OSCR

Scottish Charity Survey 2018 – Stakeholders

March reporting

Contents

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Project background

Project objectives

Method & Sample
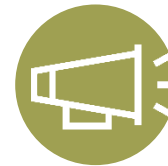
Summary of findings

Current issues

Trust

Perceptions

Contact

Communications

Website

Charity status

Media coverage

Background

Provides regulatory, administrative and advisory services to Scotland's approximately 24,000 registered charities

Progressive commissioned to conduct 2018 wave of research

Commissioned annual external stakeholder surveys to collect the attitudes of target audiences

Two stage research with Stakeholders and General Public

Progressive conducted the 2014 wave of research as well as the most recent wave of research in February/March 2016

This document reports on findings from Stakeholders

OSCR
Scottish Charity Regulator

Objectives

Issues facing charities
- Current issues
- Public trust

Perceptions of OSCR
- Opinions of OSCR
- OSCR's operations

Contact with OSCR
- Reasons for contact
- Quality of contact
- Communications
- OSCR's initiatives
- Website

Charitable status
- Benefits
- Drawbacks
- Impact
- Media coverage

Method & sample

Qualitative research

- 14 in-depth telephone interviews with stakeholders from charities registered with OSCR to determine content of questionnaire.
- Four different members of the Progressive exec team conducted the interviews.
- Conducted with a range of charities of different income bands:
  - o <=£2,000: 3 interviews
  - o £2,001 - £10,000: 2 interviews
  - o £10,001 - £25,000: 2 interviews
  - o £100,000+: 6 interviews
  - o Not specified: 1 interview
- Fieldwork dates: 24th January – 8th February 2018.
- Each interview lasted around 30 minutes.

Quantitative research

- Online self-complete questionnaire.
- Sent to charities registered with OSCR with an email address (23,703).
- 30 paper questionnaires were completed. These were issued only on request to charities.
- Final sample size – 4,343.
- A random sample of 1,215 was drawn from the 4,343 completed surveys, in order to match the size and profile of the 2016 survey sample in terms of income and region. This report refers throughout to findings from the random sample of 1,215, unless otherwise specified.
- Findings from the larger sample (4,343) are closely in line with the quota sample (1,215) which validates the continued use of the quota approach
- Fieldwork dates – between 14th February and 7th March 2018
- Margins of error for the results shown are between +/ 0.27% and +/-1.33% for the full sample of 4,343, and between +/-0.54% and +/-2.73% for the random sample of 1,215.
- The open ended responses have been analysed on the basis of the larger sample only.
- The quantitative element started a week after the news about aid workers in Haiti was first reported. Rather than avoiding the issue OSCR decided to ask a direct question about stakeholder's   views and how it may have affected them.

Notes for interpretation

- Where differences between years and/or subgroups have been highlighted, they have been tested to ensure that those differences are statistically significant. Year on year differences have only been highlighted between 2018 and 2016.

- On figures and tables, significant increases have been circled in green or highlighted with a green arrow. Significant decreases have been highlighted with a red arrow.

- Significance testing is a statistical tool for reducing the chance that random natural fluctuations in the data are reported as true findings. According to market research industry standard, a difference is deemed statistically significant if there is less than a 5% chance that it could be a false positive.

- For the purpose of clarity, not all statistically significant differences between subgroups have been highlighted. Full data tables that highlight all statistically significant differences between subgroups will be provided at alongside this report.

- As it is an anonymous survey method, online surveys allow respondents to provide critical responses without a misplaced fear of offence to an interviewer. As such, this can lead to a more realistic but negative response to questions.

- Due to rounding, the sum of responses may in some cases exceed or fall short of 100%.

- The sum of multi-coded or open ended responses will usually exceed 100%, except in those cases in which responses below a certain percentage have been excluded.

- Qualitative findings are marked with the following label:

- The qualitative element of this research took place before the news broke (week commencing 5th Feb) of charity workers behaviour in Haiti. The quantitative element started a week after the news was first reported.

Sample Profile Quantitative

Size of charity	2016	2018	Location	2016	2018
Size of charity			**Location**		
< £25,000 (Charity Population)	51% (57%)	51%	North East Scotland	13%	13%
>£25,000 (Charity Population)	49% (43%)	49%	Highlands & Islands	18%	18%
			South Scotland	15%	15%
Detailed size of charity			West Scotland	6%	6%
< £2,000	15%	15%	Central Scotland	7%	7%
£2,001-£10,000	18%	18%	Mid Scotland and Fife	15%	15%
£10,001-£25,000	18%	18%	Lothians	15%	15%
£25,001-£100,000	24%	24%	Glasgow	9%	9%
£100,000+	24%	24%	Outwith Scotland	3%	3%
BASE:	**1,215**	**1,215**	**BASE:**	**1,215**	**1,215**

Sample Profile Quantitative

Role in charity	Income <£25,000	Income >£25,000	Total 2016	Income <£25,000	Income >£25,000	Total 2018
Trustee	66%	50%	58%	69%	49%	59%
Member of Executive or committee	45%	37%	41%	47%	37%	42%
Volunteer	40%	23%	32%	44%	23%	34%
Paid employee	4%	34%	19%	2%	37%	19%
Charity adviser	3%	2%	3%	2%	3%	2%
Other	5%	4%	5%	3%	7%	5%
BASE:			1,215			

Involvement of volunteers in other roles

Charity involves volunteers in roles other than trustee:	Income <£25,000	Income >£25,000	Total 2018
No – trustees only	29%	22%	26%
Yes – both trustees and volunteers in other roles	68%	77%	73%
Don't know	2%	1%	1%
BASE:		1,215	

Q4. In addition to trustees, does your charity also involve volunteers in other roles?

Short Summary

- Funding remained the biggest single issue to charities (see slide 13)

- Charities reported a significant drop in trust in the last two years which has led to a reduction in donations (see slide 29)

- Opinions of OSCR remained positive and relatively unchanged (see slides 32-36)

- Satisfaction with OSCR was very high and in keeping with 2016 (see slides 43-54)

- Nearly two thirds (60%) were amenable to making it mandatory to display the OSCR logo (see slides 63-64)

- The importance of charitable status remains very high (see slide 76)

- There were some responses to the negative stories in the press (see slide 90)

Current Issues

Most important issues facing charities

- Findings from the qualitative work were in line with the quantitative. Funding was the most often mentioned issue for all sizes and types of charity. The issues around funding included: a lack of funding, the work involved in applying for funding, controls on how funding is spent and contract renewals

  - *Budget cuts. We are funded by the local authority and they are looking to save 75 million over the next 5 years. We are less impacted than some , but it's still a problem for us.*

  - *Lack of funding. We don't get any grants, or anything like that. We work on donations only. So that's challenging. The application process as a whole can be a pain as it's pages and pages of things you have to comply with, only to then be told you won't get the funding. You want to spend on things that are relevant, like wages or electricity and the trusts want you to spend it on other things.*

  - *Our work is heavily based on one contract. It's being re-tendered… Our biggest risk is we don't get the contract.*

- Finding volunteers was also commonly mentioned.

  - *It's all about volunteers, all charities need a suitable supply of volunteers on a regular basis but it's harder to get them now. 'We are in disarray because we can't get people to act as trustees of our scout council'. We rely on people from scout groups to volunteer with us and when they're short, we go short. 'Usually we're looking for people who have done their time at the coal face of scouting' e.g. after their child has left scouting.*

- A change in the third sector to being more professional was also mentioned as it requires more checks and balances. One respondent mentioned that she thought charities were more under the microscope these days.

- GDPR was also mentioned as an issue which was especially onerous for small charities who do not have a lot of staff resource.

Most important issues facing charities (OE)

	2018 B: 4,343		2016 B: 1,215		2014 B: 1,370	
	No.	%	No.	%	No.	%
Income/lack of funding	2,627	60%	575	47%	697	51%
Local authority cuts	90	2%	78	6%	69	5%
Running costs	322	7%	103	8%	64	5%
Less being donated	39	1%	15	1%	34	2%
Recruitment of volunteers/staff	686	16%	172	14%	163	12%
Recruitment of trustees	199	5%	41	3%	38	3%
Ability to continue with work	187	4%	32	3%	192	14%
Sustaining membership levels	209	5%	228	19%	164	12%
Rules/regulations	168	4%	126	10%	54	5%
Awareness	64	1%	59	5%	45	3%

Finance remained the most pressing issue for charities.

Base (all respondents)

Q5. What is the single most important issue currently facing your charity today?

Most important issues facing charities(comments)

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Difficulty of those involved, in committing time, as working lives are so busy.

The amount of paperwork and record keeping we have to do. So much time is taken up with paperwork and records. We struggle to find volunteers… we find all the training, record keeping etc. puts people off. SO much regulation and monitoring.

Lack of adult volunteers mean that we are restricted in the number of girls and young women we can provide services for, and we then have to operate waiting lists.

Reduced grant funding from the Local Councils and the need to approach local businesses or individuals.
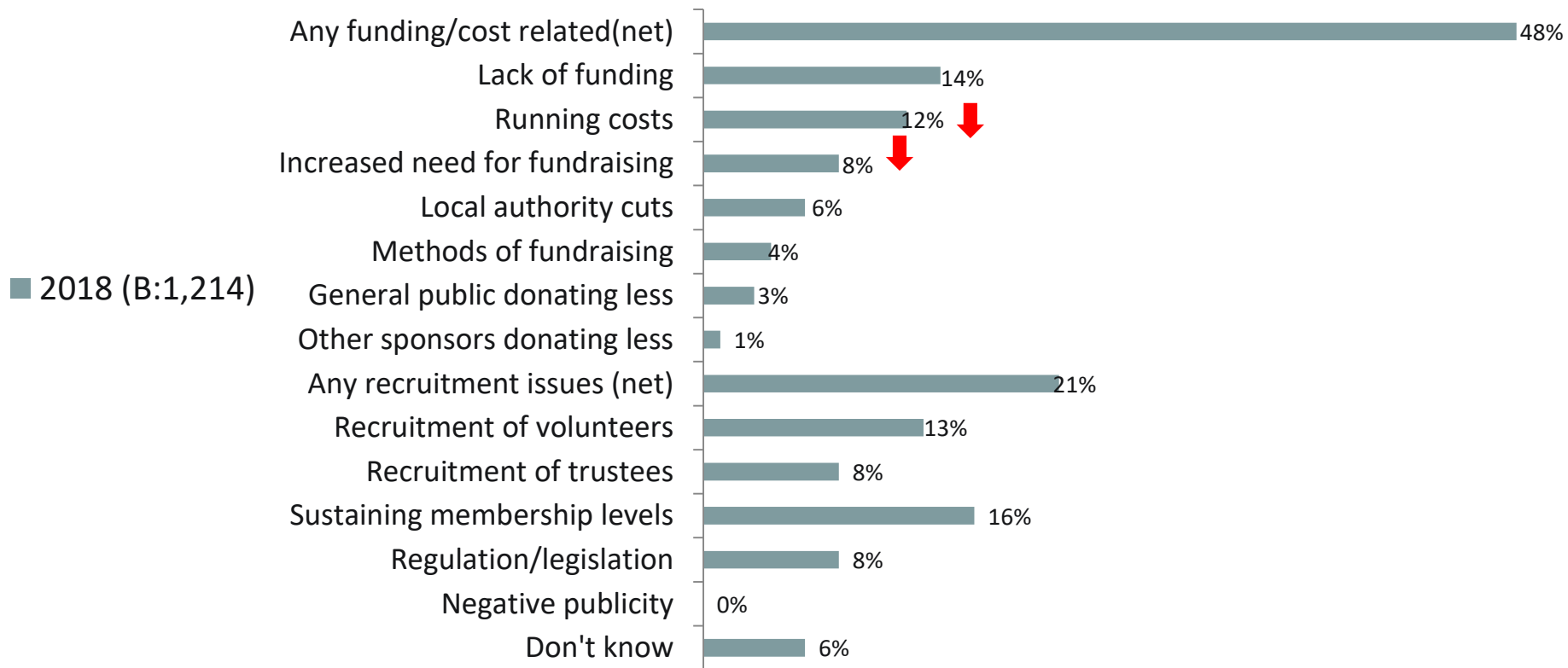
Falling membership is making its survival questionable

Guaranteed fundraising and the recruitment of trustees operating in a small rural community

Local Government funding cuts along with an increase in administrative and regulatory requirements

Fundraising is difficult as people are hearing so many negatives on how money is being used. My charity has no overheads as all contributions go directly towards the cause

Q5. What is the single most important issue currently facing your charity today?

14

Most important issue facing charities (prompted)

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Issue	2018 (B:1,214)	2016	2014
Any funding/cost related(net)	48%	46%	52%
Lack of funding	14%	-	-
Running costs	12%	14%	21%
Increased need for fundraising	8%	11%	15%
Local authority cuts	6%	11%	10%
Methods of fundraising	4%	-	-
General public donating less	3%	4%	5%
Other sponsors donating less	1%	-	-
Any recruitment issues (net)	21%	20%	19%
Recruitment of volunteers	13%	12%	13%
Recruitment of trustees	8%	8%	6%
Sustaining membership levels	16%	19%	15%
Regulation/legislation	8%	7%	7%
Negative publicity	0%	-	-
Don't know	6%	7%	6%

Funding and cost related issues were most frequently mentioned as the most important, followed by recruitment issues, in line with previous years. Despite the charity scandals at the time, negative publicity did not emerge as a top priority concern.

Base (all) 2014 – 1,370; 2016 –1215; 2018 – 1,214 (sample of respondents)

Q6a. Here we have a list of potential issues facing charities today. Which of these would you say is the most important issue facing your charity?

First or second most important issue facing charities (prompted)
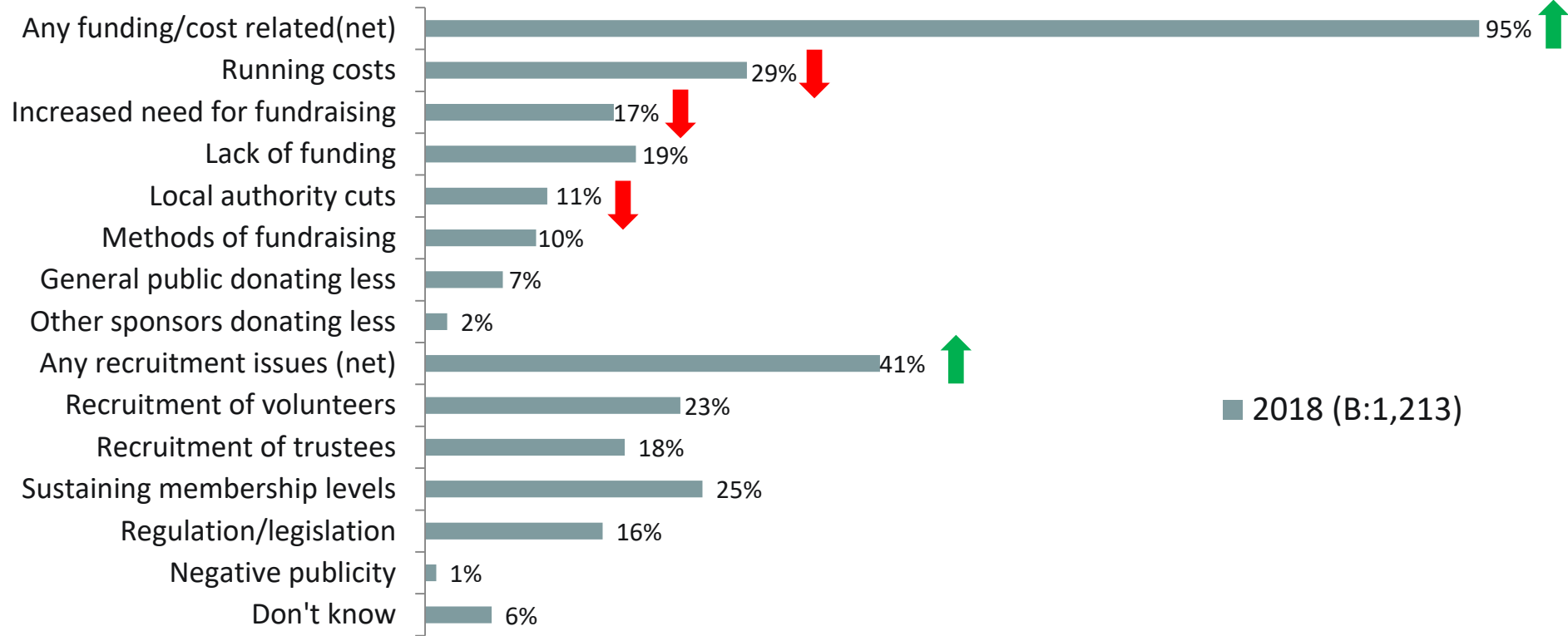
	2016	2014
Any funding/cost related(net) — 95% ⬆	69%	74%
Running costs — 29% ⬇	34%	42%
Increased need for fundraising — 17% ⬇	22%	29%
Lack of funding — 19%	-	-
Local authority cuts — 11% ⬇	16%	15%
Methods of fundraising — 10%	-	-
General public donating less — 7%	-	-
Other sponsors donating less — 2%	7%	9%
Any recruitment issues (net) — 41% ⬆	36%	34%
Recruitment of volunteers — 23%	20%	23%
Recruitment of trustees — 18%	17%	13%
Sustaining membership levels — 25%	28%	26%
Regulation/legislation — 16%	15%	16%
Negative publicity — 1%	-	-
Don't know — 6%	16%	16%

■ 2018 (B:1,213)

Funding and cost related issues were also most frequently mentioned as the second most important, followed by recruitment issues, in line with previous years, but significantly more so than in 2016. However, it should be noted that there are three new funding –related codes for 2018 ('lack of funding', 'methods of fundraising' and 'general public donating less'). Again, negative publicity did not emerge as a priority concern.

Issues affecting charities – sub groups

Size of charity (Employees)

- Charities with no staff (29%) were more likely than those with staff (1-5 emp. 17%, 6+ emp. 9%) to report recruitment of volunteers as an issue.

- Sustaining membership was more of an issue for charities with fewer employees (no emp. 26%, 1-5 emp. 33% vs 6+ emp. 10%).

- Financial issues were more pressing for charities with more staff members:
  - Local authority cuts (no emp. 6% vs 1-5 emp. 11% vs 6+ emp. 29%)
  - Increased need for fundraising (no emp. 15% vs 6+ emp. 23%)
  - Running costs (no emp. 22%, 1-5 emp. 36% vs 6+ emp. 40%)

Size of charity (Turnover)

- Smaller charities (under £25k) were more likely than those with a larger turnover to cite recruitment of volunteers (<£25k 32% vs £25k+ 13%)

- They were less likely than those with a larger turnover to cite certain financial issues:
  - Local Authority cuts (<£25k 6% vs £25k+ 15%)
  - Lack of funding (<£25k 16% vs £25k+ 21%)
  - Running costs (<£25k 21% vs £25k+ 37%)

Issues affecting charities – sub groups

Length of time established:

- The oldest charities were less likely than others to be concerned about Local Authority cuts (<4yrs 17%, 4-10 yrs 10%, 11-25yrs 13%, 26-50yrs 16% vs. >50yrs 4%).

- The oldest charities are much more likely to be concerned about sustaining membership levels (<4yrs 17%, 4-10 yrs 14%, 11-25yrs 21%, 26-50yrs 18% vs. >50yrs 48%).

What charities have done to address their main issue (spontaneous)

	2018		2016			2018		2016	
	No.	%	No.	%		No.	%	No.	%
Looked for other funding	1034	25% ↑	215	19%	Struggling to address this issue	224	5%	-	-
Fundraising/events	862	21% ↑	197	18%	Try and keep up to date with new legislation/regulation	181	4%	41	4%
Advertising/Publicity/awareness raising	722	18% ↓	280	25%	Appointed new personnel or strategy	137	3%	-	-
Encouraged new members	544	13%	170	15%	Looking for volunteers	91	2%	37	3%
Approached members/ friends or families of members or community	343	8% ↑	34	3%	Other	228	6%	-	-
Cost cutting	228	6% ↓	135	12%	Nothing	152	4%	-	-

Actions to address funding issues were the most likely actions to have been taken. Respondents were significantly more likely to have looked for other funding or undertaken fundraising or events than in 2016.

Base (all with an issue): 2016 - 1,113, 2018 -4087

Actions taken to address issues

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We have often had meetings regarding this issue however though people are willing to help at different opportunities they in the main reluctant or too busy to becoming too involved in committee representation

We need people to be sufficiently committed to keep things going. At the same time, we have to accept the times and commitment that people are able and willing to give - which is generally less than required.

Looking into registering with Justgiving to make it easier for donors to raise funds via the internet. Also planning to become part of two different schemes where people can donate as they spend online.

Local and national awareness raising. Offering shorter term roles, setting up job share type arrangements, recruitment drives

Looking at partnership working and collaboration with other groups.

We have reduced the activities taking place and tried to find new funds that may suit our functions.
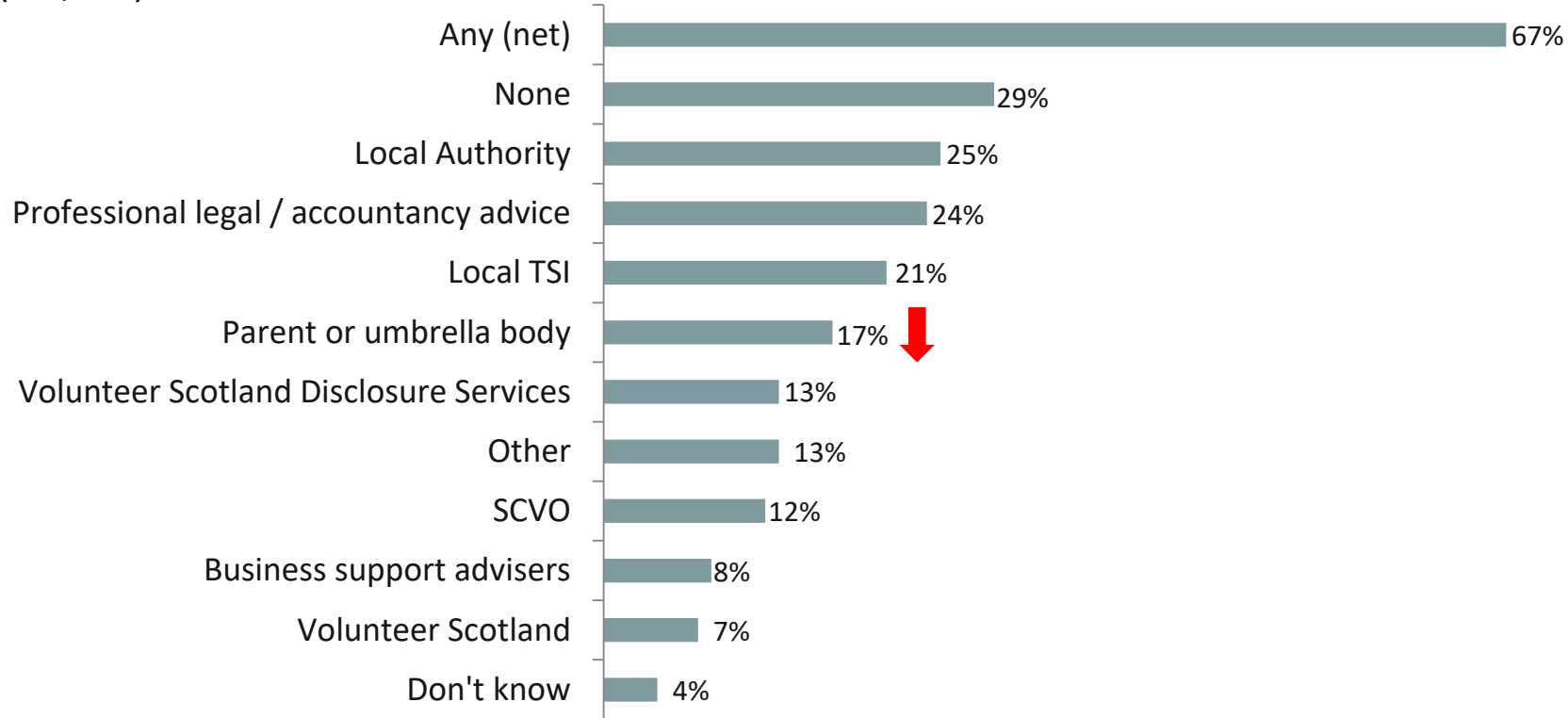
Tried to ensure that there is sufficient publicity in the local area so that people know what the society is doing through local press, local magazines, word of mouth and an annual coffee morning to keep us in the public view.

We have secured advice as cheaply as possible from leaders in the sector who can deal with things for us quickly and efficiently. This gives us reassurance as a charity and means we know that we have met the requirements imposed upon us. It relieves the volunteer trustees of a bit of the stress too.

Sought advice from support organisations

■ 2018 (B:1,215)

Category	2018
Any (net)	67%
None	29%
Local Authority	25%
Professional legal / accountancy advice	24%
Local TSI	21%
Parent or umbrella body	17%
Volunteer Scotland Disclosure Services	13%
Other	13%
SCVO	12%
Business support advisers	8%
Volunteer Scotland	7%
Don't know	4%

	2016	2014
	70%	67%
	30%*	33%*
	25%	27%
	26%	25%
	21%	20%
	24%	20%
	-	-
	7%	7%
	12%	13%
	6%	8%
	-	-
*Included Don't Know		

In line with previous years, around two thirds had sought advice from another organisation. The most popular organisations were Local TSI, Local Authority and professional legal/accountancy advice, with similar proportions to 2016 mentioning them. The proportion who sought advice from a parent or umbrella body had declined.

Base (all) 2014 – 1,370; 2016 – 1215; 2018 – 1,215 (sample of respondents)

Q8. Which, if any, third sector support organisations has your charity sought advice or help from within the past 2 years?

Sought advice from support organisations – sub groups

Size of charity (Employees)

- Charities with 6+ staff were more likely than smaller charities to have used 3rd Sector organisations (6+ emp. 89% vs. no emp. 61%, 1-5 emp. 78%).

Size of charity (Turnover)

- Larger charities were more likely than those with a smaller turnover to have used 3rd sector organisations (<£25k 61% vs £25k+ 79%).

- Larger charities were significantly more likely than smaller charities to have used each of the organisations listed.

Length of time established:

- The youngest charities were more likely than the oldest to have approached a 3rd Sector organisation (<4yrs 80%, 4-10yrs 75% vs. >50yrs 65%).

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Satisfaction with advice

2018 (B:817)

	2016	2014
Yes	90%	92%
No	5%	4%
Don't know	5%	4%

Yes — 89%

No — 6%

Don't know — 5%

In line with previous years, the overwhelming majority were satisfied with the advice received from support organisations.

Base (all) 2014 –918; 2016 –1215; 2018 – 817 (sample of respondents who had sought advice)

Q8a. Were you satisfied with the input or advice you got from this or these organisations?

Satisfaction with advice – sub groups

Size of charity (Employees)

- Charities with 6+ staff were more likely than charities with no staff to be satisfied with advice (6+ emp. 94% vs. no emp. 88%).

Size of charity (Turnover)

- Larger charities were more likely than those with a smaller turnover to be satisfied with the advice (<£25k 86% vs £25k+ 91%).

- Larger charities were significantly more likely than smaller charities to have used each of the organisations listed.

Trust
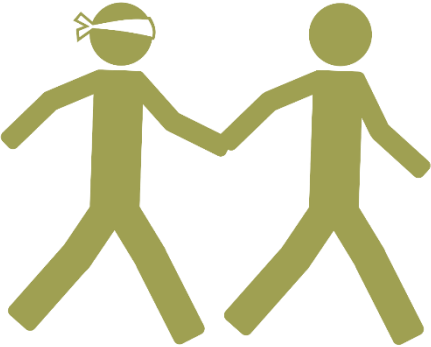
Public support

- One respondent mentioned that there is less trust now from the public but it was not a strongly expressed view across the sample.

- The negative press coverage was mentioned as being one of the things that erodes public trust in charities. This was mentioned in general and not in connection to the press coverage of aid workers in Haiti.

  - *Media coverage of the charity world has raised public concerns - the public increasingly want to make sure charities are who they say they are, and that they are legitimate concerns.*

- Respondents mentioned that the public are more interested in knowing where their donations go to and they felt this was as a result of bad press about charity staff being paid 6 figure sums.

  - *Most the charities are doing very very good work. But if people are being asked to donate, they want the bulk of the donation to go towards doing good. Rather than paying someone a great big salary. I understand though that sometimes you need people capable of doing these jobs and they are expecting these salaries.*

  - *Aware that people have become more interested in finding out who their donations are going to, over recent years. But, they are always content to make donations when the purpose of the 'band' is explained.*

- Respondents mentioned that transparency in all they do was one of the main ways to build trust.

- OSCR was mentioned by one respondent as doing a good job in building people's confidence in charities.

  - *OSCR has done a good job after people's confidence had been shaken in charities over last 20yrs or so. Bad eggs always hit the press once every 4-5 years - doesn't mean the charity sector is in a mess. Thanks to OSCR, people don't have such fears about charities any more. The fact OSCR are there, they're monitoring, charities have to make annual returns, that reassures the public.*

Building Trust

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Financial Governance

- The general opinion was that this is an important issues and good financial governance was a key way of increasing trust with the public.

- Respondents often mentioned the bad press that charities have had in connection with poor financial management. Kids company was mentioned as a point in case which is an indication of how long press coverage stays in the minds of people.

- This was thought to be more important to larger charities, small local charities felt it was less of an issue.

  - *Over recent years people have become more aware of these questions. Sometimes people do ask what their money will be used for. This is an issue the staff team discuss - they are aware they are responsible for using public money responsibly*

  - *Very important simply because reporting to OSCR, and because the charities are connected to the council, the public will see what's happening with them. It's important there is good governance as these charities are for the public good*

Open Governance

- Open governance and transparency was also seen as very important especially in light of the public's increased likelihood to seek information about charities accounts.

- The need for this was strongly expressed by charities of all types.

  - *Governance is important to the charity - open, honest, transparent governance means that problems can be identified and resolved*

Building Trust

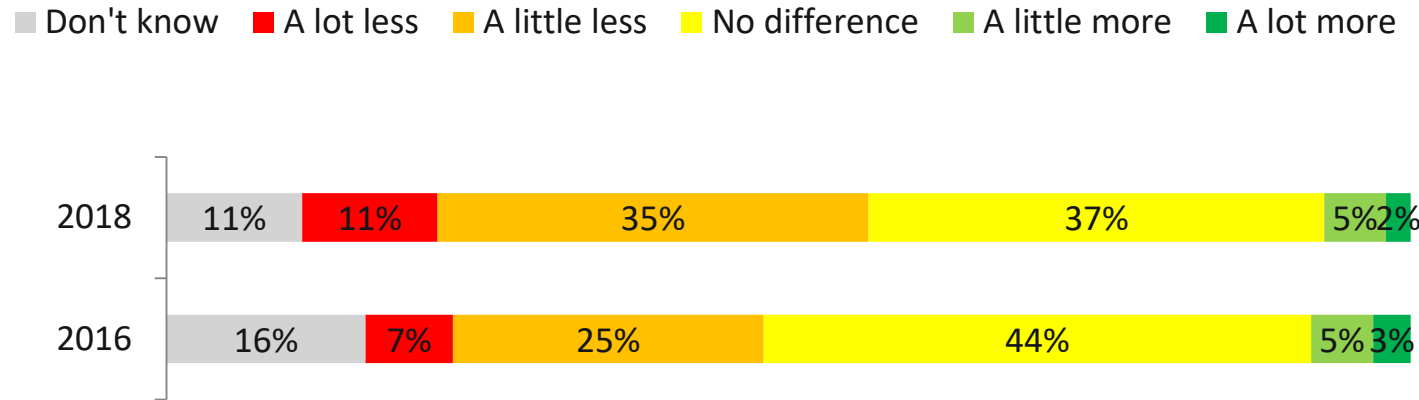**Knowing who is running the charity**

- Overall this was not thought to be really important as members of the public would not know who the trustees were anyway. However, it was thought to be important for volunteers who give their time to charities.

  - *It's important for the band members to know who is on the committee, so if they are unhappy about something, or they want to make a suggestion, they know who to go to.*

- One respondent said that staff are wary about making themselves known publicly, this was a women's aid refuge.

Knowing the charity is regulated

- Some felt this was less of an issue than financial and open governance to the public but at the same time they felt it was important for themselves to know they are regulated as it builds reassurance that they are doing things properly.

  - *Simply because the regulation helps to make sure things don't go off track, it's an extra check to make sure that every thing is being run in accordance with the articles on which the charity has been founded on.*

  - *That's a big one. We have all seen various scandals before regulation and how there was self policing before OSCR, it didn't work*

- This was thought to be important in the context of collecting donations and the public being able to see the charity is regulated.

  - *If we have a proper collecting bucket, with a proper label that says where the money's going and a proper charity number, I'm sure that is extremely important.... so that people know we are a recognised body, with a recognised charity number.*

General public's trust in charities

Legend: ■ Don't know ■ A lot less ■ A little less ■ No difference ■ A little more ■ A lot more

	Don't know	A lot less	A little less	No difference	A little more	A lot more
2018	11%	11%	35%	37%	5%	2%
2016	16%	7%	25%	44%	5%	3%

Mean Score (1 to 5)
2.48 ↓
2.67

Charities were more pessimistic in 2018 about public trust. 46% rate public trust in charities as a little or a lot less than 2 years ago, compared with 32% in 2016. This was mirrored in the general public survey by an increase in the proportion who feel that they trust charities less (2016 35%, 2018 44%).

Base (all) 2016 –1215; 2018 – 1,215 (sample of respondents)

Q9. How would you rate the current trust in charities compared to 2 years ago?

General public's trust in charities

Effect of decreased trust	2018 % (Full sample)	2016 %
Reduced donations	8%	8%
Increase scrutiny	-	7%
Decline in membership	3%	5%
No effect	75%	75%

Base (all who say trust has decreased) 2016 –358; 2018 – 1,993

Q9a. What, if any, effect has this decrease in public trust had on your charity?

General public's trust in charities – sub groups

Size of charity (Employees)

- Charities with 6+ staff (59%) were more likely than those with no staff (41%) to think that trust was a little or a lot less than two years ago.
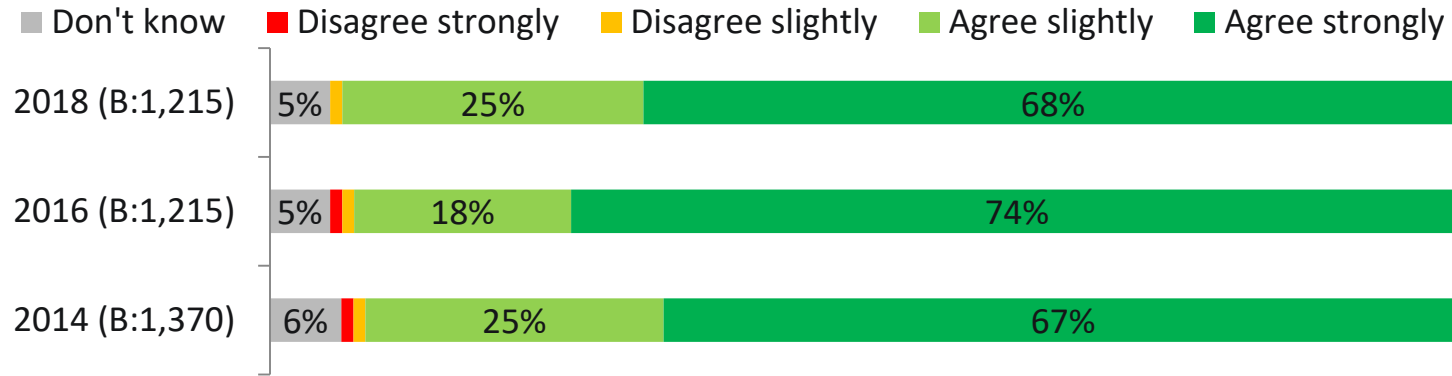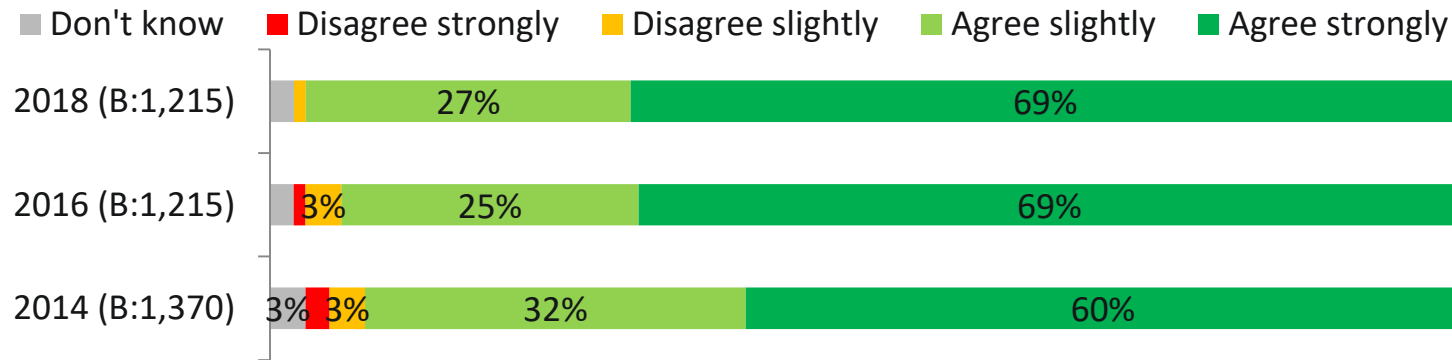
Perceptions of OSCR

Opinions of OSCR

I trust OSCR to treat charities fairly

Legend: ■ Don't know ■ Disagree strongly ■ Disagree slightly ■ Agree slightly ■ Agree strongly

	Mean Score (1 to 4)
2018 (B:1,215) — Don't know 5%, Agree slightly 25%, Agree strongly 68%	3.70
2016 (B:1,215) — Don't know 5%, Agree slightly 18%, Agree strongly 74%	3.77
2014 (B:1,370) — Don't know 6%, Agree slightly 25%, Agree strongly 67%	3.69

Completing the annual return for OSCR is just part and parcel of what we do now

Legend: ■ Don't know ■ Disagree strongly ■ Disagree slightly ■ Agree slightly ■ Agree strongly

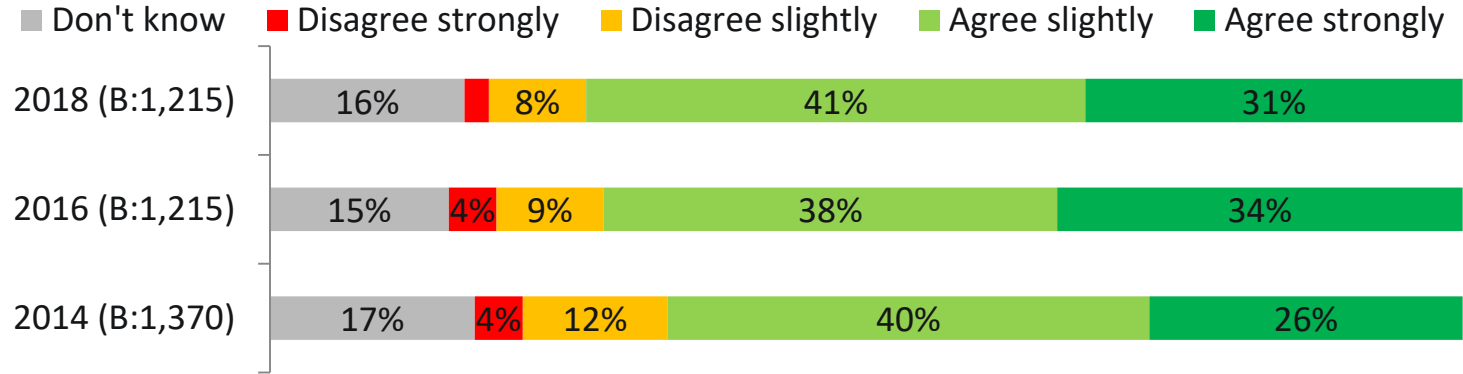|	Mean Score (1 to 4)
2018 (B:1,215) — Agree slightly 27%, Agree strongly 69%	3.68
2016 (B:1,215) — Disagree slightly 3%, Agree slightly 25%, Agree strongly 69%	3.66
2014 (B:1,370) — Don't know 3%, Disagree slightly 3%, Agree slightly 32%, Agree strongly 60%	3.55

Q23a-e. Thinking more generally about OSCR, we are now going to show you some statements that other people have made about OSCR. For each one, please select one box to show to what extent you agree or disagree with it.

Base (all)

Opinions of OSCR

OSCR does its best to minimise the burden of regulation on charities

Legend: ■ Don't know ■ Disagree strongly ■ Disagree slightly ■ Agree slightly ■ Agree strongly

Year	Don't know	Disagree strongly	Disagree slightly	Agree slightly	Agree strongly	Mean Score (1 to 4)
2018 (B:1,215)	16%		8%	41%	31%	3.21
2016 (B:1,215)	15%	4%	9%	38%	34%	3.20
2014 (B:1,370)	17%	4%	12%	40%	26%	3.07

OSCR is an innovative regulator

Legend: ■ Don't know ■ Disagree strongly ■ Disagree slightly ■ Agree slightly ■ Agree strongly

Year	Don't know	Disagree strongly	Disagree slightly	Agree slightly	Agree strongly	Mean Score (1 to 4)
2018 (B:1,215)	35%		6%	38%	19%	3.16
2016 (B:1,215)	39%		5%	32%	20%	3.18
2014 (B:1,370)	39%		6%	36%	16%	3.07

Q23a-e. Thinking more generally about OSCR, we are now going to show you some statements that other people have made about OSCR. For each one, please select one box to show to what extent you agree or disagree with it.
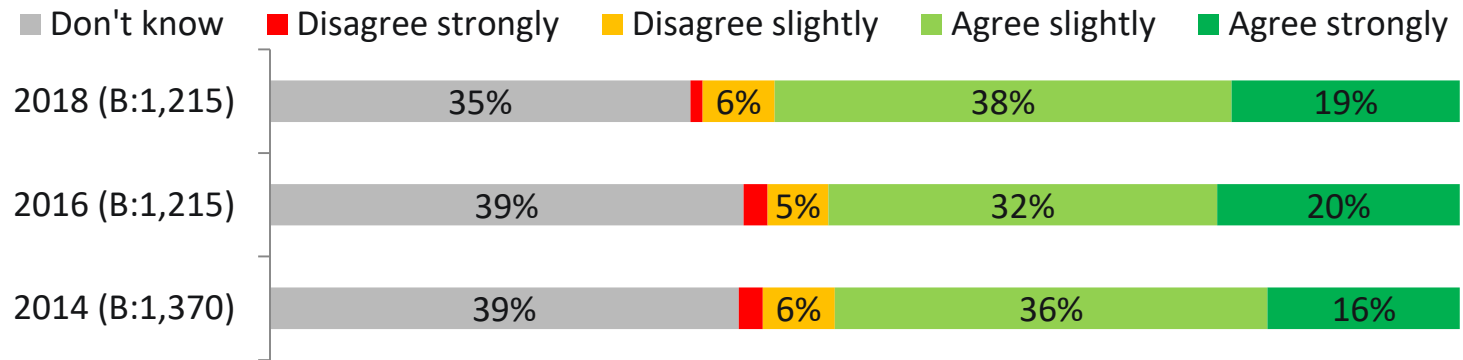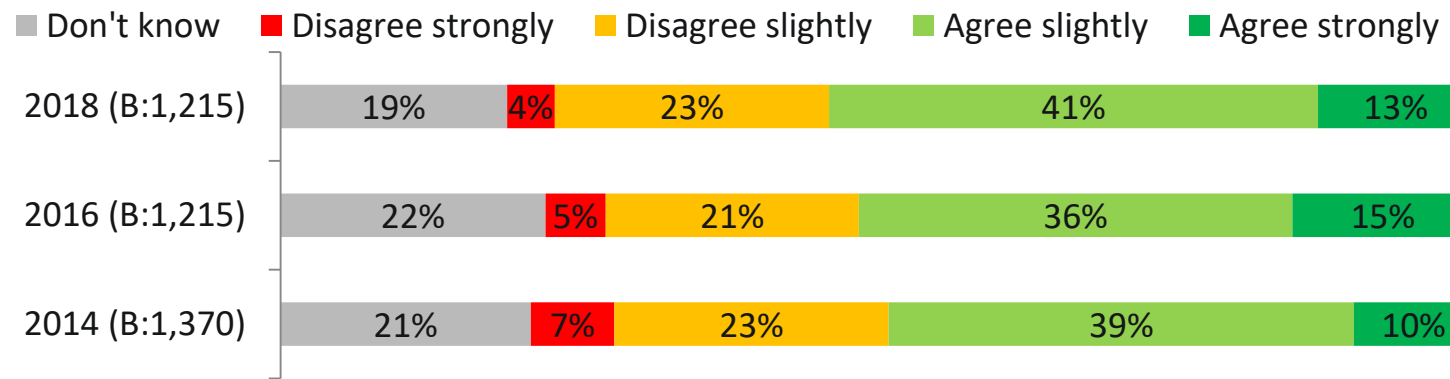
Base (all)

Opinions of OSCR

The Scottish Charity Register should feature more about charities' finances

Legend: ■ Don't know ■ Disagree strongly ■ Disagree slightly ■ Agree slightly ■ Agree strongly

	Don't know	Disagree strongly	Disagree slightly	Agree slightly	Agree strongly	Mean Score (1 to 4)
2018 (B:1,215)	19%	4%	23%	41%	13%	2.79
2016 (B:1,215)	22%	5%	21%	36%	15%	2.79
2014 (B:1,370)	21%	7%	23%	39%	10%	2.67

Opinions of OSCR remained generally very positive, in line with previous years. OSCR is trusted to be fair in its dealings with charities, and there is near-universal acceptance of completion of the annual return for OSCR as an integral part of what charities do. Charities remained less sure about OSCR's reputation as an innovative regulator, which may be down to lack of knowledge; amongst those who ventured an opinion, the vast majority agreed. Agreement was less strong regarding featuring more about charities' finances. Whilst a majority agreed, sizeable proportions continued to disagree or express uncertainty.

Q23. Thinking more generally about OSCR, we are now going to show you some statements that other people have made about OSCR. For each one, please select one box to show to what extent you agree or disagree with it.
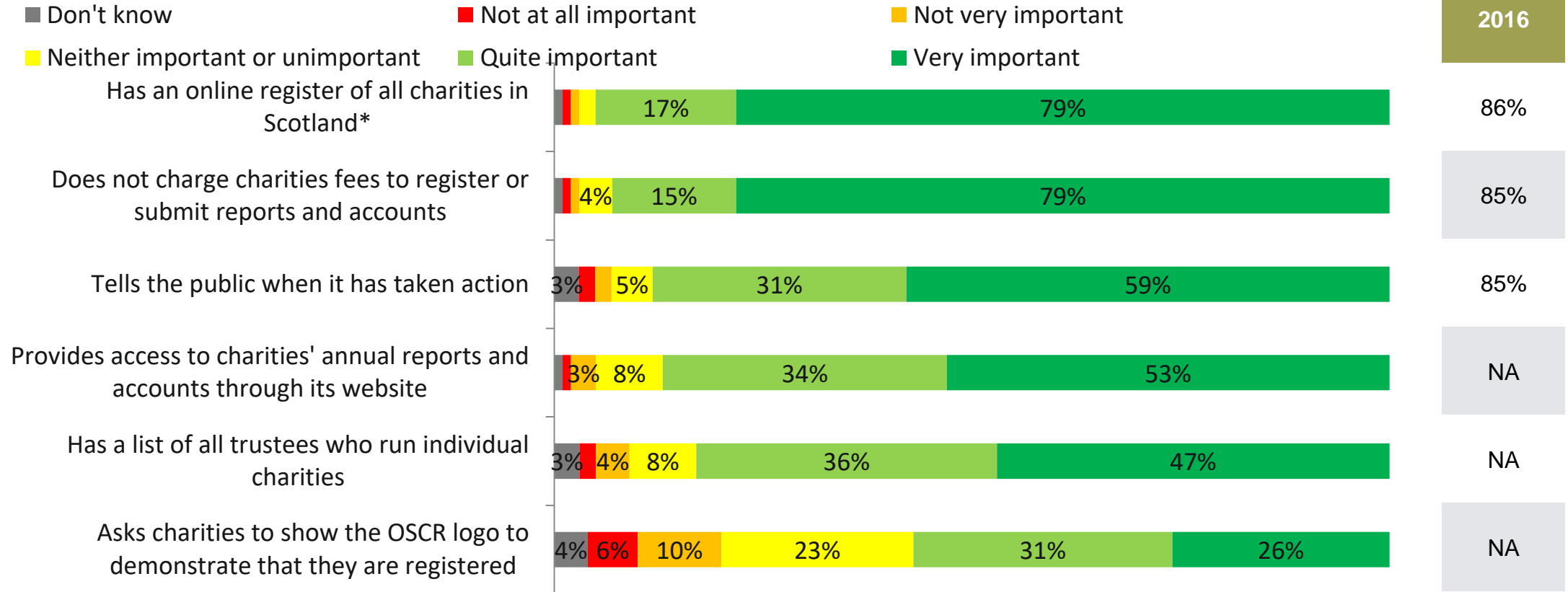
Base (all)

Opinions of OSCR – sub groups

Length of time charity established:

- The oldest charities were less likely to agree than some younger charities on the following:
  - OSCR does its best to minimise the burden of regulation on charities (50+yrs 73% vs. 11-25yrs 81% and 26-50yrs 84%)
  - OSCR is an innovative regulator (50+yrs 54% vs. 4-10yrs 69% and 11-25yrs 64%)
  - OSCR should feature more information about charities' finances and activities (50+yrs 66% vs. <4yrs 80%)

- The oldest charities less more likely than all younger ones to agree that it was important that OSCR was an innovative regulator (>50yrs 66% vs. <4yrs 89%, 4-10yrs 81%, 11-25yrs 78%, 26-50yrs 83%)

*Please note that the figures on this slide are net figures calculated excluding 'Don't know'

Importance of OSCR's operations

Legend:
- Don't know (grey)
- Not at all important (red)
- Not very important (orange)
- Neither important or unimportant (yellow)
- Quite important (light green)
- Very important (dark green)

2016

| Operation	Quite important	Very important	2016
Has an online register of all charities in Scotland*	17%	79%	86%
Does not charge charities fees to register or submit reports and accounts	4% / 15%	79%	85%
Tells the public when it has taken action	3% / 5% / 31%	59%	85%
Provides access to charities' annual reports and accounts through its website	3% / 8% / 34%	53%	NA
Has a list of all trustees who run individual charities	3% / 4% / 8% / 36%	47%	NA
Asks charities to show the OSCR logo to demonstrate that they are registered	4% / 6% / 10% / 23% / 31%	26%	NA

The aspects of OSCR's operations that charities felt most strongly about were not charging fees, and having an online register of charities in Scotland, in line with 2016. Opinions had softened regarding telling the public when it has taken action. The vast majority still agreed (2018 90%, 2016 95%) but the strength of agreement had declined (2018 59% strongly agree, 2016 74% strongly agree).

Awareness of OSCR's responsibilities

2018 (Sample)
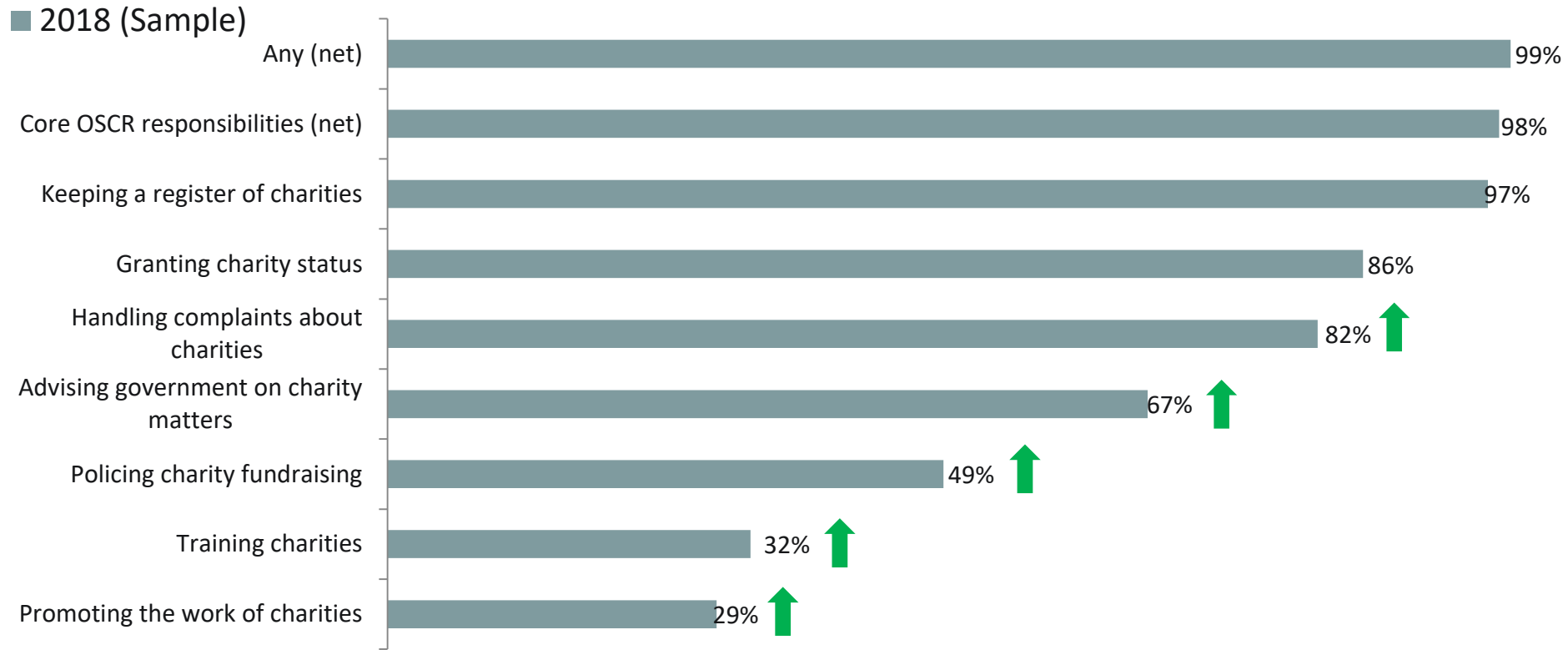
	2016	2014
Any (net) — 99%	99%	99%
Core OSCR responsibilities (net) — 98%	97%	97%
Keeping a register of charities — 97%	95%	94%
Granting charity status — 86%	84%	80%
Handling complaints about charities — 82%	76%	71%
Advising government on charity matters — 67%	59%	60%
Policing charity fundraising — 49%	43%	43%
Training charities — 32%	28%	26%
Promoting the work of charities — 29%	23%	24%

Awareness of several of OSCR's responsibilities has increased since 2016.

Q10. Which of the following functions do you believe OSCR is responsible for?
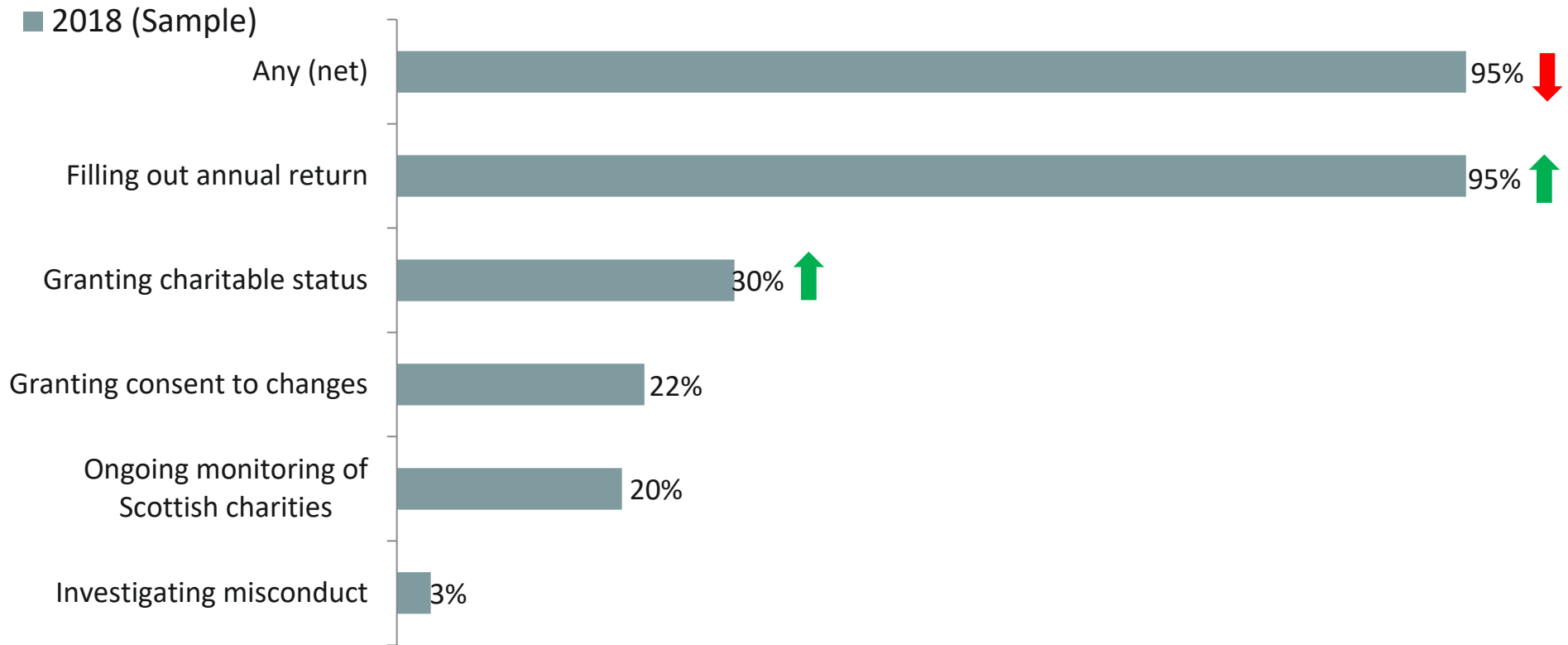
OSCR's role in building trust

- OSCR was spontaneously mentioned across the piece as doing a good job and building confidence.

- When asked directly about OSCR's role and what more it could do, the main response was to make more public the work it does.

  - *Publish information on their website. Showcase charities a bit more. There are so many charities out there , that people don't even know what they do.*

  - *A bit more public awareness would be useful. Before I got this job, I didn't even know OSCR existed.*

  - *It would help if people were aware they could go to OSCR if there was anything they were unsure/unhappy about. I'm sure there are a lot of people if you asked "who are the body you report [problems or queries] to", they wouldn't know. Increasing awareness in OSCR's role would be helpful.*

- One respondent noted that OSCR has been active in the media.

  - *OSCR have been in the media quite a bit talking about who they are and what they do. Valuable that people are just aware that a regulator is in place.*

- Most of those we interviewed were happy with their relationship with OSCR and felt that it was doing a good job. We did however, interview two very small micro charities that felt the amount of work in completing the annual return was too onerous and it left them feeling that OSCR has no understanding of how low their resource is. Larger charities were comfortable with the reporting requirements.

  - *Introducing more heavy handed regulation would be difficult to manage for small organisations.*

- OSCR's role in making public charities accounts was commended.

  - *Facilitation of public access to charity accounts by OSCR has improved. Previously they encouraged charities to make their accounts etc. available to the public - now OSCR take more of a role themselves in making them available. OSCR now ask for a link to published accounts.*

Contact with OSCR

Reasons for contact with OSCR

progressive

2018 (Sample)

	2016	2014
Any (net) — 95% ↓	97%	98%
Filling out annual return — 95% ↑	93%	94%
Granting charitable status — 30% ↑	25%	26%
Granting consent to changes — 22%	22%	18%
Ongoing monitoring of Scottish charities — 20%	20%	17%
Investigating misconduct — 3%	3%	2%

Reasons for contact with OSCR remained largely stable since 2016, although overall number of those who had made contact decreased.

Q11. For which of these purposes have you had contact with OSCR?

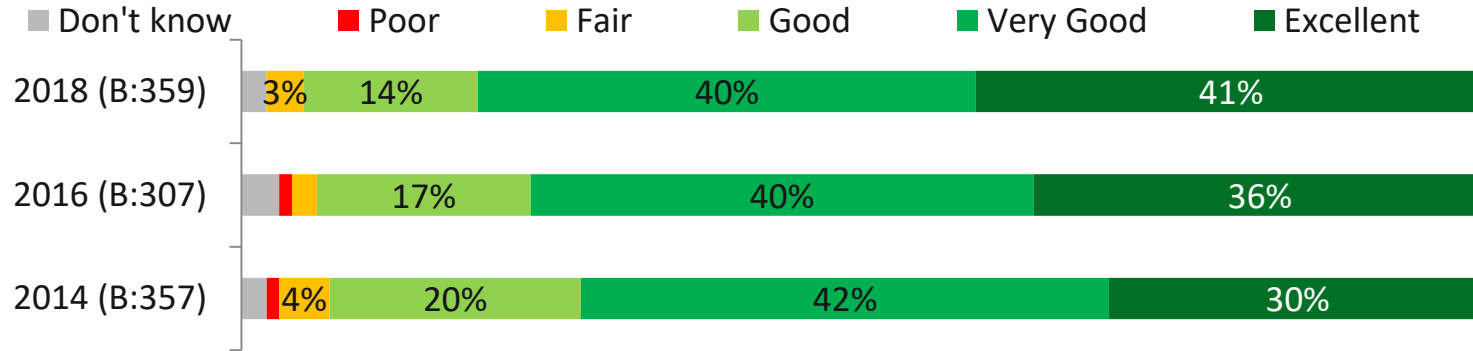# Reasons for contact with OSCR – sub groups

Size of charity (Employees)

- Beyond filling out the annual return, which was consistent across subgroups, larger charities were more likely to have contacted OSCR than smaller charities for a range of purposes:
  - Ongoing monitoring of Scottish charities (no emp. 18%, 1-5 emp. 19% vs 6+ emp. 27%)
  - Investigating misconduct (no emp. 2% , 1-5emp. 3% vs 6+ emp. 7%)
  - Granting of consent for proposed changes to charity (no emp. 18%, 1-5 emp. 21% vs 6+ emp. 42%)

Size of charity (Turnover)

- The pattern was similar in terms of turnover, with larger charities more likely to have contacted OSCR than smaller charities for the following purposes:
  - Ongoing monitoring of Scottish charities (<£25k 18% vs £25k+ 23%)
  - Granting of consent for proposed changes to charity (<£25k 19% vs £25k+ 26%)
- Smaller charities were more likely than larger ones to have contacted OSCR regarding granting of charitable status, possibly because this subgroup includes a greater proportion of younger charities (<£25k 33% vs £25k+ 26%)
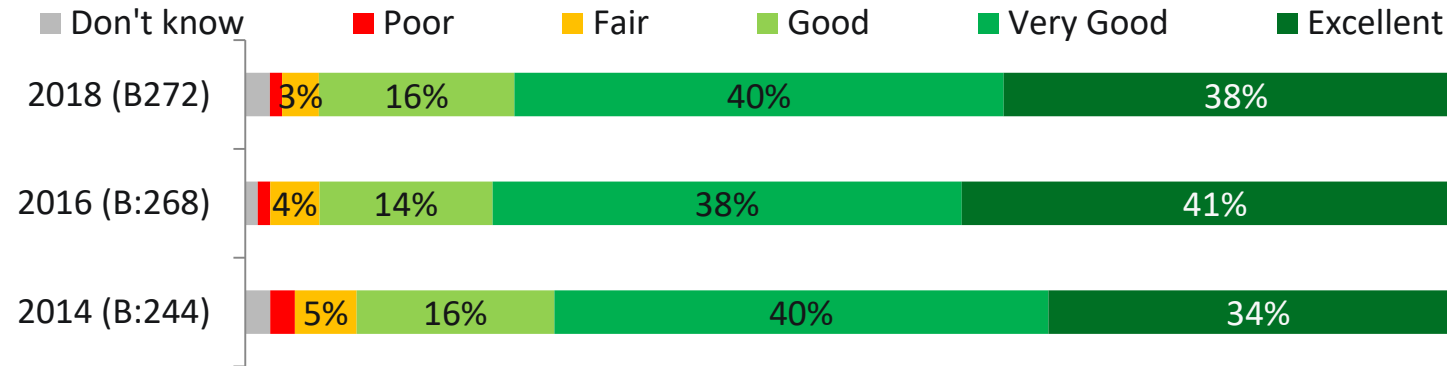
Rating contact with OSCR

Granting of charitable status

Legend: Don't know | Poor | Fair | Good | Very Good | Excellent

	Don't know	Poor	Fair	Good	Very Good	Excellent	Mean Score (1 to 5)
2018 (B:359)			3%	14%	40%	41%	4.21
2016 (B:307)				17%	40%	36%	4.13
2014 (B:357)		4%		20%	42%	30%	3.98

Granting of consent to proposed changes to charities e.g. change of name, amalgamation

Legend: Don't know | Poor | Fair | Good | Very Good | Excellent

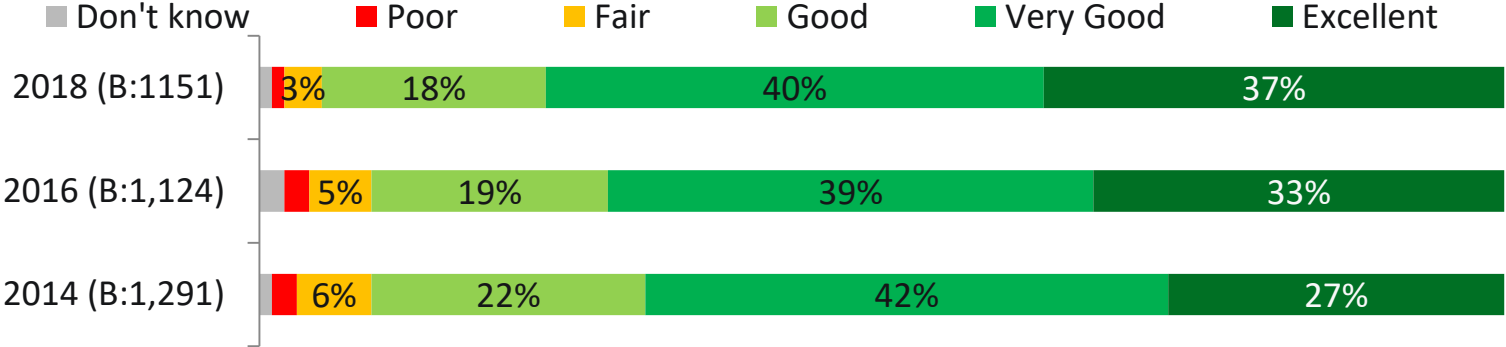|	Don't know	Poor	Fair	Good	Very Good	Excellent	Mean Score (1 to 5)
2018 (B272)			3%	16%	40%	38%	4.13
2016 (B:268)			4%	14%	38%	41%	4.15
2014 (B:244)			5%	16%	40%	34%	4.04

Q12a-e. Thinking about the contact you had with OSCR in relation to the below purposes, how would you rate OSCR's overall performance on each?

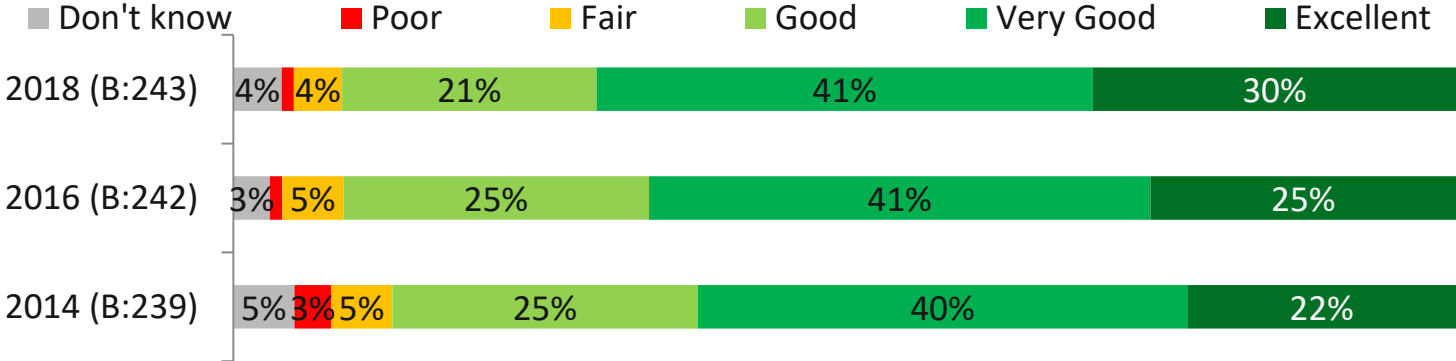Base (those who had each type of contact)

Rating contact with OSCR

Filling out annual return

Legend: ■ Don't know ■ Poor ■ Fair ■ Good ■ Very Good ■ Excellent

Year	Poor	Fair	Good	Very Good	Excellent	Mean Score (1 to 5)
2018 (B:1151)		3%	18%	40%	37%	4.11 ↑
2016 (B:1,124)		5%	19%	39%	33%	3.99
2014 (B:1,291)		6%	22%	42%	27%	3.87

Ongoing monitoring of Scottish charities

Legend: ■ Don't know ■ Poor ■ Fair ■ Good ■ Very Good ■ Excellent

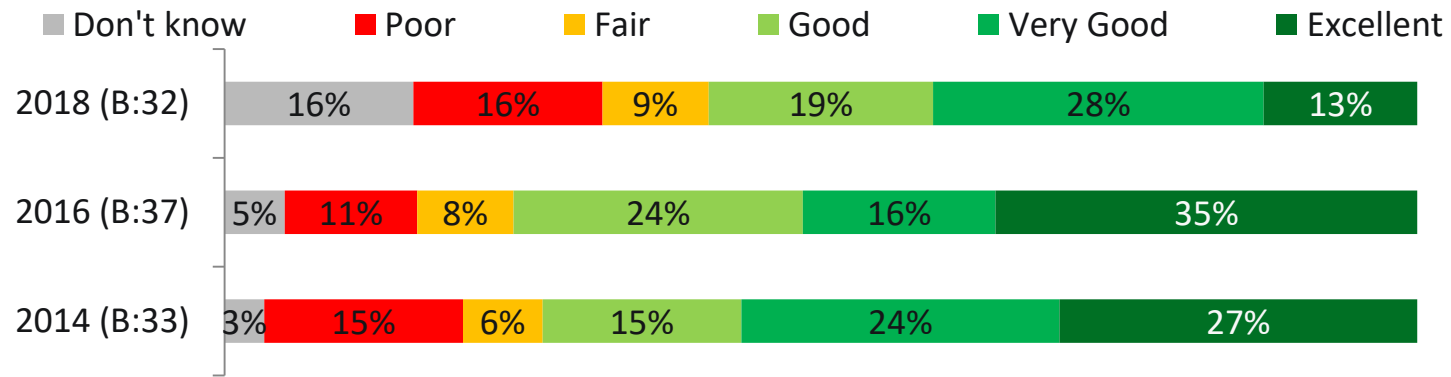| Year	Don't know	Poor	Fair	Good	Very Good	Excellent	Mean Score (1 to 5)
2018 (B:243)	4%		4%	21%	41%	30%	4.00
2016 (B:242)	3%		5%	25%	41%	25%	3.86
2014 (B:239)	5%	3%	5%	25%	40%	22%	3.79

Q12a-e. Thinking about the contact you had with OSCR in relation to the below purposes, how would you rate OSCR's overall performance on each?

Base (those who had each type of contact)

Rating contact with OSCR

Investigation of apparent charity misconduct

Legend: Don't know (grey) · Poor (red) · Fair (yellow) · Good (light green) · Very Good (green) · Excellent (dark green)

Year	Don't know	Poor	Fair	Good	Very Good	Excellent	Mean Score (1 to 5)
2018 (B:32)	16%	16%	9%	19%	28%	13%	3.15
2016 (B:37)	5%	11%	8%	24%	16%	35%	3.60
2014 (B:33)	3%	15%	6%	15%	24%	27%	3.48

Charities continued to rate their contact with OSCR highly. Ratings of contact around filling out the annual return, which were already very positive in 2016, have increased further.

Q12a-e. Thinking about the contact you had with OSCR in relation to the below purposes, how would you rate OSCR's overall performance on each?

Base (those who had each type of contact)

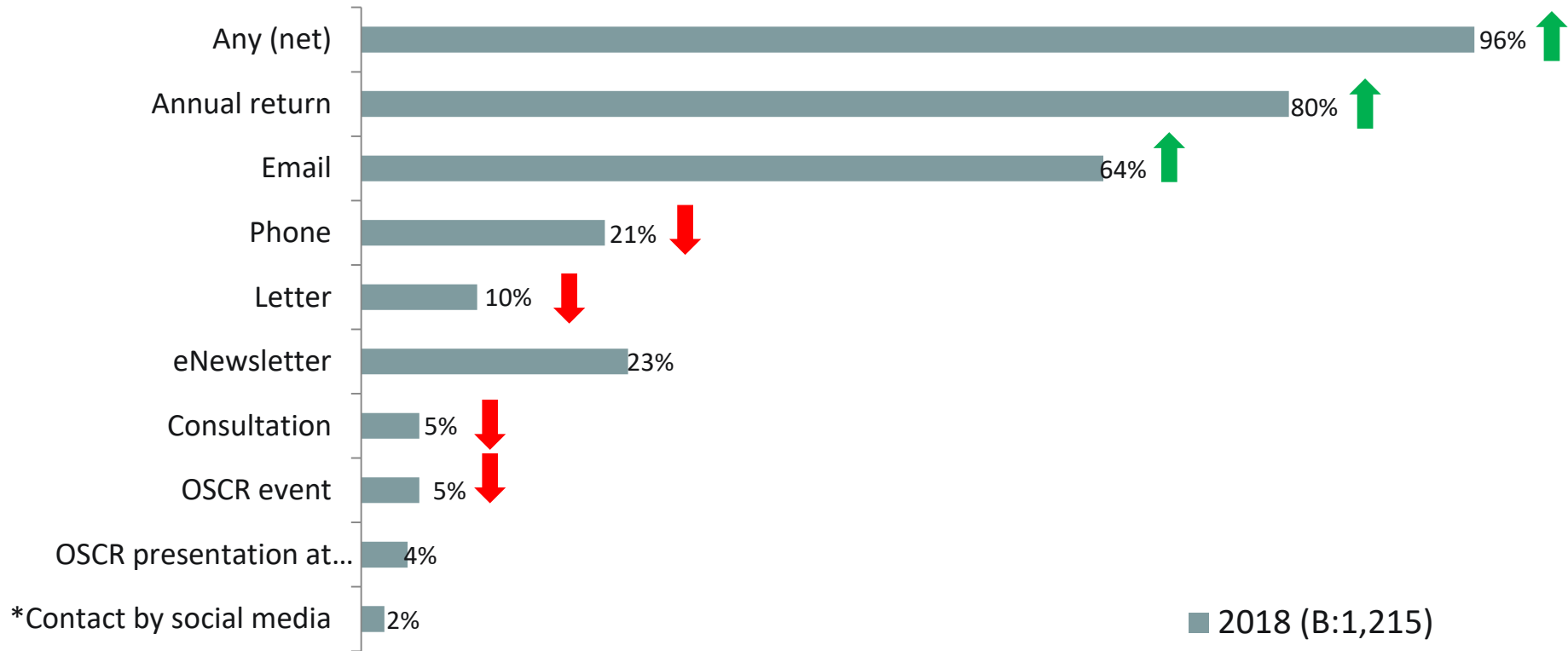# Rating contact with OSCR – sub groups

Size of charity (Employees)

- Charities with no staff (80%) are more likely than those with 6+ staff (72%) to rate filling out the annual return as Excellent/Very good

Size of charity (Turnover)

- Smaller charities were more likely to rate ongoing monitoring of Scottish charities as Excellent or Very good (<£25k 82% vs £25k+ 67%)

*Please note that the figures on this slide are net figures calculated excluding 'Don't know'

Medium of contact with OSCR

	2016	2014
Any (net) — 96%	94%	95%
Annual return — 80%	73%	76%
Email — 64%	57%	58%
Phone — 21%	26%	28%
Letter — 10%	19%	23%
eNewsletter — 23%	21%	20%
Consultation — 5%	8%	4%
OSCR event — 5%	7%	4%
OSCR presentation at… — 4%	5%	3%
*Contact by social media — 2%	* Introduced in 2018	

■ 2018 (B:1,215)

The annual return increased as a medium of contact. Email also increased whilst non-digital media (phone and letter) declined as ways of contacting OSCR.

Q13. Thinking now about different types of contact with OSCR, what type of contact have you personally had over the past 12 months?

Medium of contact with OSCR – sub groups

Size of charity (Turnover)

- Larger charities were more likely than smaller ones to have had contact with OSCR via the eNewsletter (<£25k 19% vs £25k+ 27%)
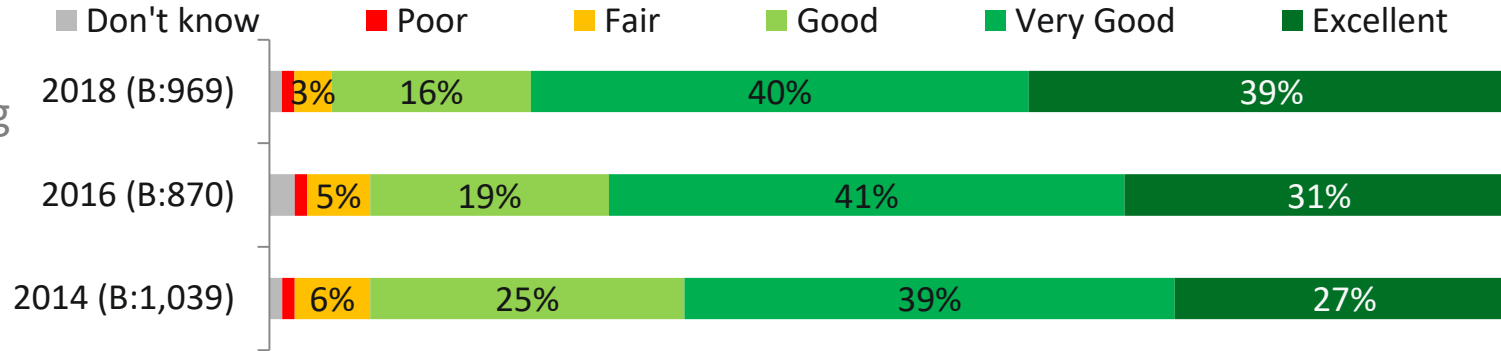
Length of time established:

- The youngest charities were more likely than all older charities to have contacted OSCR via the following methods:
  - Email (<4yrs 80% vs. 4-10yrs 61%, 11-25yrs 61%, 26-50yrs 67%, >50yrs 62%)
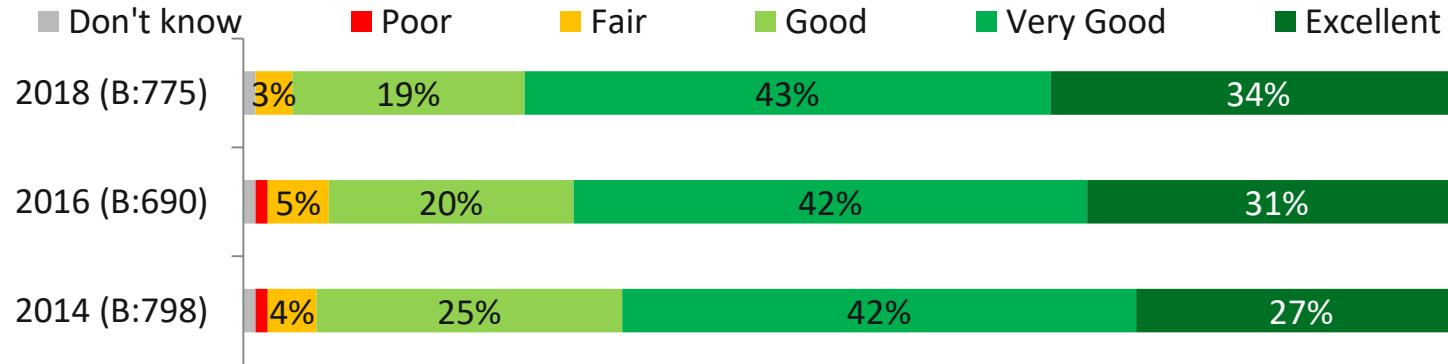 - Telephone (<4yrs 33% vs. 4-10yrs 22%, 11-25yrs 21%, 26-50yrs 18%, >50yrs 17%)

progressive

Rating medium of contact with OSCR: non face-to-face

Receiving/completing the Annual Return

Legend: ■ Don't know ■ Poor ■ Fair ■ Good ■ Very Good ■ Excellent

Year	Poor	Fair	Good	Very Good	Excellent	Mean Score (1 to 5)
2018 (B:969)	3%		16%	40%	39%	4.15 ↑
2016 (B:870)	5%		19%	41%	31%	3.99
2014 (B:1,039)	6%		25%	39%	27%	3.87

Contact by email

Legend: ■ Don't know ■ Poor ■ Fair ■ Good ■ Very Good ■ Excellent

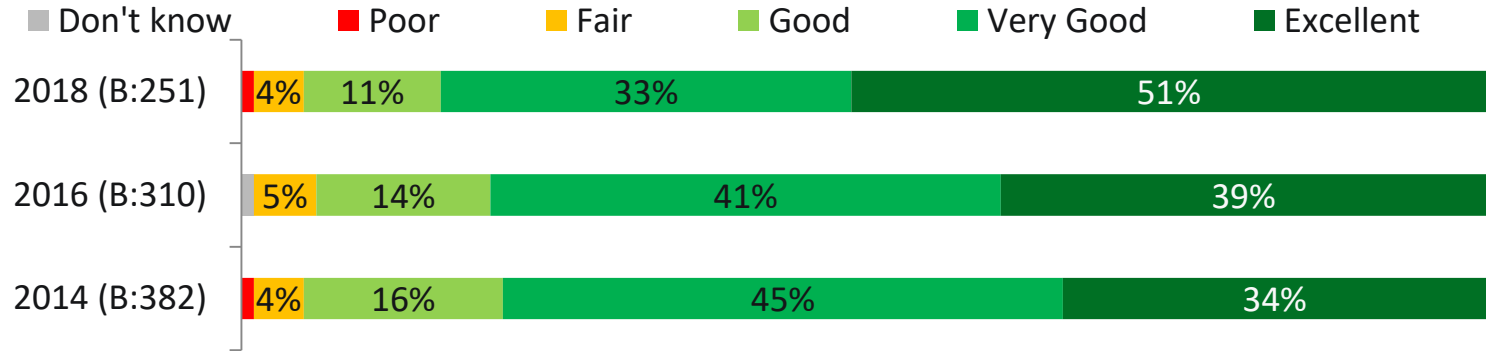| Year	Fair	Good	Very Good	Excellent	Mean Score (1 to 5)
2018 (B:775)	3%	19%	43%	34%	4.07
2016 (B:690)	5%	20%	42%	31%	3.98
2014 (B:798)	4%	25%	42%	27%	3.91

Q14a-i. Thinking about the contact you had with OSCR, how would you rate OSCR's overall performance on each?

Base (those who had each type of contact)

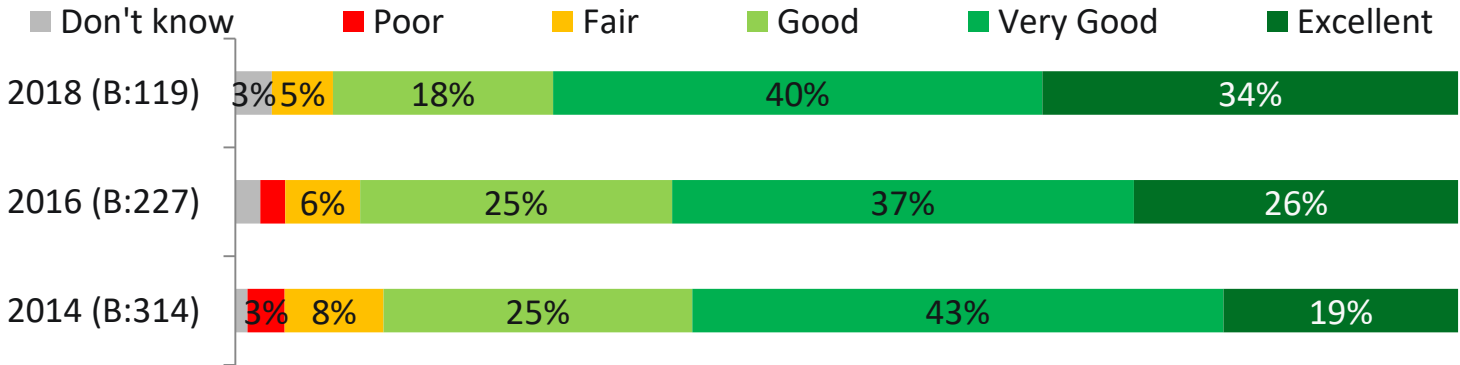# Rating medium of contact with OSCR: non face-to-face

progressive

Contact by phone

Legend: Don't know · Poor · Fair · Good · Very Good · Excellent

Year	Poor	Fair	Good	Very Good	Excellent
2018 (B:251)		4%	11%	33%	51%
2016 (B:310)		5%	14%	41%	39%
2014 (B:382)		4%	16%	45%	34%

Mean Score (1 to 5)

Year	Mean Score
2018	4.29
2016	4.15
2014	4.06

Contact by letter

Legend: Don't know · Poor · Fair · Good · Very Good · Excellent

Year	Don't know	Poor	Fair	Good	Very Good	Excellent
2018 (B:119)	3%		5%	18%	40%	34%
2016 (B:227)		6%		25%	37%	26%
2014 (B:314)	3%		8%	25%	43%	19%

Mean Score (1 to 5)

Year	Mean Score
2018	4.06 ⬆
2016	3.83
2014	3.69

Q14a-i. Thinking about the contact you had with OSCR, how would you rate OSCR's overall performance on each?

Base (those who had each type of contact)

Rating of medium of contact with OSCR: non face-to-face

eNewsletter (OSCR Reporter)
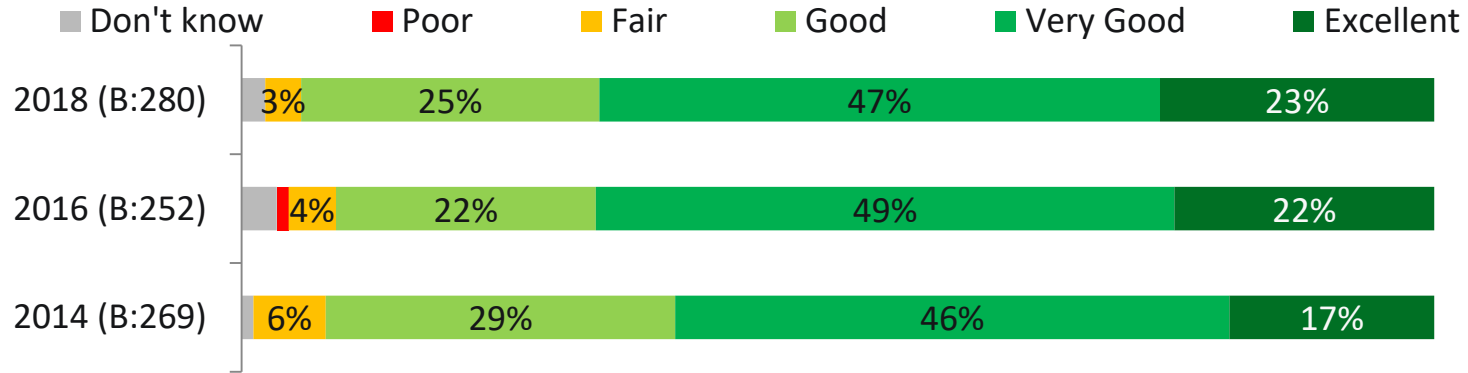
	Don't know	Poor	Fair	Good	Very Good	Excellent	Mean Score (1 to 5)
2018 (B:280)			3%	25%	47%	23%	3.92
2016 (B:252)			4%	22%	49%	22%	3.90
2014 (B:269)			6%	29%	46%	17%	3.76

Contact by social media

	Don't know	Poor	Fair	Good	Very Good	Excellent	Mean Score (1 to 5)
2018 (B:19)	5%			16%	16%	63%	4.50

Q14a-i. Thinking about the contact you had with OSCR, how would you rate OSCR's overall performance on each?

Base (those who had each type of contact)

51
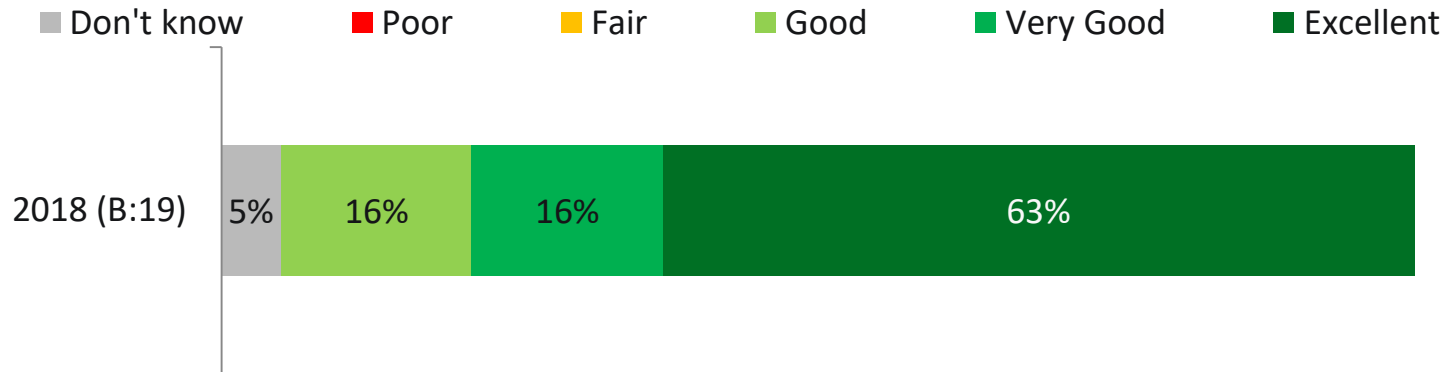
Rating of medium of contact with OSCR: face-to-face

Consultations

Legend: Don't know | Poor | Fair | Good | Very Good | Excellent
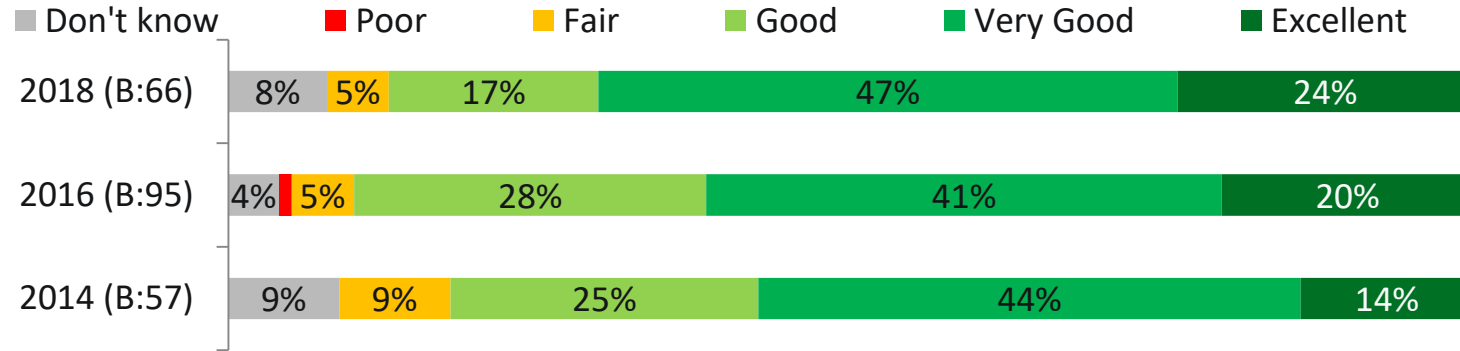
Year	Don't know	Poor	Fair	Good	Very Good	Excellent	Mean Score (1 to 5)
2018 (B:66)	8%		5%	17%	47%	24%	3.98
2016 (B:95)	4%		5%	28%	41%	20%	3.77
2014 (B:57)	9%		9%	25%	44%	14%	3.69

'Meet the Charity Regulator' Events

Legend: Don't know | Poor | Fair | Good | Very Good | Excellent

Year	Poor	Fair	Good	Very Good	Excellent	Mean Score (1 to 5)
2018 (B:64)	3%		14%	39%	42%	4.16
2016 (B:81)	4%	5%	19%	43%	28%	3.89
2014 (B:53)		9%	23%	47%	19%	3.72

Q14a-i. Thinking about the contact you had with OSCR, how would you rate OSCR's overall performance on each?

Base (those who had each type of contact)
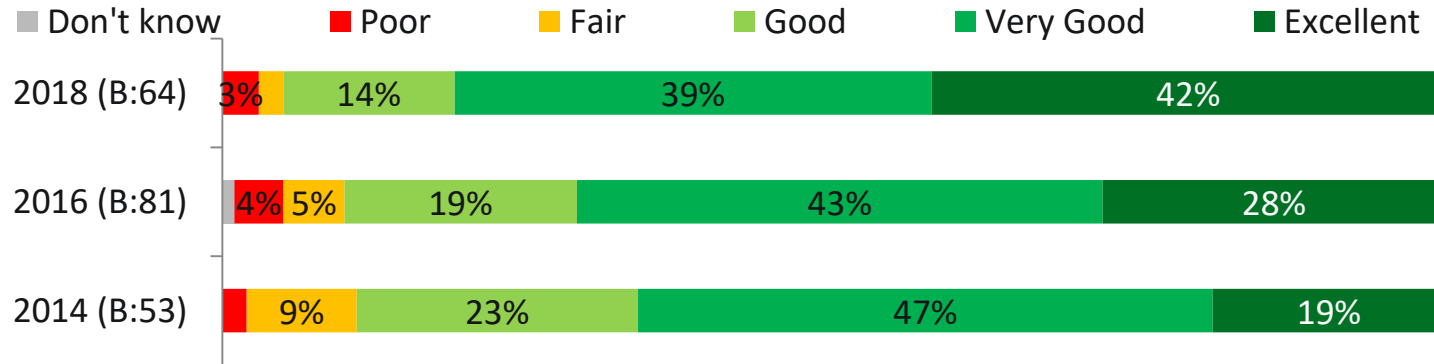
Rating of medium of contact with OSCR: face-to-face

Workshops & events at which OSCR has presented

Legend: ■ Don't know ■ Poor ■ Fair ■ Good ■ Very Good ■ Excellent
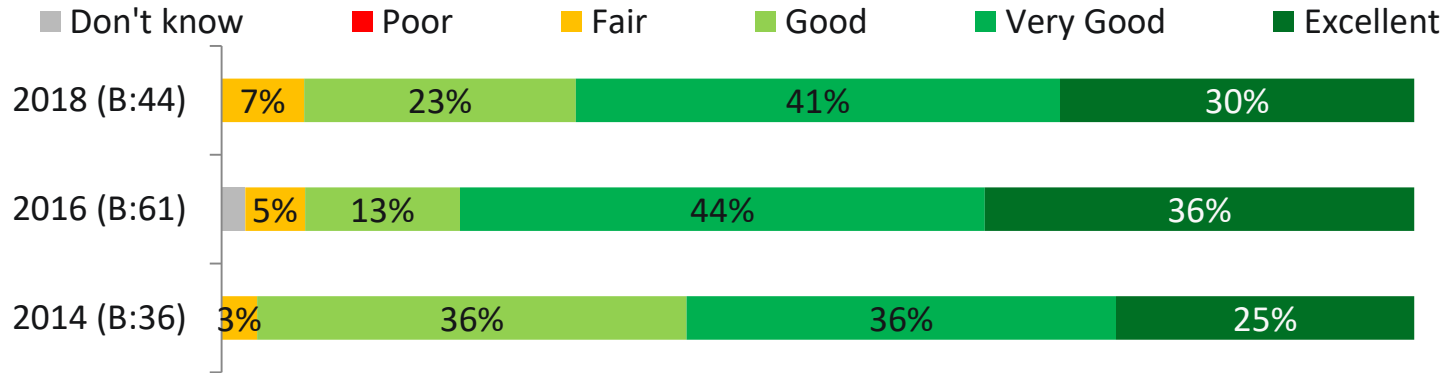
Year	Fair	Good	Very Good	Excellent	Mean Score (1 to 5)
2018 (B:44)	7%	23%	41%	30%	3.93
2016 (B:61)	5%	13%	44%	36%	4.13
2014 (B:36)	3%	36%	36%	25%	3.83

Ratings were generally stable. Small but significant improvements were seen in relation to the annual return and contact by letter. 'Social media' as a medium of contact was added to the survey for 2018, but very few appeared to have contacted OSCR this way. It will be interesting to see how this develops in future surveys.

Q14a-i. Thinking about the contact you had with OSCR, how would you rate OSCR's overall performance on each?

Base (those who had each type of contact)

Rating medium of contact with OSCR – sub groups

Size of charity (Turnover)

- Smaller charities were more likely than larger ones to rate contact by email as Excellent/Very good(<£25k 81% vs £25k+ 72%).

Size of charity (Staff)

- The smallest charities were more likely than larger ones to rate contact by email as Excellent/Very good (No emp. 80% vs £25k+ 71%).

Length of time established:

- Charities established for 4-10yrs (83%) were more likely than those established for more than 50yrs (65%) to rate the eNewsletter as Excellent/Very good.
- Charities established for 4-10yrs (84%) and 11-25yrs (82%) were more likely than those established for more than 50yrs (74%) to rate contact when receiving/completing the annual return as Excellent/Very good.
- Charities established for 26-50yrs (90%) were more likely than those established for more than 50yrs (57%) to rate contact by letter as Excellent/Very good.

*Please note that the figures on this slide are net figures calculated excluding 'Don't know'

OSCR's communications
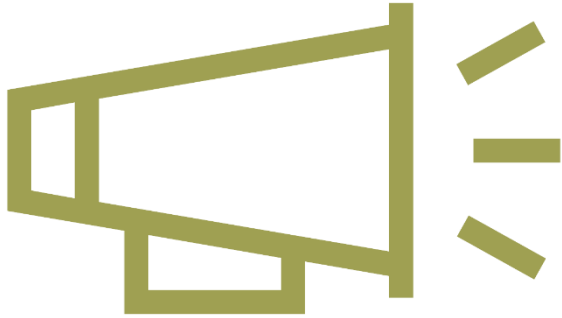
OSCR's documents: Ease of use

progressive

Annual Return

Mean Score (1 to 4)

2018 (B:1,215): Don't know 4% · Very difficult · Quite difficult 8% · Quite easy 55% · Very easy 32% — 3.22 ↑

2016 (B:1,215): Don't know 4% · Very difficult · Quite difficult 12% · Quite easy 54% · Very easy 28% — 3.13

2014 (B:1,370): Don't know 4% · Very difficult · Quite difficult 16% · Quite easy 57% · Very easy 21% — 3.01

Legend: Don't know · Very difficult · Quite difficult · Quite easy · Very easy
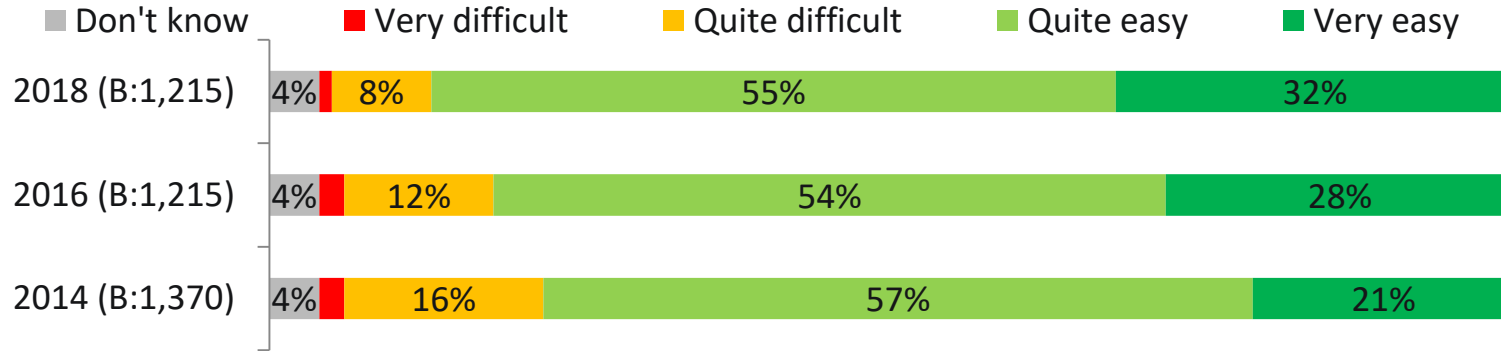
Other documentation

Mean Score (1 to 4)

2018 (B:1,213): Don't know 32% · Very difficult · Quite difficult 8% · Quite easy 48% · Very easy 12% — 3.03

2016 (B:1,215): Don't know 30% · Very difficult · Quite difficult 8% · Quite easy 47% · Very easy 14% — 3.09

2014 (B:1,370): Don't know 26% · Very difficult · Quite difficult 10% · Quite easy 52% · Very easy 10% — 2.96

Legend: Don't know · Very difficult · Quite difficult · Quite easy · Very easy

Q18. Thinking now specifically about the Annual/Monitoring Return, how easy or difficult did you find this to complete? / Q19. And thinking about any forms you have seen from OSCR (for example, the application for charitable status or application for consent), how easy or difficult did you find these to understand? (2016/2014 wording: 'And thinking about any other documentation you have seen (for example status application or Trustee declaration) from OSCR, how easy or difficult did you find this to understand?')

Base (all respondents)

OSCR's documents: Ease of use

Legend: ■ Don't know ■ Very difficult ■ Quite difficult ■ Quite easy ■ Very easy

Guidance from OSCR

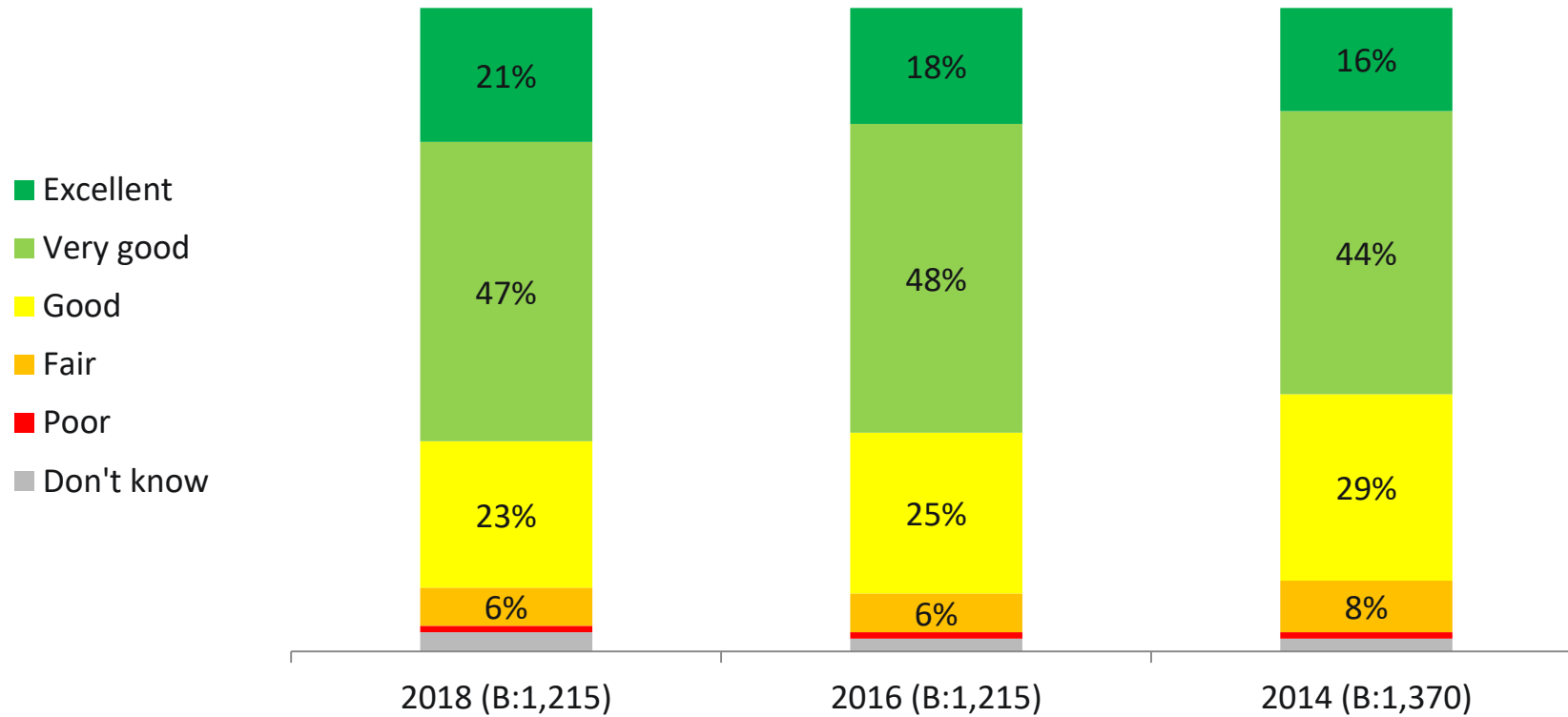| 2018 (B:1,214	Don't know	Very difficult	Quite difficult	Quite easy	Very easy
	15%		6%	59%	19%

Mean Score (1 to 4)
3.14
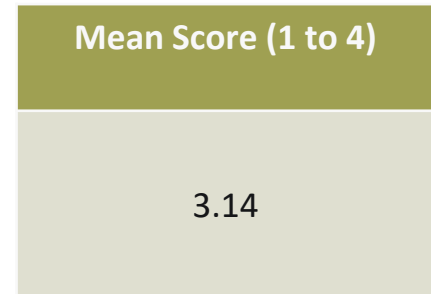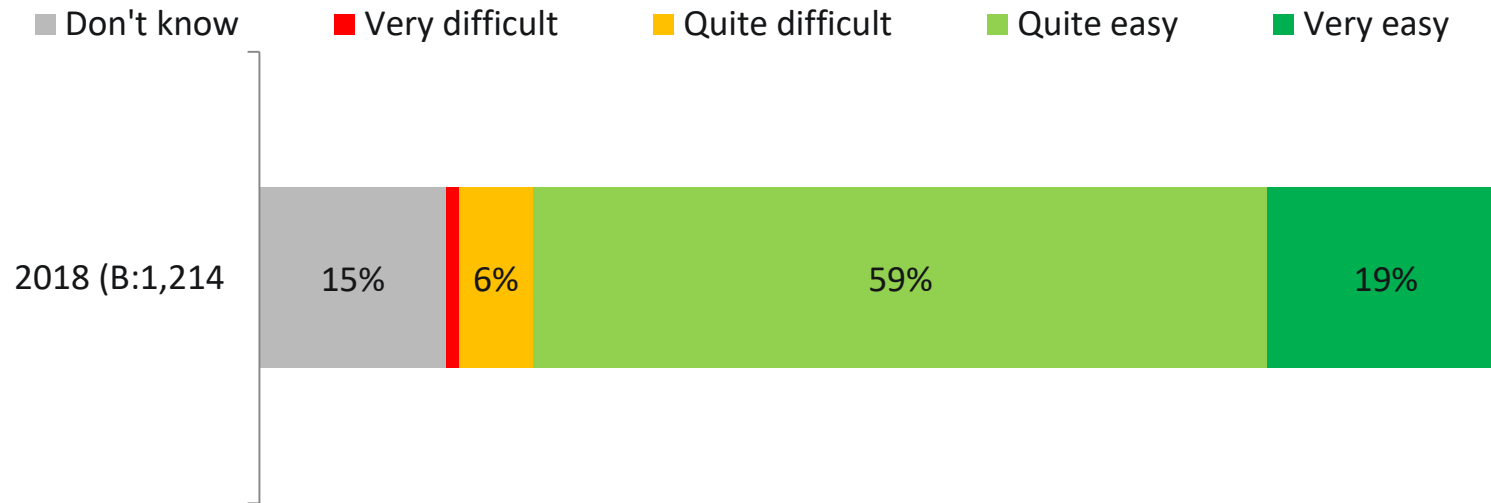
Results for ease of use remain generally favourable. There has been a significant improvement in perceptions of the annual return in terms of ease of use.

Q20. And thinking about any guidance you have seen from OSCR (for example, Guidance and Good Practice for Charity Trustees or Being a Charity in Scotland), how easy or difficult did you find this to understand?

Base (all respondents)

Overall satisfaction with communication

- Excellent
- Very good
- Good
- Fair
- Poor
- Don't know

	2018 (B:1,215)	2016 (B:1,215)	2014 (B:1,370)
Excellent	21%	18%	16%
Very good	47%	48%	44%
Good	23%	25%	29%
Fair	6%	6%	8%

Overall satisfaction with communication has remained stable – generally positive, with some room for improvement.

Q21. Now thinking about ALL of OSCR's communication methods, how would you rate OSCR overall?

OSCR's documents: Ease of use – sub groups

Size of charity (Turnover)

- Smaller charities were more likely than larger ones to rate contact by email as Excellent/Very good (<£25k 81% vs £25k+ 72%).

Length of time established:

- Charities established for less than 4yrs (82%) were less likely than those established for 4-10yrs (92%), 11-25yrs (93%), and 26-50yrs (91%) to rate the annual return as Very/Quite easy.

- Charities established for less than 4yrs (80%) were less likely than those established for 11-25yrs (90%), 26-50yrs (91%) and more than 50yrs (90%) to rate forms from OSCR as Very/Quite easy.

- Charities established for 11-25yrs (73%) were more likely than those established for more than 50yrs (65%) to rate OSCR communication overall as Excellent/Very good.

*Please note that the figures on this slide are net figures calculated excluding 'Don't know'

Comments on OSCR's communication (spontaneous)

	2018 (B:4,343)		2016 (B: 1,215)		2014 (B: 1,370)	
Positive comments						
Communication is good/helpful	198	6%	222	18%	297	22%
Clear/concise/good explanations	142	3%	59	5%	115	8%
Positive comments about staff	185	4%	63	5%	80	6%
Responsive/efficient	82	2%	10	1%	52	4%
Negative comments						
Too complex/complicated	47	1%	9	1%	42	3%
Poor online offering	391	9%	85	7%	25	2%
Poor communication	141	3%	53	4%	13	1%
Not responsive/efficient	28	1%	8	1%	10	1%
No comment	2,209	51%	442	36%	538	39%
No problem	88	2%	275	23%	206	15%

Q22 - Please type in below any comments you may have about any of OSCR's communications methods.

Base (all respondents)

progressive

60

Ways OSCR could improve communication

■ 2018 (All excluding no reply)

Category	Value
Clarity/plain English/user-friendliness	4%
Email	4%
Events	4%
Raise awareness of services/policies	4%
Happy with communication	51%
Don't know	9%
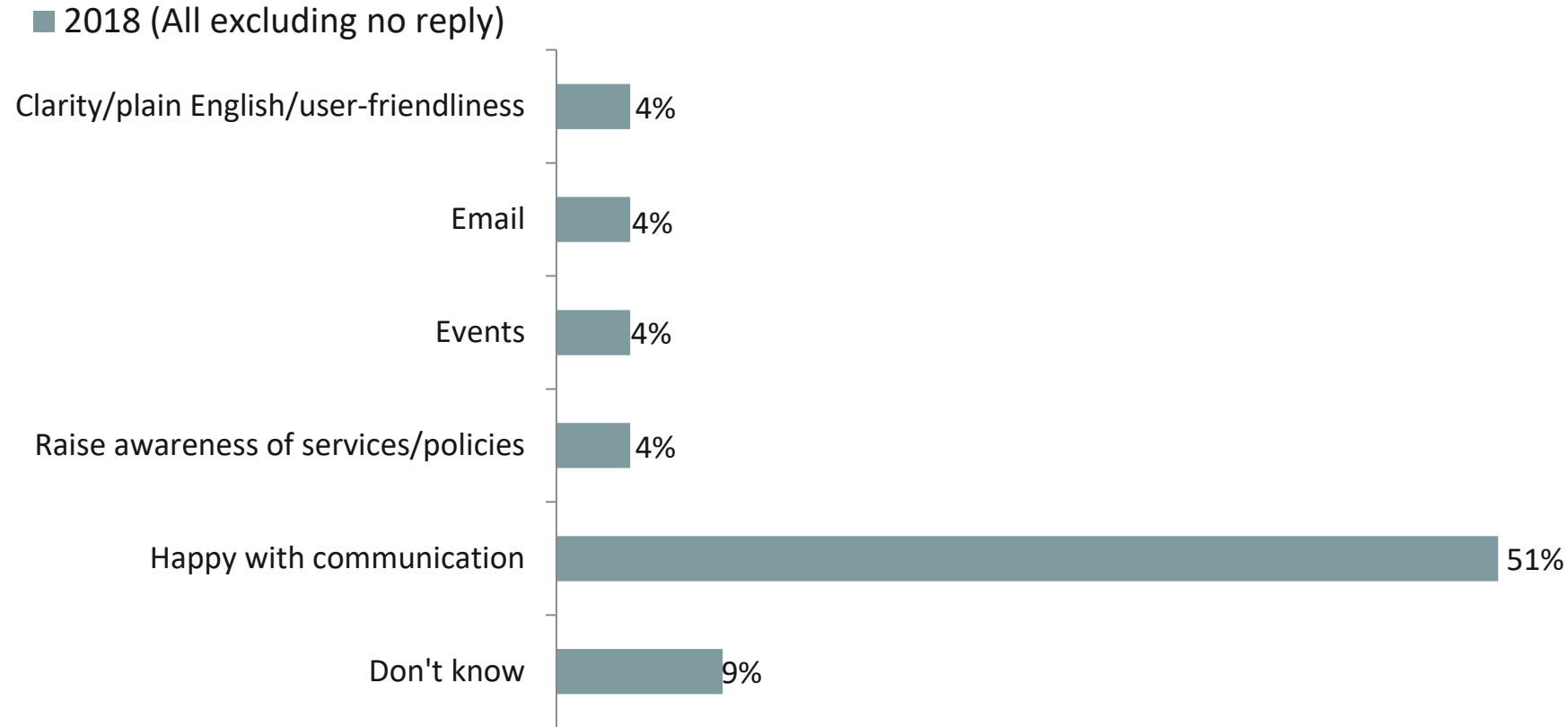
In 2018 we asked how OSCR could improve communications. Although some suggestions were made, just over half of those who offered a response to the question were happy with communications as they are and offered no suggestions for improvement.

Q32. What could OSCR do to better communicate with you?

Base (all providing and answer, from full sample): 2,746

Preferred channels of communication

Email was by far the preferred channel of communication.

Use of the OSCR logo

- The majority of respondents were open to the idea of this becoming mandatory and some were already using it.

    - *We don't use the logo at the moment, only our charity ID. However, if asked to do so, as a mandatory measure, we would be happy to do this, given time to make the changes.*

    - *Given we display the charity regulator numbers, it's not a big issue. Certainly no problem displaying logos on the website. Maybe overkill displaying them on all materials. We have enough information on our materials if people need reassurance - the registration numbers, address/contact details for our head office.*

    - *We know that we can use this, its on our website but we don't use it anywhere else or on letterheads. We have our charity number always visible so we don't feel we need any more of a visual reminder. It would be absolutely fine if it became mandatory to use this, not a problem.*

- A few said the charity number was enough as the public had come to recognise this.

- While they were happy about the idea, smaller charities were a little concerned about the work it would involve.

- While it was generally accepted as a good thing respondents wanted it to be phased in to digital formats first and to leave time for it to be mandated to printed materials.

    - *Yes - aware of this, and happy to comply. But hope it can be phased in as and when we need new stationery printed.*

Interest in potential OSCR initiatives

Running webinars to help educate and support charities

Legend: ■ Don't know ■ Not at all interesting ■ Not very interesting ■ Quite interesting ■ Very interesting

2018 (B:1,215)	5%	7%	20%	45%	23%
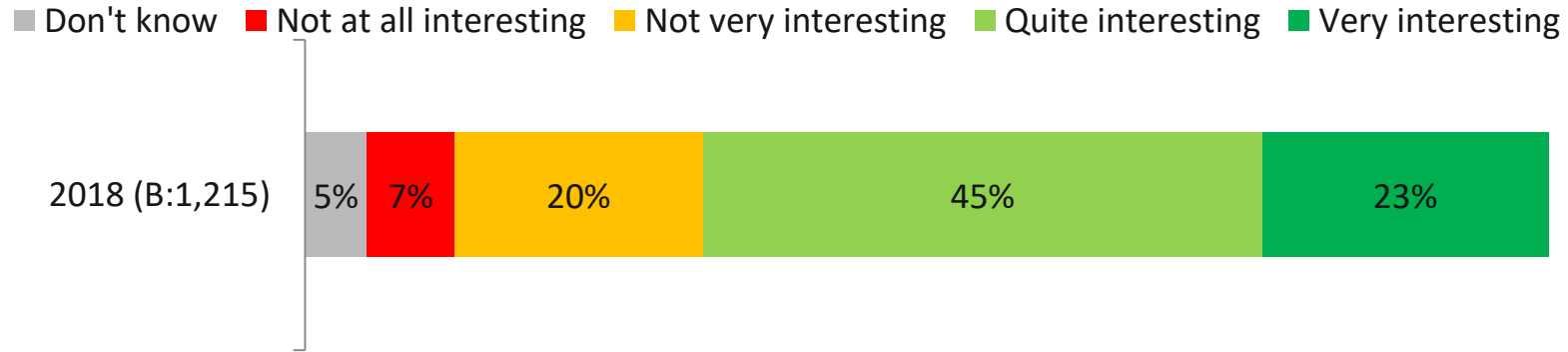
Mean Score (1 to 5)

2.87

Make it mandatory for registered charities to feature OSCR logo on their materials

Legend: ■ Don't know ■ Not at all amenable ■ Not very amenable ■ Quite amenable ■ Very amenable

2018 (B:1,214)	6%	14%	22%	41%	18%

Mean Score (1 to 5)

2.66

Q29a-d. How interesting might the following initiatives be to you?
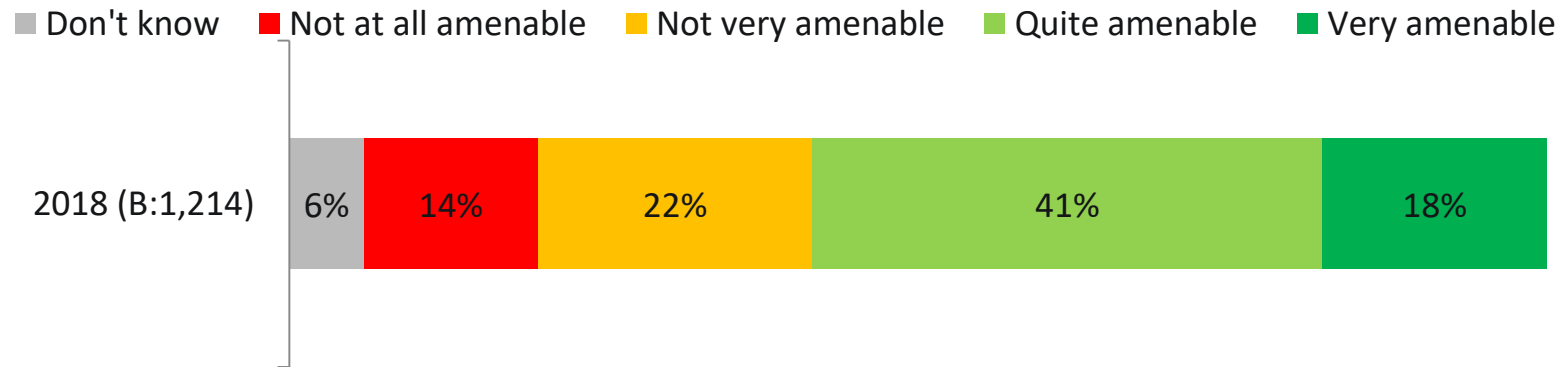
Base (all respondents)

Interest in potential OSCR initiatives

For OSCR to be represented at charity events

Legend: Don't know | Not at all interesting | Not very interesting | Quite interesting | Very interesting

2018 (B:1,214): 7% | 10% | 26% | 43% | 14%
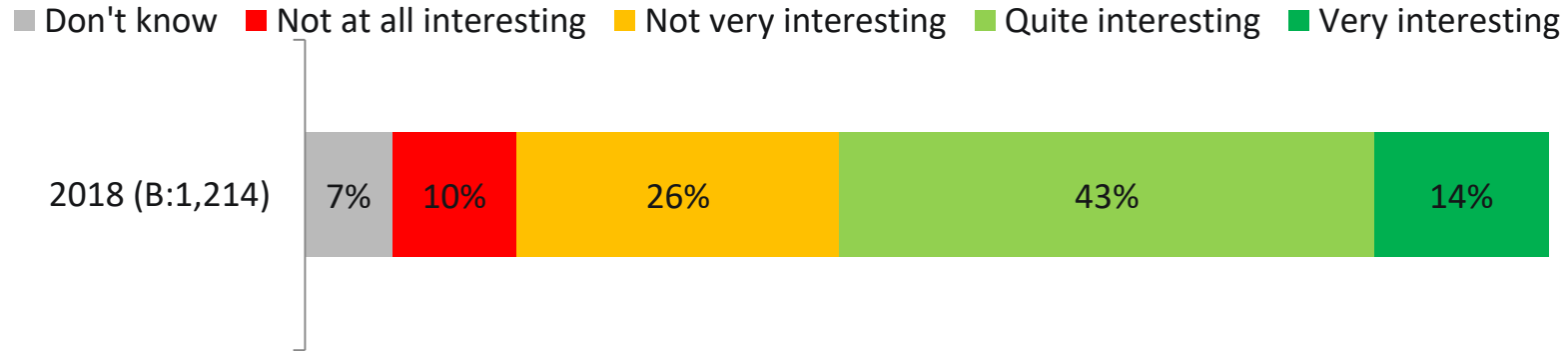
Mean Score (1 to 5): 2.66

Listing the details of the trustees who run individual charities
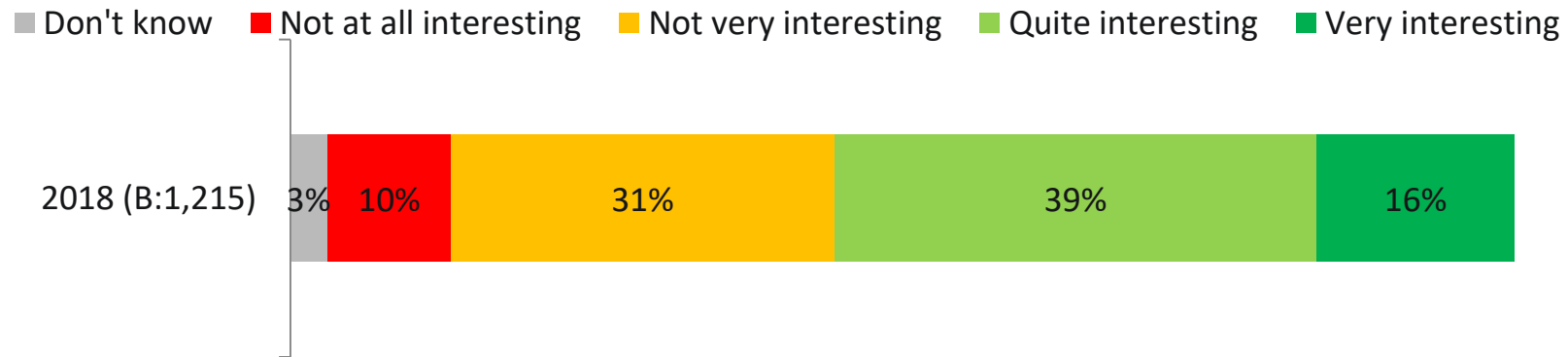
Legend: Don't know | Not at all interesting | Not very interesting | Quite interesting | Very interesting

2018 (B:1,215): 3% | 10% | 31% | 39% | 16%

Mean Score (1 to 5): 2.63

progressive

Q29a-d. How interesting might the following initiatives be to you?

Base (all respondents)

Interest in potential OSCR initiatives

Don't know ■ **Not at all interested** ■ **Not very interested** ■ **Quite interested** ■ **Very interested** ■

Support through social media

2018 (B:1,215): 5% | 15% | 27% | 39% | 14%

Mean Score (1 to 4): 2.54
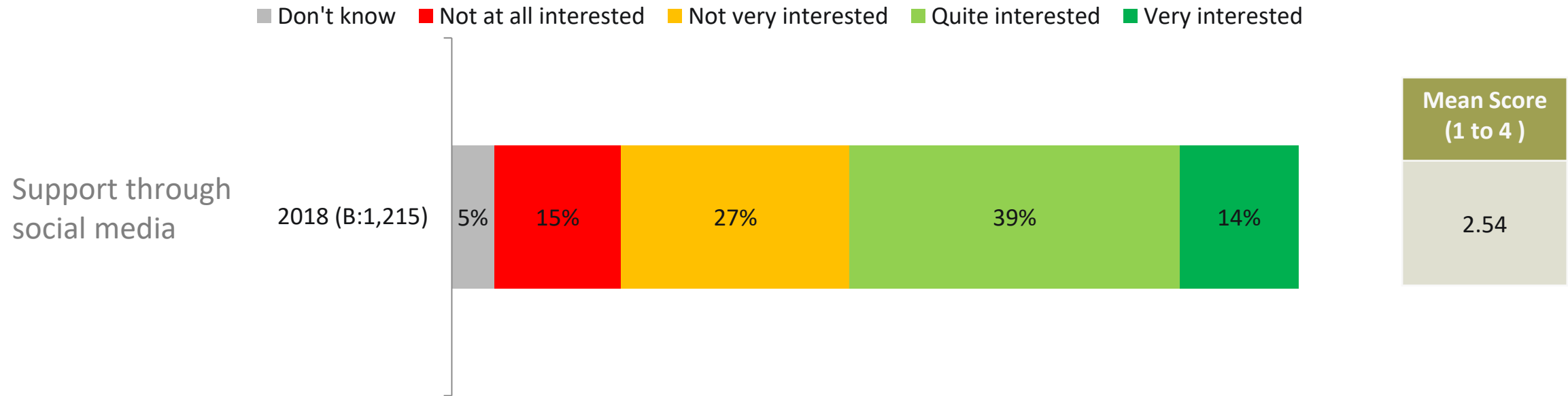
In 2018 we gauged interest in potential OSCR initiatives. There was a healthy amount of interest in all five suggestions, especially running webinars (68% interested). The majority (59%) were amenable to the idea of making it mandatory for registered charities to display the OSCR logo on its materials. Over half were interested in each of the other potential initiatives.

Base (all respondents)

Q30. How amenable would you be to the idea of making it mandatory for registered charities to feature the OSCR logo on their materials?

Interest in potential OSCR initiatives – sub groups

Size of charity (Turnover)

- Larger charities were more likely than smaller ones to be interested in:
  - Webinars (<£25K 66% vs. >£25K 76%)
  - For OSCR to be represented at charity events (<£25K 58% vs. >£25K 65%)

Size of charity (Staff)

- Larger charities were more likely than smaller ones to be interested in all of the initiatives, except mandatory use of the OSCR logo:
  - Interest in webinars: No emp. 68%, 1-5 emp. 70% vs. 6+ emp. 81%
  - Interest in support through social media: No emp. 52%, 1-5 emp. 55% vs. 6+ emp. 69%
  - Interest in OSCR representation at charity events: No emp. 57%, 1-5 emp. 61% vs. 6+ emp. 76%
  - Interest in listing details of trustees: No emp. 56%, 1-5 emp. 52%, vs. 6+ emp. 66%

Length of time established:

- Younger charities were more interested than older ones in the following:
  - Support through social media: <4yrs 70% interested vs. 11-25yrs 56%, 26-50yrs 54%, >50yrs 46% interested.
  - OSCR representation at charity events: <4yrs 70%, 4-10yrs 67% interested vs. >50yrs 55% interested.
  - Make it mandatory to feature OSCR logo: <4yrs 73%, 4-10yrs 70%, 11-25yrs 64%, 26-50yrs 66% amenable vs. >50yrs 47% amenable
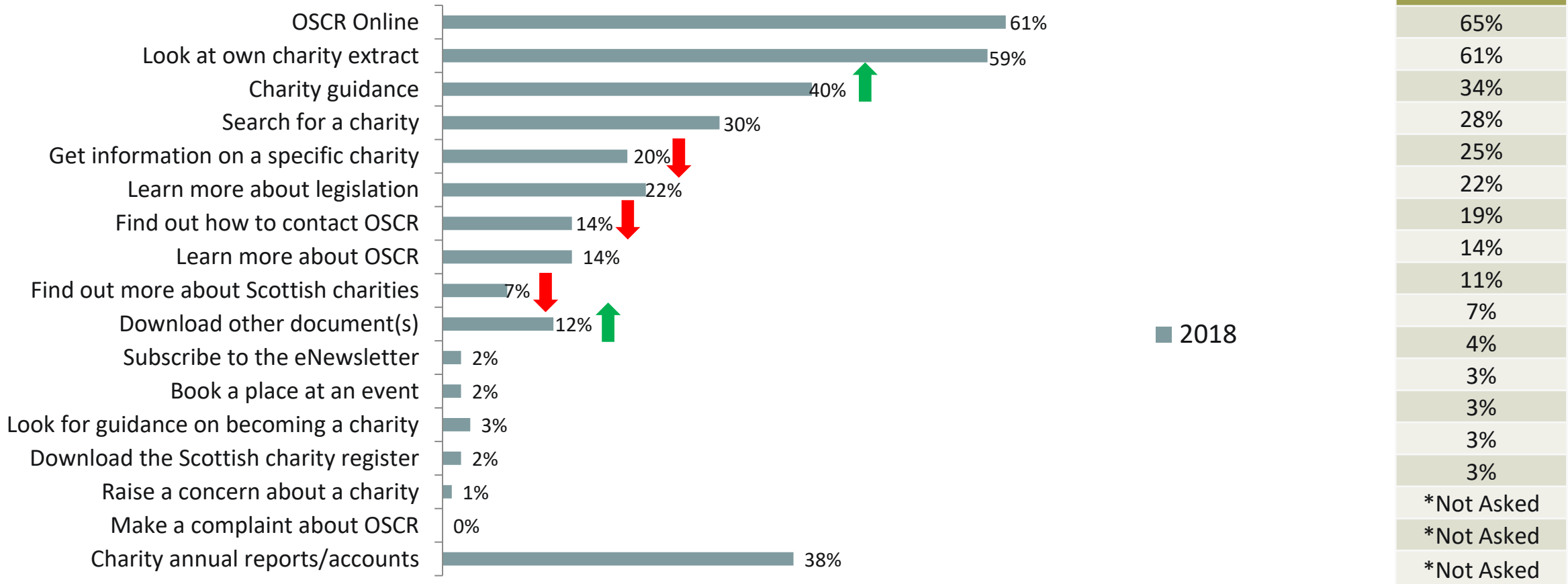
*Please note that the figures on this slide are net figures calculated excluding 'Don't know'

OSCR'S Website

Visiting the website

2014

- Yes
- No
- Unsure

1%
22%
77%

2016

- Yes
- No
- Unsure

1%
20%
79%

2018

- Yes
- No
- Unsure

1%
17%
82%
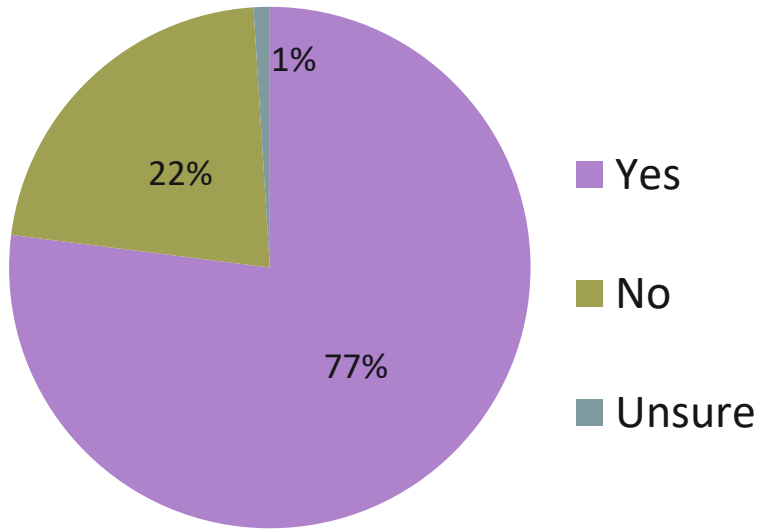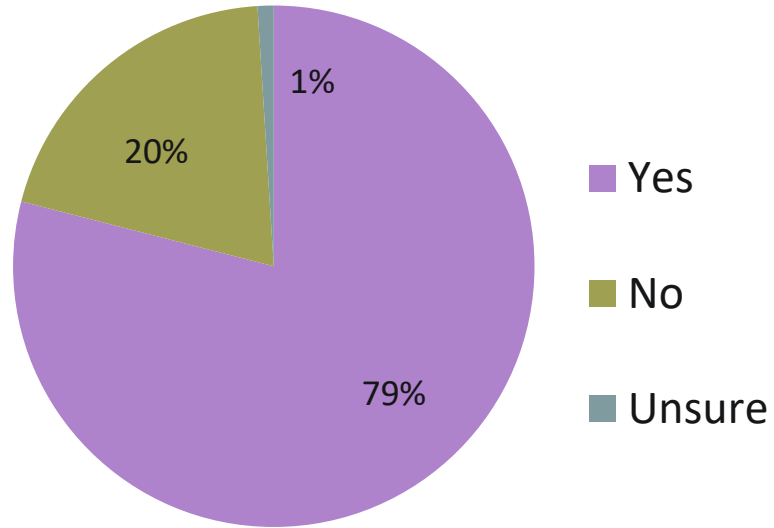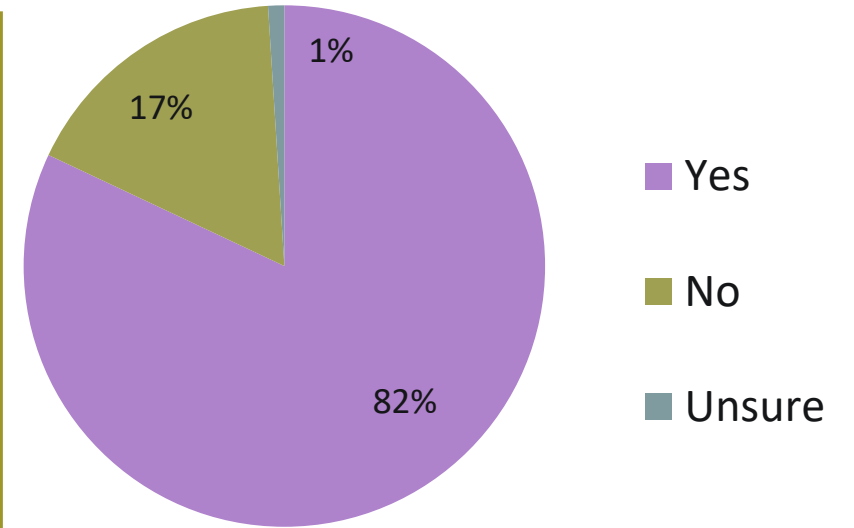
The proportion of respondents who had visited the OSCR website did not change significantly in 2018.

Q15. Have you visited OSCR's website (www.oscr.org.uk) in the last 12 months?

Reasons for visiting the OSCR website

	2016
OSCR Online — 61%	65%
Look at own charity extract — 59%	61%
Charity guidance — 40% ⬆	34%
Search for a charity — 30%	28%
Get information on a specific charity — 20% ⬇	25%
Learn more about legislation — 22%	22%
Find out how to contact OSCR — 14% ⬇	19%
Learn more about OSCR — 14%	14%
Find out more about Scottish charities — 7% ⬇	11%
Download other document(s) — 12% ⬆	7%
Subscribe to the eNewsletter — 2%	4%
Book a place at an event — 2%	3%
Look for guidance on becoming a charity — 3%	3%
Download the Scottish charity register — 2%	3%
Raise a concern about a charity — 1%	3%
Make a complaint about OSCR — 0%	*Not Asked
Charity annual reports/accounts — 38%	*Not Asked
	*Not Asked

■ 2018

Reasons for visiting the website are generally the same as 2016, with some small but significant changes. The most common reason remained using OSCR Online, closely followed by 'looking at my own charity extract'.

Base (all those who have visited OSCR's website): 2016 –954, 2018 – 994 (Sample)

Reasons for visiting the OSCR website – sub groups

Size of charity (Turnover)

- Larger charities were more likely than smaller ones to have visited the OSCR website for the following reasons:
  - To get information about a specific charity (<£25K 17% vs. >£25K 24%)
  - To learn more about Scottish charity regulation (<£25K 17% vs. >£25K 26%)
  - To search for a charity on the Register (<£25K 26% vs. >£25K 34%)

Size of charity (Staff)

- Charities with 1-5 staff (4%) were less likely than charities with 6+ staff (11%) to have visited the OSCR website to find out more about Scottish charities.
- Charities with no staff (37%) were less likely than those with 6+ staff (47%) to have visited the website to look at charity guidance.
- Charities with no staff (13%) were less likely than those with 6+ staff (19%) to have visited the website to find out how to contact OSCR.

Reasons for visiting the OSCR website – sub groups

Length of time established:

- The youngest charities were more likely than older ones to have visited the OSCR website for the following reasons:
    - To learn more about OSCR: <4yrs 24% vs. 11-25yrs 14%, 26-50yrs 10%, >50yrs 13%.
    - To find out more about Scottish charities: <4yrs 12% vs. >50yrs 4%.
    - To learn more about Scottish charity legislation: <4yrs 31% vs. 26-50yrs 18%
    - To look at charity guidance: <4yrs 60% vs. 4-10yrs 41%, 11-25yrs 36%, 26-50yrs 43%, >50yrs 34%
    - To find out how to contact OSCR: <4yrs 22% vs. >50yrs 11%
- The youngest charities (<4yrs 29%) were less likely than charities established for 11-25yrs (42%) to have visited the OSCR website to view/download charity annual reports and accounts.

Improvement in OSCR website

Legend:
- Don't know
- Much worse
- A little worse
- About the same
- A little better
- Much better

2018
- Much better: 20%
- A little better: 22%
- About the same: 33%
- A little worse: 1%
- Don't know: 24%

2016
- Much better: 23%
- A little better: 22%
- About the same: 26%
- A little worse: 2%
- Don't know: 27%
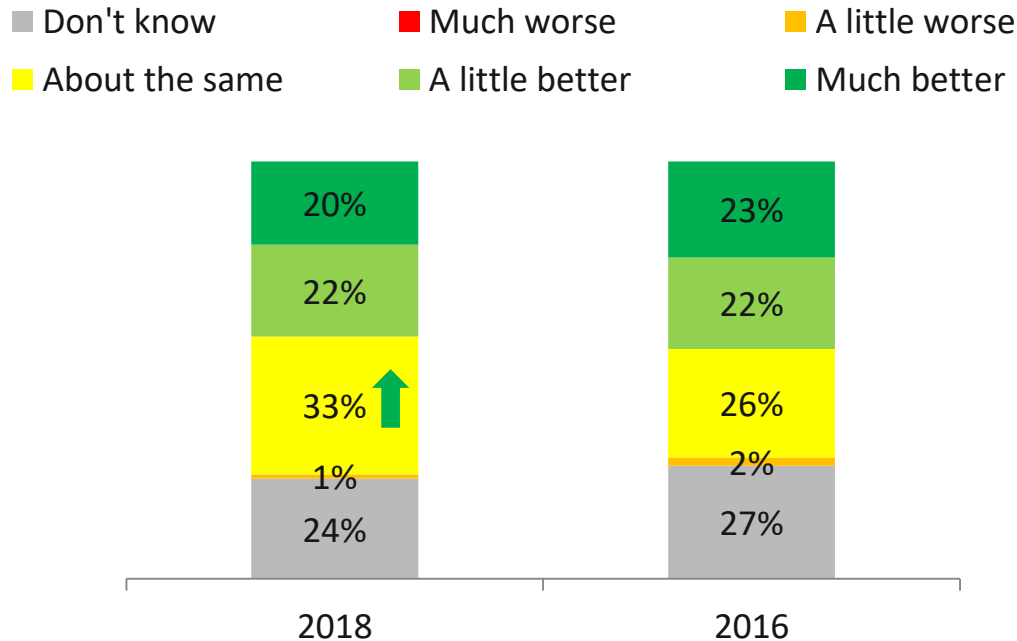
Mean Score (1 to 4)	
2018	2016
3.81	3.90

The proportion saying the website was better than 2 years ago remained broadly similar to 2016, although there was a significant increase in the proportion saying the website was 'about the same'. As in 2016, respondents were far more likely to say it had got better than worse (42% vs. 1%).

Base (all those who have visited OSCR's website): 2016 –954, 2018 994 (sample)

Q17. How does the current OSCR website perform compared to 2 years ago?

Charity status
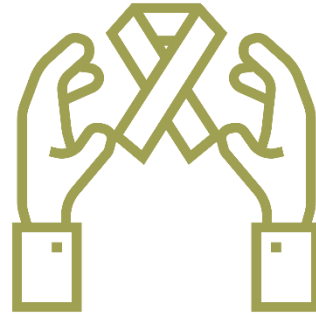
Benefits of being registered

- When asked about benefits and drawbacks of being registered, the majority of respondents referred to the benefits as being reassuring, building trust and instilling confidence with the public.

  - *It shows you are following guidance. It provides external bodies with security that you are governed in the right way; and it provides external bodies, and your own organisation, with reassurance that you are doing things the right way.*

  - *Reassures people that we are legitimate and well-run.*

  - *This is essential and we wouldn't be without it. It helps us to visibly show the public that we are being governed and overseen by someone.*

- The majority saw compliance as being light touch and saw no drawbacks from being registered. However, there were still a few micro charities who found the annual return too difficult.

- It was also thought to be useful in the context of applying for funding.

  - *It gives confidence that the organisation has been subject to recognised rules and regulations. Currently this is confidence for the public, but if they ever needed to apply for funding, external funders would be reassured that they were registered and complying with OSCR requirements.*

  - *Point of contact if people want to check you are a charity and check how you do, for example, funders. 'People can check you out, for good or bad, because you are on the OSCR website.'*

- Another benefit mentioned was having a source of advice.

  - *The main benefit to me has been... being able to get advice on how we go about doing some of the things we need to. Their advice has been invaluable. The advice they have given us has helped us to move forward and has actually helped us to save money on some of the charities.*

Importance of charity status

Legend:
- ■ Very important
- ■ Fairly important
- ■ Fairly unimportant
- ■ Very unimportant
- ■ Don't know

2018
- 73%
- 21%
- 4%

2016
- 72%
- 21%
- 5%
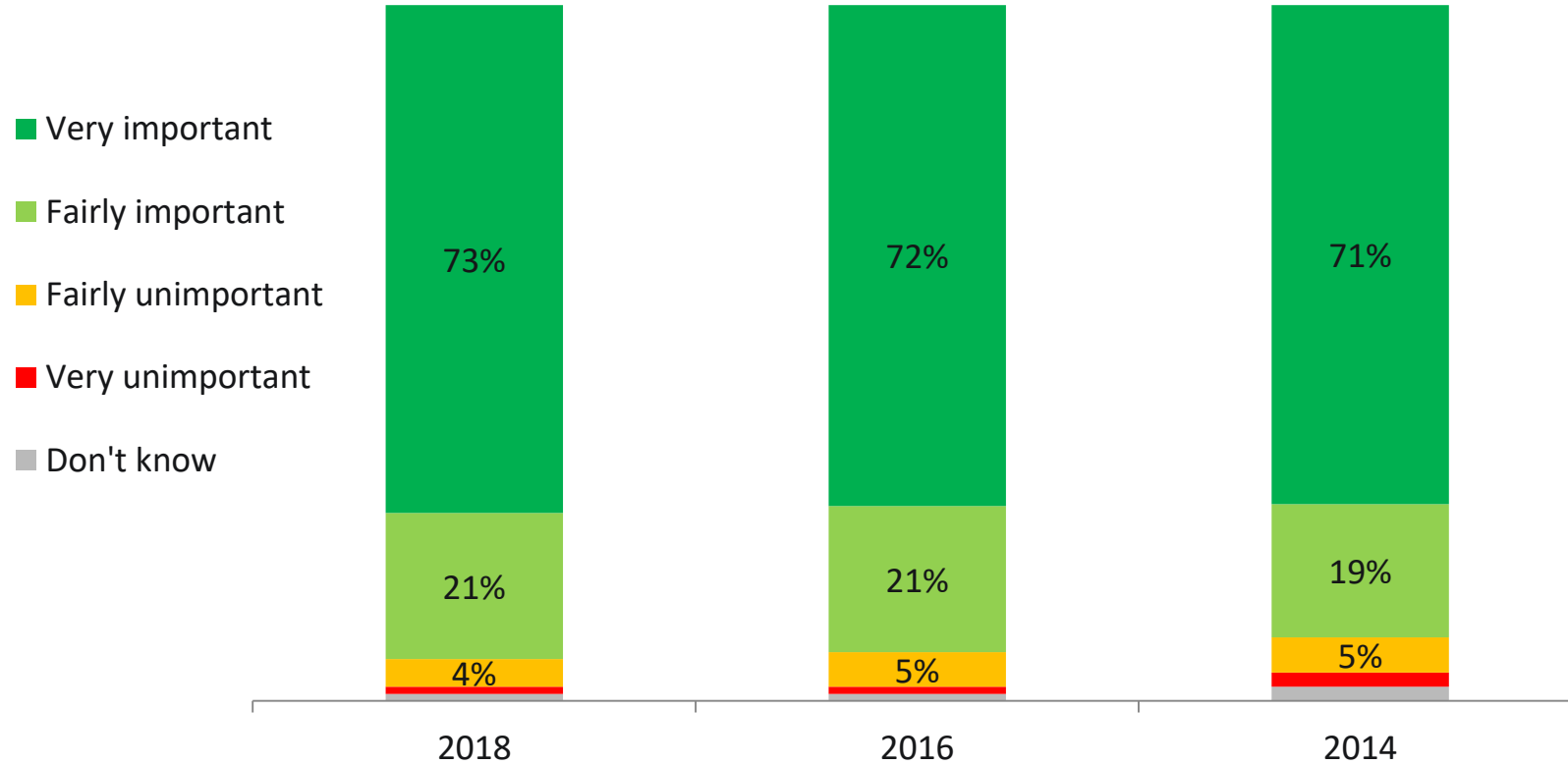
2014
- 71%
- 19%
- 5%

Charity status continued to be perceived as important by the overwhelming majority. As in previous years there was considerable strength of feeling, with 73% rating it as very important.

Base (all) 2014 – 1,370; 2016 – 1215; 2018 – 1,215 (sample of respondents)

Q25. Thinking about your organisation's status as a registered charity, how important or unimportant is this status to your organisation?

Main benefit of charity status (spontaneous)

progressive

	2018 (All)	%	2016	%
Credibility/trust/image	1,932	44%	469	40%
Tax/rates exemption/Gift Aid	1,173	27%	359	31%
Diverse funding streams	933	21%	223	19%
No benefit	61	1%	19	2%
Don't know	43	1%	43	4%

Base (all): 2016 –1186; 2018 – 4,343

Benefits of charity status

The status brings with it trust from our members and the general public. This in turn means that individuals are more willing to serve as trustees; the public are more likely to donate to us and take part in local fund-raising events. Also, as the status is backed by charity law, it facilitates good governance in the day-to-day running of the charity. It sets a high standard and prevents organisations from getting onto a slippery slope towards bad practice or dishonesty.

Allows us to carry out our remit without outside interference, i.e. Tax Authorities, Local Government, but excellent assistance from OSCR.

Showing we are a credible organisation and accountable for any income we receive

It describes why we were granted charitable status with the resultant knock-on affect of open more doors for grant funding and donations.

We can claim Gift Aid and helps when applying for funding etc.

a) Water rates exemption - without it we'd have to close. b) Tax exemptions - we'd not be liable but the paperwork would be impossible c) Incorporation - without it I'd not be a Trustee.

The security in knowing that our efforts and work are overseen by a professional body, bearing in mind that our volunteers are untrained in financial matters.

like a stamp of approval, a certificate of fitness etc.

Perceived benefits of charity status

Legend: ■ Not applicable ■ Don't know ■ 1 - No benefit ■ 2 ■ 3 - Moderately beneficial ■ 4 ■ 5 - Extremely beneficial

	Mean 2018	Mean 2016	Mean 2014
Tax / rates relief (e.g. gift aid or business rates relief) — 8% 3% 11% 4% 10% 8% 56%	4.07	4.10	4.05
Increased public trust from charity status — 3% 6% 7% 5% 21% 19% 39%	3.84 ⬆	3.73	3.80
Being recognised as a charity/brand association — 4% 4% 9% 6% 20% 17% 40%	3.79 ⬆	3.66	3.67
Being able to use charitable status as a quality mark, or stamp of approval — 4% 5% 11% 7% 21% 16% 36%	3.67	3.62	3.67
Access to different funding streams, grants or finance — 7% 5% 14% 7% 14% 11% 42%	3.68	3.61	3.61

Q31. To what extent, if at all, does your own organisation benefit from the following, as a result of its status as a charity?

Base (all) 2014 – 1,370; 2016 –1215

2018 –1,215 (Base varies)

79

Perceived benefits of charity status

Legend: ■ Not applicable ■ Don't know ■ 1 - No benefit ■ 2 ■ 3 - Moderately beneficial ■ 4 ■ 5 - Extremely beneficial

	Mean 2018	Mean 2016	Mean 2014
Ability to publicly fundraise — 9% / 4% / 15% / 7% / 16% / 14% / 36%	3.55	3.55	3.54
Ability to seek guidance/signposting/support from OSCR — 3% / 5% / 8% / 7% / 27% / 20% / 30%	3.61 ↑	3.46	3.32
Being recognised for working with a particular group — 9% / 7% / 13% / 8% / 21% / 13% / 27%	3.38	3.38	3.40
Being part of a group of regulated organisations — 7% / 6% / 13% / 9% / 22% / 16% / 27%	3.40	3.37	3.37
Raising the profile of the organisation in the community — 5% / 5% / 14% / 9% / 23% / 15% / 29%	3.40 ↑	3.32	3.41

Q31. To what extent, if at all, does your own organisation benefit from the following, as a result of its status as a charity?

Base (all) 2014 – 1,370; 2016 – 1215

2018 – 1,215 (Base varies)

Perceived benefits of charity status

Overall, tax/rates relief, trust and recognition were the main perceived benefits of charity status. The importance of public trust and being recognised as a charity had increased measurably since 2016, as had the importance of being able to seek advice from OSCR and raising the profile of the organisation in the community.

Size of charity (turnover)
On all measures (except 'Ability to publicly fundraise' where there was no significant difference) charities with incomes of up to £25,000 were less likely than those with incomes of £25K and over to find them beneficial.

Size of charity (staff)
On all measures (except 'Ability to publicly fundraise' and 'Ability to seek guidance/signposting/support from OSCR'), charities with 6+ staff were more likely than smaller staff to find them beneficial.

Length of time established
For all the measures, the newest charities (established less than 4 years) were more likely than the oldest (established more than 50 years) to find them beneficial.

Main drawback of charity status (spontaneous)

	2018 (All)	%	2016	%
Regulations and/or complying with OSCR	253	6%	136	11%
Filling annual return	386	9%	114	9%
Paperwork	298	7%	79	7%
Issues with funding	71	2%	45	4%
Other	107	2%	141	12%
No drawbacks	2,059	47%	669	55%
Don't know	98	2%	31	3%

Base (all) 2014 – 1,370; 2016 –1215; 2018 – 4,343

Q27. What do you consider to be the greatest drawback of charitable status to your organisation.?

Main drawback of charity status (spontaneous)

Compiling accounts to a set standard. Our small charity accounts could be simplified but have to comply with OSCR guidelines

Managing the expectations of stakeholders when they expect a commercial standard of activity despite being a charity e.g. local government contracting services etc.

Not necessarily any, just having to ensure annual accounts are done which can be time consuming for a small organisation.

Having to pay to have independent examination of our financial statements

The keeping of records by volunteers is difficult to keep up to date and volunteers finding time to complete returns on time.

I personally don't think there is any drawback from having charitable status. It was our choice as an organisation to become a charity. As a volunteer though, it is extremely hard work to ensure that the administration and financial work of the charity is all kept up to date, clear and transparent.

Extra pressure on the treasurer which may put off people from taking on the role

Initial process of registering was cumbersome and time consuming, but once charitable status had been granted there were no drawbacks

Q27. What do you consider to be the greatest drawback of charitable status to your organisation?

Perceived drawbacks of charity status

progressive

	Mean 2018	Mean 2016	Mean 2014
Difficulty of recruiting trustees	2.34	2.27	2.17
Public's unrealistic expectations re. running costs	2.26	-	-
Liability attached to being trustees	2.15	2.11	2.07
Financial cost of preparing accounts / reports	2.15	2.27	2.17
Responsibilities attached to being trustees	2.08	2.06	2.06

Legend: Not applicable, Don't know, 1 - No hindrance, 2, 3 - Moderate hindrance, 4, 5 - Extreme hindrance

Difficulty of recruiting trustees: 7% 3% 35% 14% 23% 10% 8%
Public's unrealistic expectations re. running costs: 11% 7% 35% 11% 20% 9% 6%
Liability attached to being trustees: 4% 5% 39% 18% 22% 6% 6%
Financial cost of preparing accounts / reports: 6% 39% 17% 25% 6% 5%
Responsibilities attached to being trustees: 3% 3% 41% 18% 24% 7% 4%

Base (all) 2014 – 1,370; 2016 –1215, 2018 –1,215 (Base varies)

Q31b. To what extent, if at all, is your own organisation hindered by the following, as a result of its status as a charity?

Perceived drawbacks of charity status

Legend: ■ Not applicable ■ Don't know ■ 1 - No hindrance ■ 2 ■ 3 - Moderate hindrance ■ 4 ■ 5 - Extreme hindrance

	Mean 2018	Mean 2016	Mean 2014
Paperwork involved in maintaining charity status	2.14	2.15	2.29
Staff costs and time being spent on charity related administration	2.00	1.95	2.02
Perceived as being outdated or 'do-gooding'	1.56 ⬆	1.48	1.53
Perception of being amateur or lacking professionalism	1.68 ⬆	1.60	1.59
Restrictions on permitted activities or making changes to how we operate	1.75	1.76	1.85
Financial restrictions	1.36	1.37	1.45

Chart percentages:

- Paperwork involved in maintaining charity status: 2%, 38%, 21%, 25%, 8%, 3%
- Staff costs and time being spent on charity related administration: 20%, 37%, 15%, 17%, 5%, 3%
- Perceived as being outdated or 'do-gooding': 11%, 7%, 57%, 12%, 9%, 3%
- Perception of being amateur or lacking professionalism: 9%, 6%, 54%, 13%, 13%, 5%
- Restrictions on permitted activities or making changes to how we operate: 9%, 7%, 48%, 15%, 16%, 3%
- Financial restrictions: 19%, 5%, 60%, 8%, 5%

Q31b. To what extent, if at all, is your own organisation hindered by the following, as a result of its status as a charity?

Perceived drawbacks of charity status

On the whole, the potentially negative aspects of charity status tended not to be an issue for charities. The area most likely to be hindrance was to do with recruiting trustees, with 41% stating that charity status would be at least a moderate hindrance in this regard.

Size of charity (turnover)
Charities with incomes up to £25,000 were less likely than those with incomes over £25,000 to find the following a hindrance:
- Financial cost of preparing accounts/reports (<£25K 12% hindrance vs. >£25K 22%)
- Staff costs and time being spent on charity related administration (<£25K 11% hindrance vs. >£25K 17%)
- The public's unrealistic expectations regarding running costs (<£25K 16% hindrance vs. >£25K 34%)
However, charities with higher incomes were less likely to find 'Paperwork involved in maintaining charity status' a hindrance (>£25K 13% hindrance vs. <£25K 19%).

Size of charity (staff)
Small charities (in terms of numbers of staff) were less likely than larger charities to find the following a hindrance:
- Financial cost of preparing accounts/reports (no emp 13% hindrance vs. 1-5 21% and 6+ 27%)
- Staff costs and time being spent on charity related administration (no emp 10% hindrance vs. 6+ 23%)
- Financial restrictions (no emp 2% hindrance vs. 6+ 7%)
- Difficulty of recruiting trustees (no emp 22% vs 1-5 30% and 6+ 34%)
- Perception of being amateur or lacking professionalism (no emp 7% hindrance vs. 6+ 13%)
- The public's unrealistic expectations regarding running costs (no emp 15% hindrance vs. 1-5 68% and 6+ 48%)
However, charities no employees were more likely to find 'Paperwork involved in maintaining charity status' a hindrance no emp 18% hindrance vs. 6+ 10%)

Perceived drawbacks of charity status

Length of time established

No clear pattern emerged across the measures in terms of the age of charities. However, a few differences emerged in specific measures:

- Charities established for 11-25 years and 26-50 years were less likely than the newest and oldest categories to find 'Paperwork involved in maintaining charity status' a hindrance (11-25yrs 12% hindrance, 26-50yrs 11% vs. <4yrs 25%, >50yrs 23%)
- The longest established charities (13%) were more likely than most other categories (4-10yrs 3%, 11-25yrs 7%, 26-50yrs 5%) to find being perceived as outdated or 'do gooding' a hindrance
- The newest charities were more likely than the oldest charities to find 'Perception of being amateur or lacking professionalism' a hindrance (<4yrs 17% vs. >50yrs 6%)

Overall impact of charity status
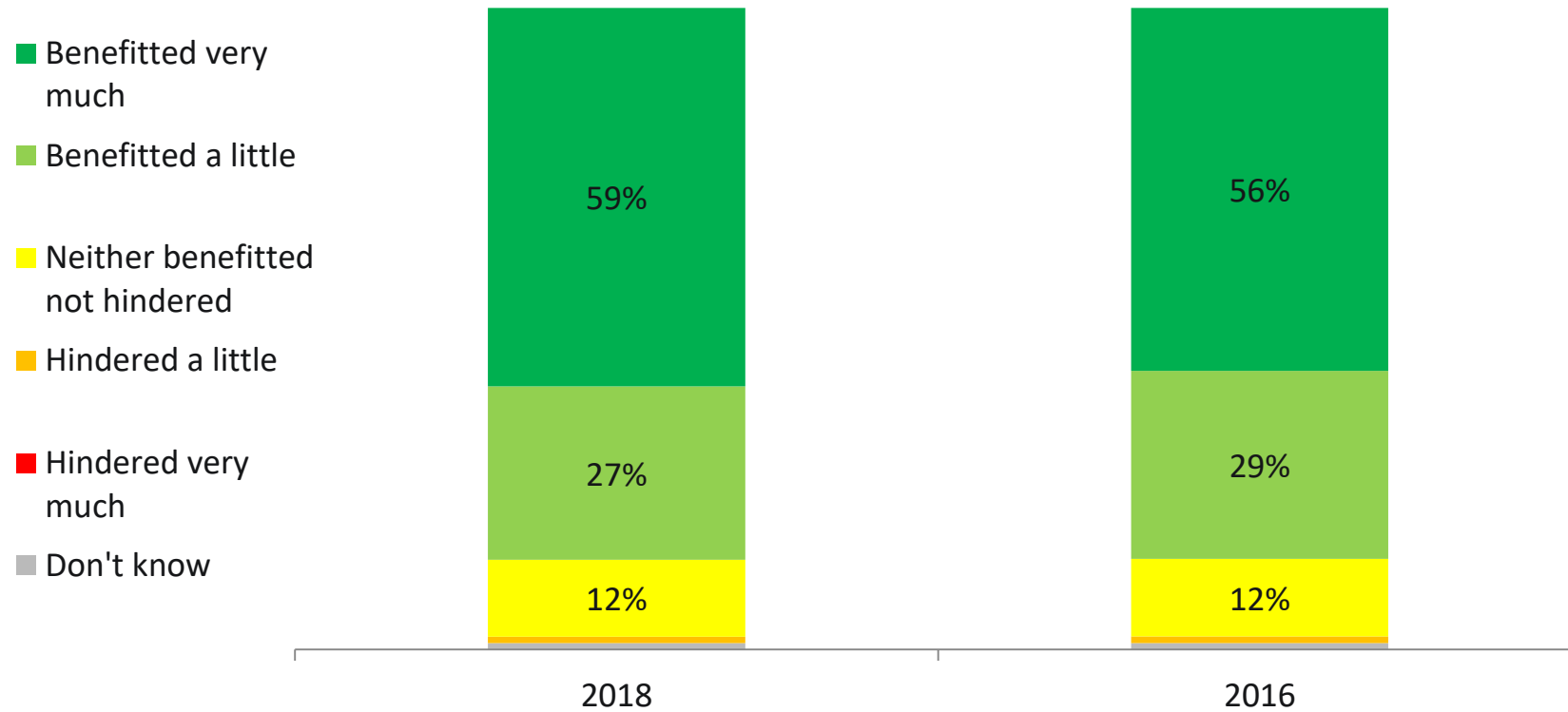
- Benefitted very much
- Benefitted a little
- Neither benefitted not hindered
- Hindered a little
- Hindered very much
- Don't know

	2018	2016
Benefitted very much	59%	56%
Benefitted a little	27%	29%
Neither benefitted not hindered	12%	12%

Charity status was overwhelmingly felt to have a beneficial impact, with well over half stating their charity benefitted very much. This is in line with 2016.

Base (all): 2016 −1215
2018 − 1,215 (sample of respondents)

Q31c. Overall, what impact does being registered as a charity have on your organisation?

Media coverage

89
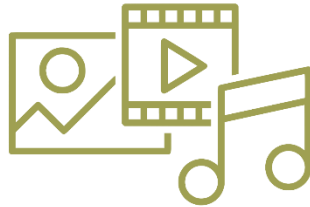
Views on media reporting of charities

	N	%
Negative press is bad for all charities	159	25%
Little effect on us because we are small / local	157	25%
Little effect on us (unspecified reason)	130	21%
General expression of concern / annoyance at the way some charities have behaved	74	12%
Little effect on us because we are a different type of charity / or receive no donations	67	11%
Media scrutiny is important	47	7%
Media are irresponsible / inaccurate	36	6%
Regulator needs to have teeth / competence	35	6%
Media tend not to report positive stories about charities	23	4%
Little effect on us because we are a religious group / church	19	3%

	N	%
Large charities are like businesses	17	3%
Issues raised by media regarding charities are being (overly) politicised	11	2%
Such scandals are inevitable / human nature	15	2%
We have reviewed our practices / learnt from others' problems	12	2%
OSCR should conduct PR / raise awareness of itself / charities' good works	13	2%
We look good in comparison	8	1%
We may struggle to adapt	5	1%
We already had good practice	7	1%
Unwise / irresponsible statements / appearances by some third sector staff	2	0%

Base (all commenting on OSCR reporting) – 1,577

Q34. What are your views on the current reporting of charities and how that may affect your charity?

Views on media reporting of charities

All charities will have to work harder to put measures in place to prevent the reported instances from recurring, which will have an impact on costs involving money which could otherwise be spent on the Charity's objectives. Our own charity is local and very small in size, but nevertheless we have to ensure that the trustees remain vigilant, particularly in issues with vulnerable people

Hopefully being a small local charity the current negative reports won't have any bearing on our charity.

The Oxfam scandal will destroy trust in the sector which will result in reduced income for the larger charities. At our local level this should have little impact upon our fundraising.

I am astounded at the lack of morality in the charities concerned.

It is a fact of life that every organisation or group of people have individuals who do not conform to the expected rules of society. The recent publicity concerning Oxfam shows that there is a small number of individuals who acted wrongly in the past. If you dig deep enough this will be found anywhere. It does not stop me continuing to support the work of Oxfam and all the other charitable organisations I have contact with.

I am glad that the elitist Oxfam has been called to account...charities are no better and no worse than other human organisations, when they work well with a decent ethos that's great and when they don't they just enforce a healthy cynicism about the human condition.

There's a different witch-hunt on charities every couple of years, they're driven more by lazy press than actual safeguarding - we get used to it. The initial concerns may be relevant but the escalation and associated fall out to the sector is nothing but sensationalising.

Bad publicity like that can create a huge amount of public distrust which results in those in need of the charity's help losing out because of the actions of a few individuals.

Q34. What are your views on the current reporting of charities and how that may affect your charity?

Views on reporting related to OSCR

	N	%
The status quo is OK	920	58%
Understand the importance / "needs to be done"	196	12%
Necessary for public trust	176	11%
No effect on us	136	9%
OSCR should not make it any harder	101	6%
Small and large charities should be treated differently	78	5%

Base (all commenting on OSCR reporting) – 1,577

Q34. What are your views on the current reporting of charities and how that may affect your charity?

Views on reporting to OSCR

Charities have to be accountable and I feel the current requirements are about right - any more would be a burden, any less would risk lack of accountability and transparency.

I feel that the reporting obligations for charities - especially in terms of the disclosability of commercially sensitive information within the annual report - has become overly transparent. I am sure the pendulum will swing back again once there is a general settling down of the charity sector. At the moment it is necessary as part of confidence building.

If the annual reports are published on line then we will have to limit what we put in reports to the minimum allowable to protect the trustees from unwanted attention from public/press

For a charity as small as ours (5 trustees, less than £10,000 per year turnover), any reporting is a waste of time and effort and money. We don't have enough money to have staff to do the reporting properly, so trustees have to do it out of their own time and out of the goodness of their hearts, and it's all a massive pain.

Charities must be accountable to a regulator otherwise it leaves charities open to abuse. There should however, be different levels of monitoring between large and small organisations - a more tailored approach.

I expect to have to submit an annual return, and it's not too onerous, though some parts of esp the supplementary form could be clearer.

For small charities, the situation has improved, in that the Scottish Regulator has accepted that charities with small budgets should not be treated in the same way as those with budgets above £100,000.

In today's world we all have to be seen to be transparent and OSCR is just one of the many organisations we have to deal with and it does it well to make it simplistic in it's requests.

Q34. What are your views on the current reporting of charities and how that may affect your charity?

Conclusions

Summary

Current issues

- Finance remains the single biggest issue of concern for stakeholders continue to face a lack of funding, local authority cuts, high running costs and reductions in donations.
- Prompted responses were very similar to spontaneous responses insofar as funding was the main issue followed by recruitment, membership, and regulatory issues. We prompted for the importance of negative press and it proved not to be an issue.
- Financial issues were more pressing for charities with more staff members. Smaller charities were more likely to cite recruitment of volunteers as an issue.
- The majority of charities were acting to address the issue, 25% were looking for other funding and 21% were looking at fundraising events.
- Over two thirds (70%) had sought advice from another organisation. This is in keeping with 2016. The overwhelming majority (89%) were satisfied with the advice they were given.

Trust

- This year saw a significant drop in the degree to which stakeholders rated the general public's trust. This is in line with findings from the general public survey which also reported significantly less trust than 2 years ago.
- The majority of stakeholders claimed that a loss in trust had no effect on them, but 8% claimed it had reduced donations.

Summary

Perceptions of OSCR

- The majority (93%) trusted OSCR to treat charities fairly. The majority (96%) agreed that completing the annual form is just part and parcel of what they do. Nearly three quarters (72%) agreed that OSCR does its best to minimise the burden of regulation. Over a third (35%) said they didn't know if OSCR is innovative, while over half (57%) said it was. Views on whether OSCR should feature more about charities' finances were mixed with 19% saying they didn't know and 54% agreeing. These results are in line with 2016.
- The most important aspects of OSCR's operations were: not charging fees to submit reports and accounts, having an online register, and telling the public when it has taken action. Having a list of trustees was important to 83% of the sample, providing access to accounts was important to 87% of the sample and showing the OSCR logo to demonstrate registration was important to 57% of the sample.
- There was a significant increase in awareness of five of the nine functions that we questioned about. Respondents were more aware of: handling complaints, advising government, policing fundraising, training and promoting the work of charities. We also saw an increase in awareness amongst the general public.

Contact with OSCR

- Completing the annual return continued to be the main reason for contact with OSCR.
- Charities continued to rate their contact with OSCR highly. Ratings of contact around filling out the annual return, which were already very positive in 2016, have increased further.
- The majority made contact either through the annual return online or through email. Contact by phone, letter consultation or through an event dropped this wave.
- Ratings for contact across the different modes were high and in line with 2016.

Summary

OSCR communications

- This wave saw a significant increase in rating for ease of completing the annual return. Over three quarters (78%) said guidance from OSCR was easy. Other documentation didn't gain such high scores as a high proportion (32%) selected 'don't know'. Overall satisfaction was very high and in line with previous years, with 91% saying it was excellent, very good or good.
- Suggested ways of improving communication were increasing user friendliness/plain English and clarity. This is likely to be in the context of OSCR's online functions.
- Email was by far the most preferred medium of contact.
- Interest in potential OSCR initiatives in order of popularity were as follows:
    - Webinars 68%
    - Making the OSCR logo mandatory 59%
    - Events 57%
    - Listing Trustees 55%
    - Social media 53%

OSCR website

- There was no significant change in the number of those who visited the website with 82% of the sample saying they had.
- Reasons given for visiting were in line with 2016. The main reason was to visit OSCR online, followed by looking at their own charity extract. There was an increase in those who had sought charity guidance.
- Views on whether the website had improved remained broadly similar to 2016.

Summary

Charitable status

- The importance of having charitable status was as high this year as last with 94% of the sample saying it was very or fairly important. The main benefits were spontaneously stated as being: credibility/trust/image (44%), followed by tax/rates exemption/gift aid (27%), and diverse funding streams (21%). This was much in line with the prompted response. Trust from the public was seen as significantly more beneficial this wave compared to 2016, as was being recognised as a charity.
- The largest single percentage of spontaneous responses (47%) said there was no drawback in being registered. The biggest prompted drawbacks were seen as recruiting trustees and the public's unrealistic expectations regarding running costs.
- Charity status was overwhelmingly felt to have a beneficial impact, with well over half stating their charity benefitted very much. This is in line with 2016.

Media coverage

- When respondents were asked to comment on recent press coverage many said the negative press was bad for all charities. However, equally large proportions said it would have little effect because they are local and small, or that it would just generally have little effect.
- Some read the question as pertaining to OSCR reporting and the majority of those who did claimed the status quo was OK.

Conclusions

- Stakeholders continue to be faced with financial concerns, with larger charities stating financial issues as a main concern and smaller charities being faced with low levels of volunteering as well as financial issues.

- This year saw a reduction in stakeholders' perceptions of the trust members of the public have in charities, which in turn has led to a few claiming it has reduced donations.

- OSCR could help address this through fostering the adoption of its logo by all charities in Scotland.

- The majority of charities were in favour of making it mandatory to feature the OSCR logo on materials and over three quarters of the general public thought it was quite or very important that charities show the OSCR logo.

- The importance of public trust and being recognised as a charity had increased significantly since 2016, as had the importance of being able to seek advice from OSCR and raising the profile of the organisation in the community.

- OSCR continues to be rated very highly for fair treatment and minimising burden of regulation, and completing the annual form is no longer seen as a problem. Quality of contact with OSCR continues to be rated very highly.

- This year saw a significant increase in understanding of OSCR's functions.

- Overall these are very positive findings that illustrate an increase in importance of OSCR's existence in Scotland's charity sector.

Progressive's services

Core qualitative techniques
A full range of qualitative research methods

Language and behaviour
Gets communications right in tone and content

Mobile ethnography
Captures real consumer behaviour in real time

The View on Scotland
Glasgow city centre viewing facility provides comfort convenience and first class facilities

Brand mapping
Discovers core brand values, benchmarks and maps progress

Core quantitative techniques
A full range of quantitative research methods

Progressive Scottish Opinion
Offers fast and inexpensive access to over 1,000 Scottish consumers

Progressive Business Panel
Takes soundings from companies across Scotland quickly and efficiently

Field and tab
Bespoke stand alone Field and Tab services for qualitative and quantitative methods

Data services
We have a wide range of analytical services

Thank you

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Technical appendix
quantitative: method, sampling and data processing

- The data was collected by online survey
- The target group for this research study was charities registered with OSCR
- The sampling frame used for this study was OSCR's database of registered charities
- All OSCR-registered charities with an email address were invited to take part. The target sample size was 1,200 and the final achieved sample size was 4,343.
- A random stratified sample of 1,215 responses was drawn from the full sample of 4,343. This random sample was stratified and drawn to match the size and profile (in terms of charity income and region) of the final sample of 1,215 from the 2016 Charities Survey.
- Fieldwork was undertaken between 14th February and 7th March 2018.
- Full data tables for both sample sizes have been provided.
- All persons on the sampling frame were invited to participate in the study. Respondents to paper and internet self-completion studies are self-selecting and complete the survey without the assistance of a trained interviewer. This means that Progressive cannot strictly control sampling and in some cases, this can lead to findings skewed towards the views of those motivated to respond to the survey.
- The overall response rate to the survey was 18%. This response rate is typical for a survey of this kind.
- The sample is broadly reflective of the overall profile of the sampling frame.
- Margins of error for the results shown are between +/ 0.27% and +/-1.33% for the full sample of 4,343, and between +/-0.54% and +/-2.73% for the random sample of 1,215.

Technical appendix
quantitative: quality procedures

progressive

- Our data processing department undertakes a number of quality checks on the data to ensure its validity and integrity.
- For **CAWI Questionnaires** these checks include:
  - Responses are checked for duplicates where unidentified responses have been permitted.
  - All responses are checked for completeness and sense.
  - Depending on the requirements of the survey, and using our analysis package SNAP, data is either imported from email responses received in a dedicated email inbox or stored directly on our dedicated server
- A computer edit of the data carried out prior to analysis involves both range and inter-field checks. Any further inconsistencies identified at this stage are investigated by reference back to the raw data on the questionnaire.
- Where "other" type questions are used, the responses to these are checked against the parent question for possible up-coding.
- Responses to open-ended questions will normally be spell and sense checked. Where required these responses may be grouped using a code-frame which can be used in analysis.
- A SNAP programme set up with the aim of providing the client with useable and comprehensive data. Crossbreaks are discussed with the client in order to ensure that all information needs are met.

Technical appendix
quantitative: quality procedures

- Data gathered using self-completion methodologies are validated using the following techniques:

  - Where the data is collected via an internet survey using an access panel, password protection ensures that each respondent can only submit one response. Our internet panel supplier, Research Now, also complies with the rules of the MRS and ESOMAR.

  - Internet surveys using client lists use a password system to ensure that duplicate surveys are not submitted. The sample listing is also de-duplicated prior to the survey launch.

  - Where some profiling information has been provided on the sample list, this is also checked against responses where possible to validate the data.

  - Where a self-completion survey is returned anonymously there is not any opportunity for validation. However all questionnaires returned undergo rigorous editing and quality checks and any thought to be invalid are removed from further processing.

- All research projects undertaken by Progressive comply fully with the requirements of ISO 20252.

Technical appendix
qualitative: method and sampling

- The data was collected by in-depth telephone interviews
- The target group for this research study was charities registered with OSCR
- The sampling frame used for this study was OSCR's database of registered charities
- In total, 14 depth interviews were undertaken.
- Fieldwork was undertaken between 24th January – 8th February 2018
- Respondents were recruited by telephone by Progressive's skilled in-house team of qualitative recruiters. These recruiters worked to predetermined quota controls to ensure that the final sample reflected the requirements of the project. All respondents were screened to ensure that they had not participated in a group discussion or depth interview relating to a similar subject in the 6 months prior to recruitment.
- An incentive of £40 payable to the respondent's charity compensated them for their time and encouraged a positive response.
- In total, 4 moderators were involved in the fieldwork for this project.
- It should be noted that, due to the small sample sizes involved and the methods of respondent selection, qualitative research findings do not provide statistically robust data. This type of research does however, facilitate valid and extremely valuable consumer insight and understanding.