



Supporting the essence of small and medium-sized UK charities

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Question

How can big donors work best with small and medium sized UK charities to build their capacity to achieve development outcomes?

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1. Summary

Small and medium-sized charities (SMCs) in the UK are recognised for their distinct approach to community work which values relationships, provides more personalised care, and holds a holistic understanding of development. In order to effectively support SMCs big donors, need to understand and learn how to value the particular way in which such charities practice and conceptualise social transformation.

The most recent UK Civil Society Almanac (2019) shows that the CSO sector in the UK is dominated by large organisations. In 2015/16, there were 166,001 voluntary organisations in the UK ("Small charities: Key findings from our data" 2019). Of those, large organisations, considered as those with an annual income over 1 million pounds, make up only 3% of the charity sector in the UK, but account for 81% of its total income. 19% of total income is managed by those charities with income under £1m, which make up 97% of all charities (ibid).

Despite the scarce financial resources, smaller organisations are believed to outperform their larger equivalents in terms of fostering relationships and providing individualised care (Hunter & Cox, 2016). They are regarded as more agile and flexible, and therefore better placed to foster innovation (ibid).

Recent political changes have generated much insecurity for UK SMCs. On the one hand, the continued cuts to the welfare state and the precarious nature of the job market means that charitable services continue to be in demand (Dayson, Baker, & Rees, 2018); yet, the decrease in grant money leaves SMCs in a vulnerable position (Hunter & Cox, 2016). For example, a study by Lloyds Bank Foundation found that smaller charities lost more income proportionally than large ones as a result of the 2008 financial crisis, when grant funding dropped (Cooney, 2017).

The literature places the vulnerability of smaller UK charities in the context of cultural shifts which are putting in question the very added value and uniqueness of this portion of the charitable sector, including their community orientation (Harris, 2018).

Current economic and political trends are jeopardising small and medium-sized charities' access to resources, autonomy, and health. Among these trends the following stand out in the literature:

- Cuts in public spending and to grants made available; since SMCs tend to be more dependent on public funding, they are being most affected by the cuts (Ravenscroft, 2017).
- A flourishing of different resourcing mechanisms including contracting and pay-by-results (*'Strength in Numbers Small charities' experience of working together'*, 2010). Through these payment modalities, SMCs are requested to take risks that they cannot afford. As a consequence, large charities and the private sector are being contracted disproportionately (Harris, 2018).
- Because of the lower resources available, competition in the sector is on the rise. Small and medium sized-charities are asked to enter in competition with large CSOs, the private sector, and even governmental organisations (Hunter & Cox, 2016).
- Small and medium sized-charities struggle to demonstrate their value under the logic of impact assessment and an emphasis on quantitative assessments (Hunter & Cox, 2016).

Section 3 of the report focuses on the added value of small and medium-sized UK CSOs as development partners. It stresses that SMCs:

- Are more flexible and therefore better able to adapt, be resilient, and respond to changes in context (Tomlinson, 2016).
- Tend to work in niche topic area and with more focused geographical scope. This means they are able to develop better expertise and closer relationship with Southern partners (Tomlinson, 2016).
- Are more likely to articulate long-term and more equal partnership with Southern CSOs (Jeffery, 2014).
- Value the human aspect of development and are able to portray powerful stories of human transformation that can influence the way the UK public perceives development efforts (Jeffery, 2014; Tomlinson, 2016).

Finally, part 4 pulls out of the literature a series of insights and strategies that emerge around how to support small and medium sized CSOs. Donors should consider:

- Providing core funding;
- Disaggregate contracts and making them proportionate and appropriate to SMCs;
- Encourage innovative North/South partnerships;
- Support SMCs to prove their value;
- Simplify procedures.

This report builds on recent grey and academic literature. The discussion on the changes within UK civil society are rich and the works referenced synthesize a wide range of academic studies and grey literature. Meanwhile, UK SMCs are understudied as development partners. Consequently, section three draws on discussions of North-South partnerships, and from two recent reports that discuss SMCs in the UK and Canadian contexts respectively.

2. Trends influencing UK small and medium sized charities

The added value of SMCs is widely recognized. Because of their size, they are regarded as better able to embed themselves in the community, develop trust and establish closer and long-term presence. SMCs are also known for providing safe spaces where people can feel heard and engage the community through volunteering (Harris, 2018). As a study by Dayson et al. (2018) stresses, they play a special role in the social ecosystem with a unique service offer, a person-centred approach, and their closer position to community that allows them to reinforce community bonds. These functions are particularly critical to the health of British society. The current political climate is characterized by instability, cuts to the welfare system, and social isolation (Hopgood & Cairns, 2016). The independent inquiry led by Julia Unwin on Civil Society Futures reports that between 2010 and 2016, £26 billion in UK social security and tax credits spending were cut (Unwin, 2018). Local authorities have suffered 49.1% from central government between 2010 and 2018 (Unwin, 2018). Despite the obvious value added of SMCs in mitigating the social impact of such cuts, Hunter and Cox (2016) argue that the “risk that many small charities will disappear is an increasingly real one” (p.4). This section explores some of the trends that might contribute to their vulnerability.

A decrease in government grant funding has been accompanied by an emphasis on other forms of disbursing public funding, such as contracting. For example, in 2003/04, over half of the charitable sector income came from the government. This percentage has been falling: grants

made up only 17% of the voluntary sector's income from government in 2012/13 (Civil Society Almanac, 2018). The UK Civil Society Almanac (2018) finds that small charities are funded on average 58% from individual donation with only around 15% from government. According to the same report, "the proportion of income from government going to small charities has also decreased from 2.7% of the total in 2006/07 to 2.1% in 2015/16" (Civil Society Almanac, 2018).

Data shows that a small number of leading charities have been monopolizing the great majority of resources (UK Civil Society Almanac, 2018, Hunter & Cox 2016). The growing inequality in the UK seems to reflect in a growing inequality amongst charities; as the report on Civil Society Futures stresses "concentrations of wealth come with concentrations of power, highlighting the gap between the privileged and powerful and the poor and powerless" (Unwin, 2018).

In order to capture both public donations and government grants, large charities invest greatly in PR (Ravenscroft, 2017). These are investments that are obviously out of reach for small and medium-sized charities. In other words, it takes money to attract funds. Without professional fundraisers, which are some of the best paid positions in the charity sector, CSOs might lack the skills and time to attract funding (Harris, 2018).

Meanwhile, competitive contracting has become a favoured mechanism to allocate public resources and an important income stream for UK charities. However, here SMCs face an uneven playing-field (Hunter & Cox, 2016). Through modes such as the 'prime provider', the government contracts a main provider which then subcontracts to smaller ones; the large bids made available are out of reach for SMCs (ibid). This creates complex power dynamics. The organizations who can manage such large bids tend to be private sector companies, with different organizational cultures and values. Smaller charities are excluded from engaging directly with the government agency and find themselves instead in the position of fulfilling contract clauses that they have not negotiated (Hunter & Cox, 2016). Moreover, the gap in resources availability between private sector firms and smaller charities is so stark that, according to Harris (2018), private sector companies or large charities tend to dictate working styles, norms and assumptions.

Meanwhile, charities are being asked to prove their impact. However, it is harder for SMCs to capture the value that they might provide under the logic of impact assessment (Hunter & Cox, 2016). In addition, impact assessments are expensive, and time consuming. While SMCs might be able to showcase the value of their work through storytelling and case studies, this type of qualitative evidence is not regarded as having the same legitimacy as quantitative studies which measure outputs and outcomes. This means that SMCs find themselves in the position of having to translate their value to a different language spoken by the donor which makes invisible the very essence of their work. In 2012, 25% of all charities did not measure impact at all; the number almost doubles for organizations with an annual income of less than £100,000 (Hunter and Cox, 2016). This is also because the marginal cost for evaluation is higher for SMCs compared to larger charities. More fundamentally, performance management is perceived as making charity work feel more business-like: many charities reject such an approach that encourages them to do more with less. As Hunter and Cox (2016) explain, being able to demonstrate impact does not say much about the way a charity's work can be valued and respected within a community

A study by Hopgood and Cairns (2016), shows how the concept of sustainability has become a criterion for charities to receive support. According to this study, sustainability is utilised without much unpacking or consideration for how the charity works and creates changes in the

community. The concept of sustainability has become a buzzword that comes along with recommendations to diversify income streams, rely less on grants, generate independent revenues, become more enterprising, and scale up. However, Hopgood and Cairns (2016) argue that having too many funding streams is not always good: it might mean that organisations will have to engage with 'too many masters' and spend too much time complying with various sets of requirements.

SMCs are considered more responsive and flexible because their key staff, volunteers and trustees take on multiple roles (Dayson et al., 2018; Frost, 2018). However, Harris (2018) finds that SMCs tend to be dependent on the personal qualities and networking skills of one or few individuals. Applying and managing grants and contracts takes time. The capacity of SMCs might get eaten up by bureaucratic duties, challenging their capacity to plan and sustain the quality relationships they strive for in their work. For this reason, having a significant percentage of funding coming from restricted income could be a cause of organisational unsustainability – especially when staff are overloaded, and there is no energy to think and develop the organisation strategically (Hopgood & Cairns, 2016).

SMCs rely on a series of non-financial resources and the focus on financial sustainability might be too narrow. For example, the trend towards professionalization might be accompanied with the loss of volunteers. SMCs are better able to attract volunteers compared to larger charities: Dayson et al. (2018) find that small charities maintain 5.62 volunteers for £10,000 of income received, while this number goes down to 0.02 for the largest charities.

The trends discussed above all stem out of more profound cultural shift that some critics have defined the 'marketised welfare state' in which the government applies more business-like management systems to public spending (Harris, 2018). SMCs are asked to compete with larger institutions, proving their social impact according to the standards of the large donors.

Ravenscroft (2017) reports that council services have been cut by 40% since 2010. Such austerity measures, including cuts to public services and local authority budgets, have affected in particular disadvantaged communities and minority groups. According to the Civil Society Futures report, more than one in 10 people in the UK (14.2 million people) has lived below the poverty line for the last two or three years: the necessity for SMCs' community-led approaches is needed more than ever. Smaller charities will have a key role in coordinating advocacy work to ensure marginalised and underserved communities receive the access to needed resources. For example, people with disabilities are more likely to live in poverty (Unwin, 2018). However, given the reduced public spending, local charities experience less access to local government funding.

Meanwhile, a 2010 survey by the Charity Commission found that smaller charities have a tendency to collaborate - half of the charities surveyed had collaborated with other charities in the past two years (*Strength in Numbers Small charities' experience of working together* 2010). Collaboration is both formal and informal. 82% of those who had worked with another charity recognized the collaboration as successful, whilst 28% reported cost saving thanks to the collaboration. The report, however, points out that collaborations were deemed more problematic when charities join forces to bid for contracts.

3. Small and medium sized charities as partners in development

North-South partnerships have been widely discussed in recent years as an opportunity to expand Southern partners' networks, to strengthen their capacity, and build their resilience. Coventry, Watson, and Blight (2015) found that Southern CSOs value Northern partners for their capacity building efforts, especially for sharing technical competencies, and for the opportunity to establish a long-term close relationship with the northern partners. North-South partnerships are also regarded as opportunities to: articulate mutual learning; encourage intercultural knowledge exchange; facilitate Southern partners to access resources; carry out more innovative research; and; develop long-term relationships between partners.

Meanwhile, some critics question the feasibility of establishing more equal partnerships. The literature stresses that in reality North-South relationships are permeated by power dynamics. In fact, while the expression 'North-South partnership' has joined the ranks of the development buzzwords, implementing balanced and equitable partnerships is particularly hard. Money continues to influence the way decisions are made: states: "Southern NGOs are financially overshadowed by their northern counterparts" (Fowler, 2015).

Another criticism of North-South partnerships is that capacity development efforts are thought of in a narrow sense: they focus on sharing with Southern partners the skills to deal with the Northern reporting practices and requirements. In this sense, they can be associated with a solidifying of the unequal power relationship in which Northern partners dictate ways of working. In recent years, joint bidding has been a strategy to encourage more partnerships. However, Fowler (2015) finds that the Northern partner tends to lead the contract, while the Southern partner is relegated to the role of subcontractor, thus replicating the usual power dynamics.

On the one hand, Northern donors continue to channel funding to Southern CSOs through domestic CSOs. Meanwhile, most recently INGOs have been challenged to demonstrate their value added, especially in light of the recognition of a dynamic and strong Southern civil society (OECD, 2013). In fact, the context around civil society has been changing rapidly and new ways of collaborating and funding are becoming possible. For example, South-South cooperation is becoming more common (Gosovic, 2016). Some Northern charities are also deciding to move their head offices to the South (a process known as disintermediation) (Williams, 2018). This being said, it seems that small and medium sized CSOs in the South continue to lose out in these arrangements, which favour larger CSOs which can more easily comply with standards (Gioacchino, 2019).

The discussion on North-South partnerships focuses on larger institutions. In the UK, the large development charities are so visible that they risk overshadowing the contribution of SMCs to international development. Based on the characteristics discussed in the previous section, there are reasons to think that SMCs might behave differently as development partners. Yet, the role of SMCs in international development is understudied. The remaining part of this section pulls on two reports:

- A research paper on the value, roles and contributions of small and medium-sized Canadian civil society organizations (SMOs) as development actors (Tomlinson, 2016).
- A study answering the question "Do small UK international development charities make a valuable and distinctive contribution to international development?" (Jeffery, 2014).

Overall, the two studies present SMCs as development actors able to deliver high quality initiatives. They are able to minimize costs while working in challenging contexts with a more personalized style. In particular, the two studies highlight the following added values of small and medium SMCs.

Nuance and Flexibility

The size of SMCs means that they can afford to set up simpler internal bureaucratic processes. With fewer staff and therefore more direct decision-making mechanisms, SMCs can design more nuanced and adaptive responses. Engaging with challenging local contexts, a flexible approach can be very useful to address a situation promptly. This responsiveness is regarded as an added value in humanitarian work. For example, Jeffery (2014) reports that small INGOs are the first one to appear in a site post-crisis. Flexibility also means that SMCs can tailor their programmes and work more easily in partnerships with local organisations.

Moreover, with faster decision making, the responsiveness of the organisation can allow for changes in direction if a programme does not bear the expected results. For example, Tomlinson, (2016) describes a case study in which an organization dismantled a programme and redirected resources following an assessment. Such flexibility is enabled by closer local relationships, which allow organisations to be more intimately aware of changing local context.

Tomlinson (2016) reports a powerful example of how flexibility might benefit SMCs. A donor reported that two organizations, a larger INGO and a smaller one, were due to purchase specialised medical equipment. Without complicated in-house procurement and procedural constraints, the smaller organisation was able to buy a second-hand machine and save 70% compared to the larger organisation. As this example suggests, flexibility enable smaller organisations to be also more efficient with their resources.

Specialisation and innovation

Compared to larger charities, SMCs tend to focus their work on more narrow and specific topic areas, developing niche skills and expertise. The case study on Canadian charities reports that more than half the respondents from SMCs emphasised the value of specialized work: they chose to concentrate their work at the level of programming and in terms of geographical area. Moreover, the study reported that these SMCs were able to tap into highly specialised volunteers to engage in foreign programmes. Developing a niche focus, SMCs can become experts on specific topics and therefore articulate compelling cases to inform and guide partner organisations and decision makers. Jeffery (2014) found that all SMCs surveyed recognised themselves as having a niche area of expertise, and over half of the respondents focused their work in only one geographical area.

The combination of specialisation and flexibility makes SMCs more likely to act as laboratories for innovation. Tomlinson (2016) highlights organisations able to experiment with both income streams, programme design, and governance systems.

Local partnerships and ownership

Jeffery (2014) found that all SMCs surveyed took pride in long-term partnership with Southern partners. In her study, the median length of partnerships amongst the surveyed organisations was 6 to 7 years. Articulating work through consolidated partnerships was also

considered a strategy to develop mutual trust. For example, SMCs provided a range of support mechanisms to Southern partners characterised by flexibility and long-term core support to encourage organisational development. These types of relationships are by nature dynamic and require constant exploration and renegotiation based on changing needs.

The two reports find that SMCs are more likely to work intimately and equally with local counterparts and encourage local ownership of results. The size of the UK partner enables a more open communication, which is the baseline for a more equal relationship between partners. Surveyed Southern partners reported having greater confidence in smaller Northern partners and finding them more supportive and accessible. Moreover, the tendency to articulate closer and long-term partnerships was found to improve the quality of capacity building programmes as they can be tailored and adapted to local context.

A more human approach development

Thanks to the development of closer relationship with local partners, SMCs have the opportunity to view development processes from a more human perspective. This approach might contribute to deeper intercultural dialogue, generating more sensibility towards international issues, and bringing the UK public closer to selected issues (Jeffery, 2014). For example, despite the widespread aversion amongst SMCs for impact measurement tools, SMCs are known for their ability to share evocative and powerful narratives of human transformation. Such capacity is connected to a more personal approach and a focus on process in development work. This approach invites and inspires voluntarism. It also places SMCs in a good position to share development education in the UK. According to Jeffery (2014), UK SMCs show high level of commitment and passion towards their specialised causes. Such passion can improve both the quality of relationships and the capacity to fundraise in UK communities. As a Southern partner in Jeffery's study commented: "They give a personal, human and professional touch proving small is beautiful" (p.13).

Challenges of international SMCs

Despite the unique value added of SMCs working in development, international SMCs are under pressure to prove impact in quantitative terms and scale up their work – all this while unrestricted funding continues to shrink. UK SMCs challenges to respond to donors' requirements risk overloading the organisations with added bureaucratic layers, distracting them from their core work. Moreover, SMCs might not be the appropriate partners to deliver large scale projects; if donors value scale over quality, SMCs might be overlooked. Moreover, their limited capacity means that SMCs might not have the time to engage in more strategic networking, therefore limiting their access to resources.

4. Strategies to sustain the essence of small and medium sized charities

The literature emphasises that SMCs struggle to find appropriate funding that enables them to *be* small. Instead of asking SMCs to be something they are not, donors could learn to recognise and value their distinctiveness. Below are selected recommendations that emerged in the reviewed literature about supporting SMCs:

Appreciate the small by simplifying procedures

Funding avenues should provide visibility and appreciate the added value of smaller organisations. Jeffery (2014) suggests that donors need to calibrate their expectations and consider the limited capacity of SMCs. This can be done by ensuring that reporting requirements and procurement process are simple and accessible.

Most importantly, donors could learn from smaller organisation and be willing to engage in more personal and open conversations: for example, asking SMCs what they actually need to do their work (Hopgood & Cairns, 2016).

Reconsider the value of core funding

Donors want to fund results – however, SMCs are less likely to deliver results if they do not have the organisational capacity to do so. There is a wide agreement in the literature that long-term core funding remains the most appropriate form of supporting SMCs. For example, Hopgood and Cairns (2016) argue that “It would also be very helpful if more funders were prepared to consider continuation funding as a mark of development and success rather than a sign of dependency” (p. 42).

Core funding is so important because project grants and contracts that are allocated to specific service delivery can limit the opportunity for smaller organisations to experiment, think creatively and be flexible. For example, a study on core funding points out that restricted funding hampers flexibility because any changes in budget allocations based on necessity or changing context needs to be renegotiated with the donor (Cairns, Mills, & Ridley, 2013).

Donors should also think about what it might look like to support the SMCs’ organisational development. This type of funding could come along with opportunities for capacity building and experience sharing between grantees. For example, Hunter and Cox (2016) suggest donors could provide access to consultants and other help that organisations might not have access to. Support with disseminating results and sharing lessons learned might also be welcomed. However, all these efforts should be targeted to help organisations strengthen their own working style, rather than to convert SMCs in a poorer version of large organisations.

Hopgood and Cairns (2016) argue that the following is the best model for helping SMCs become more resilient:

“The most supportive thing an independent funder can offer is core funding for a reasonable period with light touch reporting requirements, and a sympathetic ear if things don’t go to plan” (p. 49).

Engaging with SMCs in a conversation around sustainably

Hopgood and Cairns (2016) point out that donors have unrealistic expectations around sustainability: on the one hand, they expect an organisation should have long-term impact and financial sustainability, and on the other hand, they provide short-term funding.

They agree with Ravescroft (2017) in suggesting that organizations should engage in participatory conversations around what it means to be sustainable. Such reflection could expand the imagination beyond financial sustainability thinking of how different grants, income generating

activities, volunteering, etc. might contribute to their work over time (Ravenscroft, 2017). Donors could provide spaces to encourage SMCs to host more critical conversations around sustainability.

Provide proportionate and appropriate contracts

When contracting for service delivery, the public sector should account for the specific needs and added values of SMCs (Ravenscroft, 2017). Hunter and Cox (2016) report that in 2014 The House of Commons Public Accounts Committee evidenced that suppliers risk becoming 'too important to fail' and argued the government should disaggregate contracts to ensure SMCs have fair opportunities to apply.

Encourage different type of partnerships

There is a need to explore more innovative types of North-South partnership that can encourage equality. For example, an OECD publication (2013) suggests that it would be valuable to reassign budget holding to the Southern partners (OECD, 2013). The same publication points out that SMCs could benefit from collaboration across sectors including alliances with public, private and academic actors.

Within international partnerships, Fowler (2015) stresses that "there is a need to undo a vertical mind-set that sees intermediating INGOs, in a rich to poor aid chain, as the aspirational model". To strengthen the possibility for SMCs to collaborate, donors can provide more opportunities for SMCs to come together, share learning based on different experiences, and build the trust needed to establish trust (Jeffery, 2014). Donors can facilitate collaboration by providing clear guidelines that encourage equity between partners. They can set the tone and account for additional costs to strengthen relationships between partners and ensure capacity building.

Exploring with more participatory grant making models – for example, 'Collaborative funding in place'

A report by Buckley (2017) explores the role of Collaborative Funding in Place. According to the report this model is appropriate as a response to austerity in a specific geographic location.

For example, the model has been piloted by Bristol council as a response to funding shortages. The Council, in the face of funding cuts, started to see itself as an enabling actor for the community. It decided to consolidate various grant streams to create a fund that was co-designed with the help of a range of local actors, including SMCs. The fund was made accessible to organisations of all sizes.

Buckley (2017) highlights six case studies in which funders across sectors came together in a specific underserved geographical area and combined different types of private and public funding. The study finds that this type of collaborative funding required clarity on roles, without it, the process could generate confusion and insecurity. Yet, all case studies found that working across sectors deepened the understanding of different funders and allowed for more conversations with civil society organizations.

Evaluation

Hunter and Cox (2016) explain that, as donors assign great importance to demonstrating their money is well spent, many evaluation tools have emerged. However, since the skills required to implement them are very specialised, utilising them can become cost prohibitive. Hunter and Cox (2016) argue that it might be useful for SMCs to receive support to evaluate their work along with funding.

They explore different types of impact assessment tools that can be used to translate qualitative results into quantitative numbers. Such tools include:

- **Cost–benefit analysis (CBA):** CBA measures value by demonstrating how much direct and indirect saving an intervention would generate to public bodies;
- **Social return on investment (SROI) analysis:** SROI captures value as perceived by stakeholders and attributes monetary values to social outcomes.
- **Wellbeing valuation:** uses financial proxies to measure increase in people’s wellbeing.

All these tools provide only partial accounts of value and financial proxies tend to be based on rough estimations (Hunter & Cox, 2016). Since SMCs will still face challenges in demonstrating their value Hunter and Cox (2016) suggest that umbrella organisations could support SMCs to carry out impact evaluation studies.

Donors could also welcome more qualitative ways of measuring impact, which might be more appropriate for SMCs because they offer more richness and nuance, giving visibility to stories of social transformation.

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Key websites

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- UK Civil Society Almanac: <https://data.ncvo.org.uk/almanac18/>
- Institute of Voluntary Action Research (IVAR): <https://www.ivar.org.uk/>

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