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Evaluation of the Voluntary, Community, and Social Enterprise Funding Package

Scoping report

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Prepared for: Department of Digital, Culture, Media & Sport (DCMS)

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1 Introduction

1.1 Background of the fund

The Covid-19 Voluntary, Community and Social Enterprise (VCSE) sector support package, hereby referred to as the ‘funding package’, was announced by the Chancellor on 8th April 2020¹ as an emergency funding package of £750 million to support the VCSE sector through the Covid-19 pandemic. The funds were distributed by The Department for Digital, Culture, Media & Sport (DCMS) and other government departments to a range of organisations. Of the £750m, £360 million was distributed directly from government departments and £370 million was distributed to smaller charities, including a grant to the National Lottery Community Fund. The government also matched donations to the National Emergencies Trust (NET) as part of the BBC’s ‘Big Night In’ fundraiser.

As of 1 March 2021, the grants have supported over 14,000 organisations and funded a wide range of projects. Organisations that have been supported include²:

- Hospices to help increase capacity and give stability to the sector;
- St Johns Ambulance to support the NHS;
- Victim charities, including domestic abuse to help with increases in demand;
- Vulnerable children charities, to help them to continue deliver services on behalf of local authorities;
- Citizens Advice to increase the number of staff providing advice during the Covid-19 pandemic.

The funding package aimed to ensure that charities could continue day-to-day work during the Covid-19 pandemic and meet any increased demand as a result of Covid-19. In particular, the fund aimed to support communities, take pressure off the NHS and make sure those on the front line were able to reach people who needed the most help³.

The funding package included nine funding streams, eight of which are covered by this evaluation. This includes (1) Big Night In (BNI), (2) Community Match Challenge (CMC), (3) Coronavirus Community Support Fund (CCSF), (4) Funding delivered via DCMS and a range of other government departments (OGDs), (5) Hospices, (6) Voluntary & Community Sector Emergencies Partnership (VCSEP), (7) Youth Covid-19 Support Fund and (8) The Loneliness Fund. No additional evidence will be gathered for CCSF as a rigorous evaluation has already been conducted by Ipsos Mori and therefore its findings will be integrated into this evaluation instead. The Devolved Administrations fund is out of scope as the UK government is not involved in administering or managing the fund.

The purpose of this evaluation is to assess the impact of the funding package as a whole upon organisations, people, and communities. To do that, the scoping report has sought to understand the type, depth and consistency of evidence currently available (including from other evaluations), to identify where the focus should be for our data collection, analysis and reporting.

1.2 The evaluation

Evaluation activities will be conducted in three phases (scoping, implementation and synthesis). The first phase, a scoping phase, included an analysis of documents, including end of grant and evaluation reports, which was used to assess gaps in evidence and inform the development of a Theory of Change (ToC) (see section three).

¹ [Chancellor sets out extra £750 million coronavirus funding for frontline charities](#)

² Ibid

³ As above.

The second phase is an implementation phase, which aims to gather evidence for the process and impact evaluation of the funding package and will address evidence gaps identified during the scoping phase. This will include a survey with grantholder organisations and a volunteer survey (see section 4.3); up to 20 case studies of grantholder organisations, which will include interviews with managers, staff, volunteers (if applicable), and service users (see section 4.6); up to 150 interviews will be conducted with grantholders (see section 4.4) and three group discussions with sector representatives (see section 4.5) will take place.

The final phase will involve applying contribution analysis⁴⁵ to primary and secondary data, case study development and synthesis of findings. Available data will be matched to the ToC indicators to systematically analyse all available quantitative and qualitative data. Contribution analysis provides a framework for evaluators to make credible causal claims where the ToC is complex and infer whether the VCSE funding package has contributed to the impacts observed. The evaluation will provide evidence to:

- Understand which approaches worked best to achieve desired outcomes;
- Identify who was reached and where;
- Identify all outputs achieved; and
- Inform DCMS' sector stewardship strategy.

An expert advisory group will be consulted throughout the evaluation. This will ensure that the evaluation delivers valuable learning for the VCSE sector and government. The advisory group have already provided feedback on the ToC, case studies, and group discussions for this scoping report. All the feedback has been addressed and incorporated into the research tools and outputs in this scoping report. They will continue to provide valuable feedback during the evaluation and will review draft research tools, advise on engagement approaches, discuss emerging findings, and take part in a dissemination webinar. Please see below for members of the expert panel:

- **Sini Rinne-Kerridge**, Lead Consultant (strategy and evaluation), **NCVO**. Sini leads NCVO evaluation and strategy consultancy portfolio. She is a highly experienced consultant with an extensive track record of working with a wide range of civil society organisations and their funders.
- **Dr Jurgen Grotz** is the Director of the **Institute for Volunteering Research (IVR)** at the University of East Anglia. He joined the University of East Anglia, School of Health Sciences as Senior Research Associate in Patient and Public Involvement in Research for CLAHRC, East of England in August 2017.
- **Nathan Hudson** is a Research Director at **NatCen**. He is a mixed-methods researcher with expertise in the interdisciplinary study of disadvantage and equality. He is currently leading several projects focused on the funding and provision of voluntary and community sector (VCS) services.
- **Rebecca Moran** is currently the Evidence, Impact and Learning Manager for the **Cardinal Hume Centre** (a homeless prevention charity in London) and brings extensive experience of leading research in the VCSE sector.
- **Will Rossiter**, **Nottingham Trent University**, is an experienced research, evaluation and policy practitioner. Will currently leads a three-year voluntary sector programme evaluation for DCMS (Office of Civil Society) and a UKRI/ESRC-funded project on the impact of Covid-19 on the voluntary and community sector. He is also leading research to estimate the local, regional and sectoral economic impacts of the Covid-19 pandemic

1.3 Definitions used in this report

We are aware that the language used to describe those involved in and elements of the funding package are different both across and within funds. Therefore, please see the table below which describes the terms used throughout this report:

⁴ Mayne, J. (2012) 'Contribution analysis: Coming of age?', *Evaluation*, 18(3), pp. 270–280.

⁵ Mayne, J., (2019). Revisiting Contribution Analysis. *Canadian Journal of Program Evaluation*, 34(2), pp.171–191

Table 1:1 Definitions used in this report

Term	Definition
Beneficiary/beneficiary groups	Target beneficiaries is what service users were referred to during the preparatory stages of the ToC development. The term also referred to the NHS, other public services and volunteers.
Fund	One of eight funds that constitute the funding package (see below). These are: Big Night In, Coronavirus Community Support Fund, Community Match Challenge, Government Departmental Funding, Hospices Fund, Voluntary and Community Sector Emergencies Partnership, COVID-19 Youth Fund, and the Winter Loneliness Fund (consisting of Arts Council England, DCMS Loneliness, and Radio funding).
Funding package	The Covid-19 Voluntary, Community and Social Enterprise (VCSE) sector support package of £750m
Funding intermediary	An organisation which was awarded money by a funding partner, which then distributed that money to grantholder organisations
Funding partner	A sub-fund organisation which distributed money to grantholder organisations.
Grantholder organisation	An end organisation that received money from the funding package to deliver activities.
Grantholder	A staff member or volunteer within the grantholder organisation who is responsible for applying for and managing money.
Service user	A person who received support from or engaged with the activities supported by the grantholder organisation.
Sub-fund	One of the funding streams through which money is distributed under the above funds. For example, The Greggs Foundation is a sub-fund of the Community Match Challenge fund.

2 Understanding the VCSE funds

2.1 Introduction

The following pen portraits provide a picture of each of the funding streams and are based on a range of documents NatCen received from DCMS. These included applications for funding documents, evaluation reports, end of grant reports, impact reports and grantee reports. A total of 40 documents were extracted into a classification matrix. The analysis did not include any documents from Arts Council England as these had not been received at the time of writing the scoping report, and limited documents for the Hospice, radio, and loneliness fund, resulting data being presented in a different structure below. Document extraction and analysis will continue following this scoping report to inform further outputs. Data from the documents were extracted into a matrix by the following themes and sub-themes:

Table 2:1 Documentary Analysis Themes

Theme	Sub-theme
General	Funding stream; Sub-fund name (if document originates from sub-fund level); Document analysed; Summary; Overall lessons learned; Overall aim; Sub fund(s) (if applicable); End Funder; New or existing; Evidence base; Target population(s); Location
Awarding of grants	Criteria for grant award; How do the criteria meet service user needs; How grants were awarded
Grants awarded	Number of organisations/grants; Types of organisations; Types of activities; Timeline
Outputs	Service users; Organisation; Staff/volunteer; Other
Outcomes	Service user; Organisation; Staff/volunteer; System outcomes; Unintended outcomes; Other
Delivery experience	Barriers and facilitators; Lessons learned; Degree of flexibility; Adaptations made
Sustainability	Funding identified; Expected sustainability without funding; Sustainability for protected groups
Assumptions and indicators	Assumptions; Key performance indicators; Impact measures
Value for Money (VfM)	N/A
Case studies	Were case studies conducted; Where to find details of case studies

By extracting the data outlined in table 2:1, we were able to map the way in which each fund was structured, what its aims were, and how it was implemented, as well as the barriers, facilitators, and lessons learned during implementation. Pertinently, we were also able to map the existing evaluation activities which have been conducted within each fund, therefore identifying key methodological gaps (see section 4.2).

2.2 Pen portraits

The below pen portraits are based on the document extraction explained above only. This means that the data which informed them is based on secondary data, rather than primary data collected by the evaluation team. Consequently, they are based on the understanding of those who authored the documents and not DCMS or the evaluation team, nor do they include interview data. This section will present a pen portrait for each one of the eight funds that constituted the wider funding package (see Table 1.1), including their aims, structure, mechanisms for delivery, as well as factors that enabled (facilitators) and hindered (barriers) delivery.

2.2.1 Big Night In

Funding partners: Children in Need, Comic Relief, National Emergencies Trust

Value: £37m

The Big Night In (BNI) fund included £37m in government match funding of public donations received during the BBC's 'Big Night In' appeal that took place on April 23rd, 2020. The BNI fund was distributed between three sub-funds; Children in Need (CiN), Comic Relief (CR) and National Emergencies Trust (NET). The sub-funds dispersed monies to voluntary and community organisations responding to the needs of their communities affected by the Covid-19 pandemic. The CiN sub-fund responded to the needs of vulnerable and marginalised children (0-18), with funding focussed on children and young people disproportionately impacted by the Covid-19 pandemic, for example those affected by poor mental health and domestic abuse. The CR sub-fund focussed on supporting families and communities to meet young children's needs, women and girls, those requiring mental health support and those who are homeless or facing insecure housing. The NET sub-fund was more broadly focussed on the needs of vulnerable people in local communities.

The sub-funds dispersed the funding in a variety of ways. CiN awarded 600 grants through three funding streams with different time scales. CR funded grantholder organisations through two streams (emergency and recovery) to a variety of national, regional and community-led charities. Within the emergency funding stream, funds were distributed to six funding partners who made onward grants. Through the recovery funding stream, 201 investments were made to local and national organisations. The NET awarded grants through 46 community funds across the four UK nations which had pre-existing relationships with local organisations.

Facilitators

Sub-funds reported several facilitators. Funding partners reported that the BNI fund had a clear purpose which was understood by grantholder organisations. NET also reported that the funding timetable corresponded to peak demand. CiN split their funding into three streams with different timescales which they felt enabled the funding to address immediate needs as well as longer-term issues. In addition, sub-funds felt that productive and supportive relationships built with DCMS were a key facilitator to delivery. Remote working was also seen as a facilitator, resulting in greater collaboration and partnership working between grantholder organisations.

Barriers

Sub-funds also encountered several barriers. Although online working was seen as a facilitator, some services such as women's refuges and physical therapy were reliant on physical resources. It was noted that remote working reduced accessibility of services for users and grantholder organisations were sometimes lacking the skills needed for digital service delivery. The perceived short and inflexible spending timescales were also reported to be a barrier. Some grantholder organisations had to spend fund money first and adjust other funds that they had received over a longer period, noting that the funding did not address the longer-term needs resulting from the ongoing Covid-19 pandemic. Sub-funds also cited an increased workload for fund staff. This included increased relationship management work, due diligence, and reporting. For CiN, workload pressures led to minor delays releasing grant payments. Supported grantholder organisations found that the paperwork and audit requirements of the Fund were extensive.

Some small projects were unable to be supported by the Fund as they wouldn't have been able to cope with additional audit pressures while working in already difficult situations during the Covid-19 pandemic.

Key lessons

- **Government and third sector collaboration:** sub-funds found that collaboration between the charitable sector and government can ensure impact by sharing information, identifying common interest and sharing best practice.
- **Flexibility of funding:** it was reported that funding needed to be based on need rather than prescriptive criteria. For example, NET stressed the importance of covering staffing and Personal Protective Equipment (PPE) costs. Allowing grantholder organisations to also change and adapt projects and services ensured grantholder organisations could be flexible to changes in the Covid-19 pandemic situation.
- **Streamlining processes:** sub-funds found that it was possible to streamline grant making processes without undermining due diligence and anti-fraud measures. Examples of this included trustees making decisions via emails rather than waiting for a trustee meeting.
- **Targeting of grants:** it was perceived that that smaller grassroots grantholder organisations, including Black, Asian and Minority Ethnic community-led organisations had the greatest impact for service users. Additional support was required for smaller organisations, including encouragement to apply for funding, flexibility of funding and funds accepting greater risk, such as funding smaller organisations with more limited capacity to meet monitoring requirements.

2.2.2 Community Match Challenge (CMC)

Funding partners: Absolute Return for Kids (Ark); Charities Aid foundation; Children in Need; Comic Relief; Founders Pledge; Global Charities; Greggs Foundation; Lloyds Bank Foundation; Localgiving Foundation; Pears Foundation; Rank Foundation; Smallwood Trust; Stefanou Foundation; Steve Morgan Foundation; The Church Revitalisation Trust; The Coalfields Regeneration Trust; The Henry Smith Charity; The OnSide Foundation; The Vardy Foundation; UKCF.

Value: £84.6m

The CMC fund was distributed by 20 charity funding partners who were allocated between £1m and £20m of match funding, meaning that successful grantholder organisations had to demonstrate that they could match the value of the grant sought from the funding package. The fund aimed to support a range of service users based on their needs, including older people, disabled people, children and young people, carers, low income families, the homeless, victims of domestic abuse and people with learning disabilities. Some sub-funds were focussed on specific groups. For example, Absolute Return for Kids (ARK) supported children, young people and school staff, and The Coalfields Regeneration Trust provided grants to charities working with residents of former coalfield communities. The majority of sub-funds provided grants across the whole of either England or the UK, to both local and national organisations, whereas others were targeted to specific areas, for example The Vardy Foundation funded charities based in the North of England.

Facilitators

Sub-funds reported several facilitators. Many charity funding partners had strong pre-existing working relationships with charities. This meant that vetted actors could be found quickly to respond to the Covid-19 emergency. Another facilitator to delivery was the flexibility of grants. Allowing grantholder organisations to use the funds to cover core costs allowed them to continue to operate and respond to evolving needs. Founders Pledge noted that the fact they were able to widen their grants to any non-profit (rather than just well-established registered charities) helped them to reach a wider range of service users. Sub-funds also felt that good communication from DCMS was a facilitator to delivery. They reported that the team was responsive and provided guidance and assistance through organised catch ups. It was also felt that reporting requirements were clear and not burdensome.

Barriers

Sub-funds encountered several barriers. Many grantholder organisations found the tight timescales and a hard deadline for spending challenging, reporting that it prevented some grantholder organisations achieving further outcomes for beneficiaries. Some sub-funds reported that this was exacerbated by delays to DCMS releasing funds. Charity funding partners also noted that the timelines restricted their ability to carry out evaluation activities. Another barrier to delivery was Covid-19 public health restrictions. The requirement to work remotely meant that some benefits of face-to-face meetings and project delivery were lost. Many grantholder organisations experienced barriers to working with some service users, for example engagement with schools was highlighted as a particular challenge. It was felt that the third lockdown in January 2021 was not widely anticipated when designing the fund, and some funding had to be repurposed between grantholder organisations due to the lockdown restricting delivery. Sub-funds also highlighted that a high turnover of staff at DCMS was a barrier to relationship building and sometimes resulted in duplication of communication and changing views through the programme. One sub-fund reported challenges working with external DCMS consultants as they felt they were inexperienced in grant making.

Key lessons

- **Match funding model:** the model incentivised individuals to support the emergency response and brought new donors to participating charities. In particular, the model highlighted smaller grassroots charities who can struggle to generate income from new donors.
- **Benefits of online delivery:** online delivery allowed online peer support networks for grantholder organisations, reduced costs of programmes while maintaining impact, and allowed the creation of digital resources which can be used and shared long after the funding ends.
- **Importance of core funding:** for many grantholder organisations, the ability to use the funding for core costs such as staff, rent, venue hire, insurance, bills and equipment was vital. It was stressed that investing in core functions aided sustainability for organisations.
- **Service user-centred approach:** sub-funds stressed the importance of a service user-centred approach. They felt it was important to trust the expertise of grantholder organisations who work with marginalised groups and prioritise causes based on organisation and service user feedback.
- **Evaluation and monitoring activity:** some grantholder organisations were not aware of evaluation and monitoring requirements from the start of the grant. This led to inconsistency in evaluation activities and gaps in information.

2.2.3 Hospice fund

Funding partners: Hospice UK; NHS England and Improvement

Value: £155m

Up to £155m in funding was issued by NHS England (NHSE) to Hospice UK, a national charity which works for those experiencing death, dying and bereavement and has a membership of hospice organisations. Hospice UK acted as the funding partner for NHSE, to receive and take responsibility for the grant funding as a restricted fund, and to allocate it through onward agreements to eligible member hospices. Eligible hospices were defined as falling into three categories: charitable hospices providing end of life care as a primary objective; hospices that were recipients of NHS England and Improvement's Children's Hospice Grant; and hospices that were a Together for Short Lives voluntary sector organisation member, registered with Care Quality Commission (CQC) as provider.

During the period April to July 2020, Hospice UK had allocated funding to 163 hospice organisations (many of these operate multiple hospices, so the number of hospices reached was reported to be much higher). A requirement of the funding was to meet daily targets across the eligible hospices of 6,800 beds and an average of 82,000 community contacts. Hospices were also required to collect twice daily capacity logs and to report these monthly to NHSE. From these capacity reports, the government calculated in July 2020 that the NHS had received the benefit of £323m in capacity in return for the initial grant of £155m; of this, 70%

was used to support more than 40,000 patients and accordingly to relieve the NHS of managing these patients' care during the COVID-19 pandemic.

The overall aim of the Fund was to alleviate the financial pressures on hospices during the COVID-19 pandemic and to enable them to provide palliative care and COVID-19 clinical services whether for inpatient care in hospices or in the community. The target population was individuals of all ages requiring end of life care. The geographic coverage was England-wide.

2.2.4 Other government departments (OGD)

Funding partners: Department for Business, Energy and Industrial Strategy (BEIS); DCMS; Department for Environment, Food and Rural Affairs (DEFRA); Department for Education (DfE); Home Office; Ministry of Housing, Communities & Local Government (HCLG); Ministry of Defence (MoD); Ministry of Justice (MoJ).

Value: £162.79m

This funding stream distributed £163m through eight central government departments across a total of 24 sub-funds, ranging in value from £125,000 to £25m, which included a range of partner organisations. Some funding partners had a pre-existing relationship to the relevant department, while others were new. Allocations were made in a variety of ways: direct grant to a national organisation; through an intermediary funding partner; using an intermediary to assist the department in assessment and allocation of funds; establishing a dedicated fund to act as grant-maker; a national organisation sub-contracting to service providers.

The sub-funds allocated funding in three key ways: emergency relief of additional needs among people adversely impacted or in crisis during the Covid-19 pandemic; adaptations to services for delivery during the national lockdowns and local restrictions (for example switching to digital, online or phone); and support for continuation of core operations to offset loss of revenue during the Covid-19 pandemic. The aim across the funding stream was to address the needs of a wide range of people: those in financial hardship; children and young people and their families, foster and adoptive families, and care leavers; domestic abuse victims and their children; homeless people; armed forces communities; those experiencing mental and physical health challenges. Some funding programmes had a particular focus on people from ethnic minority groups, people with disabilities, and LGBTQ+ individuals. One sub-fund differed from all the others in that it was aimed at supporting zoos and zoo animals. The sub-funds were delivered across the UK.

Facilitators

Previous experience of emergency funding reportedly helped one grantholder organisation to make a rapid case for funding. Other sub-funds indicated that simple processes for charities, advance planning centrally, and discussing issues with the sector in advance all helped with smoother assessment and allocation of funds and with well-targeted funding. Flexibility in terms of eligibility criteria and purpose, along with swift payment of funds were reported to have facilitated service delivery, while a move to rolling funds allowed a wider range and diversity of applicants. The emergency funding helped to accelerate grantholder organisations' already existing plans to expand and improve modes of delivery into digital, online and remote. Introducing or expanding digital and remote services helped grantholder organisations to meet additional demand, to reach additional end beneficiaries, and to continue delivering services while face-to-face support was restricted.

Barriers

The eligibility criteria for funding and reporting requirements were a barrier to applying for some grantholder organisations. Planning and set-up barriers that were reported included the need to avoid overlap or duplication, integrating the funded programme to the local situation, delays to getting started, or activities taking longer than expected to set up. Both the short timeframe for the funds and the fact that the end date took place while the Covid-19 pandemic was still ongoing were both viewed as barriers to effective and sustainable delivery of services, though these were mitigated in some cases by extensions to the spending period. Problems were reported with recruitment and staffing, including obtaining agency staff. These issues were attributed to the Covid-19 pandemic and led to underspends against budget. Features of the

Covid-19 pandemic were reported to have an impact on the ability to deliver services: the national lockdowns and local restrictions themselves made delivery difficult, including because staff were going through the same lived experience as end beneficiaries while the organisational ability to support was reduced; third party supplier delays owing to lockdown. The switch to digital and online delivery and remote working presented some hurdles such as provision of equipment and training for staff and volunteers.

Key lessons

- **Application and assessment:** it was reported that better application documents and more rapid assessment would improve the process. It was noted that more communication with the VCSE sector before launching the fund would produce better targeted support, while more advance notice of award, before payment, would allow for planning ahead and timely recruitment. Formal control over third party delivery partners was needed. The sub-contracting model was reported to be more onerous than acting as a grant-maker.
- **Timescales:** it was perceived that the short deadline for applications led to inequities in distribution of grants and a skew to organisations which were in a position to respond quickly, leaving some vulnerable groups underrepresented. The speed of funding allocation allowed for continuity of existing services. However, some grantholder organisations reported difficulties in delivering in a short timeframe, while it was also noted that much can be achieved in a short space of time.
- **Funding and use of budget:** there was reported flexibility in allocating funds either to keep operating core services during a period when fundraising and revenues were reduced, or to adapt and add additional services as circumstances changed during the Covid-19 pandemic. Another view was that eligibility criteria, permitted purposes, and spending deadlines should have been relaxed more, though some grantholder organisations noted that there was flexibility here too through second round funding with changed criteria and extensions to the delivery timeframe in some cases.
- **Digital delivery:** this reportedly increased the reach to end beneficiaries and was popular. The move to digital and remote delivery was reported to be a lasting change which will shape future delivery. One organisation discovered and took steps to address barriers for certain client groups in accessing digital services (deaf people and people with mental health issues). However, the change of mode to digital and online did expose a skills and equipment need for some organisations.
- **Partnerships:** best practice was shared within and across organisations and networks. The VCSE sector and government department should work on closer partnerships in future.
- **Awareness and marketing:** a centrally-produced marketing approach from the sub-fund or funding partner to raise awareness of additional elements to existing services would be helpful. Another view held that awareness raising was more effective when locally led.
- **Adaptations:** some grantholder organisations reported adapting services to emergency provision of food, meals and basic necessities and to providing support for more complex needs exacerbated by the Covid-19 pandemic. Adopting an agile approach helped to respond to the changing circumstances.
- **Sustainability post-pandemic:** sub-funds commented that the needs of vulnerable people will continue post-pandemic and there was a question mark about how this support will be provided.

2.2.5 VCS Emergency Programme (VCSEP)

Funding partners: British Red Cross (BRC) and National Association for Voluntary Community Action (NAVCA)

Value: £4.8m

VCSEP, an emergency response organisation underpinned by NAVCA and the BRC, distributed £4.8m of the COVID-19 emergency funding through 200 local partner organisations and 30 national partner organisations. Links, partnerships and networks both short- and longer term with a range of local, national and regional VCSE organisations have been established to coordinate responses, for example to the national vaccination programme.

The aim was to match the response from large numbers of volunteers during the Covid-19 pandemic to large-scale requests for support. The end beneficiaries are those impacted by emergencies. A dashboard of online insights tools was created including an online request for support service, a map of areas of socioeconomic vulnerability and support services, and reports of needs at local level. VCSEP have stated their goal of increasing diversity at all levels and have developed equality principles and undertaken in-house research to help them achieve this. The funded programme was delivered through the English regions, with 50% of requests for support came from London and the South East.

Facilitators

Sharing of insight and intelligence between grantholder organisations has developed during the funded period. Several examples of co-creation of projects were reported as good practice. Connectivity and collaboration between projects facilitated by the regional multi-agency cells (MACs) and the Local Infrastructure Network were reported as helping to deliver services effectively.

Barriers

Sharing of organisational datasets which could assist with coordinated delivery has been challenging. Formal agreements needed to be set up between the national organisations and this remained a long term goal. Competition between organisations in providing emergency response was evident and different organisational cultures were at play.

Key lessons

- **Coordination and intelligence sharing:** grantholder organisations should do this proactively and be supported to do it, to avoid duplication and ensure resources are targeted better.
- **Improving resilience:** organisations should adopt a service user-centred and locally-tailored approach.
- **Relationship between statutory and VCSE sector:** close partnership should continue because future risks (such as pandemics and climate change) will require it.
- **Local vs national:** tensions between the under-resourced local organisations and the national emergency response organisations which are perceived to be well-resourced should be resolved.
- **Adaptations:** the focus was on building links and connections between already existing VCS organisations and on providing insights and online tools. VCSEP also supported the volunteer response to testing and vaccination on mass scale. Fund has been extended with further funding twice to take account of ongoing Covid-19 pandemic.

2.2.6 Winter Loneliness Fund

Funding partners: Audio Content Fund; Arts Council England; DCMS; Ofcom.

Value: £7.5m

The government allocated a £7.5m funding package to tackle loneliness during the winter, particularly over Christmas 2020, in the context of further lockdowns during the COVID-19 pandemic. The funds were distributed through three existing schemes which are outlined in more detail below: the Loneliness Fund; Arts Council England); and the Radio Funds. The winter loneliness fund built on a £4m Local Connections Fund which was announced in December 2020 to reduce social isolation through small grants to small charities and groups.

Loneliness Fund (extension)

The Loneliness Fund administered by DCMS initially ran from June-December 2020 with £5m of funding to provide targeted support and relief to those most at risk of loneliness during the COVID-19 pandemic. The

funds were distributed through nine grantholder organisations which were all national charities with the capacity and reach to provide support quickly to vulnerable groups. The present funding stream allocated extension funding of £2m to allow seven of the original nine grantholder organisations to continue their work: Alzheimer's Society, Carers Trust, Home-Start UK, The English Football League (EFL) Trust, Mind, Royal National Institute of Blind People (RNIB), The Soldiers, Sailors, Airmen and Families Association (SSAFA). Two of these, Carers Trust and Home-Start UK awarded onward grants to local groups within their federated network structure.

The funding aimed to reach those at most risk of loneliness, from vulnerable groups including those with physical or mental health conditions, carers, vulnerable mothers, serving and ex-service personnel and their families, and older adults.

Arts Council England

Arts Council England distributed £5m of the £7.5m winter loneliness funding through several existing arts and cultural programmes. The national charity the Reading Agency received £3.5m of the DCMS funding via Arts Council England and allocated this through their Reading Well and Reading Friends programmes, which aim to support people with wellbeing and to tackle loneliness. The remainder of the Arts Council England fund was awarded to around 50 grantholder organisations through two existing arts and cultural programmes: Creative People & Places and Celebrating Age. These programmes aim to encourage social connections through community arts and cultural spaces, particularly focussed on older people in the case of Celebrating Age.

Radio Funds

Two separate radio funds acted as funding partners for a total of £500,000 under the winter loneliness fund. The Audio Content Fund (ACF) awarded £297,000 to 19 projects for creation of original audio content including comedy, short-form, fitness and wellness, for broadcast across more than 100 commercial and community radio stations. The geographic reach of the broadcasts extended to Scotland, Wales and Northern Ireland as well as England. ACF's projects across all funding sources typically reach a diverse audience with one in five projects focussing on a BAME, LGBTQ+, or disabled perspective or narrative. The aim was to alleviate loneliness in listeners and to empower listeners to combat loneliness they may be experiencing owing to lockdown restrictions during the COVID-19 pandemic. Vulnerable groups addressed through the 19 projects included children and young people, parents, LGBTQ+ communities, and people who may have physical or mental health problems, or those suffering social anxiety or isolation.

The Community Radio Fund (CRF) is administered by Ofcom to distribute funding to Ofcom-licensed community radio stations, of which there are around 300. These are not-for-profit stations, staffed largely by volunteers and serving local communities. They reach around one million listeners per week and have suffered a significant loss of advertising revenue during the COVID-19 pandemic. The CRF distributed £200,000 in emergency funding as part of the winter loneliness package to help stations meet their core costs and to continue providing services.

2.2.7 Youth Covid-19 Support Fund (YCSF)

Funding partners: DCMS

Value: £16.5m

The YCSF was established as a new fund to support the youth sector during the COVID-19 pandemic. The Fund made 551 awards, through its grant delivery partner PricewaterhouseCoopers (PwC), to a mix of grassroots youth clubs, uniformed youth groups, and national youth and umbrella organisations. The Fund's aim was to enable youth organisations to continue operating; it was targeted at those that were impactful but struggling, having reduced their services or temporarily closed owing to loss of income during the COVID-19 pandemic. The target population was young people in England, aged between 5 and 19 years (or up to 25 years in the case of individuals with special educational needs).

Facilitators

Strong collaboration and acting as one team as well as adopting an agile approach were all reported as important facilitators to developing the Fund quickly and adapting it. This in-flight decision making was supported by a strong dataset and the ability to analyse it to assess progress.

Barriers

Just over half of applicants reported finding the application stage difficult, for example in terms of the form itself, or having to submit multiple forms for different age groups if a large age range was served. While there was a 91% response rate to monitoring and evaluation, post-event assurance requests were still ongoing three months after grant offers were issued.

Key lessons

- **Knowledge of the sector** – awareness of the sector and its types of grantholder organisations was reported to be important to ensuring the Fund is aligned with needs, and stakeholder feedback incorporated.
- **Application process** – support for applicants, particularly the less experienced grantholder organisations, could help improve reach, and it was noted that umbrella bodies could play a role here; the application forms could have been simpler particularly for smaller applicant organisations or those supporting multiple age ranges. The online application portal was cited as less resource intensive because of the built-in validation, while it was noted that a first come first served basis could have avoided a high volume of applications close to the deadline.
- **Communications and monitoring** – some grantholder organisations were reportedly unresponsive to the award email and had not completed all the collation and supply of documents in a timely fashion, so communicating a firm deadline could tighten this up; sharing the monitoring form with multiple contacts in grantholder organisations and stating the consequence of non-return could further increase the already high response rate.
- **Post event assurance requests** - accelerating the timeline for monitoring requests (while still allowing at least 3 weeks response time) could help to avoid losing momentum.

3 Theory of Change

3.1 Introduction

The Theory of Change (ToC) reflects how this funding package was expected to lead to changes for those organisations, individuals and communities it supported. Please refer to appendix A. for an overview of the participatory and iterative steps taken to develop the ToC, who was involved in this process, and presentation of the final, agreed output.

The ToC for the funding package forms the **theoretical basis guiding the impact evaluation**. It provides the overarching framework on what the funding package was aiming to achieve and for whom. All evaluation tools have been developed to align with the ToC and in particular the outcomes the funding package aimed to achieve. The tools are structured to collect the evidence needed for the contribution analysis techniques that will be used as part of this evaluation.

This funding package supported a large and diverse range of VCSE organisations and people in need during the Covid-19 pandemic (the service users). In doing so, DCMS and other government departments deployed multiple delivery mechanisms and collaborated with a diverse group of funding bodies and sector stakeholders.

It is crucial that the ToC is reflective of all seven funds being evaluated within the wider funding package, to ensure a comprehensive coverage of the elements that are common across all funding streams and those that are specific. This is particularly important in the context of the targeted outcomes. To achieve this aim, the evaluation team conducted a participatory and iterative process in developing and finalising the ToC, based on the following steps.

1. Agreeing key principles for the development of the ToC.
2. A review of documentation and data relating to each funding stream.
3. Consultations with fund managers.
4. Development of a draft ToC reflecting funding package-wide outcomes, barriers, target beneficiaries⁶, assumptions, and guiding hypothesis.
5. A workshop with the core DCMS oversight and management team.
6. A workshop with fund managers to test and seek feedback on the draft.
7. Refinement and finalisation of the ToC.

Each step is discussed in further detail in appendix A. **As a result of this process, all fund managers have engaged with and fed back on the ToC and its related measures.** Due to pragmatic and ethical constraints⁷, the service users who were supported by the grantholder organisations that received funding were not consulted in this process. They will, however, be consulted through interviews conducted for case studies as part of the implementation phase of the evaluation (see section 4.6). Similar considerations (protecting grantholder organisations' time and the need to complete the ToC process at pace) meant that grantholder organisations were not consulted in the process. These organisations, however, will be engaged through the grantholder survey and grantholder interviews.

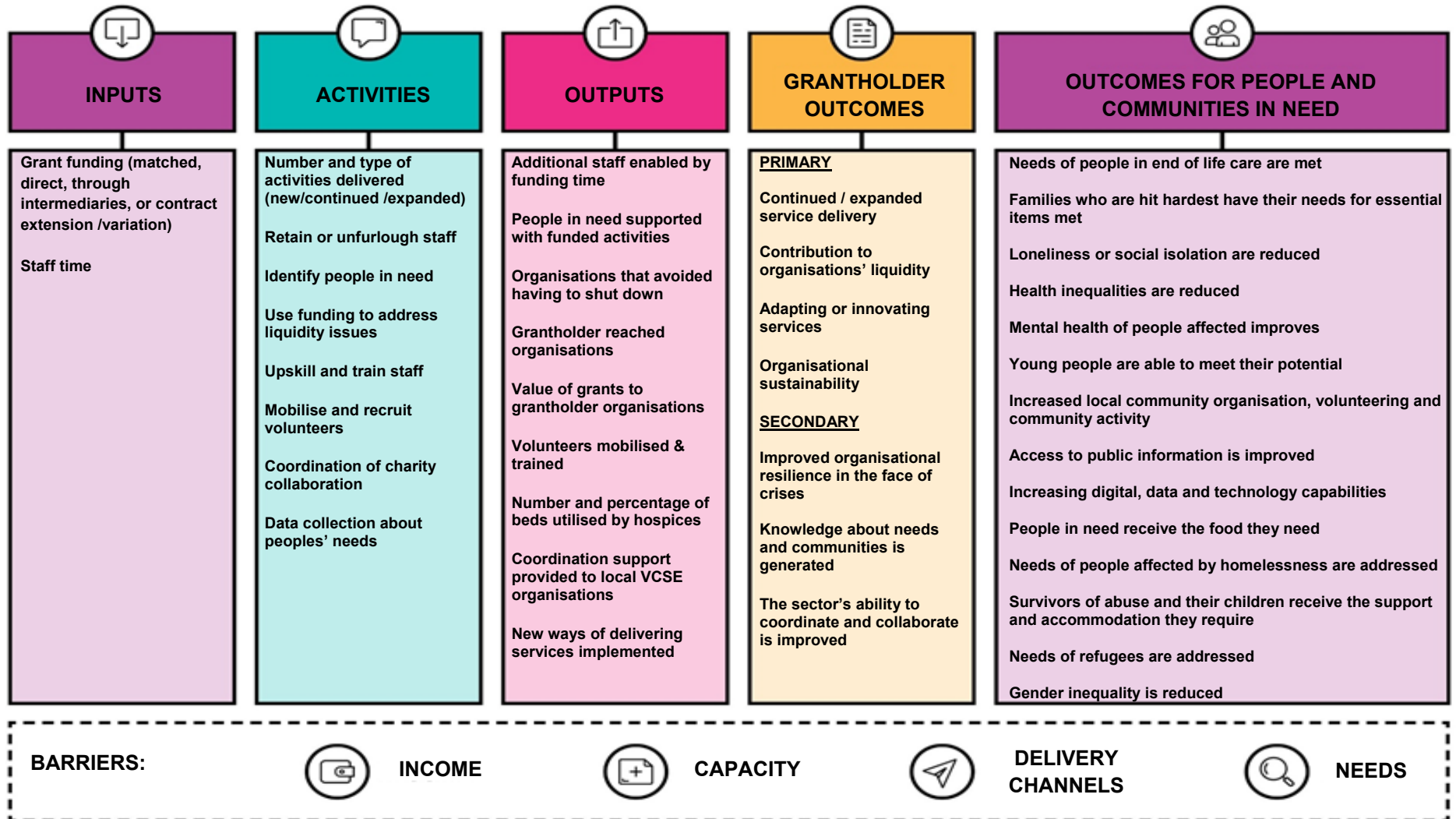
⁶ Beneficiaries and beneficiary groups is what grantholder organisations, staff, volunteers, and service users were referred to during the preparatory stages of the ToC development. The term also referred to the NHS and other public services at this stage.

⁷ Time constraints meant it was not practical or feasible to meaningfully engage with service users at this stage. The development process focused on those stakeholders who were responsible for designing and overseeing the funding streams and the funding package as a whole. The evaluation will collect service users' views as part of case studies and will therefore be inclusive within reasonable limits. The evaluation team felt it was not the best use of time for service users who are vulnerable during the pandemic to be consulted for the ToC development process.

3.2 Theory of Change diagram

Please see below for the ToC logic model diagram, which outlines the inputs, activities, output, and outcomes of the funding package, which are explained in more detail below (please see section 3.3)

Figure 3:1 Funding Package ToC



3.3 Explaining the funding package Theory of Change

A ToC diagrammatically illustrates how activities undertaken by an intervention are expected to lead to changes for the beneficiaries of that intervention. It includes key barriers that such activities are intended to address. It is based on one or more hypotheses, while helping to conceptualise and test whether the hypothesis held true. In short, the ToC sets out what the intervention inputs, how funded activities are expected to result in the intended outcomes, and for whom.

The **hypothesis** for this funding package is:

By providing direct grant funding to VCSE organisations across the UK, these organisations will be able to meet increased and evolving demand for their services. Funding will also allow them to continue their day-to-day activities supporting those in need.

This hypothesis assumes that:

- The funding was primarily intended to enable VCSE organisations to support people at a local level, although some awards were made at national level to support people in need across the UK;
- People in need faced additional or different pressures;
- VCSE organisations could address such pressures in principle but required support to do so;
- These VCSE organisations had an increased need for support and could not [continue to] provide services without this support; and
- Crucially, VCSE organisations were the means through which people in need are supported.

During the development of the hypothesis, **two other hypotheses** were considered, discussed, and ultimately discarded.

(a) Funding has directly addressed the needs of disproportionately affected people and communities across the UK.

This hypothesis was discarded as it ignores the role of grantholder organisations and is difficult to measure, despite direct work with service users. This also does not capture VfM adequately.

(b) Grantholder organisations have used the funding to adapt their services or to provide new services.

This hypothesis was discarded as it does not consider the needs of people which these services address and that some organisations may not have adapted services or added new services.

Grant funding to VCSE organisations and those organisations' staff time were **inputs** that were designed to enable VCSE organisations to conduct the activities detailed in the ToC diagram.

During the Covid-19 pandemic, VCSE organisations have faced **barriers** that have affected their ability to operate. These main barriers relate to the following four factors:

Table 3:1 Barriers

Income	Capacity	Delivery channel	Needs
VCSE organisations faced a reduction in income due to restrictions on fundraising activities and generating income	VCSE organisations did not have enough employees / resources to deliver the services needed	Social distancing rules meant face-to-face services or support could not take place.	People faced needs that were unknown, changing and difficult to predict. VCSE organisations lacked data regarding peoples' needs and existing support

Outputs, as listed in the ToC, were the expected result of activities. In turn, outputs were expected to contribute to outcomes for the different **beneficiaries of the funding package**. These beneficiaries were:

Table 3:2 Beneficiaries

(1) Grantholder organisations	(2) Service users
<ul style="list-style-type: none"> The organisations responsible for the delivery of activities supported through money received under this funding package. This includes local community groups, charities, social enterprises, as well as large national charities, such as Salvation Army or Barnardo's. In the case of funds, such as BNI or CMC and some OGDs, funding reached these organisations through funding partners, including Comic Relief, the National Emergencies Trust and Community Foundations. 	<ul style="list-style-type: none"> People and communities in need during the Covid-19 pandemic, who received support from grantholder organisations. The funding package did not specifically target any group, such as ethnic minorities or people with disabilities. Instead, it was intended to reach anyone who faced specific needs during the Covid-19 pandemic. As such, DCMS expected that the funding would enable grantholder organisations to reach all people who were in need, including ethnic minorities, people with disabilities, or LGBTQ+ communities. Some individual funds, such as the YCSF, targeted specific groups – in this case, children and young people.

The NHS and other public services were not direct recipients of the funding package. Nonetheless, they were considered to be indirect beneficiaries as the support provided to grantholder organisations may have reduced pressure on them as an unintended consequence. This may have been the case, for instance, through support provided to hospices or to charities supporting cancer patients as illustrative examples. Volunteers and grantholder staff are also likely to have been indirect beneficiaries of the support package, achieving reduced loneliness and less social isolation, due to continued employment and involvement in delivering services. The **funding package outcomes for grantholders** are detailed below:

- Primary outcomes
 - Continued/expanded service delivery to people and communities in need
 - Contribution to organisations' liquidity so that they can continue to operate in the short term and don't close
 - Adapting or innovating services in the face of changing operating environment

- Organisational sustainability including the retention of trained volunteers and staff
- Secondary outcomes
 - Improved organisational resilience in the face of crises
 - Knowledge generation about what communities need and how to support them
 - Help the sector to coordinate and collaborate to respond to needs as they arise

The **funding package outcomes** for **service users** are detailed below:

- Needs of people who are pushed into crisis are addressed
- Needs of people in end of life care are met
- Families who are hit hardest have their needs for essential items met
- Loneliness or social isolation are reduced
- Health inequalities are reduced
- Mental health of people affected improves
- Young people are able to meet their potential
- Increased local community organisation, volunteering and community activity
- Access to public information is improved
- Increasing digital, data and technology capabilities
- People in need receive the food they need
- Needs of people affected by homelessness are addressed
- Survivors of abuse and their children receive the support and accommodation they require
- Needs of refugees are addressed
- Gender inequality is reduced

Each outcome has related measures, sources, and analysis techniques. These are included in the **evaluation framework** in section 4.1. The outcomes for service users are aligned with the classifications DCMS used in its monitoring of the funding package delivery.

4 The next stages of the evaluation

4.1 Evaluation framework

The following table provides indicators for each ToC statement and how we will measure and analyse them. This is fully aligned with the approved ToC and is reflective of the three core groups of outcomes: (1) for people in need / service users (2) primary level outcomes for grantholders and (3) secondary outcomes for grantholders.

As a rule, the measures in table 6 will be disaggregated by:

- Funding stream and funding mechanism (matched funding, direct funding, new grant, grant variation)
- Region
- Type of recipient (charity, community organisation, social enterprise)
- Size of organisation

Relevant VfM measures are highlighted with **Economy/ Effectiveness/ Efficiency/ Equity / Sustainability**. In all cases, available valuation reports and end-of-grant reports for funding streams or individual sub-funds will be used as existing data source. Where service user interviews are indicated as a research tool that is used for a specific outcome, they are used to verify outcomes reported by organisations and learn more about the extent of the outcome achieved and how this was achieved. All evidence is fed into the contribution analysis spreadsheet.

Table 4:1 ToC Indicators		
ToC statement	Research Tool	Analysis Approach
Outcomes for people in need (service users) – Effectiveness and equity for all people in need outcomes		
ToC service user outcomes	Combination of: Grantholder survey and interviews Service user interviews Volunteer survey Existing evaluation and end-of-grant reports	Descriptive statistics for survey, inductive thematic analysis for interviews and reports. Estimated number of people based on a proportion of total number of beneficiaries they directly supported (note: this applies for ALL following outcomes for people in need)
Grantholder Outcomes – PRIMARY		
Continued / expanded service delivery Effectiveness	Grantholder survey and interviews	Descriptive statistics for survey, inductive thematic analysis for interviews.
Contribution to organisations' liquidity Effectiveness	Grantholder survey and interviews	Descriptive statistics for survey, inductive thematic analysis for interviews.

Table 4:1 ToC Indicators

Adapting or innovating services Efficiency	Grantholder survey and interviews	Descriptive statistics for survey, inductive thematic analysis for interviews.
Organisational sustainability Sustainability	Grantholder survey and interviews Volunteer survey	Descriptive statistics for survey, inductive thematic analysis for interviews and reports.
Grantholder Outcomes – Secondary – Sustainability for all secondary grantholder outcomes		
ToC secondary grantholder outcomes	Combination of: Grantholder survey and interviews Sector focus group discussions	Descriptive statistics for survey, inductive thematic analysis for interviews and reports.
Outputs		
Additional staff time enabled by funding Economy (unit costs) and sustainability	Grantholder survey	Descriptive statistics for survey and reports, thematic analysis for reports.
People in need supported with funded activities Equity	Grantholder survey	Descriptive statistics for survey and reports, thematic analysis for reports.
Organisations that avoided having to shut down Economy (amount spent per organisations not shutting down), Equity and sustainability	Grantholder survey	Descriptive statistics for survey and reports, thematic analysis for reports.
Grantholder organisations reached Economy and sustainability	Grantholder survey In addition, existing monitoring data (funding package dashboard)	Descriptive statistics for survey and monitoring data, thematic analysis for reports.
Value of grants to grantholder organisations Economy and equity	Grantholder survey In addition, existing monitoring data (funding package dashboard)	Descriptive statistics for survey and monitoring data, thematic analysis for reports.

Table 4:1 ToC Indicators

Volunteers mobilised & trained Economy (unit costs) and sustainability	Grantholder survey Volunteer survey	Descriptive statistics for survey and reports, thematic analysis for reports.
# and %-utilisation of hospice beds provided Economy (unit costs)	Monitoring data from hospices funding stream	Descriptive statistics for monitoring data, thematic analysis for reports.
Coordination support provided to local VCSE organisations Sustainability	Grantholder survey	Descriptive statistics for survey and reports, thematic analysis for reports.
New ways of delivering services implemented Efficiency	Grantholder survey	Descriptive statistics for survey and reports, thematic analysis for reports.

4.2 Methodology and gaps matrix

As is the purpose of this evaluation, there has been no standard funding package-wide evaluation or monitoring criteria, resulting in funds, sub-funds and grantholder services being evaluated in a myriad of ways. To gain an understanding of this, data from the document extraction was analysed to map the range of existing evaluation activities and data collected under each fund. This analysis was based on the documents that were provided by DCMS at the start of the project, which included end of grant and evaluation reports. Consequently, these may not include evaluation activities that have since been planned, commissioned, are ongoing, or have been recently completed. The inclusion and rigor for each activity was assessed, the criteria of which is presented in table 4:2 below:

Table 4:2 Assessment criteria

Colour indication	Explanation
Green	The evaluation or data collection activity has been conducted to a high standard across the fund.
Yellow	The evaluation or data collection activity has been conducted to a varied or low standard across some or all of the fund.
Red	There is no evidence that the evaluation or data collection activity has taken place.

Methodology

Fund	Evaluation conducted (Process or Impact)	Document review/ analysis	Survey (organisation)	Survey (staff/ volunteer)	Interviews/ focus groups (grantholder)	Interviews/ focus groups (service user)	Interviews/ focus groups (staff/ volunteer)	Sector representative discussion	Value for Money (VfM) analysis	Secondary data e.g. monitoring	Case study/studies
Arts Council England											
Big Night In (National Emergencies Trust)										(committed but not evidenced)	(light touch)
Big Night In (Children in Need)										(sub-sample of self-reported grantee forms)	
Big Night In (Comic Relief)										(monitoring reports of funding partners)	(service user level)
Community Match Challenge										(monitoring data, grantholder reports)	
Hospice										(bed capacity data)	
OGD						(interviews)				grantholder monitoring reports, dashboard data	
Loneliness	(process)				(focus group)	(interviews)	(focus group)			(monitoring data)	
Radio											
VCSEP	(process and impact)				(interviews)		(interviews)			Value Proposition development, performance and 'Stocktake' data	(including Qualitative Comparative Analysis (QCA))
Youth			(monitoring questionnaire)		(focus groups and follow-up interviews)					(application)	

As presented in Table 4:2, evaluation activities vary both within and across funds. These include, but may not be limited to, impact evaluations, process evaluations, surveys (grantholder and staff), interviews and focus groups (grantholder, staff, and service user), secondary data analysis, and case studies.

Two funds commissioned independent fund-level evaluations: VCSEP and Covid-19 Youth Support Fund. Within the Other Government Department fund, evaluations of various rigor were evidenced under the DCMS (health and social care), DCMS (loneliness), DfE, MoD (support for armed services), and a CMC sub-fund; however, DCMS (Loneliness) and DfE were the only ones to be clearly independent.

Under the CMC fund, one sub-fund conducted an internal evaluation of the application process and developed a learning & evaluation framework in collaboration with an independent evaluation consultant, to be delivered by their in-house research team. Another CMC sub-fund gave all grantholders access to a shared monitoring and evaluation tool, Upshot, however it was unclear if any analysis of this data took place. Another CMC sub-fund's end of grant report stated that other funded organisations have written completed evaluations on the delivery of the grant awards, which consequently has enabled them to keep a record of the programme impact, however these were not signposted.

The greatest evidence gaps presented in Table 4:2 are within Arts Council England, BNI, CMC, OGD, Hospice fund, and Radio fund. The main methodological gaps will be covered in this evaluation are through the following methods: survey (grantholders); survey (volunteer); interviews (grantholder); interviews (service user); sector representative discussion; VfM; and substantial case studies.

4.3 Surveys

4.3.1 Grantholder survey

The grantholder survey will be sent to all organisations which received money under the funding package and that we have been provided a named contact and email address for. It will gather information on process (e.g. how services/activities were delivered and how the organisation applied for and received funding) and impact (e.g. what activities were delivered).

Design

We have developed one 20-minute questionnaire covering all funding streams to ensure comparability and consistency (please see Appendix B.), with two exceptions. Firstly, the CCSF, which has conducted its own evaluation survey collecting comparable data. Secondly, the Hospices Fund, where data on the funded activities organisations delivered is being provided through monitoring data collected during the grant period, in addition to through the survey. This change has been made in part because the Hospices Fund has used a different model to other funding streams, with bed capacity purchased from hospices, rather than a grant making structure. In addition, detailed data on daily usage of hospices' facilities was collected as part of the process, which could not be collected in a survey format. Given the monitoring data will show what services have been delivered through the Hospice Fund, these organisations will not be asked to complete the "activities delivered with the funding", "beneficiary groups" sections of the survey.

The survey was developed drawing on the documentary analysis conducted across all funding streams, which mapped the range of activities, beneficiary groups, and funded organisations reached by the package. Where possible, the survey questions were drafted to provide comparable data to the survey asked of organisations funded through the CCSF, so they would provide a uniform set of results across the whole £750m VCSE sector funding package. Finally, it was aligned with the ToC underlying the funding package, to ensure it would inform the key assumptions and outputs outlined in the ToC. The draft questionnaire was then refined through an iterative process with the fund managers of the different funding streams to ensure it would apply to the diverse set of activities and funded organisations.

Section 3 outlines how the survey relates to the Theory of Change for the evaluation. We will use questions designed for the Impact or Process strands to also provide data for the VfM assessment.

Implementation

The survey will be running in two waves. For each wave, an invitation email will be sent out at the beginning of the three week fieldwork period, to inform respondents what information they will need to hand when completing the survey, to explain the reason for the evaluation and the importance of their taking part. It will also include contact details for NatCen in case organisations have questions and a link to the evaluation webpage on NatCen's website. The survey will be conducted online whereby the named contact at each grantholder organisation will be emailed a link to take part. An additional two reminder emails will be sent out one week later to boost response. A number of funding organisations have indicated a preference to distribute the survey to their grantees; an invitation email will be sent to these funding organisations who will then forward an open survey link to all the grantholder organisations they funded to complete the survey. We will also send the funding organisations one reminder email which will be forwarded to the grantholder organisations one week later to boost response.

In the original proposal, we had assumed a response rate of 10% which means that we will receive around 1,500 completed surveys from a sample of up to 14,000 organisations, after excluding those which received funding as part of the CCSF. However, based on our knowledge on the survey conducted as part of the CCSF evaluation we would anticipate a response rate higher than 10%.

4.3.2 Volunteer survey

The volunteer survey will collect information from volunteers who supported the delivery of services provided by grantholder organisations. We propose to use one 15-minute questionnaire which is in the process of being developed at present.

Design

The topics covered by the volunteer survey are focused on process and impact but are designed to be relevant to volunteers who may not have knowledge of how the Fund was used. We will ask all grantholders, who will also be completing the grantholder survey, to forward a survey email/ link of the survey to their volunteers (if they have any). Section 3 outlines how the volunteers survey links to the ToC for the evaluation.

Implementation

The survey will be running in two waves. For each wave, an email invitation will be sent to volunteers, with a clear explanation of the purpose of the survey and the value of

taking part. It will also include contact details for NatCen in case volunteers have questions and a link to the evaluation webpage on NatCen’s website. A reminder email will be sent to organisations and ask them to let us know if they have sent out the survey link or if they are unable to do so. Although this will be dependent on grantholders sending out the invites and also having the contact details for volunteers, we will try and collect as many responses as possible. We aim to achieve 1,000 completed surveys, however, the likely achieved number of survey responses will be confirmed when the number of volunteers across funded organisations is known. The organisation level survey asks organisations about how many volunteers there are working at their organisation, so will be able to estimate what proportion of volunteers are responding across organisations.

4.4 Grantholder interviews

4.4.1 Purpose

Interviews will be conducted with a sample of grantholder organisations' management team members involved in the delivery of activities supported by the funding package. The purpose of these interviews is to obtain in-depth evidence to assist the understanding of how funding has made a difference to these organisations and the way they delivered services to people in need. The interviews will have a core focus on lessons learned.

4.4.2 Sampling

Interviews with managers in 120 grantholder organisations will be conducted. We will recruit approximately half the grantholder interviewees through the grantholder survey, enabling us to explore reported outcomes and issues raised through the survey in depth. The other half will be directly contacted via email, using contact names and email addresses to be received from DCMS. To achieve these 60 interviews we will initially contact 180 grantholder organisations.

The **following criteria** will be used to sample grantholders:

Table 4:3 Sampling Criteria	
Sampling criteria	Description and rationale
Funding Stream	We will sample from all funds with the exception of the CCSF (as it has been evaluated separately) and devolved administrations (as this is out of scope of this evaluation). This will be the primary sampling criterium, relative to the amount of funding that went to each fund. A minimum of 5 organisations and a maximum of 30 organisations will be sampled from each fund. By sampling from each fund, our sample will cover all different types of awards (including direct, match-funded, existing contract). For streams such as OGD and CMC, we will sample at least one organisation for each department and each CMC partner.
Region	We will sample from all English regions. Scotland, Wales, and Northern Ireland will be sampled more broadly, reflecting the distribution of recipients across those geographies (and including urban and rural regions). Within each fund, we will

Table 4:3 Sampling Criteria

	sample from every region that stream reached, relative to the amount of funding that went to each region.
Outcomes for service users	The sample derived from the survey will be designed so that it includes at least one organisation for each outcome for service users.
Outcomes for grantholder organisations	The sample derived from the survey will be designed so that it includes at least one organisation for each outcome for grantholder organisations.
Size of grant award	We will sample organisations that received less than £10,000 and those that received over £10,000. Due to lack of existing data, this criterium will be applied to the sample derived from survey respondents. Whereas the case study sample will exclude organisations which received less than £4000 (see section 4.6.2), these will be included in the grantholder interview sample.

4.4.3 Interview method

All interviews and discussions will be conducted using online meeting technology such as Microsoft Teams or phone (to aid access) and will not exceed 60 minutes. Interviews will be conducted by a facilitator supported by a note taker.

4.4.4 Topic guide development and thematic areas

The discussion guides will be semi-structured, with thematically structured questions and prompts which encourage an in-depth, guided discussion. The guides will be developed based on the ToC, focusing on grantholder outcomes and outcomes for service users. The guides will cover the following **thematic areas** :

- What outcomes did you achieve for service users?
- How did you adapt, expand, or change your activities to meet needs of service users?
- How did you find out about changing or increasing needs of service users?
- What outcomes did the grant have for you organisation?
- What worked to achieve the outcomes for service users?
- How do you know that you achieved the outcomes for service users?
- In what ways has funding contributed to the sustainability of your organisation (e.g., through training staff or volunteers or retaining trained staff or volunteers, or through new physical or digital infrastructure)?
- To what extent and why do you believe that you are now in a better position to respond to any future crisis?
- How has funding helped you to coordinate with other organisations to understand or meet people's needs?
- What other support does your organisation need from government going forward to enable you to best deliver your services, aside from funding?

For the grantholder organisations that are recruited through the survey, we will first review their survey response. In those cases, specific themes may be explored in more depth. The survey derived sample will also be used to fill gaps which the initial directly sampled grantholder interviews did not adequately address.

4.4.5 Analysis

As noted in the evaluation framework (see section 4.1), inductive and deductive thematic analysis will be used for interviews to understand what outcomes were achieved, how, and what barriers existed. Findings will be coded by grantholder outcomes and by outcomes for service users, so that specific themes relating to each outcome can be identified and analysed.

Analysis will be conducted at both fund and the wider funding package level. Appropriate analysis and coding software will be used, such as NVivo.

4.4.6 Value for Money

The evaluation team has taken a holistic approach to assessing VfM for this evaluation. Each ToC outcome and output metric is assigned one VfM category, these being: Economy, Efficiency, Effectiveness, Equity and Sustainability. Evidence for these VfM categories will be integrated into the data collection tools and therefore gathered as part of data collection for the impact evaluation. The categories are explained in further detail in table 4:4.

Table 4:4 VfM Categories

Economy	Unit cost of outputs, broken down by different funding stream, regions, and type of funding mechanism (direct, match, extension).	Sources: Grantholder survey and monitoring data (for details, see evaluation framework)
Efficiency	Identification of delivery mechanisms for different outputs, and whether and why they changed.	Sources: Grantholder survey and qualitative work with grantholders (for details, see evaluation framework)
Effectiveness	Assessment of whether delivery mechanism enabled organisation to achieve desired outcomes, and to address liquidity gaps.	
Equity	Identification of target beneficiary groups and communities and whether they were reached.	
Sustainability	Identification of a) aspects of delivery or organisation capacity that are now stronger than before Covid-19, and b) strategic needs of the sector as a whole to underpin DCSM's role as steward of the sector.	Sources: Grantholder survey and qualitative work with grantholders, sector representatives, and staff in funding bodies, and other evaluations (for details, see evaluation framework)

4.5 Group discussions

4.5.1 VCSE sector representative groups

Up to three group discussions will be held with representatives of relevant umbrella organisations for charities, social enterprises, community organisations and volunteers. Each group discussion will include eight to 10 organisation representatives. The discussions will be facilitated online using Microsoft Teams or a similar online meeting technology and facilitator will be supported by at least one note taker. With the consent of participants, the discussions will be recorded. Each discussion will last up to 90 minutes.

The purpose of these group discussions is to understand what type of support the sector needs from the Government going forward, aside from funding, and the wider strategic needs of the sector. In addition, they will elicit sector views on the impact of this funding package on the sector and the role it had in supporting VCSE organisations.

The topic guides for these group discussions will be semi-structured to allow for an in-depth discussion of the following **thematic areas**:

- How have you supported the sector?
- What do you understand the role of DCMS to be in supporting the sector?
- In the future, how can the government, and DCMS in particular, effectively provide strategic support to the sector?
- What do you not want government to do?
- What role did the funding package have in the survival of VCSE organisations and the sector as a whole?

The questions will be designed following a similar approach to that outlined for interview guides. However, as the topic guide will be shorter it will not be piloted, but instead reviewed by the expert panel.

To sample organisations, we will be guided by the following criteria:

- **National or regional organisations.** We will sample national and regional organisations, with a focus on national ones for a wider lens. We will ensure representation from England, Scotland, Wales, and Northern Ireland.
- **Membership body.** This group will be comprised of organisations that function as membership bodies for charities, community organisations, social enterprises, volunteers. The group will be selected based on their knowledge, understanding and engagement with a wide group of members impacted by the funding package. This will include groups/bodies that lobby on behalf of their members.
- **Group that provides funding to target organisations.** For instance, a sector funder that supports relevant organisations and who would be aware of the funding package. For example, TNLCF, who delivered the CCSF under this funding package.
- Group that isn't a membership group or sector funder but **provides services to the sector both nationally and regionally**, service user organisations and health and social care organisations.

Each organisation will be contacted via email. We anticipate that organisations, such as Association of Chief Executives of Voluntary Organisations (ACEVO), National Association for Voluntary and Community Action (NAVCA), Social Enterprise UK, The National Lottery Community Fund (TNLCF), Citizens Advice and Citizens Advice Scotland, Shaping our Lives, Health Education England, or Volunteering Matters, will be contacted for the group discussions.

4.5.2 Staff in funding bodies

We will conduct three group discussions, each with up to 10 staff in bodies who have provided funding, either from Government or from match funding organisations. The discussions will be held online using Microsoft Teams or a similar online meeting technology. The facilitator will be supported by at least one note taker. With the consent of participants, the discussions will be recorded. Each discussion will last up to 90 minutes.

This will provide the evaluation team with the necessary evidence to understand why different delivery models were chosen and what they intended to deliver. The discussions will be facilitated using semi-structured topic guides that will cover the following **thematic areas**:

- Aside from funding, what support does the VCSE sector require going forward?
- For departments, did the funding approach work in terms of supporting the department's goals? How well did inter-departmental cooperation work to achieve intended outcomes?
- Did a particular delivery model (direct grants, extension of existing contracts, match funding) work particularly well / not so well to support the sector?
- Why was the specific delivery model chosen?

This element of the research will include DCMS funding team senior staff, and staff involved in the design and oversight of every funding stream (including TNLCF who delivered the CCSF) – reflecting all different delivery models.

A group discussion will be conducted for: direct funding approaches; match funded approaches; and extensions of existing contracts with service providers. The questions will be designed following a similar approach to that outlined for interview topic guides. However, as the topic guide will be shorter it will not be piloted, but instead reviewed by the expert panel.

4.6 Case studies

4.6.1 Purpose

Case studies will be conducted with a sample of 20 grantholder organisations. These will consist of interviews with senior managers, operational staff, volunteers, and service users to gain a holistic view of how fund money has been used. By doing so, we will evidence an in-depth understanding of the impact of the funding package on grantholders and service users. The case studies will target a varied group of grantholder organisations with a number of different characteristics such as organisation size, grant size, target population, and region. This will offer a richer and more complex picture, from which the full spectrum of perceptions and experiences of the funded programmes can emerge.

4.6.2 Sampling

Using a purposive sampling approach, we will sample grantholder organisations and service users following specific criteria that will allow us to explore a wide range of perspectives and experiences. For each case study we aim to interview one senior staff member, one operational staff member, one volunteer, and seven service users (on average). However, we recognise that organisations in the VCSE sector are structured in a myriad of ways, therefore we will work flexibly with organisations to ensure the case studies reflect this. For example, where the role of volunteers is central for the organisation, we may decide to increase the number of interviews with volunteers. We will also liaise with grantholders to adapt to their organisation's structure and the grant size they have received to determine the number of service users to include in the case study. We will work with grantholders to recruit service users, who will be asked to gain consent for their contact details to be shared with the evaluation team or pass on the information of the evaluation to a sample of their service users. As mentioned, the sampling approach will be purposive and not representative. This is due to the large number of organisations that have taken part in the funded programmes (~14,000) which would make the creation of a representative sample of case studies impractical. It is also important to note that the case studies will form part of a larger evaluation that will also include grantholder and volunteer surveys, sector representative group discussions, and grantholders interviews.

Due to the large number of possible sampling criteria, we have grouped them into primary and secondary criteria. Primary criteria (Table 4:5) will guide the initial recruitment of organisations, while secondary criteria will be used to increase the potential diversity of the sample, broadening the variety of perspectives and experiences. The primary sample rationale is based on getting a balance between having a good spread of case studies across funding streams, as well as taking into account how the money was weighted, while capturing a range of experiences across service delivered and size of grants.

Primary criteria will be used to create a set of sub-samples of grantholder organisations which will be contacted to gauge their interest in participating in the evaluation. Where possible, according to the information available before the screening phase, we will also use the secondary criteria to further diversify the sub-samples. Grantholder organisations will be contacted directly via email, and those who will express their interest in participating will be screened. This will allow us to select a diverse sample and to ascertain that they respond to the sampling criteria. Please see Table 4:5 below for the primary sampling criteria:

Table 4:5 Primary Sampling Criteria

Sampling criteria	Description and rationale
Funding stream	<ul style="list-style-type: none">• We will sample from all funds with the exception the Hospices Fund, which was designed to only provide spare capacity of beds and therefore its outcomes may be less clearly obvious to stakeholders.• Five case studies will be dedicated to the CMC due to the lack of previous evaluations.• Six case studies will be conducted for the OGD fund stream given the wide variety of activities of the funded organisations.

Table 4:5 Primary Sampling Criteria

	<ul style="list-style-type: none"> • Three case studies will be carried out for BNI, one for each one of its sub-funds (National Emergencies Trust, Children in Need, and Comic Relief). • For the Winter Loneliness Fund we will sample two case studies: for each one of two of its sub-funds (Arts Council England and Radio Fund). We will exclude the DCMS Loneliness Fund, which was continuation funding for a previous sub-fund under OGD, as case studies have already been conducted for seven out of nine of the funded organisations for the original funding. • For the remaining two funds (Voluntary and Community Sector Emergencies Partnership, and Youth Covid-19 Support Fund) we will sample two case studies for each.
Type of service provided	<ul style="list-style-type: none"> • We will sample according to the type of service provided by the grantholder organisation (for example, health support, financial support, help against loneliness and social isolation).
Size of grant award	<ul style="list-style-type: none"> • We will sample organisations according to the size of the grant they have received. However, based on the current data we have received, the distribution of grantholder organisations is skewed, with 50% of grants below £10,000. Grantholder organisations that have received very low grants may not provide the breadth of information we are looking for. Therefore, we will apply a cut-off point of £4,000 and exclude all the organisations that received less than that. These organisations will be included in other elements of the evaluation, with qualitative data collected from grantholder interviews. • We will sample 4 case studies from within the £4,000 to £10,000 group. Given the relatively small size of the grant they have received, their involvement with the funds may be less intense than that of organisations that received higher amounts, however exploring their experience would still be beneficial for the evaluation. • The two other groups (£10,011 to £30,860 and £30,868 to £13,500,000) contain 25% of cases each and we will sample 8 cases from each one of them. However, we will explore a higher end grant cut off point, as it is likely that very large grants were broken up into smaller ones as opposed to fund specific programmes.

While part of the secondary sampling criteria will be specific to grantholder organisations, some will be specific to service users. The secondary sampling criteria that apply to grantholder organisations include:

- Size of the grantholder organisation (small, medium, and large/major);
- Type of organisation (for example, registered charities, educational institutions, community interest companies)
- Region where the funded activities took place (rural vs. urban areas)
- If old or new services were funded
- How the service was delivered (for example, telephone calls, online meetings, or in person); and
- Type of service users targeted by the funded programmes.

By looking at the size of the organisations and their set up we have the opportunity to explore the effect of structural differences irrespective of the size of the grant they were awarded, whereas geographical differences and modes of service delivery may affect the outcome of the programmes. Among the secondary criteria that specifically apply to service users we will explore views from participants coming from a range of characteristics including age, gender, ethnicity, if part of the LGBTQ+ community, and if they live in an urban or rural area. Furthermore, we recognise the importance of adopting an intersectional approach as different social categories (e.g. race, gender identity, religion, occupation, culture) overlap or intersect with one another, therefore we have to look at the whole picture and all the factors that impact people’s experience and perceptions.

4.6.3 Interview method

The interviews will be conducted by researchers who have experience of conducting interviews with vulnerable groups. Each interviewer will conduct all the interviews in their assigned case study, so as to be a single point of contact, develop a holistic understanding of the organisation, and to recognise with more ease any potential gaps and patterns.

All interviews will be conducted using remote communication technologies such as Microsoft Teams for online meetings or telephone. The interviews will last no longer than 60 minutes and will be audio recorded with the consent of the participant to allow for an accurate account of the discussion. The recordings will only be accessible to the research team and will be stored on NatCen’s secure server from which they will be safely deleted after the end of the project.

4.6.4 Topic guide development and thematic areas

The interviewers will be supported by topic guides specifically designed for each type of stakeholder and guided by the ToC. A summary of the themes that will be explored for the case studies is described in Table 4:6. The topic guides will be semi-structured with open questions organised around the main themes and include tailored sub-questions for each fund where appropriate. For example, to ask grantholder organisation’s under CMC about their experience of sourcing match funding. We aim at keeping the questions as open as possible and with only a limited number of prompts to encourage an in-depth, guided discussion. The topic guides will be developed by NatCen through the following four-step approach:

Table 4:6 Summary of the themes explored in the case studies

Stakeholders	Themes
Senior staff	Experience of the applications process, administration and monitoring of the funds
Senior staff	Understanding if and how the grant has contributed to expanding or maintaining existing services.
Senior staff	How services have been adapted and innovated due to the grant received.

Table 4:6 Summary of the themes explored in the case studies

Senior staff	How the grant has supported the organisations' sustainability and resilience, also in case of future crises.
Senior staff	How organisations has developed their knowledge of the communities they support and of their needs.
Senior staff	How the collaboration and coordination between VCSE sector organisations has improved and how the grant received has supported the improvement.
Operational staff; Volunteers	How the funded programmes were delivered and what worked well and less well.
Operational staff; Volunteers	Facilitators and barriers encountered in providing support to service users.
Operational staff; Volunteers; Service users	General impact of funded programmes on service users and communities.
Operational staff; Volunteers; Service users	How the funded programmes have supported the needs of service users (for example, reducing health inequalities, mental health support, end of life support, etc.).
Operational staff; Volunteers; Service users	How the funded programmes have supported people in a situation of distress or marginality (for example, support to people pushed into crisis, financial support, distribution of food, support to survivors of abuse, meeting the needs of people affected by homelessness, reduction of gender inequality, meeting the needs of refugees, etc.)
Operational staff; Volunteers; Service users	How the funded programmes have reduced loneliness and social isolation, supported young people, and improved the organisation of local communities.
Operational staff; Volunteers; Service users	How the funded programmes have facilitated the access to public information and to new technologies.
Operational staff; Volunteers; Service users	How the delivery of funded programmes worked for service users.
Operational staff; Volunteers; Service users	How the organisation has supported service users during the pandemic and what kind of role they have played.

Table 4:6 Summary of the themes explored in the case studies

Service users	Facilitators and barriers encountered in receiving support.
All	Recommendations for future initiatives and support.

4.6.5 Analysis and presentation of cases

We will use a Framework approach to qualitative data analysis, which facilitates robust qualitative data management and analysis by case and theme within an overall matrix. We will develop thematic matrices through familiarisation with the data and identification of emerging issues. Each thematic matrix will represent one key theme (for example, how the funded programme was delivered), and the column headings in each matrix will relate to key sub-topics. We will summarise the data from each case (i.e., each interviewee) into the relevant cell. Each stand-alone case study will then be presented in the final report and a wider comparison of their outcomes will be included as part of the synthesis.

4.7 Timeline

There have been some delays to the original project plan set out in the proposal, including a delayed project start and in obtaining a full list of grantholder organisations and contact details, which are essential to the evaluation. The project plan below provides an overview of when the different activities will take place, together with key milestones, to ensure that the evaluation outputs can be delivered by the end of February. However, this is contingent on the provision of grantholder organisation and contact detail lists being provided by 22nd October, with further delay impacting the below timeline:

Project phase	Activity	2021				2022	
		S	O	N	D	J	F
	Months						
Implementation phase	Survey of grantholder						
	Survey of volunteers						
	Interviews with grantholders/beneficiaries						
	Sector representative group discussions						
	Staff in funding bodies discussion						
	Case studies						
	Analysis of data						
Synthesis phase	Synthesis mapping						
	Impact mapping						
	Process mapping						
Outputs	Draft report						

5 Ethical considerations, risks and limitations

5.1 Ethical considerations

Ethics permission was received from NatCen Research Ethics Committee (REC) for each workstream where primary data collection (i.e., surveys and interviews with staff and/ or service users) is to be carried out. Our REC procedure is designed to ensure that all research undertaken by NatCen Social Research is ethically sound and meets the ethical standards of government and other funders. The REC reviewed our application to ensure that we collect fully informed consent, consider diversity and accessibility requirements, that our approach to recruitment is not coercive and that the requests for information were proportionate and necessary to address research objectives.

Many of the service users targeted by the funding package are highly vulnerable groups. For example, those who experience domestic abuse, those who are homeless, and those who require end of life care. Consequently, for ethical reasons not all service users who were involved in activities supported by the funding package are suitable to take part in the evaluation (i.e. interview participation), including those in end of life care, crisis, or experiencing domestic abuse (see section 4.6). For each case study, we will work flexibly with the grantholder organisations to plan how we can best support those service users who do participate in the evaluation. This will include tailoring an aftercare leaflet for each case study, which will signpost service user participants to relevant support services.

The size of grant and grantholder organisations is highly varied, with some grantholders receiving less than £100 under the funding package. For this reason, we want to avoid overburdening smaller grantholder organisations. To mitigate this, we will only recruit grantholder organisations for case study who received a grant of £4000 or more. In all communications with grantholders, it will be made clear than their decision on whether or not to participate will not affect any future funding opportunities.

The topics which may arise during service user interviews may include those which are considered sensitive i.e. loneliness. We will therefore employ a staged consent process, work with grantholders on how best to approach interviews, and reiterate participants' right to withdraw during the interview process. Furthermore, all interviews will be conducted by researchers with experience of interviewing people about difficult or sensitive topics.

5.2 Risk register

Table 5:1 Risk Register

Risk	Likelihood	Impact	Mitigation(s)
A full list of grantholder organisations, contact	High	High	At the time of writing, lists of contacts for organisations that received funding have been

names and email address is not provided			<p>received for some, but not all, of the funding streams.</p> <p>It may be the case that the evaluation proceeds in absence of a full list, however this will affect its reach or result in further delays to the evaluation.</p>
Lack of engagement from grantholder organisations	Medium	High	<p>The grantholder survey will be sent to all organisations that received money under the funding package. To boost response, an initial email will be sent to grantholders two weeks prior to the survey, and reminder emails will be sent to those who do not respond.</p> <p>Sub-samples from full lists will be created to recruit for grantholder interviews and case study organisations. If there is a lack of engagement, reminder email will be sent and a new sub-sample created for recruitment.</p>
Smaller organisations may not have capacity to engage in the evaluation	Low	Medium	<p>The grantholder survey has been designed to be as straightforward and short as possible, taking around 20 minutes to complete.</p> <p>Those organisations which received smaller under (under £4000) are being excluded from case studies. Instead, they will be given the opportunity to take part on one grantholder interview to share their experience.</p>
Lower engagement from grantholders who have already taken part in evaluation activities related to the funding package	Low	Medium	<p>All communications to grantholders will clearly outline that this evaluation is separate in both method and scope to any other evaluation related to elements of the funding package.</p>
Low engagement from hard to reach or	Medium	Medium	<p>As set out in the case study sample frame, one primary</p>

underrepresented groups			sample criterion is the target service user group. This will be monitored throughout the recruitment process, with harder to reach groups given priority for interview if necessary.
Reduced recollection of the activities or programmes being evaluated, due to the time elapsed since their implementation	Medium	Medium	It will be made clear to participants exactly what timeframe the evaluation aims to capture. If necessary, interviewers can describe the exact activities that were supported by the funding package that they engaged with.

5.3 Limitations

This evaluation and standardised monitoring activities were not built into the funding package at its inception. In some instances (for example, CMC), standardised monitoring and expectations for evaluation were not built into separate funds. As a result, sub-funds, funding partners, and grantholders may not expect to take part in an evaluation, and grantholders may not have given consent for their contact details to be shared for evaluation purposes. Consequently, the evaluation activities may not capture the full breadth of the funding package as we will not be able to contact all grantholders which received money.

Due to the ethical considerations set out above, those participants who are highly vulnerable will not be interviewed for the evaluation. Although their experience will be captured anecdotally through interviews with managers, staff and volunteers, the evaluation will not include their direct experience.

As mentioned in section 3 service users were not engaged in the ToC development process, which is often customary, and therefore the ToC may not reflect their experience. This was due to us not being able to engage service users through grantholder organisations at the time, due to lack of ethical approval and not knowing which organisations had received grants.

The documentary analysis is based on a total of 40 document extractions. However, new documents may have since been published which we have not been made aware of, thus potentially limiting the pen portrait (see section 2.2) and methodology matrix (see section 4.2).

6 Appendix A. Theory of Change development process

6.1 Approach to developing the Theory of Change

6.1.1 Agreeing key principles for the development of the ToC

At the outset we proposed the following principles to DCMS to ensure a purposive and structured approach. These were that the ToC should:

- Reflect all eight funds across the funding package;
- Reflect the diverse funding mechanisms, delivery channels, and beneficiary groups supported;
- Be framed based on 'what was intended' at funding award stage, note that this is different for different funds;
- Focus on outcomes at a funding package level; and
- Integrate Value for Money (VfM) considerations at all levels.

To adhere to these principles, it was important to review existing documentation for the funding package and its constituent streams. In addition, consultations with fund managers and the DCMS oversight and management team were key so that all funding streams were appropriately reflected, including specific priorities.

6.1.2 A review of documentation and data relating to each funding stream

Underpinning the ToC is a wealth of fund-specific documentation provided by DCMS that was used to inform all elements of the ToC. To identify outcomes that were common across the funding package, the team reviewed a wide-range of documents and data sources across the different funds. Within these documents, the outcomes that were intended to be achieved were identified and collated in an Excel list.

The most consistently reviewed sources were:

- Grant applications and grant agreements from funding partners. For example, with TNLCF, Comic Relief, and all OGDs;
- End of grant reports from funds to DCMS;
- Evaluation reports (in some cases, interim evaluation reports) and evaluation scoping documents where available; and
- Monitoring returns from funding partners, such as OGDs or BNI partners, and DCMS's centrally held funding package wide monitoring dashboard.

These documents were reviewed because they include descriptions of what each fund intended to achieve. In addition, there were common documents across the different funding streams. The outcome descriptions were thematically grouped to derive the common outcomes across the funding package. In addition to identifying these outcomes, the team also identified:

- Barriers that each funding stream was seeking to address;
- Organisations, people, or communities that the funding stream sought to support; and
- Outputs and activities.

6.1.3 Consultations with funding stream managers.

As noted above, the ToC was designed at an overall funding package level. To ensure that the various funding streams were duly reflected in the ToC, particularly at the outcome level, it was important to engage those who knew the funds well. Therefore, consultations with fund managers were conducted to gain a better understanding of funding stream-specific barriers, assumptions, outcomes and target beneficiaries. This was conducted in parallel to the review of documentation.

6.1.4 Development of a draft ToC including funding package wide outcomes, barriers, beneficiaries, assumptions and hypothesis

The draft ToC included definitions of barriers, beneficiaries, assumptions, and outcomes at a funding package wide level. Based on the document review and funding stream manager consultations, a first draft of the ToC was developed. This draft included a funding package wide hypothesis (see section 3.3) describing at a high level what the funding package expected to achieve. In addition, the draft considered:

- Barriers that had to be overcome by VCSE organisations that the funding was aimed at;
- Beneficiaries of the funding package;
- Assumptions made in developing outcomes; and
- Funding package wide outcomes for the different beneficiary groups.

The ToC, along with information about how it was developed and why, and a discussion of barriers, beneficiaries, and assumptions, was reflected into a ToC document. This document was then discussed with DCMS in a structured workshop.

6.1.5 Workshop with the core DCMS oversight and management team

On 8 July 2021, the evaluation team convened an online workshop with the DCMS oversight and management team, including the Senior Responsible Owner (SRO), to discuss the draft ToC document. The workshop enabled the evaluation team to update the ToC in preparation for funding stream manager engagement and covered:

1. what a ToC is;

2. the context for the funding package ToC;
3. how the draft ToC was developed;
4. the hypothesis discussion;
5. the beneficiaries discussion;
6. the barriers discussion; and
7. the outcomes discussion.

As a result of the workshop, the hypothesis was further revised to reflect the Chancellor's announcement of the £750m funding package. While it is discussed in detail below, the final hypothesis is included here for reference:

"By providing direct grant funding to VCSE organisations across the UK, these organisations will be able to meet increased and evolving demand for their services. Funding will also allow them to continue their day-to-day activities supporting those in need."

Other changes to the ToC as a result of this workshop were as follows:

- Removal of volunteers and grantholder staff as a stand-alone groups of beneficiaries. This change reflects the Chancellor's statement in which service users (people in need) and grantholder organisations are the beneficiaries of the funding package. The extent to which the NHS and other public services are beneficiaries of the funding package was also discussed, with the result that these are not considered beneficiaries for the purposes of this evaluation. More detail on volunteers, the NHS and public services is included in section 3.3. It should be noted that the evaluation team recognises that volunteers will have received and made use of services offered by grantholder organisations even though they are not considered as a standalone group of beneficiaries. They are also a key means through which grantholder organisations delivered their services. Therefore, the evaluation includes a volunteer survey.
- The barrier relating to people's needs was changed so that it now focuses on changing unknown needs. Initially, this barrier had focused on increased needs.
- The number of grantholder outcomes (see sections 3.2 and 3.3 for more detail) was reduced overall. The outcomes for grantholders were split into primary outcomes that were intended at the time of the original announcement and secondary outcomes that emerged during the set-up of the individual funding streams. Outcomes relating to sector sustainability were removed as they were deemed not to be direct intended outcomes of the funding package.
- Outcomes for service users underwent minor changes in formulation. In line with the removal of volunteers as funding package beneficiaries, outcomes that were initially included for volunteers were removed.
- The hypothesis was shortened to be more in line with the Chancellor's original announcement of the funding package.

Following the workshop, funding package wide inputs, activities, and outputs were also added to the ToC, and a revised ToC document was developed. This revised document was used as part of the consultations with fund managers. It was also shared with the DCMS team for further feedback, which was actioned in parallel to feedback from funding stream managers (see below).

6.1.6 Workshop with funding stream managers

On 12 August 2021, a second workshop took place with funds managers. The purpose of this workshop was to ensure that all funds were adequately reflected in the ToC. Managers from the following funds were represented in the workshop:

- Arts Council England;
- Big Night In;
- Community Match Challenge;
- Other government departments;
- Hospices; and
- Voluntary and Community Sector Emergencies Partnership (VCSEP).

The Loneliness Fund was not represented at the workshop due to unavailability, however the Loneliness team was able to provide feedback via email. This means that all funding streams have engaged with and fed back on the ToC.

Small changes were suggested by fund managers and adopted in the ToC. Where the DCMS team provided feedback that conflicted with fund stream manager feedback, the DCMS team's feedback was prioritised. This was the case for feedback relating to outcomes for specific groups of service users (e.g., people with disabilities).

Other feedback that was not actioned was as follows.

- Funding stream managers suggested adding 'interruption to income' to the hypothesis. This feedback was not taken forward as it was not part of the Chancellor's announcement.
- Funding stream managers noted the need to pivot to online delivery and the associated cost implications in relation to the delivery channels barrier. As this is covered under grantholder outcomes, no change was made to this barrier.

6.1.7 Refinement and finalisation of the ToC.

The ToC was updated as outlined in section 6.1.6. It was then shared with DCMS for review and sign off. DCMS signed off the ToC, hypothesis, barriers, and beneficiaries included in the revised ToC. This is presented and discussed in sections 3.2 and 3.3.

6 Appendix B. Grantholder survey

Introduction

SHOW TO ALL EXCEPT HOSPICES FUND ORGANISATIONS

Intro

Thank you for taking part in this survey.

This survey is in relation to the funding your organisation received from:
[INSERT FUNDING SOURCE, VALUE OF FUNDS, AND DATE GRANTED].

Throughout the survey we refer to grant funding, but we are aware the way funding was distributed varied widely, with some organisations contracted to provide a particular service. If this applies to your organisation, please answer with respect to the services you delivered with the funding, however it was received.

The original announcement of this funding can be found [here](#). We would like to ask you about how the funding has helped your organisation and what difference it has made, if any, for the services or activities you deliver. The results will be used to understand how well the funding met its aims and improve the effectiveness of future funding for the sector.

When answering the questions, please only think about [this funding/these grants].

It should take about 20 minutes to complete this survey if you have all the information needed and it should be completed by [INSERT CONTACT NAME HERE], who is the named contact we have been provided for this funding. If this is incorrect, please get in touch with the survey team at NatCen on **0800 652 0601** or by emailing us at VCSEsurvey@naten.ac.uk. Participation is voluntary, and you can choose not to answer specific questions or to stop the survey at any time. There is an option to click **Save and continue later** to save your answers and continue the survey at a later time.

Your answers will be used to inform the evaluation of emergency funding provided to the Voluntary, Community and Social Enterprise (VCSE) sector during the pandemic and will be published as part of a report. All findings will be based on aggregated responses, and it will not be possible to identify your organisation's answers. A fully anonymised dataset will also be delivered to the department for Digital, Culture, Media and Sport. We will remove from that dataset any information that may make your organisation identifiable.

SHOW TO HOSPICE FUND ORGANISATIONS ONLY

This survey is about the purchase of additional bed capacity and community contacts from hospices during the coronavirus pandemic to help reduce pressure on NHS services.

We would like to ask you about how this funding has benefited your organisation during the period of the coronavirus pandemic, such as replacing funding lost during the pandemic, allowing staff to be kept off furlough, or services to be delivered in new ways. Information on the services provided by hospices during the pandemic has been collected separately and will not be asked about in this survey. The results will be used to understand how well the funding met its aims and improve the effectiveness of future funding for the VCSE sector.

It should take about 20 minutes to complete this survey if you have all the information needed and it should be completed by [INSERT CONTACT NAME HERE], who is the named contact we have been provided for this funding. If this is incorrect, please get in touch with the survey team at NatCen on **0800 652 0601** or by emailing us at VCSEsurvey@naten.ac.uk. Participation is voluntary, and you can choose not to answer specific questions or to stop the survey at any time. There is an option to click **Save and continue later** to save your answers and continue the survey at a later time.

Your answers will be used to inform the wider evaluation of emergency funding provided to the VCSE sector during the pandemic and will be published as part of a report. All findings will be based on aggregated responses, and it will not be possible to identify your organisation's answers. A fully anonymised dataset will also be delivered to the Department for Digital, Culture, Media and Sport. We will remove from the dataset any information that may make your organisation identifiable.

[NEW SCREEN]

SHOW TO ALL

When answering the questions, please only think about the role of funding received from:

[INSERT FUNDING SOURCE, VALUE OF FUNDS, AND DATE GRANTED].

Throughout the rest of the survey we will refer to this money as the **VCSE sector support funding**.

[NEW SCREEN]

SHOW TO ALL

Before starting the survey, it would be useful to have the following pieces of information to hand:

- Number of staff:
 - Before the pandemic/ put on furlough during the pandemic/ brought back from furlough or hired with the VCSE sector support funding.
- Number of volunteers (if applicable):
 - Before the pandemic/ recruited as a result of the VCSE sector support funding.
- Amount of funding received from other grant funding sources during the pandemic
- Number of service users who were supported by or who took part in activities funded by the VCSE sector support funding.

Service users may not be the term used in your organisation, however, please think of the group of people who benefit from the work you do, whether these

are patients in a hospice, listeners of a radio station, or people accessing resources from a website.

Don't worry if you do not have all of these, you can still respond to the survey, and respond with "Don't know" to questions where necessary. If it would be easier to provide an estimate for any of these, there is an option to do this as well.

Grant details

SHOW TO ALL

GrantDetails

If the amount in £ (pounds) for the grant you received from {EndFunder1-9} did not appear on the previous screens, we will ask you to provide that information now.

We will also ask you to tell us the date of award.

{IF Grant = N/A; LOOP FOR Grant1-9}

GrantAmount

What was the value in £ (pounds) of the grant your organisation was awarded by {EndFunder1-9} as part of the VCSE sector support funding?

ANALYSIS:"Grant funding value"

1. NUMERIC [0...100,000,000]

2. Don't know

{IF GrantAmount – 2 'Don't know'}

GrantAmount2

Can you estimate the value of the grant funding your organisation was awarded by [EndFunder] as part of the VCSE sector support funding?

ANALYSIS:"Grant value estimate"

1. £1 - £10,000

2. £10,001 - £50,000

3. £50,001 - £100,000

4. £100,001 - £300,000

5. £300,001 - £500,000

6. £500,001 or over

{ASK ALL}

GrantDate

What was the **date of award** for the grant your organisation received as part of the VCSE sector support funding? If you are not sure, you can just answer with the month and the year

1. DD/MM/YYYY

[Allow DD to be left blank]

2. Don't know

Onward grants

SHOW TO ALL

Screening1

In which of the following ways was the VCSE sector support funding used by your organisation?

ANALYSIS: "Onwards grants"

1. The funds were provided to other organisations as onwards grants. This does not include grants made to individuals (e.g. emergency cash to cover bills/housing/groceries).

2. The funds were used by your organisation to deliver services or fill a gap in finances (e.g. covering staff costs or bringing staff back from furlough). If the funding was used to pay another organisation to deliver a service (for example, mentoring or tuition) **not** using a grant arrangement please select this option.

3. The funds were used both by your organisation to deliver services or fill a gap in finances as well as for onwards grants to other organisations.

{IF Screening1 = 1 or 3}

OnwardOrg

How many organisations did you provide funding for?

ANALYSIS: "Onward grant number"

1. NUMERIC [0...100,000,000]

2. Don't know

{IF GrantAmount – 2 'Don't know'}

OnwardOrg2

Can you estimate the number of organisations you provided funding for?

ANALYSIS:“Onward grant estimate”

1. 1-10
2. 10-50
3. 50-100
4. 100-300
5. 300-500
6. 500-1000
7. More than 1000
8. Don't know

{IF Screening1 = 3}

OnwardOrgPerc

What percentage of the funding you received was sent to other organisations as onwards grants?

ANALYSIS:“Onward funding percentage”

1. 0-10%
2. 11-20%
3. 21-30%
4. 31-40%
5. 41-50%
6. 51-60%
7. 61-70%
8. 71-80%
9. 81-90%
10. 91-100%
11. Don't know.

{IF Screening1 = 1 or 3}

OnwardActiv

What was the funding you sent to other organisations used for?

Please think of activities or services it would not have been possible to deliver without the funding or which would have been delivered on a smaller scale.

PLEASE SELECT ALL THAT APPLY

ANALYSIS:“Onward grant activities”

- 1) Information and advice (including signposting people to other support or helping people access services)
- 2) Mental health support and related services (including bereavement support, suicide prevention, treatment for addiction, wellbeing courses and mental health resources)
- 3) Medical care (including end of life care and hospice care)
- 4) Childcare support (such as day care, nurseries or babysitting)
- 5) Other care services (such as adult social care, including care for the elderly or people living with disabilities)
- 6) Help with material deprivation (such as help with financial pressures and pay bills, provision of essential items like food and clothing, or cookers and fridges, and ensuring access to housing)
- 7) Encouraged social connections and tackled loneliness
- 8) Education related activities (including training and support for teachers, equipment for students and schools to work remotely, digital resources and curriculum development, or tuition services)
- 9) Improved digital access for people with disabilities (for example, enabling deaf people to communicate with someone online through a BSL interpreter)
- 10) Improved digital access generally (for example, provision of equipment such as computers and phones and software such as Zoom, access to the internet, or paying for data on a mobile phone)
- 11) Support with other urgent needs (such as domestic abuse, domestic violence, hate crimes, or victims of modern slavery)
- 12) Other (please describe)
- 13) Don't know

{IF Screening1 = 1}

GrantholderEnd

The remaining questions in this survey are for organisations who delivered services.

Thank you for taking the time to complete this survey – your views are key to this evaluation and will play an important role in understanding what difference this funding has made to the VCSE sector and the people it helps during the coronavirus pandemic. The findings of the survey will be published by the DCMS as part of the wider evaluation results.

If you have any questions about the survey, please contact us for free on 0800 652 0601 or email VCSEsurvey@natcen.ac.uk.

{IF Screening1 = 3}

BothIntro

The following questions in the survey relate only to the funding you received to deliver services or fill a gap in finances. Please do not include the funding you provided to other organisations as onwards grants when considering your responses.

Purpose of funding

SHOW TO ALL

Intro1

Next, we would like to ask you about how your organisation used the VCSE sector support funding.

ASK ALL

FundUse

In which, if any, of the following ways was the VCSE sector support funding used by your organisation?

SELECT ALL THAT APPLY

- 1) To ensure we had enough funding to continue delivering existing services during the pandemic
- 2) To meet increased demand for our existing services during the pandemic
- 3) To meet new demands for services not offered before the pandemic
- 4) To adapt our services for the pandemic (for example, delivering services remotely, social distancing measures, or providing transport for isolated people)
- 5) To improve the quality of existing services (for example, by getting better equipment or facilities)
- 5) To deliver research into people's needs during the pandemic
- 6) To improve our ability to collaborate with other VCSE sector organisations or public services
- 7) To facilitate collaboration among other VCSE sector organisations and/or with public services
- 8) To maintain assets during the pandemic so we could reopen following lockdowns (for example, by allowing us to maintain vehicles or buildings, or keep up the let on office space)
- 9) To improve our sustainability after the pandemic ends
- 10) Other (please describe)
- 11) Don't know

ASK IF FundUse = 4

HowAdapt

You mentioned that the VCSE sector support funding allowed your organisation to adapt its services or activities for delivery during the pandemic.

In which of the following ways were they adapted?

SELECT ALL THAT APPLY

- 1) Allowed staff to work from home where needed
- 2) Allowed our services to be delivered online through video calls or online messaging services
- 3) Allowed our services to be delivered online in some other way (please describe)
- 4) Allowed our services to be delivered by phone
- 5) Allowed our services to be delivered remotely in some other way (please describe)
- 6) Allowed our services to be delivered face-to-face during pandemic conditions

- 7) Other
- 8) Don't know

ASK ALL

FundUse2

Thinking about how the VCSE sector support funding supported your organisation, did it allow you to do any of the following?

SELECT ALL THAT APPLY

- 1) Retain existing staff
- 2) Retain existing volunteers
- 3) Recruit new staff
- 4) Increase the number of volunteers we work with
- 5) The funding was not spent on expanding or retaining our workforce
- 6) Don't know

ASK IF FundUse = 6

Collab1

You mentioned that your organisation improved how it collaborates with other VCSE sector organisations or public services.

In which, if any, of the following areas was this done?

SELECT ALL THAT APPLY

- 1) Referring people to or from other VCSE sector organisations
- 2) Referring people to or from public services
- 3) Information sharing on demand for services with other VCSE sector organisations and public services
- 4) Delivering services in partnership with other VCSE sector organisations or public services
- 5) Collaborating with other VCSE sector organisations in accessing new sources of funding
- 6) Other (please describe)
- 7) Don't know

ASK IF FundUse=7

Collab2

You mentioned that your organisation facilitated collaboration **among other** VCSE sector organisations.

In which, if any, of the following areas was this done?

SELECT ALL THAT APPLY

- 1) Referring people between VCSE sector organisations
- 2) Referring people to public services
- 3) Information sharing on demand for services between VCSE sector organisations and public services
- 4) Matching volunteers with demand for support from VCSE sector organisations
- 5) Delivering services in partnership with other VCSE sector organisations or public services

- 6) Encouraging VCSE sector organisations to collaborate in accessing new sources of funding
- 7) Other (please describe)
- 8) Don't know

Services (activities) delivered with the funding

ASK ALL (EXCEPT HOSPICES FUND) **FundAct**

What activities or services were delivered by your organisation as a direct result of receiving the VCSE sector support funding?

Please think of activities or services it would not have been possible to deliver without the funding or which would have been delivered on a smaller scale.

PLEASE SELECT ALL THAT APPLY

- 1) Information and advice (including signposting people to other support or helping people access services)
- 2) Mental health support and related services (including bereavement support, suicide prevention, treatment for addiction, wellbeing courses and mental health resources)
- 3) Medical care (including end of life care and hospice care)
- 4) Childcare support (such as day care, nurseries or babysitting)
- 5) Other care services (such as adult social care, including care for the elderly or people living with disabilities)
- 6) Help with material deprivation (such as help with financial pressures and pay bills, provision of essential items like food and clothing, or cookers and fridges, and ensuring access to housing)
- 7) Encouraged social connections and tackled loneliness
- 8) Education related activities (including training and support for teachers, equipment for students and schools to work remotely, digital resources and curriculum development, or tuition services)
- 9) Improved digital access for people with disabilities (for example, enabling deaf people to communicate with someone online through a BSL interpreter)
- 10) Improved digital access generally (for example, provision of equipment such as computers and phones and software such as Zoom, access to the internet, or paying for data on a mobile phone)
- 11) Support with other urgent needs (such as domestic abuse, domestic violence, hate crimes, or victims of modern slavery)
- 12) Other (please describe)
- 13) Don't know

ASK ALL WHO SELECTED OPTION 1-11 at FundAct

ActOf

Thinking about the activities or services delivered by your organisation as a direct result of receiving the VCSE sector support funding, how long would a typical service user engage with this service or activity?

Please answer for each activity.

SHOW ONLY CODES SELECTED at FundAct

	Varies too much to say	One off contact	Up to one week	Up to two weeks	Up to one month	Up to three months	Three months or longer
1. Information and advice (include signposting people to other support or helping people access services)							
2. Mental health support and related services (including bereavement support, suicide prevention, treatment for addiction, wellbeing courses and mental health resources)							
3. Medical care (including end of life care and hospice care)							
4. Childcare support (such as day care, nurseries or babysitting)							
5. Other care services (such as adult social care, including care for the elderly or people living with disabilities)							
6. Help with material deprivation (such as help with financial pressures and pay bills, provision of essential items like food and							

	Varies too much to say	One off contact	Up to one week	Up to two weeks	Up to one month	Up to three months	Three months or longer
clothing, or cookers and fridges, and ensuring access to housing)							
7. Encouraged social connections and tackled loneliness							
8. Education related activities (such as training and support for teachers, equipment for students and schools to work remotely, digital resources and curriculum development, or tuition services)							
9. Improved digital access for people with disabilities (for example, enabling deaf people to communicate with someone online through a BSL interpreter)							
10. Improved digital access generally (for example, provision of equipment such as computers and phones and software such as Zoom, access to the internet, or paying for data on a mobile							

	Varies too much to say	One off contact	Up to one week	Up to two weeks	Up to one month	Up to three months	Three months or longer
phone interpreter)							
11. Support with other urgent needs (such as domestic abuse, domestic violence, hate crimes, or victims of modern slavery)							

ASK IF FundAct=2, 3 or 4

Hlthcare

You mentioned that your organisation’s activities supported service users’ access to medical care, mental health services or care services.

Did your organisation directly provide these services or facilitate people’s access to services provided by others?

- 1) Directly provided healthcare services
- 2) Facilitated access to healthcare services provided by others (for example, transport to healthcare facilities)
- 3) Other [PLEASE SPECIFY]
- 4) Don’t know

ASK IF FundAct=5

BNeeds

You mentioned that your organisation’s service users were supported with issues around material deprivation. Which of the following forms of support did you offer to service users?

SELECT ALL THAT APPLY

- 1) Emergency cash or other financial help
- 2) Food
- 3) Clothing
- 4) Toiletries and hygiene products
- 5) Household items
- 6) Accommodation

- 7) Other [PLEASE SPECIFY]
- 8) Don't know

ASK IF FundAct=10

PrHarm

You mentioned that your organisation worked to support people with urgent needs, such as facing a risk of domestic violence, thanks to the VCSE sector support funding you received.

Which of the following forms of support did you offer to service users?

SELECT ALL THAT APPLY

- 1) Protection or support for people experiencing child abuse
- 2) Protection or support for people experiencing domestic abuse
- 3) Protection or support for people experiencing hate crime
- 4) Protection or support for victims of modern slavery
- 5) Other [PLEASE SPECIFY]
- 6) Don't know

ASK ALL (EXCEPT HOSPICES FUND)

ActNew

Were any of the activities or services your organisation delivered as a result of the VCSE sector support funding set up with that funding?

That is, they were new services not delivered before this.

1. Yes
2. No
3. Don't know

ASK IF ActNew = 1 AND MORE THAN ONE OPTION SELECTED AT FundAct

NewServ

Of the services and activities your organisation delivered, which were **new ones** set up with the VCSE sector support funding?

SHOW ONLY ACTIVITIES SELECTED AT FundAct

- 1) Information and advice (include signposting people to other support or helping people access services)
- 2) Mental health support and related services (including bereavement support, suicide prevention, treatment for addiction, wellbeing courses and mental health resources)
- 3) Medical care (including end of life care and hospice care)
- 4) Childcare support (such as day care, nurseries or babysitting)
- 5) Other care services (such as adult social care, including care for the elderly or people living with disabilities)
- 6) Help with material deprivation (such as help with financial pressures and pay bills, provision of essential items like food and clothing, or cookers and fridges, and ensuring access to housing)
- 7) Encouraged social connections and tackled loneliness
- 8) Education related activities (such as training and support for teachers, equipment for students and schools to work remotely, digital resources and curriculum development, or tuition services)

- 9) Improved digital access for people with disabilities (for example, enabling deaf people to communicate with someone online through a BSL interpreter)
- 10) Improved digital access generally (for example, provision of equipment such as computers and phones and software such as Zoom, access to the internet, or paying for data on a mobile phone interpreter)
- 11) Support with other urgent needs (such as domestic abuse, domestic violence, hate crimes, or victims of modern slavery)
- 12) None of these were new services or activities

ASK IF FundAct = 1 to 8

Intent2

We would like to know how far the VCSE sector support funding was used to address unexpected needs, that is, ones which were **not** outlined in the application.

Which, if any, of the services or activities your organisation delivered with the funding, were to meet **unexpected** needs?

SELECT ALL THAT APPLY [SHOW THOSE SELECTED AT FundAct]

- 1) Information and advice (signposting to other support, helping people access existing services)
- 2) Mental health support (including counselling, therapy, bereavement support, suicide prevention, treatment for addiction, wellbeing courses and mental health resources)
- 3) Medical care (including end of life care and hospice care)
- 4) Childcare support (such as day care, nurseries or babysitting)
- 5) Other care services (such as adult social care, including care for the elderly or people living with disabilities)
- 6) Help with material deprivation (such as help with financial pressures and pay bills, provision of essential items like food and clothing, or cookers and fridges, and ensuring access to housing)
- 7) Encouraged social connections and tackled loneliness
- 8) Education related activities (such as training and support for teachers, equipment for students and schools to work remotely, digital resources and curriculum development, or tuition services)
- 9) Improved digital access (provision of equipment such as computers and phones and software such as Zoom, access to the internet, for example by paying for data on a mobile phone, as well as adapting online services to be more accessible to people with disabilities (for example, enabling deaf people to communicate with someone online through a BSL interpreter)
- 10) Support with other urgent needs (such as domestic abuse, domestic violence, support for victims of modern slavery)
- 11) Other
- 12) None of these
- 13) Don't know

Beneficiary groups targeted

SHOW ALL (EXCEPT HOSPICES FUND)

The next few questions are about people supported by your organisation as a result of the VCSE sector support funding.

Throughout this section we refer to these people as 'service users'.

Service users may not be the term used in your organisation, however, please think of the group of people who benefit from the work you do, whether these are patients in a hospice, listeners of a radio station, or people accessing resources from a website.

ASK ALL (EXCEPT HOSPICES FUND)

Benef

Which, if any, of the following groups of people were supported with the VCSE sector support funding received by your organisation?

- 1) Not a specific group – our support is universal [ANCHOR AT THE TOP OF THE LIST]
- 2) Religious and faith groups
- 3) Ethnic minority groups
- 4) LGBTQ+
- 5) People with a long-term illness or disability (physical or mental health condition lasting or expected to last for 12 months or more)
- 6) People with an illness or disability (physical or mental) expected to last less than 12 months
- 7) People at greater risk of domestic abuse (e.g. women and children)
- 8) Children and young people
- 9) Older people
- 10) Families facing financial hardship
- 11) Individuals facing financial hardship
- 12) Homeless people
- 13) Asylum seekers and/or refugees
- 14) People dealing with substance misuse
- 15) People at end of life and their families
- 16) People at greater risk of loneliness or social isolation
- 17) Carers and those supporting the people above
- 18) Other [PLEASE SPECIFY]
- 19) Don't know

ASK ALL (EXCEPT HOSPICES FUND)

BenefNum

Approximately how many service users did your organisation support thanks to the VCSE sector support funding?

Again, service users may not be the term used in your organisation, however, please think of the group of people who benefit from the work you do, whether these are patients in a hospice, listeners of a radio station, or people accessing resources from a website .

- 1) [INCLUDE OPEN END TEXT BOX. LIMIT TO 8 DIGITS]
- 2) Don't know

IF BenefNum=2

BenefNumA

Can you provide an estimate of the number of service users supported by your organisation thanks to the VCSE sector support funding?

- 1) 1 – 10
- 2) 11 – 50
- 3) 51 – 100
- 4) 101 – 500
- 5) 501 – 1000
- 6) 1001 – 2000
- 7) 2001 – 4000
- 8) 4001 – 6000
- 9) 6001 – 8000
- 10) 8001 – 10,000
- 11) 10,000 – 50,000
- 12) 50,001 – 100,000
- 13) 100,001 – 500,000
- 14) 500,001 or more
- 15) Don't know

ASK ALL (EXCEPT HOSPICES FUND)

NewBenef

Thinking of those service users supported thanks to the VCSE sector support funding, were any of these people **new** service users?

That is, people you did not engage before receiving the funding.

- 1) Yes
- 2) No
- 3) Don't know

ASK IF NewBenef=1

NewBenefA

What proportion of those supported thanks to the VCSE sector support funding were **new** service users?

That is, people you did **not** engage before receiving the funding?

12. 0-10%
13. 11-20%
14. 21-30%
15. 31-40%
16. 41-50%
17. 51-60%
18. 61-70%
19. 71-80%
20. 81-90%
21. 91-100%
22. Don't know.

Achieved outcomes for service users

ASK ALL (EXCEPT HOSPICES FUND)

AchOutc

This question is about the ways in which people benefited as a result of the activities or services your organisation delivered thanks to the VCSE sector support funding.

Please look at the following list and select all the ways in which people's situation was improved by the work your organisation did.

SELECT ALL THAT APPLY

- 1) People were better informed about other sources of support or similar services
- 2) People had better access to healthcare or social care services
- 3) People's experience of end of life care was improved
- 4) People experiencing bereavement received better support
- 5) People's physical health improved
- 6) People's mental health and wellbeing improved
- 7) People's short-term basic needs (such as food, clothing and shelter) were better met
- 8) People had more opportunities of social contact
- 9) People's experience of loneliness was reduced
- 10) People's protection from harm, violence and abuse was improved
- 11) Children and young people's education and development was improved
- 12) People developed their skills and confidence in themselves
- 13) People's resilience and ability to respond to changing circumstances was improved
- 14) Other [PLEASE SPECIFY]
- 15) Don't know

ASK IF AchOutc = 1 – 13

BenHow

Thinking about all the service users supported by your organisation as a result of the VCSE sector support funding, how many of these were helped in each of the following areas?

SHOW ONLY THOSE SELECTED AT AchOutc

	All of them	Most of them	Some of them	A few of them	None of them	Don't know
1. People were better informed about other sources of support or similar services						
2. People had better access to healthcare or social care services						
3. People's experience of end of life care was improved						
4. People experiencing bereavement received better support						
5. People's physical health improved						
6. People's mental health and wellbeing improved						
7. People's short-term basic needs (such as food, clothing and shelter) were better met						
8. People had more opportunities of social contact						
9. People's experience of loneliness was reduced						
10. People's protection from harm, violence and abuse was improved						
11. Education and development of children and						

young people were improved							
12. People developed their skills and confidence in themselves							ASK

ALL(EXCEPT HOSPICES FUND)

CovidBen

Thinking about the service users you supported with the VCSE sector support funding.

How much of this support was to do with issues **primarily** caused by the coronavirus pandemic?

1. All of it
2. A great deal
3. Some of it
4. Very little of it
5. None of it
6. Don't know.

Volunteers

SHOW IF FundUse2= 2 or 4

The next questions are about how the VCSE sector support funding supported your organisation in working with your voluntary staff during the pandemic.

Please think about anyone who worked for your organisation whose time was unpaid during this period.

ASK IF FundUse2= 2

VolKeep

How many existing and/or new volunteers did your organisation work with as a result of the VCSE sector support funding?

Please only include volunteers whose work would not have been possible without this additional financial support.

- 1) OPEN
- 2) Don't know

ASK IF VolKeep = 2

VolKeep2

Can you provide an estimate of how many existing and/or new volunteers your organisation was able to continue working with as a result of the VCSE sector support funding?

Please only include volunteers whose work would not have been possible without this additional financial support.

- 1) 1 to 10
- 2) 11 to 50
- 3) 51 to 100
- 4) 101 to 500
- 5) 501 or more
- 6) Don't know

ASK IF FundAct= 4

VolNew

And how many, if any, of these were **new** volunteers which your organisation was able to begin working with due to the VCSE sector support funding?

By 'new volunteers' we mean anyone who began volunteering with your organisation after the pandemic began.

- 1) OPEN
- 2) Don't know

ASK IF VolNew = 2

VolNew2

Can you provide an estimate of how many were **new** volunteers, which your organisation was able to begin working with due to the VCSE sector support funding?

- 1) 1 to 10
- 2) 11 to 50
- 3) 51 to 100
- 4) 101 to 500
- 5) 501 or more
- 6) Don't know

ASK IF FundAct= 2 or 4

VolHour

Thinking about the overall contribution of these volunteers, in total, how many hours did they give to your organisation in an average week during the pandemic?

Please include both new volunteers and existing ones.

- 1) OPEN
- 2) Don't know

ASK IF VolHour = 2

VolHour2

Can you provide an estimate of how many hours in total these volunteers gave to your organisation in an average week during the pandemic?

1. 1 – 10
2. 11 – 50
3. 51 – 100
4. 101 – 500
5. 501 – 1000
6. 1001 – 2000

7. 2001 – 5000
8. 5001 or more
9. Don't know

ASK IF Volunteers NOT EQUAL TO "None"

VolNum

Without the VCSE sector support funding, would the number of volunteers you worked with have fallen during the pandemic?

- 1) Yes
- 2) No
- 3) Don't know

ASK IF VolNum=1

VolNum2

Without the VCSE sector support funding, how many volunteers would your organisation have had to stop working with as a result of the pandemic?

- 1) OPEN
- 2) Don't know

ASK IF VolNum=2

VolNum3

Without the VCSE sector support funding, can you provide an estimate of how many volunteers your organisation would have had to stop working with as a result of the pandemic?

- 1) 1 to 10
- 2) 11 to 50
- 3) 51 to 100
- 4) 101 to 500
- 5) 501 or more
- 6) Don't know

Staff

ASK IF FundUse2 = 1 or 3

FurloughStop

The next few questions are about how the VCSE sector support funding supported your organisation to retain or recruit new staff during the pandemic.

Have staff been kept off the Furlough Scheme or brought back to work using this funding?

SELECT ALL THAT APPLY

- 1) Yes, kept off the Furlough Scheme
- 2) Yes, brought back from the Furlough Scheme
- 3) No
- 4) Don't know

ASK IF FurloughStop = 1

StaffKept

How many staff have been kept off the Furlough Scheme due to your organisation's use of the VCSE sector support funding?

- 1) OPEN
- 2) Don't know

ASK IF FurloughStop2 = 2

StaffKept2

Can you estimate how many staff have been kept off the Furlough Scheme using the VCSE sector support funding?

- 1) None
- 2) 1 to 10
- 3) 11 to 50
- 4) 51 to 100
- 5) 101 to 500
- 6) 501 or more
- 7) Don't know

ASK IF FurloughStop = 2

StaffReturn

How many staff have been returned to work from the Furlough Scheme using the VCSE sector support funding?

- 1) OPEN
- 2) Don't know

ASK IF FurloughStop2 = 2

StaffReturn2

Can you estimate how many staff have been returned to work from the Furlough Scheme using the VCSE sector support funding?

- 1) 1 to 10
- 2) 11 to 50

- 3) 51 to 100
- 4) 101 to 500
- 5) 501 or more
- 6) Don't know

ASK IF FundUse2 = 3

NewStaff

Have any new staff been hired using the money received from the VCSE sector support funding?

- 1) Yes
- 2) No
- 3) Don't know

ASK IF NewStaff = 1

NewStaff1

How many new staff have been hired using grant money received from the VCSE sector support funding?

- 1) OPEN
- 2) Don't know

ASK IF NewStaff1 = 2

NewStaff2

Can you estimate how many staff have been hired using grant money received from the VCSE sector support funding?

- 1) 1 to 10
- 2) 11 to 50
- 3) 51 to 100
- 4) 101 to 500
- 5) 501 or more
- 6) Don't know

ASK IF FundAct= 1 or 3

WorkHour

In this question please think about the overall contribution of staff hired or returned to work from furlough by the VCSE sector support funding.

Thinking about the total number of hours worked by all the staff in your organisation during the last month, how much of this was from staff hired or brought back to work from furlough using the VCSE sector support funding?

1. All of them
2. Most of them
3. Some of them
4. Not very many of them
5. None of them
6. Don't know

Financial position of the organisation

SHOW TO ALL

The next questions are about the financial position of your organisation and any emergency funding received during the coronavirus pandemic.

ASK ALL

FinHealth

Thinking about the financial health of your organisation **now**, overall would you describe yourself as...

- 1) Very concerned about its finances
- 2) Somewhat concerned about its finances
- 3) A little concerned about its finances
- 4) Not at all concerned about its finances
- 5) Don't know

ASK ALL

FinChang

And thinking about the financial health of your organisation **before** the coronavirus pandemic began (in March 2020), would you say you were...

- 1) Very concerned about its finances
- 2) Somewhat concerned about its finances
- 3) A little concerned about its finances
- 4) Not at all concerned about its finances
- 5) Don't know

ASK ALL

IncChang

Thinking about how your organisation's annual turnover has changed since the beginning of the coronavirus pandemic (in March 2020), which of the following applies best to your organisation?

Please take into account any funding your organisation has received from the VCSE sector support funding.

- 1) Our income has increased substantially
- 2) Our income has increased a little
- 3) Our income has remained largely unchanged
- 4) Our income has fallen a little
- 5) Our income has fallen substantially
- 6) Don't know
- 7) Prefer not to say

ASK ALL NOT Don't know OR Prefer not to say AT **IncChang**
IncChan2

And thinking about how your organisation's annual turnover would have changed since the beginning of the coronavirus pandemic **without** the VCSE sector support funding, which of the following applies best to your organisation?

1. Our income would have increased substantially
2. Our income would have increased a little
3. Our income would have remained largely unchanged
4. Our income would have fallen a little
5. Our income would have fallen substantially
6. Don't know
7. Prefer not to say

ASK IF FundUse = 1

FundImp

To what extent, if at all, would you say the VCSE sector support funding helped your organisation to sustain or improve its financial health during the pandemic?

- 1) Not at all
- 2) Very little
- 3) Somewhat
- 4) Quite a bit
- 5) A great deal
- 6) Don't know

ASK ALL

FundOth

The next questions are about grant funding from **other sources**, besides the VCSE sector support funding.

The VCSE sector support funding includes:

[INSERT FUNDING STREAM NAME OR NAMES HERE].

Besides this funding, has your organisation applied for any other grant funding during the coronavirus pandemic?

- 1) Yes
- 2) No
- 3) Don't know

ASK IF FundOth = 1

FundApp

And was your organisation's application for other grant funding successful?

- 1) Yes, all our applications were successful
- 2) Yes, some of our applications were successful
- 3) No
- 4) Don't know

ASK IF FundApp = 1 or 2

FundAmount

And what was the value of the other grant funding your organisation was successful in applying for during the coronavirus pandemic?

Please exclude support from the VCSE sector support funding.

- 1) OPEN
- 2) Don't know

ASK IF FundAmount = 2

FundAmount2

Can you estimate the value of the additional grant funding your organisation was successful in applying for during the coronavirus pandemic?

Please exclude support from the VCSE sector support funding.

1. £1 - £10,000
2. £10,001 - £50,000
3. £50,001 - £100,000
4. £100,001 - £300,000
5. £300,001 -£500,000
6. £500,001 or over
7. Don't know

ASK IF FundOth = Yes

Contr

How much, if any, of the other coronavirus related grant funding was used for the same purposes as the VCSE sector support funding?

1. All of the other funding was used for the same purposes
2. Most of the other funding was used for the same purposes
3. Some of the other funding was used for the same purposes
4. None of the other funding was used for the same purposes
5. Don't know.

ASK ALL

FundH

Thinking about the impact of the coronavirus pandemic on your ability to continue delivering your normal services, if your organisation had not received the [insert grant name here] funding, which of the following would have applied best to your organisation?

- 1) We would have been able to keep the level of services we provided **the same**
- 2) The level of services we provided would have had to be **slightly reduced**
- 3) The level of services we delivered would have had to be **substantially reduced**
- 4) We would have had to **close or stop** delivering services.
- 5) Don't know

ASK ALL

FundH2

And thinking about how your organisation has coped during the coronavirus pandemic, which of the following applies best to your organisation?

- 1) We have **substantially increased** the level of services we deliver
- 2) We have **slightly increased** the level of services we deliver
- 3) We have kept the level of services we deliver **the same**
- 4) We have **substantially decreased** the level of services we deliver
- 5) We have **slightly decreased** the level of services we deliver
- 6) We have had to close or stop delivering services altogether
- 7) None of these
- 8) Don't know

ASK IF FundH = 2, 3 or 4

FundBarr

You mentioned that if you had not received the VCSE sector support funding your organisation would have had to slightly reduce the level of services it delivers/substantially reduce the level of services it delivers/close or stop delivering services altogether.

Which, if any, of the following reasons for this would have applied to your organisation?

SELECT ALL THAT APPLY

- 1) Our income would have fallen
- 2) Our staff or volunteers would have been unable to continue working (for example, because they would have been unable to work from home)
- 3) We would not have been able to change the way services were delivered (e.g. moving to remote delivery, or putting in place social distancing)
- 4) Other (please describe)
- 5) Don't know

ASK IF FundBarr = 1, 2 or 3 AND MORE THAN ONE SELECTED

Barr2

And which of these would have been the most important reason for a decrease in your services during the coronavirus pandemic?

- 1) SHOW OPTIONS SELECTED AT FundBarr
- 2) Both were equally important
- 3) Don't know

ASK ALL

Sustain1

Thinking about the financial position of your organisation, which of the following applies best to your organisation over the **next 3 months**?

1. We will be able to **substantially** increase the level of services we deliver
2. We will be able to **slightly** increase the level of services we deliver
3. We will be able to keep the level of services we deliver **the same**
4. We will have to **slightly** decrease the level of services we deliver
5. We will have to **substantially** decrease the level of services we deliver

6. We will have to close or stop delivering services altogether
7. Don't know

ASK ALL

Sustain2

And thinking about the financial position of your organisation over the **next year**, which of the follow applies best to your organisation?

- 1) We will be able to **substantially** increase the level of services we deliver
- 2) We will be able to **slightly** increase the level of services we deliver
- 3) We will be able to keep the level of services we deliver **the same**
- 4) We will have to **slightly** decrease the level of services we deliver
- 5) We will have to **substantially** decrease the level of services we deliver
- 6) We will have to close or stop delivering services altogether
- 7) Don't know

ASK IF Sustain2 NOT 6 or 7

Sustain3

How important, if at all, would you say the VCSE sector support funding has been in allowing your organisation to [IF SUSTAIN2=1 or 2: "increase the level of services it delivers over the next year?"; IF SUSTAIN2 = 3: "keep the level of services it delivers the same over the next year?"; IF SUSTAIN2 = 4 or 5: "continue delivering services over the next year?"]

- 1) Not at all important
- 2) Not very important
- 3) Quite important
- 4) Very important
- 5) Don't know

ASK IF Sustain2 NOT 6 or 7

Sustain4

And has the VCSE sector support funding improved your organisation's ability to continue delivering services over the next year in any of the following other ways?

- 1) By allowing us to keep existing staff or recruit new ones,
- 2) By allowing us keep existing volunteers or recruit new ones,
- 3) By allowing us to change the way we deliver services,
- 4) By allowing us to maintain important assets, such as offices, machinery or vehicles
- 5) By allowing us to collaborate better with other VCSE organisations or public services
- 6) Another way (please describe)
- 7) None of these

Application process

ASK ALL (EXCEPT HOSPICES FUND)

Apply

Thinking about the process of applying for the VCSE sector support funding, how easy or difficult was it for your organisation to apply for this?

- 1) Very easy
- 2) Fairly easy
- 3) Neither easy nor difficult
- 4) Fairly difficult
- 5) Very difficult
- 6) Don't know

ASK IF Apply = 4 or 5

Apply2

You mentioned that the application process was difficult , what were the main causes of the difficulties you encountered?

SELECT ALL THAT APPLY

- 1) Unclear instructions
- 2) Communication issues with the funder
- 3) Extent or type of documentation required
- 4) Limiting selection criteria
- 5) Other (please describe)
- 6) Don't know
- 7) Prefer not to say

Organisational background

The final section of the survey is about your organisation and its situation before the coronavirus pandemic began.

These will help us understand what types of organisation received the funding and where there was greatest need for it.

ASK ALL

Staff

Thinking about before the pandemic began (in March 2020), can you estimate how many staff your organisation employed?

1. 1
2. 2 – 5
3. 6 – 10
4. 11 – 20
5. 21 – 50
6. 51 – 100
7. 101 – 500
8. 501 or more
9. Don't know

ASK ALL

Furlough

During the coronavirus pandemic, did your organisation put any staff on the UK Government Furlough Scheme?

1. Yes
2. No
3. Don't know

ASK IF Staff2 = 1

FurloughNum

How many staff were put on the Furlough Scheme during the pandemic?

If staff were put on the scheme repeatedly at different points, please only count them once.

1. OPEN
2. Don't know

ASK IF FurloughNum = 2

FNum2

Can you estimate how many staff were put on the Furlough Scheme during the pandemic?

1. 1 – 5
2. 6 – 10
3. 11– 20
4. 21 – 50
5. 51 – 100
6. 101 – 500
7. 501 or more
8. Don't know

ASK ALL

VolNum

Throughout this survey, we refer to 'volunteers' but your organisation may call them something else. Please think of anyone giving unpaid time as part of your organisation's work to benefit someone else.

Again, thinking about before the pandemic began (in March 2020), how many people volunteered at your organisation?

1. OPEN
2. Don't know

ASK IF VoINum=2

Volunteers

Thinking about before the pandemic began (in March 2020), can you estimate how many people volunteered at your organisation?

1. None
2. 1 – 5
3. 6 – 10
4. 11 – 20
5. 21 – 50
6. 51 – 100
7. 101 – 500
8. 501 or more
9. Don't know

ASK ALL

Sector

Which, if any, of these areas does your organisation operate in?

SELECT ALL THAT APPLY

- 1) Education
- 2) Social care
- 3) Health (including mental health, addiction support)
- 4) Families and children
- 5) Community
- 6) Economic development
- 7) Advocacy
- 8) Legal support
- 9) Housing
- 10) Culture
- 11) Sport
- 12) Religious or faith based
- 13) Other (please describe)
- 14) Don't know

ASK FundUse2 = 2 or 4

VolSurvey

As part of this evaluation, NatCen is also conducting a survey of people who volunteered with organisations like yours which received the COVID-19 Support funding during 2020-2021.

We would like to ask for your help in forwarding the survey invitation to individuals who volunteered with your organisation at the time you received the VCSE sector funding.

The survey will give volunteers a chance to tell us about their experiences of volunteering and it will be completely confidential and anonymous for them to take part.

Would you be willing to be contacted again in early December to send out, on NatCen's behalf, an email inviting volunteers to take part in the survey?

We will provide this email, which will explain what taking part involves, why it is important complete the survey, that it is completely voluntary, and what will be done with the data they provide.

Yes I am happy to be contacted and will be able to forward the email to volunteers on the funded activities
No, I do not want to be contacted again / we do not have the resources to forward the volunteer survey to our volunteers

If you leave your name here it will **only** be used to contact you for the volunteers survey and will be securely deleted at the end of the project.

Contact details (please type in if you are happy for us to send you the invitation to take part in the volunteer survey and to forward that on to volunteers on the funded activities)

Name	
Email	