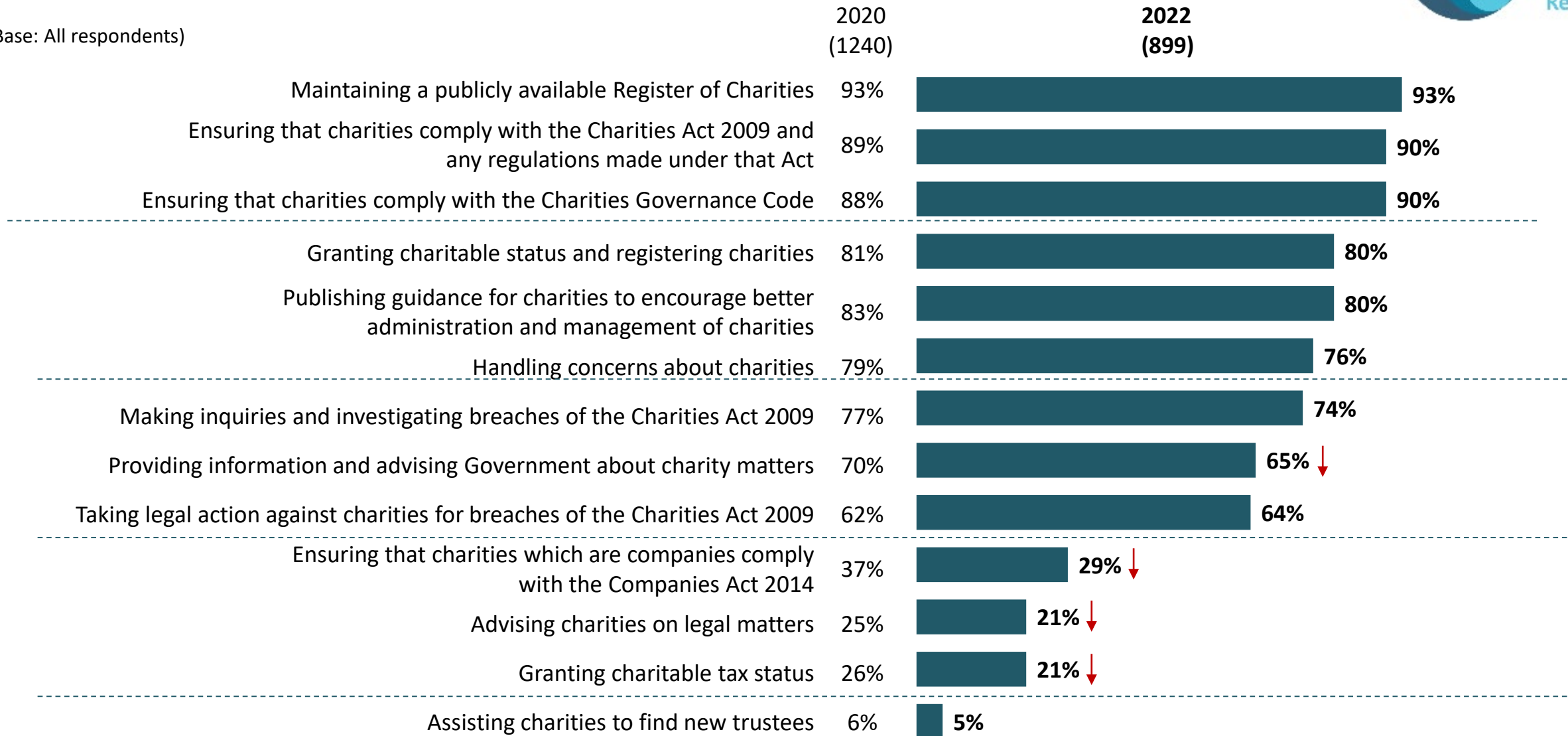
REGULATIONS

STANDARDS

The Charities Regulator

There is widespread awareness in the charity sector of the Charities Regulator's functions

(Base: All respondents)

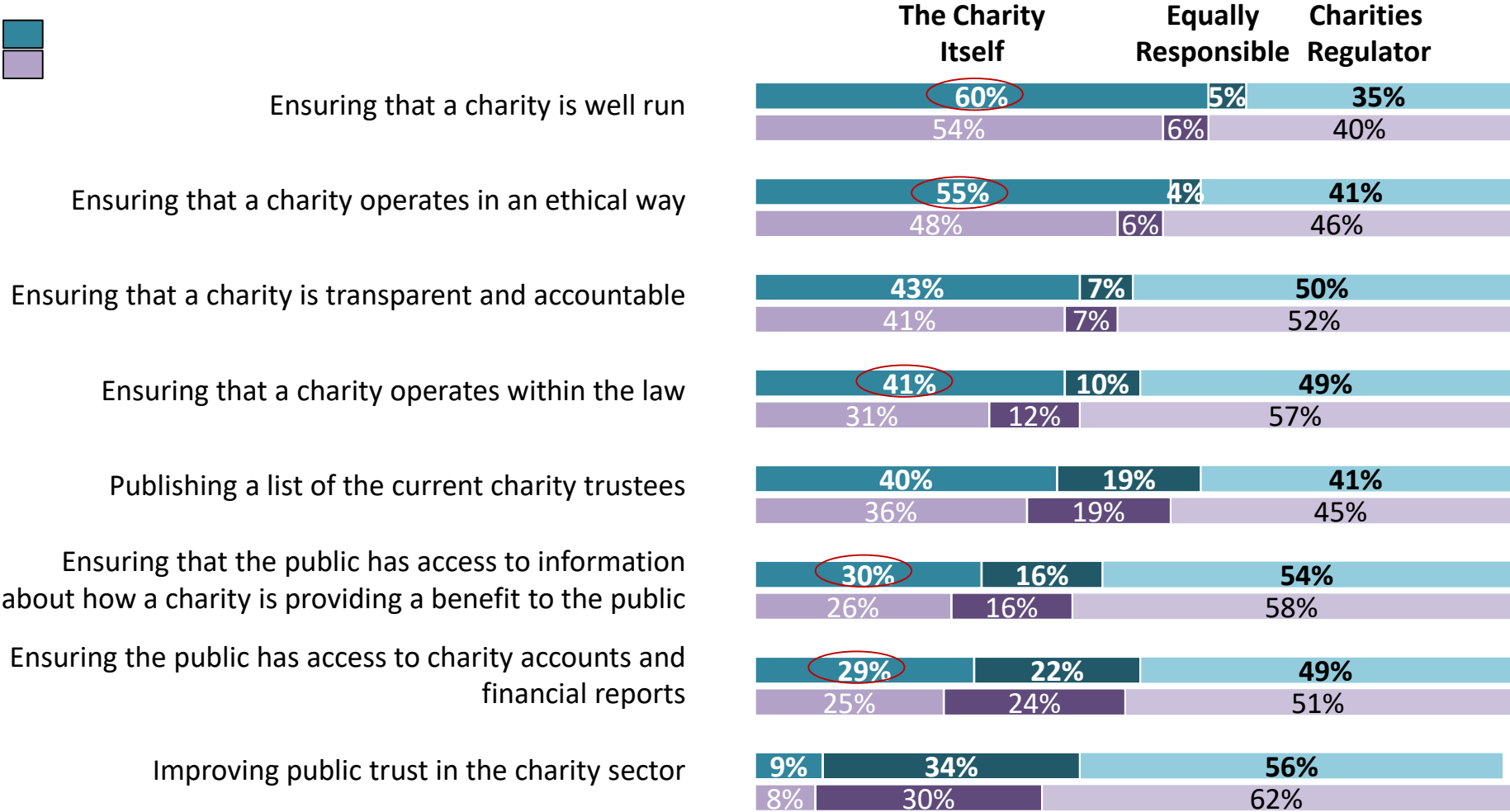


More survey participants feel many of the governance and operational matters assessed should be the responsibility of the charity itself, with the Regulator responsible for improving trust & making information accessible to the public



(Base: All respondents)

2022 N=899
2020 N=1240



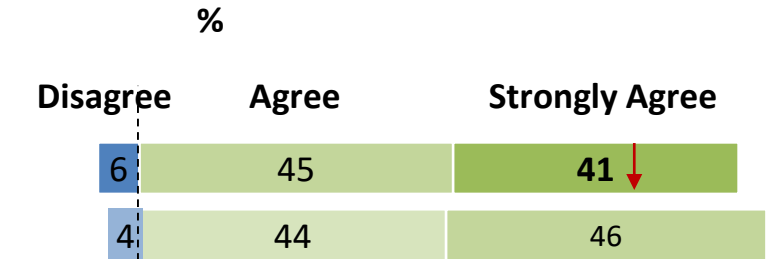
Sentiment towards the Regulator remains positive though there is evidence of declining agreement with some statements

(Base: All respondents)

2022 N=899

2020 N=1240

I trust the Charities Regulator to act in the public interest when deciding whether to investigate or take legal action again



Neither/
Nor/DK
%

7
7
10
8
10
7
31
27
25
23

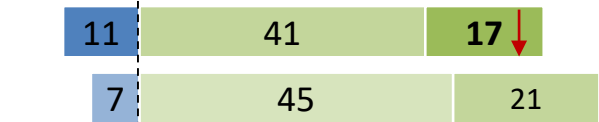
I trust the Charities Regulator to make effective decisions when granting or refusing charitable status/ applications for reg



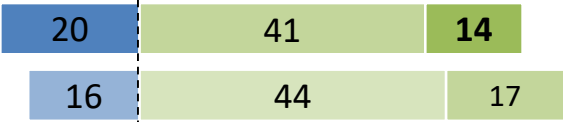
I trust the Charities Regulator to treat charities fairly and proportionately



Increased regulation and the introduction of the Charities Governance Code is improving trust and confidence in the sector



Completing the annual report for the Charities Regulator is very straightforward



The impact of increased regulation remains positive and there is greater support for financial transparency. However 1 in 4 would like to see more done to ease the administrative burden.



(Base: All respondents)

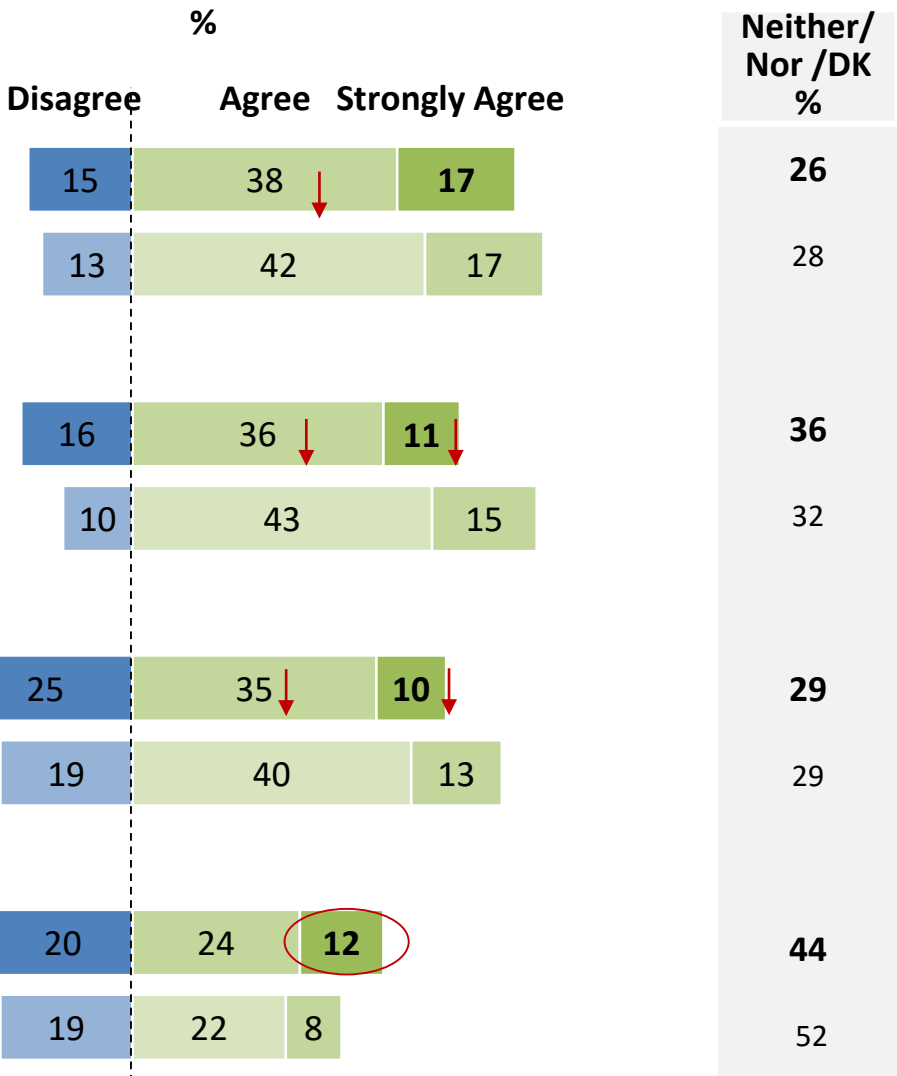
2022 N=899
2020 N=1240

Increased regulation and the introduction of the Charities Governance Code has improved the way my charity operates

The Charities Regulator proactively engages with charities and is supportive and innovative

The Charities Regulator does its best to keep the regulatory and administrative burden on charities to a minimum

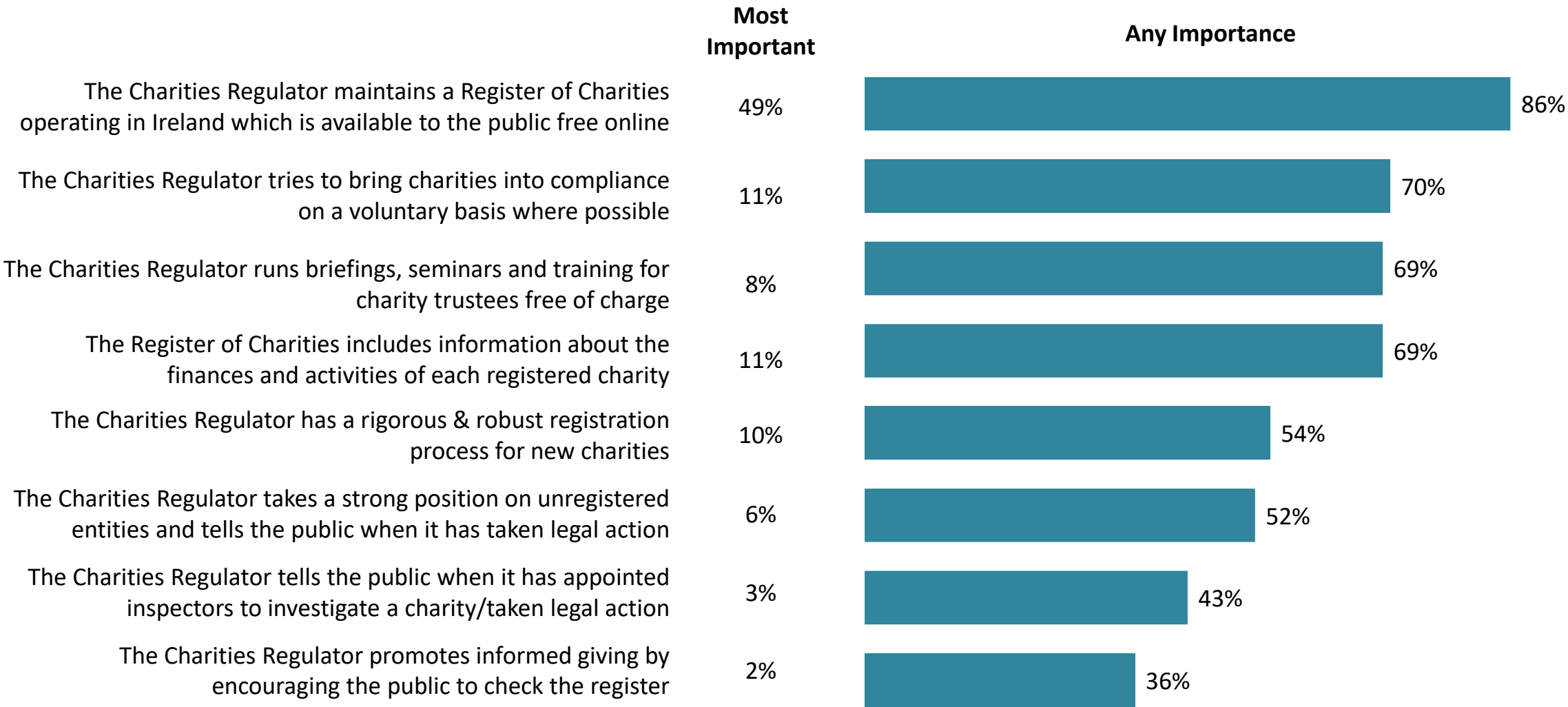
The Register of Charities should show more detailed financial information about all charities



Maintaining the Register of Charities and its approach to regulation are considered the most important aspects of the Charities Regulator operations



(Base: All respondents)

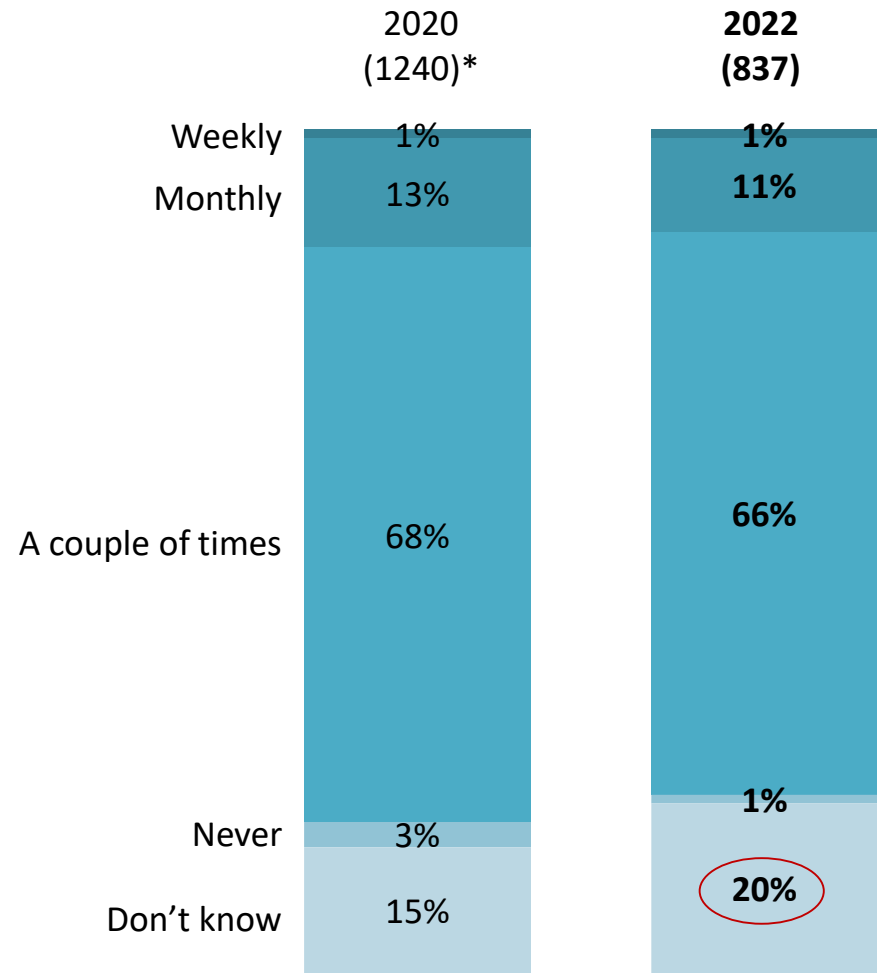


*New question in 2022

Q21. Thinking about how the Charities Regulator operates, please rank the statements below in what you think are the 5 most important, in order of importance.

8 in 10 said the authorised filer for their charity had logged into MyAccount at least a couple of times in the last 12 months

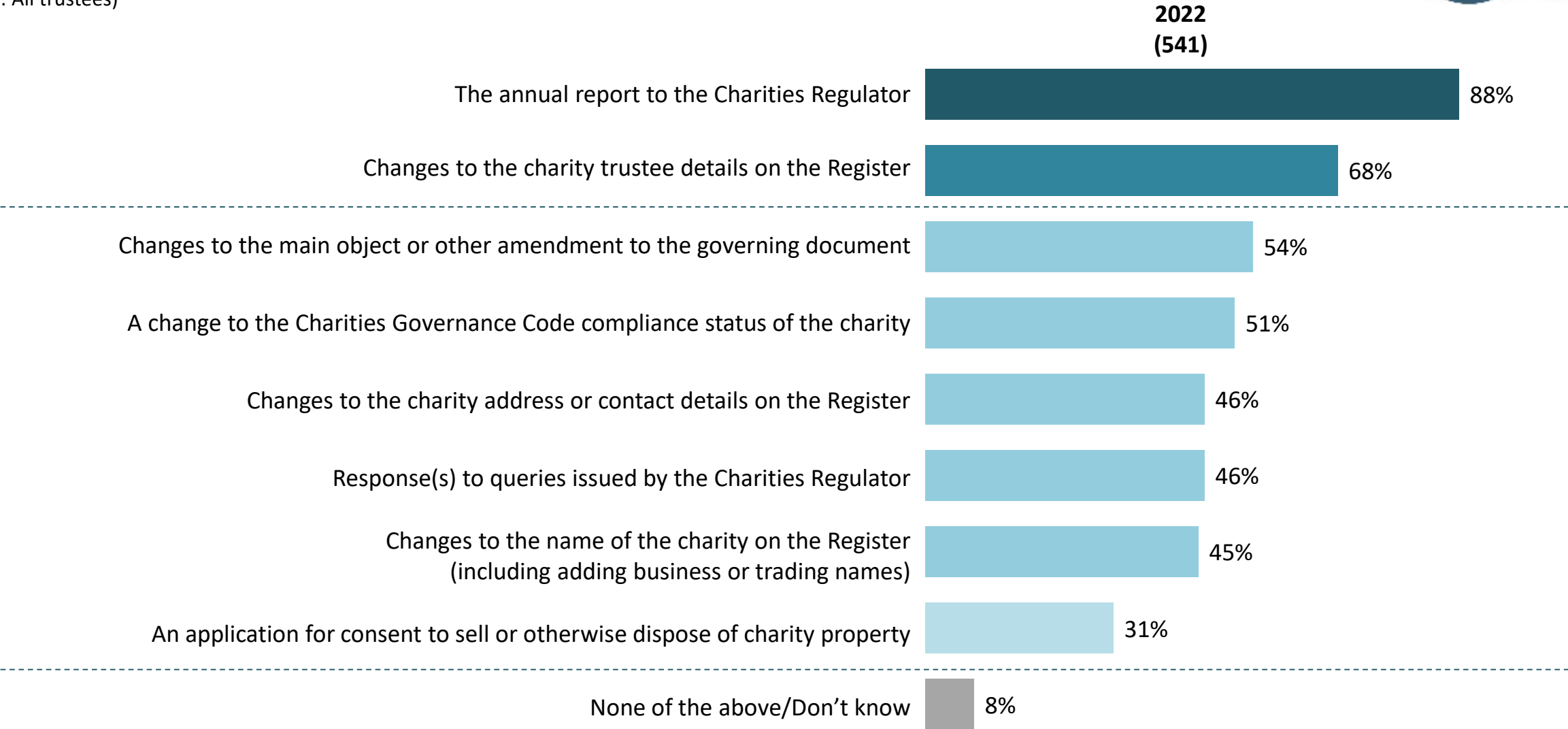
(Base: All authorised filers/aware of authorised filer for charity)



*Asked of all respondents in 2020

Survey participants reported that trustees most commonly approve their annual report to the Regulator and changes to trustee details before these are submitted

(Base: All trustees)

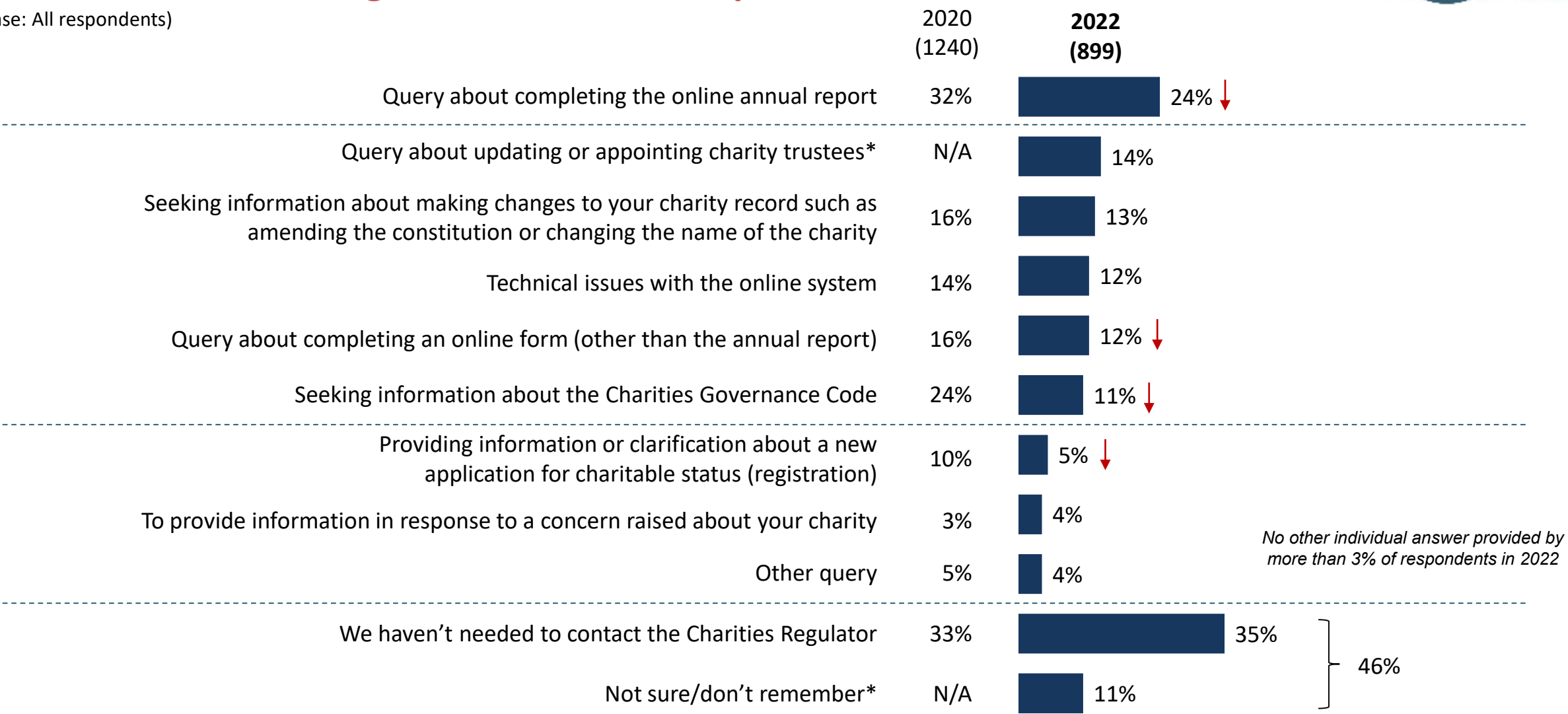


*New question in 2022

Almost half (46%) have not contacted the Regulator (or were not aware of any contact) in the past year. Those who have been in contact had a range of reasons, the most common being the online annual report



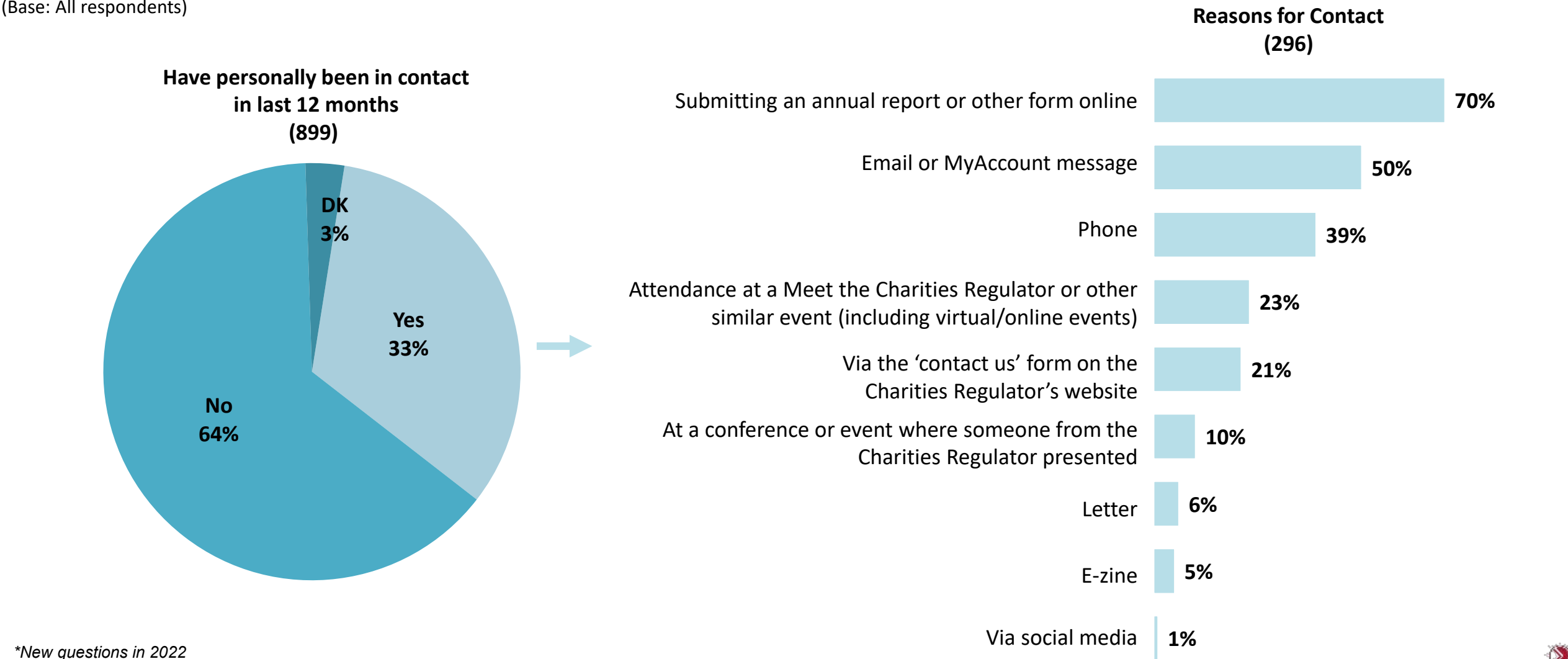
(Base: All respondents)



*New response option in 2022

One third of respondents had personally been in contact with the Regulator, primarily to submit their charity’s annual report or another form online.

(Base: All respondents)



*New questions in 2022

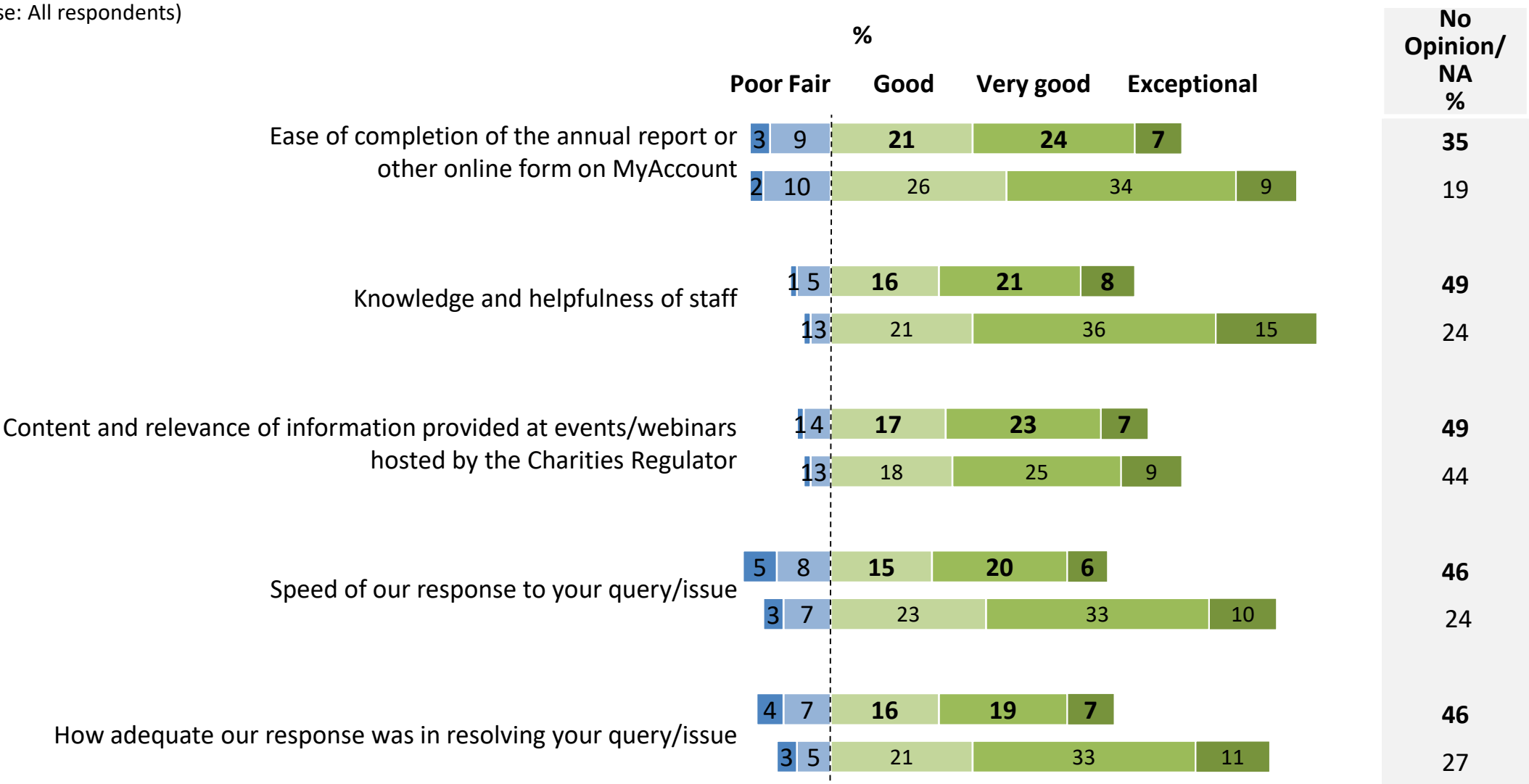
Q26: Have you personally been in contact with the Charities Regulator in the last 12 months?
 Q26a. What type of contact have you personally had with the Charities Regulator in the last 12 months? (Select all that apply)

For those able to express an opinion, the ease of completing online forms and knowledge/helpfulness of staff are most positively rated aspects of their contact with the Regulator in the past year

(Base: All respondents)

2022 N=899

2020 N=1240

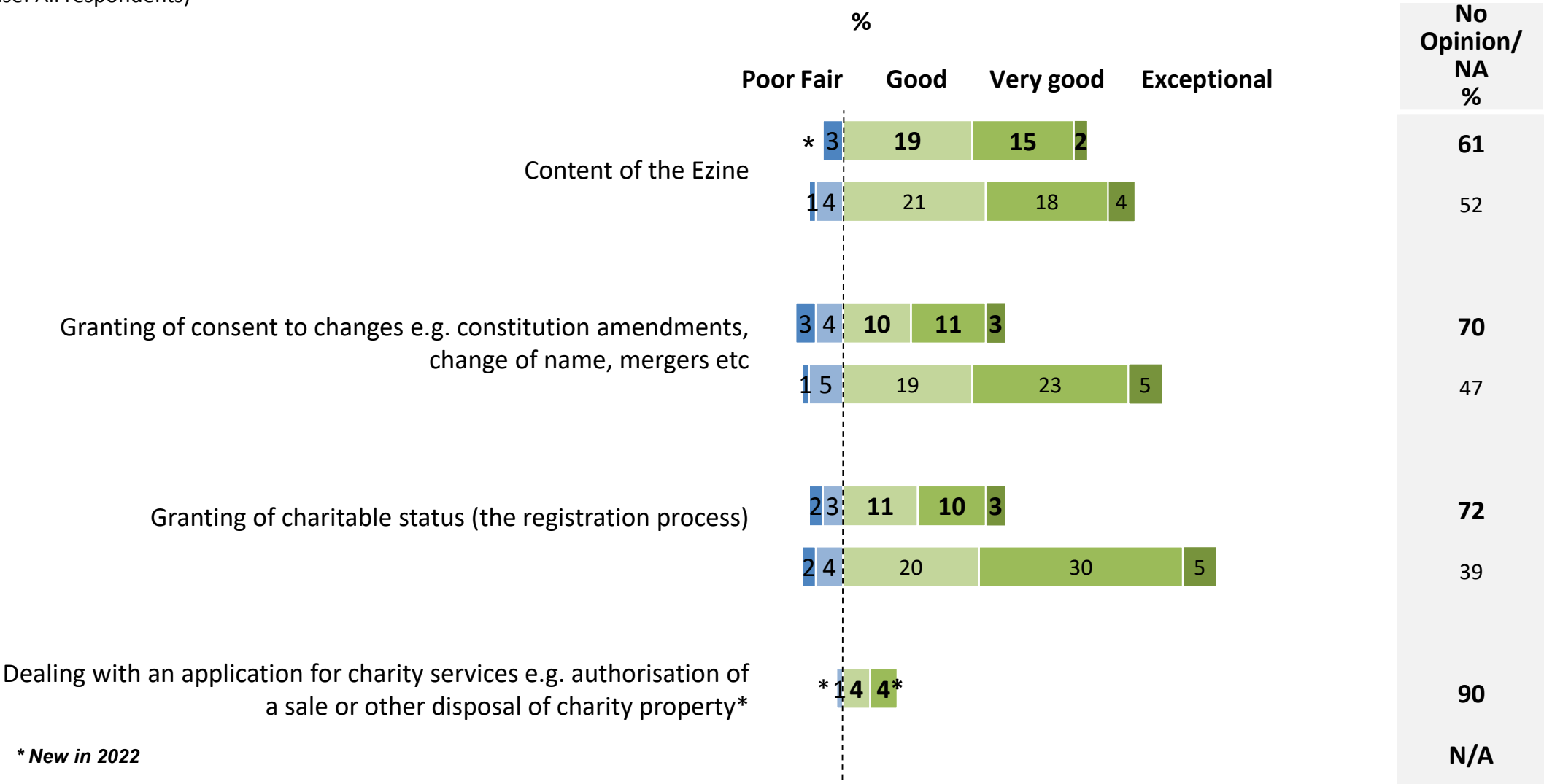


Though some of the activities of the Regulator are relevant to a small number of charities, these activities are positively rated amongst those who expressed an opinion

(Base: All respondents)



2022 N=899
2020 N=1240

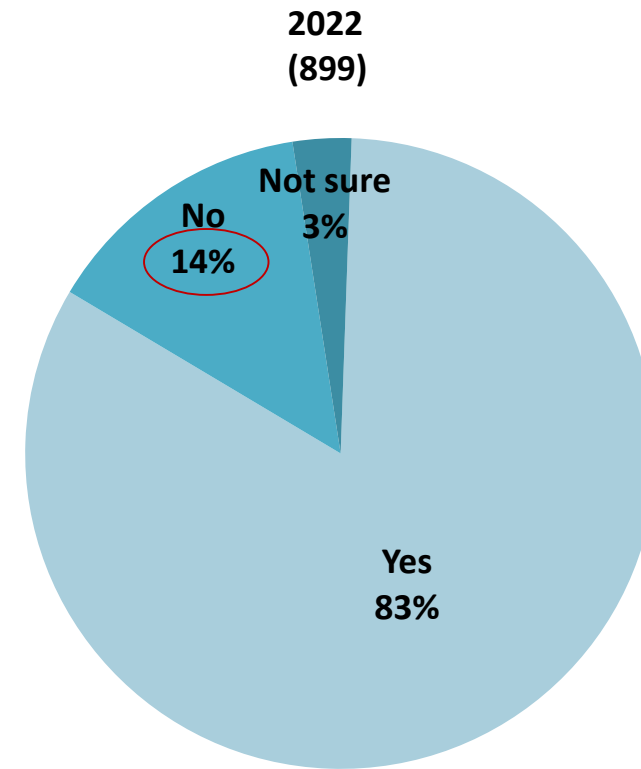
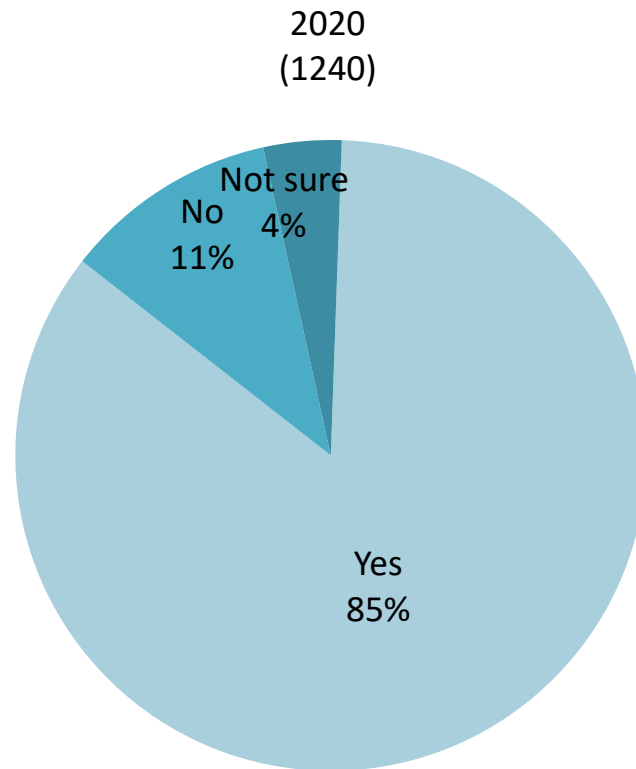


* New in 2022



Use of the Regulator's website remains high

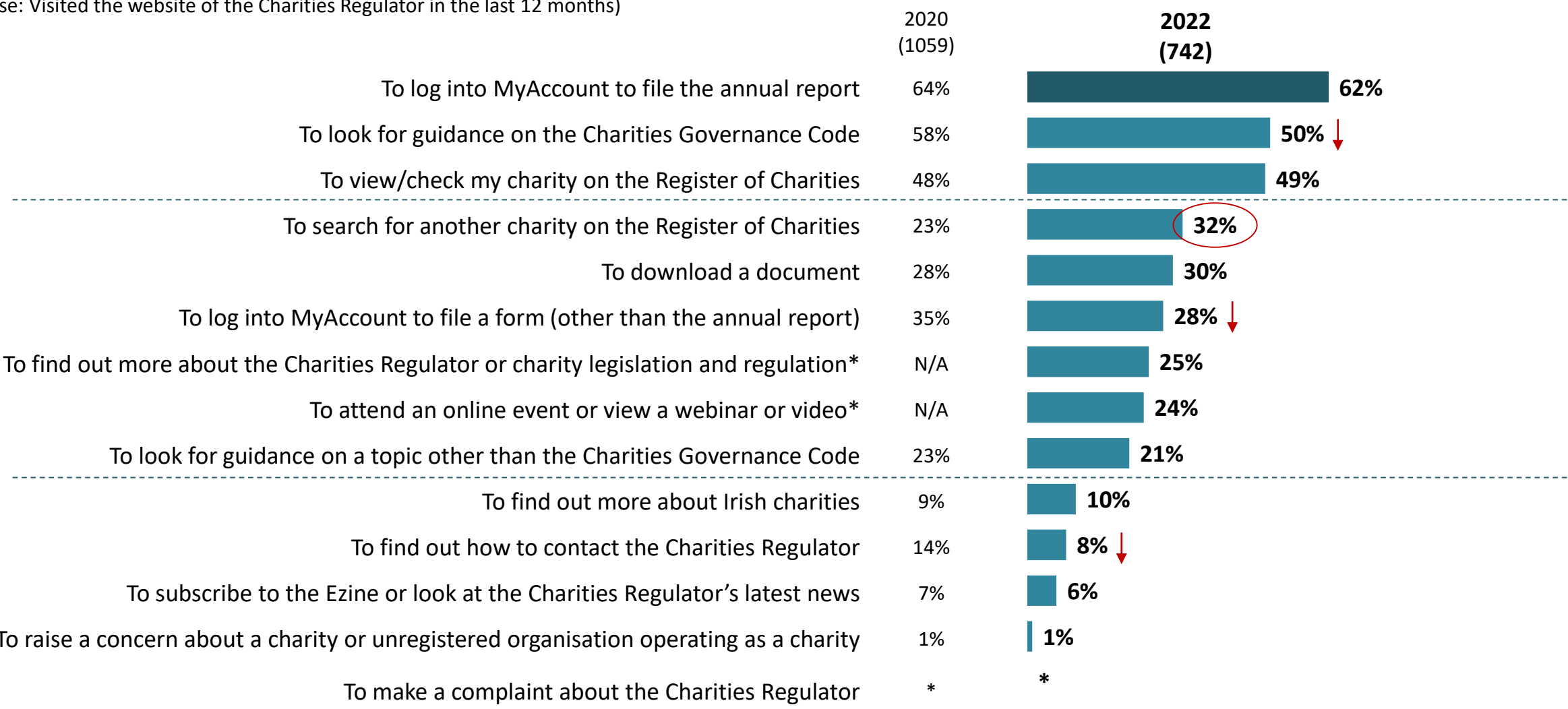
(Base: All respondents)



Although there was little change to the most widely mentioned reasons for visiting the site, the number who reported searching the Online Register of Charities has increased

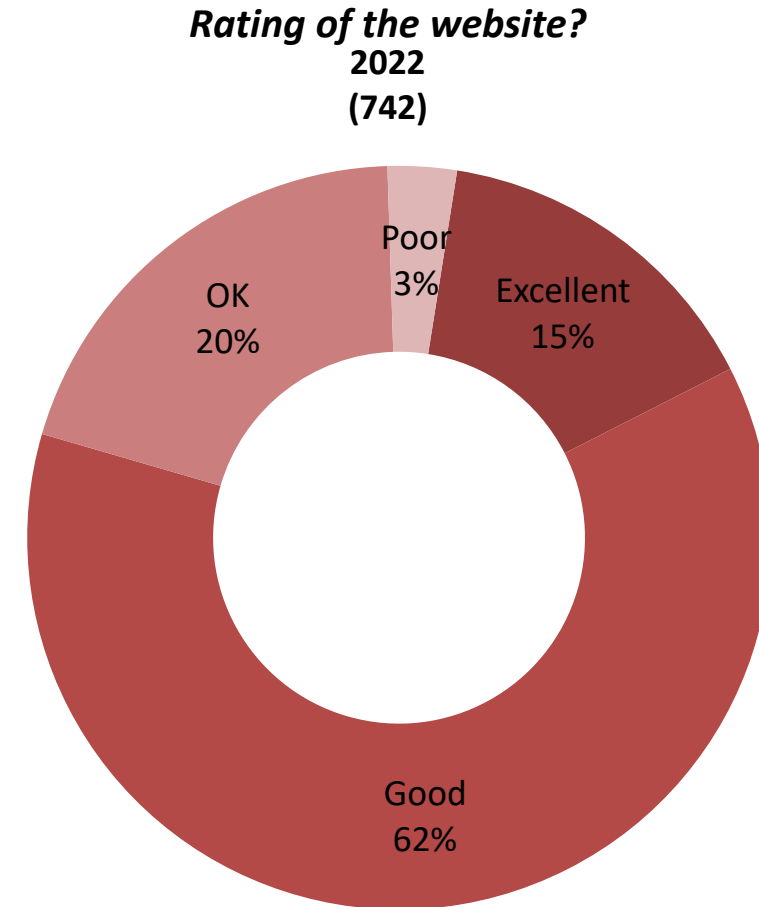
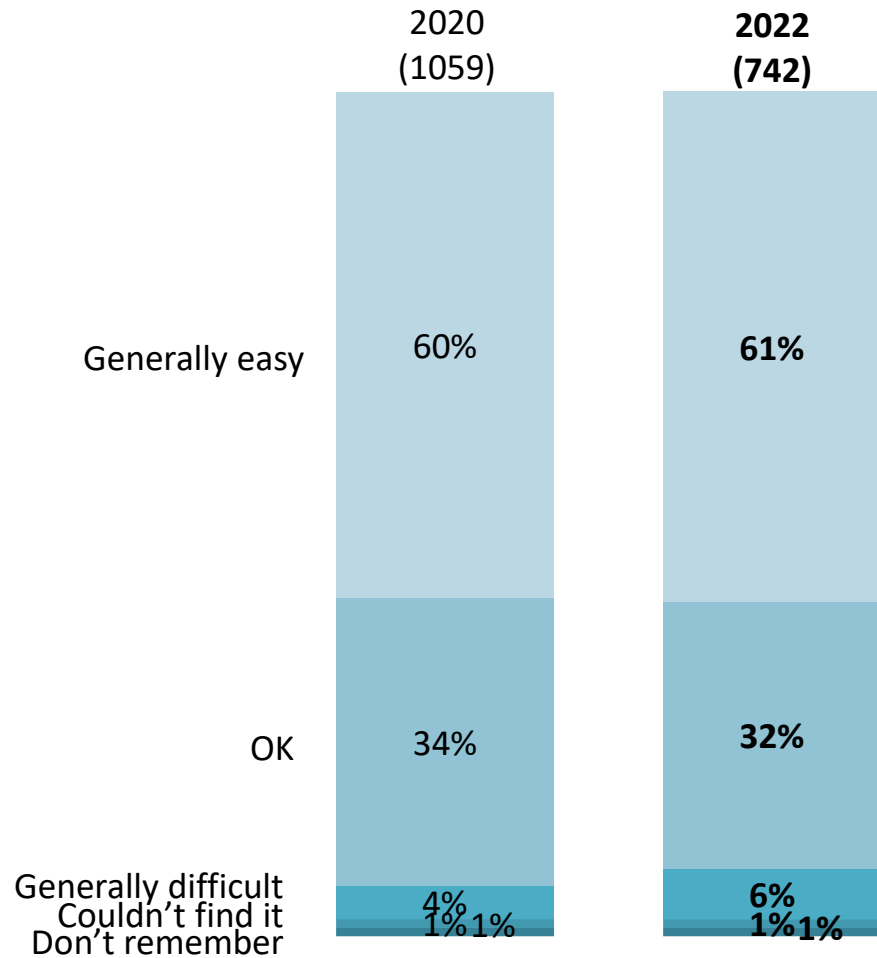


(Base: Visited the website of the Charities Regulator in the last 12 months)



6 in 10 found it easy to find what they needed which may correlate to the 3 in 4 users (77%) who rated the website as good or excellent

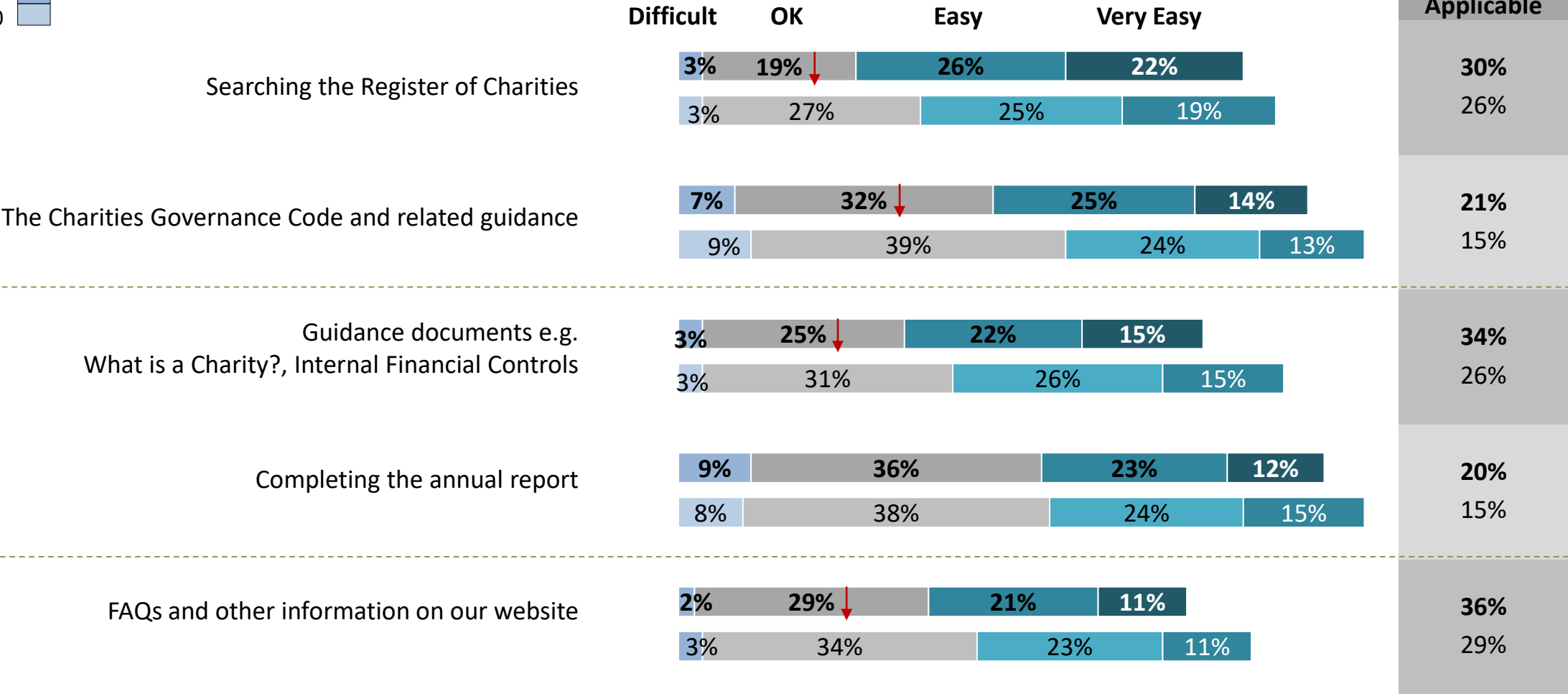
(Base: Visited the website of the Charities Regulator in the last 12 months)



For those with a view on the website and MyAccount system, accessing the Register and the Governance Code has become easier

(Base: All respondents)

2022 N=899
2020 N=1240

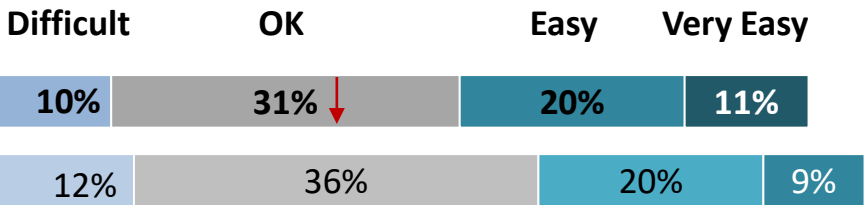


While modest, a consistent 1 in 10 respondents find the Compliance Record Form and other online forms difficult to understand

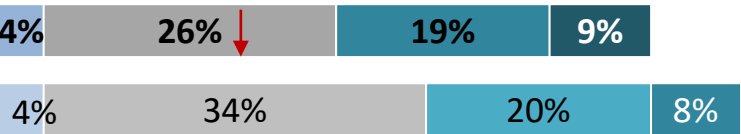
(Base: All respondents)

2022 N=899
2020 N=1240

The Charities Governance Code Compliance Record Form



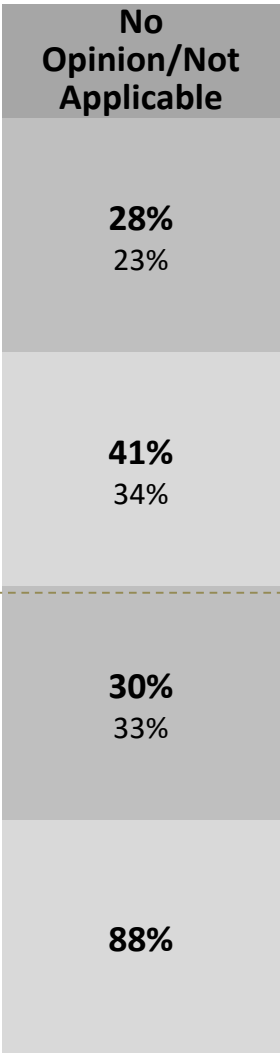
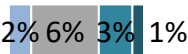
‘How do I?’ user guides for MyAccount



Completing other online forms e.g. updating charity trustees



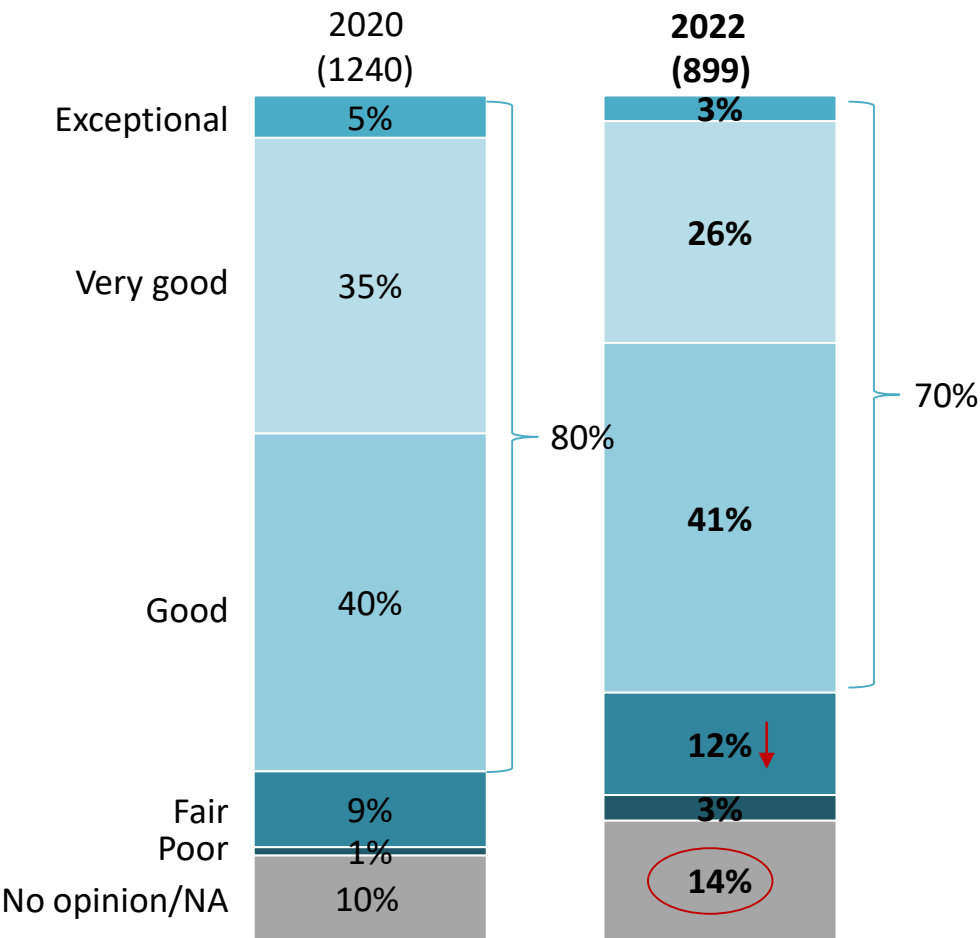
Making a Charity Services application e.g. seeking consent to sale of charity property*



*New response option in 2022

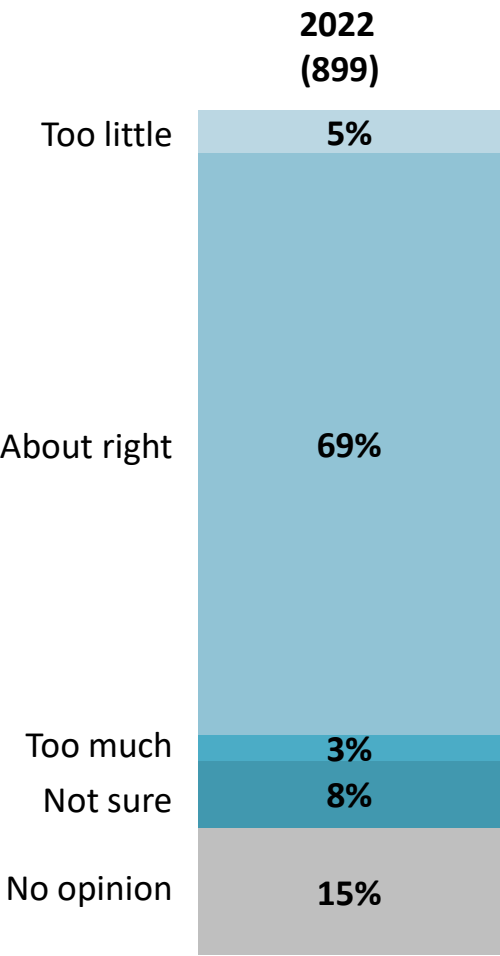
Communications from the Regulator continue to be rated positively though there is a little slippage amongst those who expressed an opinion

(Base: All respondents)



7 in 10 feel the amount of communications received from the Regulator is about right

(Base: All respondents)



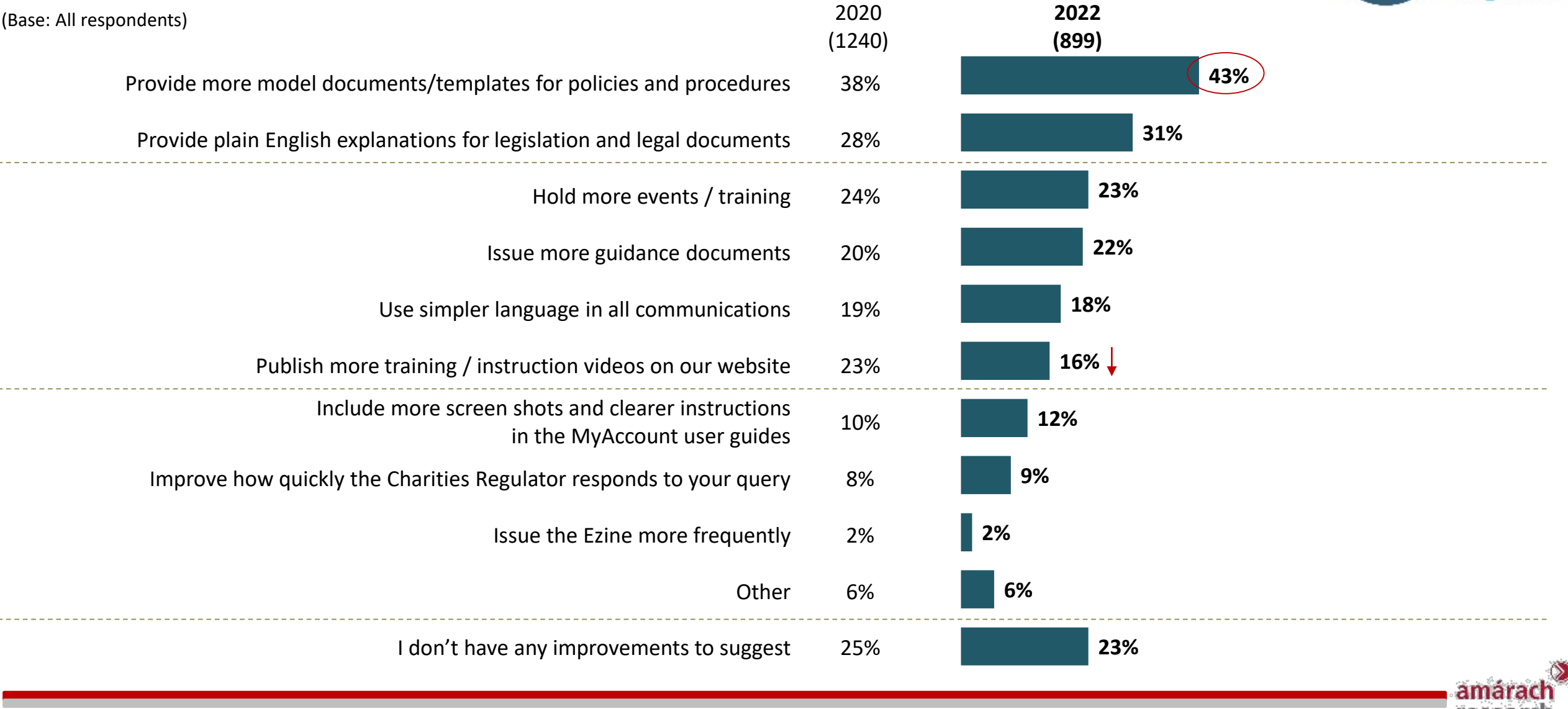
* New question in 2022

Q30a Do you feel the number of communications you get from us each year is? (select one only)

Availability of more templates and simple explanations of legal documents are of most interest to those who would like to see improvements to the Regulator’s communications



(Base: All respondents)

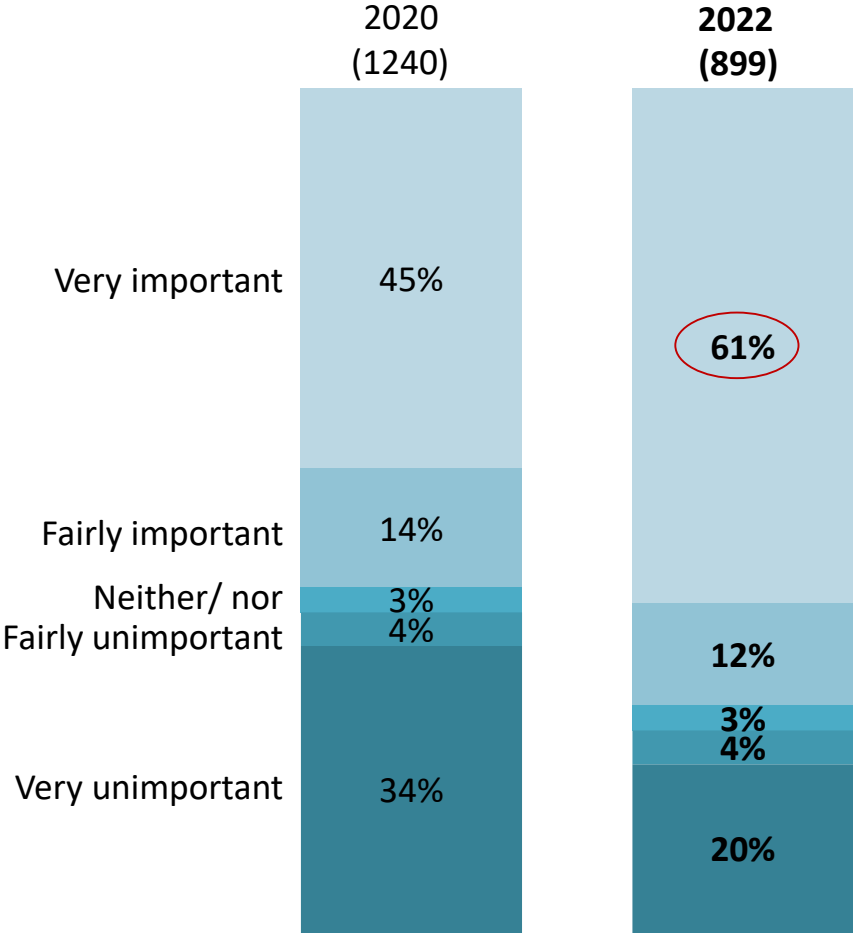




Being a Registered Charity

Being a registered charity is believed to be much more important now than it was two years ago

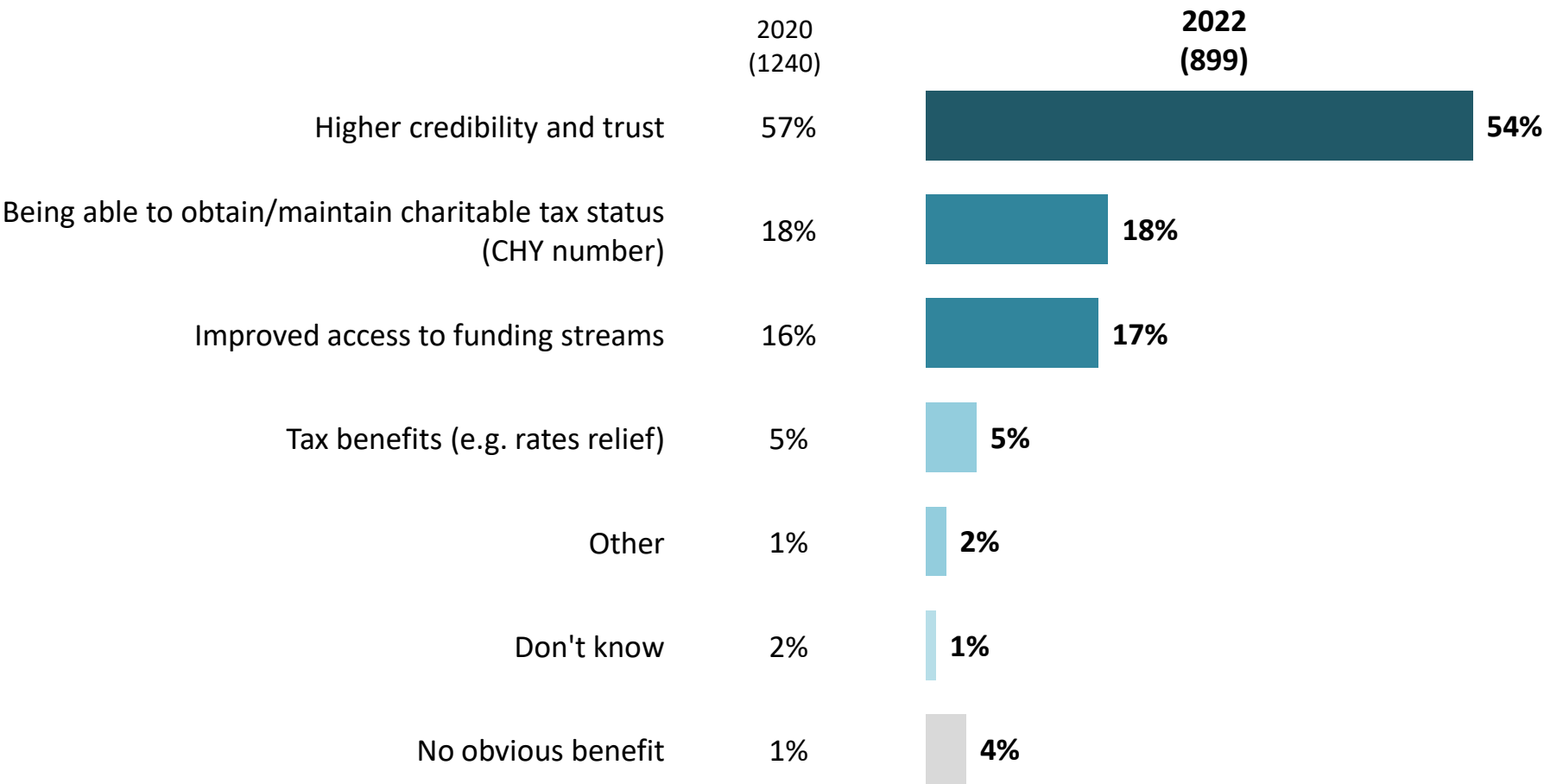
(Base: All respondents)



Higher credibility and trust continue to be the single greatest benefit of being a registered charity



(Base: All respondents)

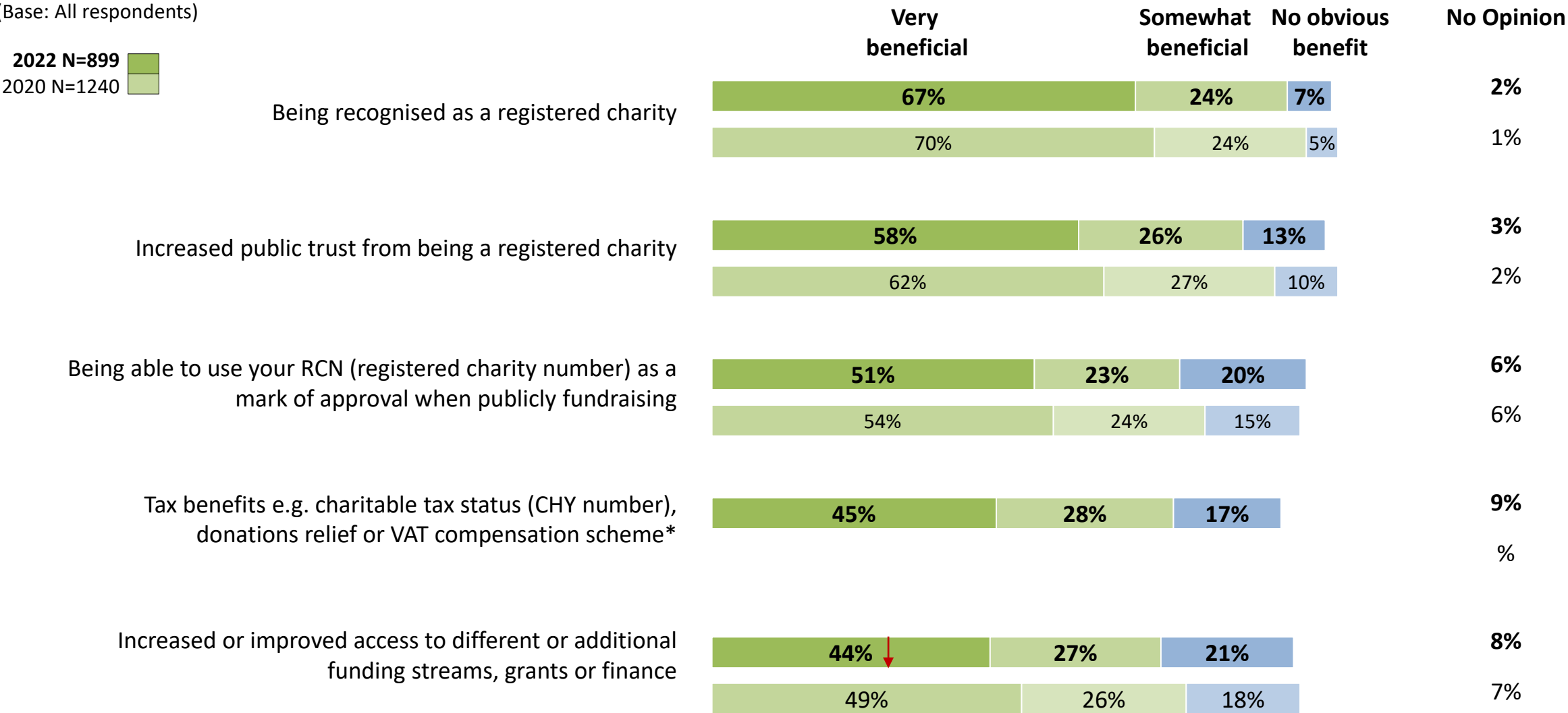


Being recognised as a registered charity and increased public trust remain the key benefits of being a registered charity, although both are at slightly lower levels than in 2020



(Base: All respondents)

2022 N=899
2020 N=1240



* New in 2022

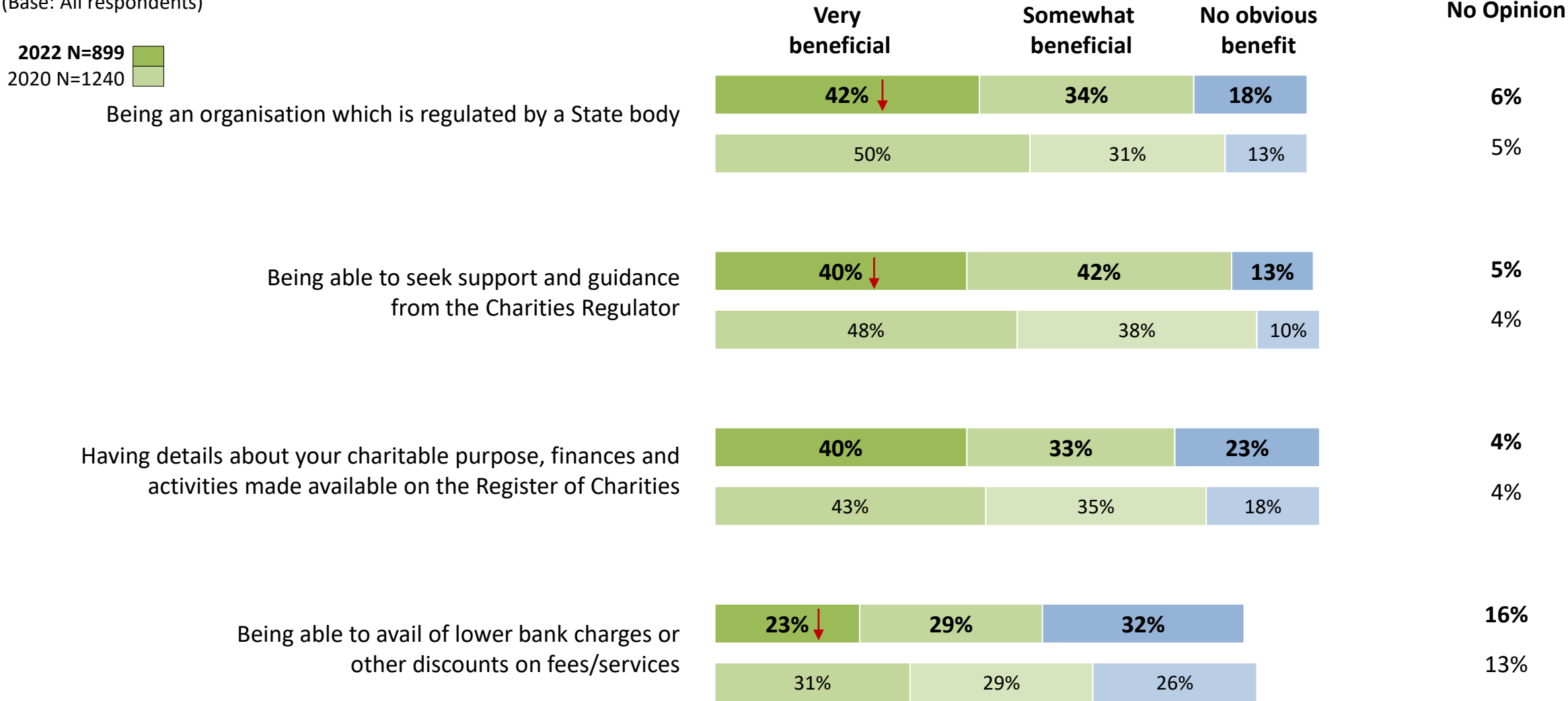


The ability to avail of discounts or lower bank charges as a registered charity is not considered to be as beneficial as was the case two years ago



(Base: All respondents)

2022 N=899
2020 N=1240



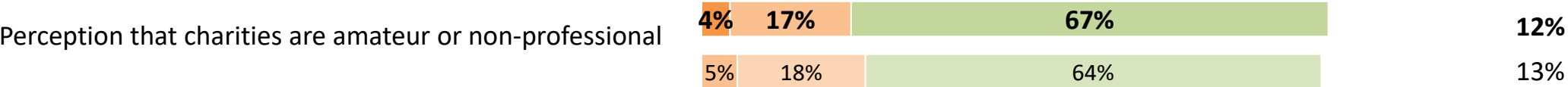
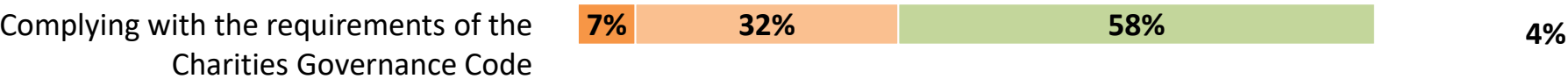
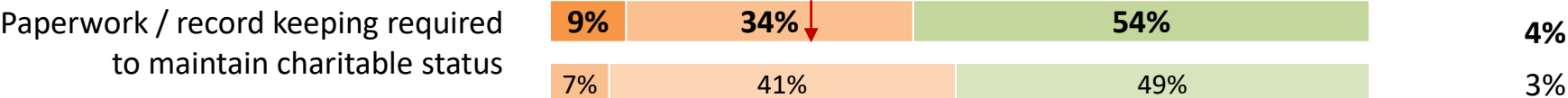
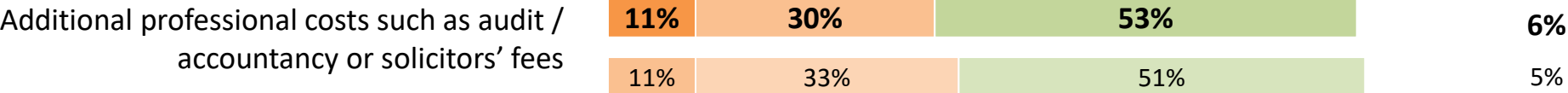
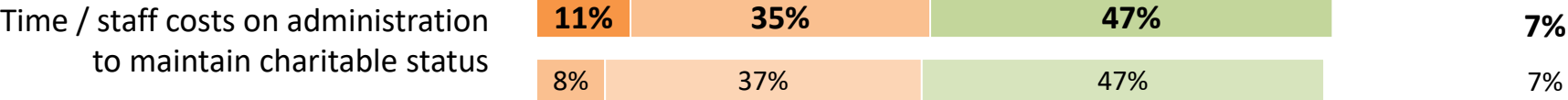
While most do not see any obvious hindrance to being a registered charity, for those who do the main drawbacks are the costs and resources associated with maintaining charitable status



(Base: All respondents)

2022 N=899
2020 N=1240

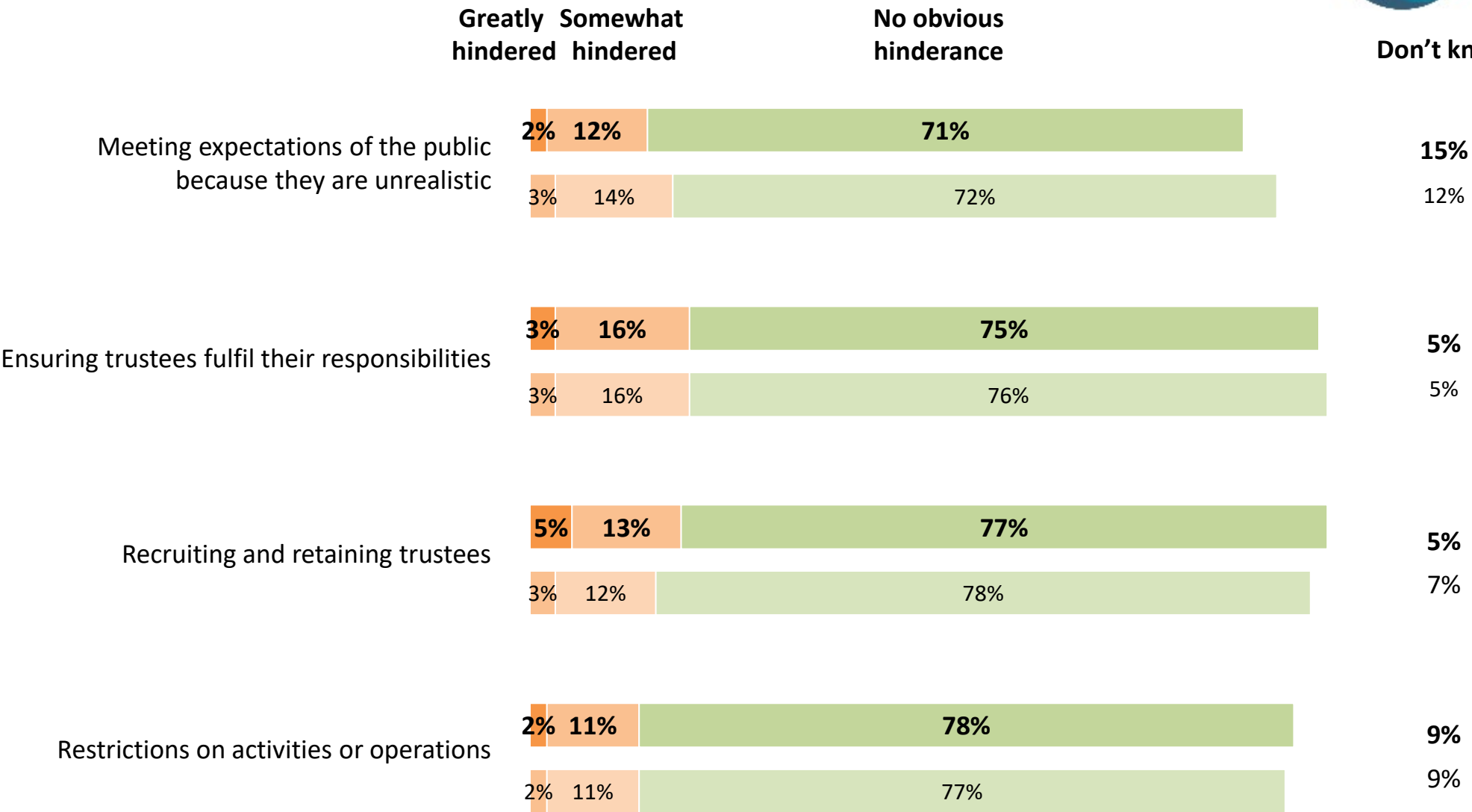
Greatly hindered Somewhat hindered No obvious hinderance Don't know



Other potential impediments are recorded at lower levels

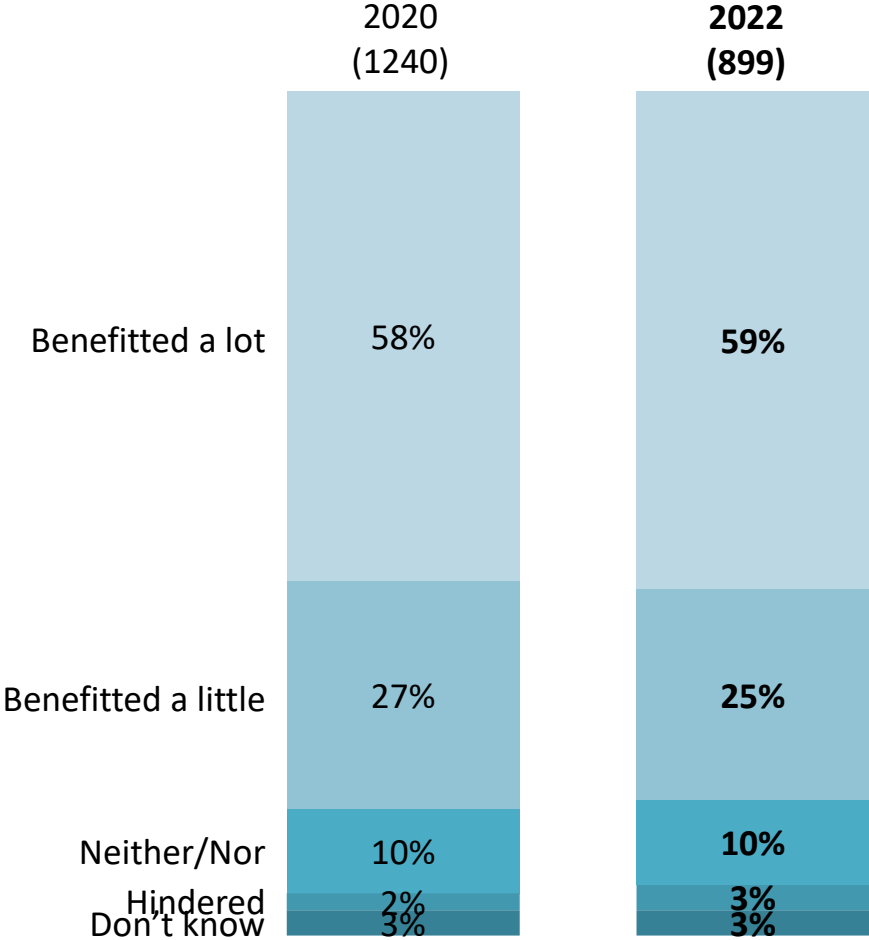
(Base: All respondents)

2022 N=899
2020 N=1240



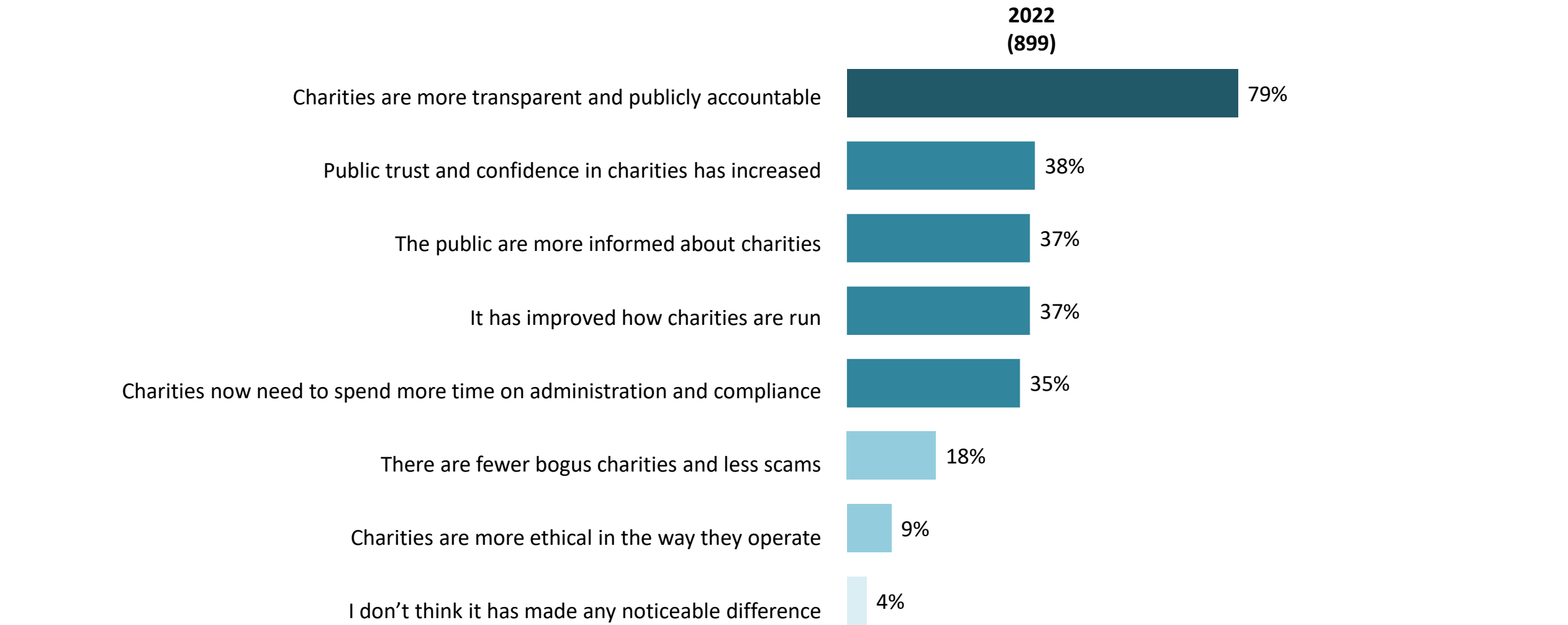
The majority of respondents (84%) feel their charity has benefitted from being registered

(Base: All respondents)



And the Charities Regulator has positively impacted the sector by making it more transparent and accountable

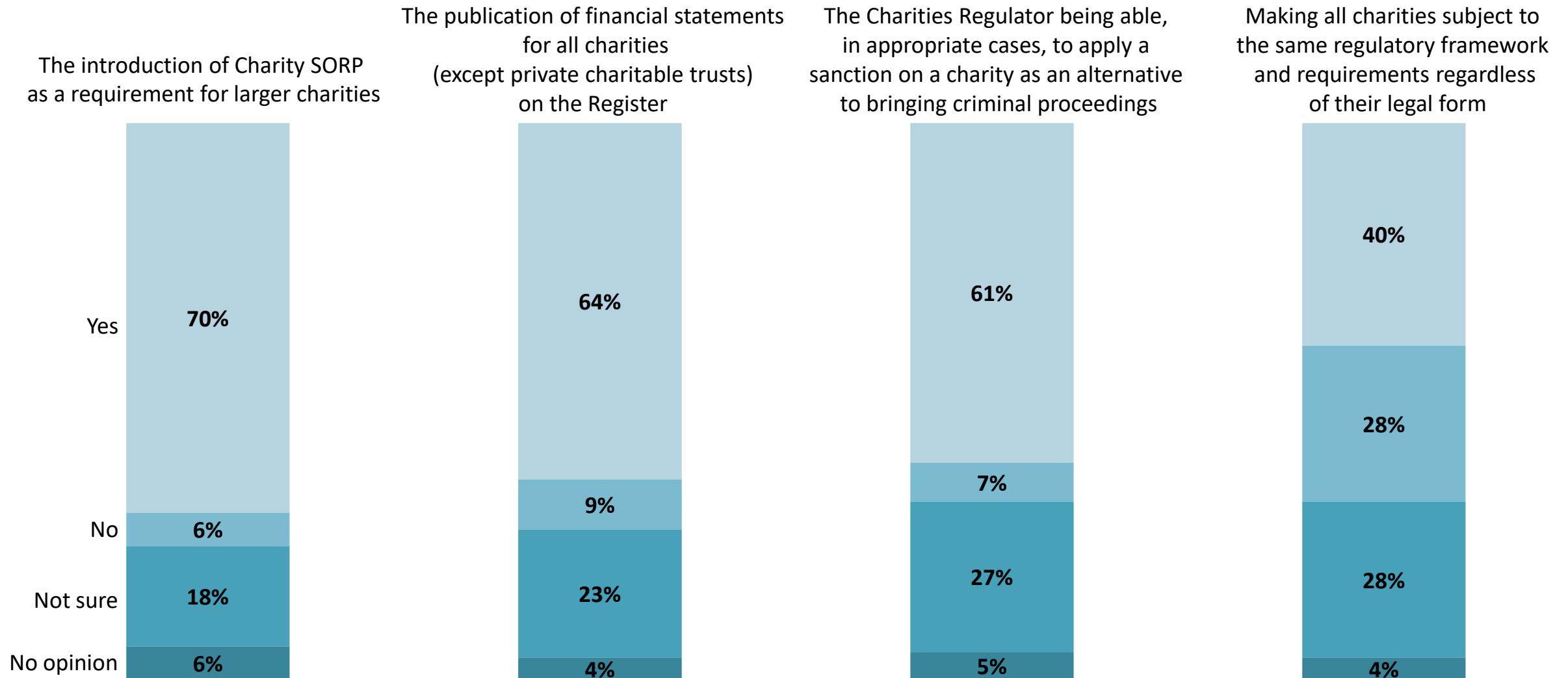
(Base: All respondents)



* New question in 2022

Overall, there is widespread support for the potential initiatives evaluated apart from making all charities subject to the same regulatory framework

(Base: All respondents)



* New question in 2022

Q38: Thinking about how the Charities Regulator could operate, would you be in support of the following: -

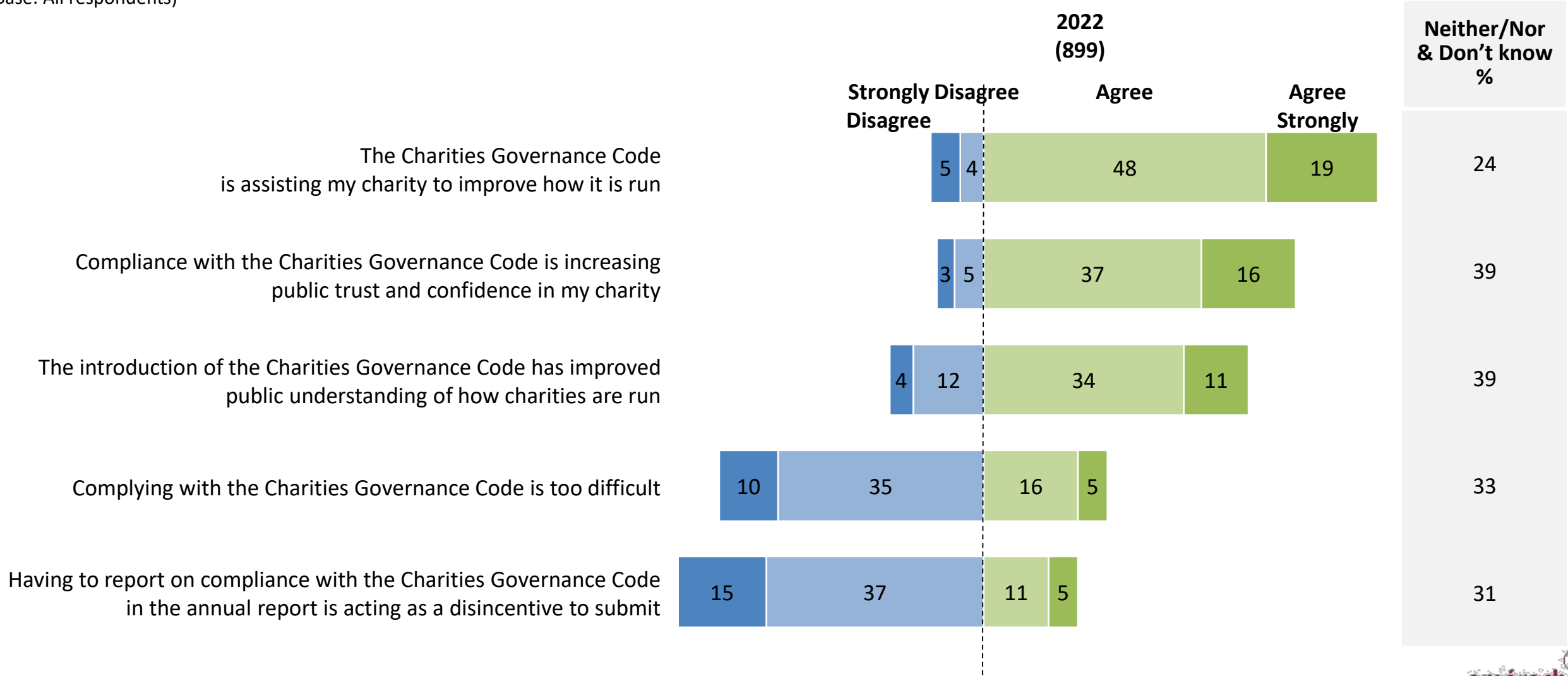


Register of Charities and the Charities Governance Code

On balance, the Charities Governance Code benefits charities and public perceptions of the sector though for some, complying with the Code is difficult and can act as a disincentive to submit the annual report



(Base: All respondents)

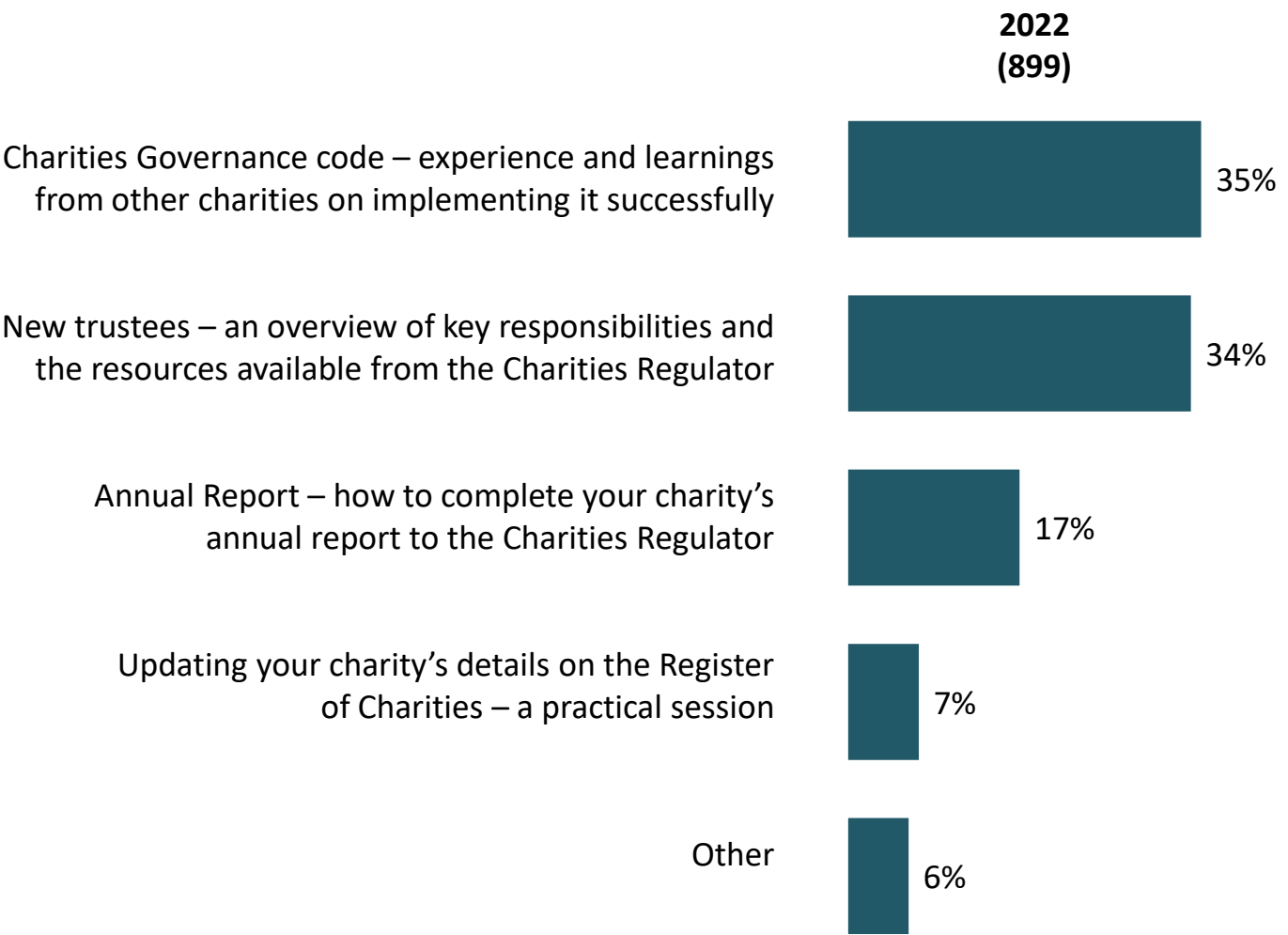


* New question in 2022

Q39: For each of the following statements select the response which most accurately reflects your opinion regarding the Charities Governance Code

Respondent suggestions for future webinars and guidance materials mainly focus on the Charities Governance Code and new trustees

(Base: All respondents)



* New question in 2022



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Irish Charity Survey

Mandy Osborne

Research Manager

28 June 2023

Trust and confidence – public

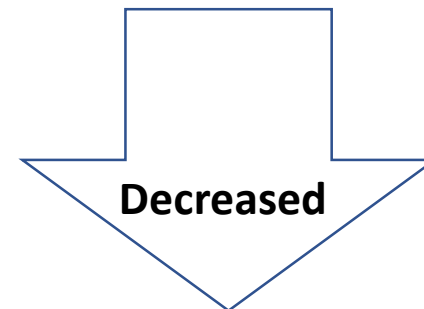
- **80% of public said having trust and confidence in a charity was very important when deciding to donate**
(up from 65% in 2020)
- **29% of public have high levels of trust and confidence in charities generally**
(down from 36% in 2020)
- **Public have highest level of trust and confidence in charities personally supported (63%)**
(stable - 64% in 2020)

Trust and confidence overall

- **23% of charities**
- **15% of public**
(44% & 16% in 2020)



- **26% of charities**
- **37% of public**
(12% & 34% in 2020)



What has increased public trust?

Charities say

- **more positive media coverage about charities generally (24%)**
- **fewer negative stories about the sector (20%)**

Public say

- **impact made by charities at Covid frontline (21%)**
- **more awareness of structure/governance of charities (15%)**

What has decreased public trust?

Charities say

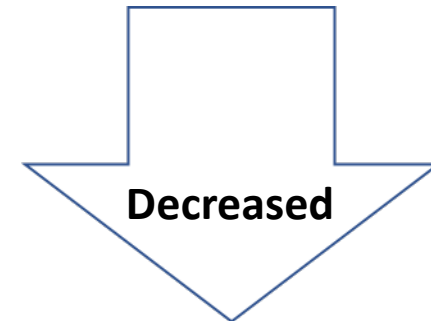
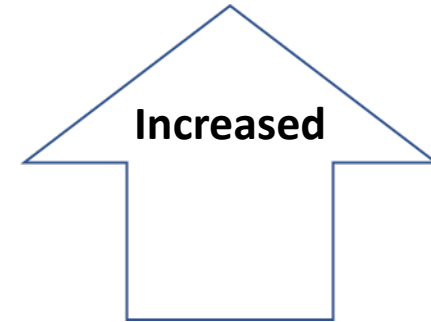
- media coverage of serious issues in some charities impacting on all (55%)
- ongoing public dialogue about perceived issues (27%)

Public say

- not sure that money is going where meant to (27%)
- reports about CEO salaries (22%)

Impact of changes in trust and confidence

- 45% more support generally
 - 30% more confidence internally
 - 30% no obvious impact
-
- 25% fewer volunteers or harder to recruit or retain staff
 - 22% less support generally
 - 38% no obvious impact



What would improve public trust?

- **88% - knowing what percentage of their donation actually goes to the cause**
- **88% - seeing evidence of what the charity has achieved**
- **83% - having more information on the charity's accounts and financial transactions**
- **82% - knowing a charity is well run by having access to information about compliance with the Charities Governance Code**
- **78% - knowing more about salary of CEO and senior staff**

Who do you think is or should be responsible for.....?

- Ensuring that a charity is transparent and accountable

Charities say: the Charity 43%, the Regulator 50%, Equally 7%

Public say: the Charity 23%, the Regulator 27%, Equally 51%

- Improving public trust in the charity sector

Charities say: the Charity 9%, the Regulator 56%, Equally 34%

Public say: the Charity 27%, the Regulator 24%, Equally 49%

Who is responsible? cont'd

- Ensuring that a charity is well run

Charities say: the Charity 60%, the Regulator 35%, Equally 5%

Public say: the Charity 30%, the Regulator 21%, Equally 49%

- Ensuring that the public has access to charity accounts and financial reports

Charities say: the Charity 29%, the Regulator 49%, Equally 22%

Public say: the Charity 25%, the Regulator 28%, Equally 47%

What can charities do?

- **Be openly transparent and accountable**
- **Keep your charity's information on the Register of Charities up to date (contact details, trustees, classification)**
- **Ensure your charity's website / social media is current and accurate**

What can charities do?

- **Tell your charity's story**
- **Who are your trustees – more than just a name**
- **Promote and use your Registered Charity Number (RCN)**

'10 steps' infographic

www.charitiesregulator.ie



What can the Regulator do?

- **Work to increase public awareness of:**
 - **Register of Charities**
 - **Registered Charity Number (RCN)**
 - **Charities Governance Code**
 - **the Regulator – role and remit**
- **Publish guidance for charities to encourage best practice**
- **Ensure charities comply with the Charities Act 2009**



**An Rialálaí
Carthanas**

**Charities
Regulator**