

# **SECTOR** PRO BONO AUSTRALIA'S **SURVEY**

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**GAUGING THE STATE OF THE NOT FOR PROFIT SECTOR**

**+ 2015 REPORT**



## PARTNERS

A special thanks to Ernst & Young (EY) who made the 2015 sector survey possible



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## 1.0 FOREWORD FROM PRO BONO AUSTRALIA'S FOUNDER &amp; CEO KAREN MAHLAB

There are many interesting take outs from this year's State of the Sector Survey.

Over 1100 people answered the call to complete this year's survey. More than two-thirds of respondents were at CEO or Board level and had been involved in the sector for more than 10 years. This enabled us to provide a 'view from the top' and give voice to how the sector sees itself and its future.

Whilst the survey was conducted just prior to the Turnbull Government, anecdotally, only the change of Ministers has affected the sector. However, the next Federal election is rapidly approaching and it is timely to hear the voice of the sector.

Out of the many finding in this year's survey there are six key points I'd like to highlight.

### 1. ADVOCACY

A staggering nine out of 10 respondents saw recognition of the role of advocacy as being the most important factor in developing a thriving Australian Not for Profit sector, with two-thirds rating it as extremely important. Survey respondents ranked the performance of advocacy and human rights as number one amongst all sector industry groups. However, looking ahead to 2016, their performance is not assured due to recent concerns that government would curb sector advocacy.

### 2. THE AUSTRALIAN CHARITIES AND NOT FOR PROFIT COMMISSION

The Australian Charities and Not for Profit Commission (ACNC) continued to receive strong support from the sector with four out of five respondents recognising the ACNC's importance in developing a thriving Australian Not for Profit sector. This is the same level of support as in 2014 and 2013.

The ACNC has proven its popularity after a full two years as a regulator of the sector. This is the only sector that has wished for regulation and the ACNC should now be given an ironclad government guarantee to ensure its continued existence.

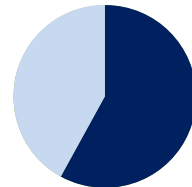
### 3. ENGAGING THE CORPORATE SECTOR

In both the 2014 and 2015 surveys respondents identified the top two priorities for government as establishing a Social Finance Taskforce and mechanisms to expand and strengthen partnerships between business and NFPs. The increasing interest in impact investing and the Prime Minister's Community Business Partnership reflect the importance of these priorities, which are getting traction.

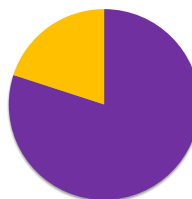
### 4. THE NEED TO INVEST IN ORGANISATION CAPACITY BUILDING

Respondents clearly identify the investment in capacity building as a priority: in particular education and training relating to leadership and management, strategy and governance.

The importance of this cannot be understated given the pace of growth and change in the sector with the associated challenges and opportunities.



**58%**  
of respondents were  
CEO or board level



**80%**  
of respondents  
thought the ACNC  
would have an  
important role in  
creating a thriving  
sector.

1.0 FOREWORD FROM PRO BONO AUSTRALIA'S FOUNDER & CEO KAREN MAHLAB

## 5. MEASURING SOCIAL IMPACT

Respondents think the sector is doing a good job of measuring its own financial performance but the same cannot be said for measuring social outcomes – which is, of course, the *raison d'être* for NFPs. Proposed changes to accounting standards to include “service performance reporting” will prompt investment in measuring outcomes. We recognise the fundamental importance of this and will shortly be releasing our own social impact statement that recognises the contribution of our news service and other services that support the sector.

## 6. THE OLD CHESTNUT - GOVERNMENT FUNDING

It is no surprise that a staggering nine out of 10 respondents stated that the funding arrangements between Government and the sector was “top priority”. It is difficult for organisations to plan and invest for growth without certainty hence the clear message to government that the sector is looking for a minimum contract length of three years and a six month end notice period.

I urge you to read the rest of the Sector Survey to get a more in-depth understanding of sector stakeholder views.

Pro Bono Australia is proud to be an integral part of the growing ecosystem that is supporting the growth and transformation of the Not for Profit sector.

We thank our partners EY and CCA, for linking with us once again to produce this important annual report, and our many supporters for agreeing to distribute the survey far and wide to their own constituents.

With kind regards,  
**Karen Mahlab AM**  
Founder & CEO  
**Pro Bono Australia**



*For the past 16 years Karen has been watching the changes occurring in the Not for Profit sector as Pro Bono Australia has supported its emergence. For much longer she's been involved at a 'doing' level via her voluntary positions on Not for Profit boards and committees.*

*She's seen the emergence of CSR, philanthropy, social enterprise, regulatory reform, social finance, the blurring of boundaries between sectors, social impact measurements, and everything online.*

*Karen's contribution was recognised when she was awarded the Order of Australia in 2015.*



## 1.1 FOREWORD FROM EY

**Ernst & Young (EY) and Pro Bono Australia are pleased to present the State of the Not for Profit sector 2015.**

We believe this survey provides important and timely insights into the performance, challenges and confidence of the sector as it navigates through an era of unprecedented and disruptive change. The sector is under tremendous pressure to adapt its financial and operating models in order to remain effective and viable organisations today and in the coming years.

Our aim at EY is to help Not-for-Profit organisations to maintain their purpose, values and culture so they can continue to deliver the responsive and high level of quality services Australians' expect while also remaining commercially viable.

In response to the emerging challenges facing the NFP sector, EY is working across a range of priority issues including developing:

- alternative models to mergers and acquisitions that enable like-minded organisations to increase their scale and efficiencies without losing their Boards, identity or client base
- alternative financing models such as social impact bonds which increase opportunities for diversifying revenue and improving financial sustainability

- new ways for Not-For-Profit organisations to improve collaboration such as collective impact
- more effective ways to measure and report the broader social and economic value created
- a diagnostic, planning and implementation service for NGO Boards and CEOs to identify and select the areas where they need to invest in adaptation and capacity building

We hope this survey provides insight to assist those that govern, lead and manage Not-for-Profit organisations and help them adapt to the changing strategic and operational environment.

We wish to thank respondents for participating and contributing to the survey. We hope that you find the report to be a valuable contribution to the continued development of the sector.

**Cameron Bird**  
Partner  
**Ernst & Young**



*Cameron has over 15 years of experience providing financial and economic analysis advice to Government, Not for Profit and the private sector.*

*Over the last few years, Cameron has specialised in investment evaluation and policy reform in the health and human services sector, in particular transitioning to the NDIS.*

*He leads a team of experts which specialise in preparing business cases, divestment strategies, alternative business models such as public service mutuals and new forms of social financing.*

## 1.2 THE SOCIAL AND ECONOMIC SIGNIFICANCE OF THE AUSTRALIAN NOT FOR PROFIT SECTOR

**The Not for Profit (NFP) sector plays a fundamental role in every Australian community and also makes a significant contribution to the Australian economy.**

It has a strong history of helping vulnerable and disadvantaged people in Australia and globally; contributes to the quality of life in terms of sport, culture, the arts and religion; and the resilience and vibrancy of Australians communities through employment, voluntarism, mutual support and philanthropy.

There are 57,000 economically significant NFP organisations with combined incomes of over \$100 billion with over one million paid employees and almost 4 million volunteers that contribute a further \$17 billion of economic value.<sup>1</sup> Australia's NFP sector is one of the biggest in the world, making up 8.5% of the total jobs in Australia; comparable to 7.7% of the workforce in the US, 6.8% in Japan, and just 4.4% of jobs in New Zealand.<sup>2</sup>

### **GROWTH AND TRANSFORMATION OF THE NFP SECTOR**

The NFP sector is now in the midst of unprecedented growth and transformation. The sector's contribution to Gross Domestic Product (GDP) increased 66% between 2007 and 2013 and now accounts for \$57 billion of GDP.<sup>3</sup> The sector's contribution to Gross Value Added in 2013 was 3.8%.<sup>4</sup>

The NFP sector is fulfilling a significant role in public service reforms initiated by Commonwealth and State Governments including fundamental changes relating to commissioning of public services, contestability, public service markets, client directed care, outcomes based contracting, payment by results, social impact bonds, and public service mutuals. These fundamental changes are transforming the operating environment for NFPs especially in relation to the National Disability Insurance Scheme (NDIS), employment services, aged care, health and social services, and international development.

Government is now the largest provider of income (\$41 billion) and NFP organisations providing social services generated almost \$20 billion of income.<sup>5</sup> In 2006 households were the biggest contributor of income. This reflects

the growing demand from government for the services provided by NFP organisations.

There are other key external drivers of growth and transformation for the NFP sector including increasing:

- expectations of the clients and beneficiaries of NFP organisations including in relation to accessibility, choice and control
- focus on the use of evidence especially in relation to prevention, early intervention and breaking the cycle
- competition but also collaboration
- emphasis on outcomes and using measurement and reporting framework such as Results Based Accountability (RBA) and Social Return on Investment (SROI) which will become front of mind as NFP organisations adopt the Service Performance Reporting accounting guidelines.

There are also significant internal drivers as CEOs and boards of NFP organisations develop new strategies and guide the adaptation of their organisations including:

- ensuring that strategies and programs are aligned with mission
- focus on relationships and alliances
- embedding outcome and performance measurement in internal systems and job roles
- benchmarking performance against peers
- focussing on becoming high performing and learning organisations.

<sup>1,2,3,4,5</sup> 5256.0 - Australian National Accounts: Non-Profit Institutions Satellite Account, 2012-13. Re-issue August 2015.



## 1.3 ABOUT THE STATE OF THE SECTOR SURVEY

**Pro Bono Australia's State of the Sector Survey 2015 seeks to provide a voice for all those with an interest in the Not for Profit sector – especially Pro Bono Australia's subscribers and other stakeholders that contribute to the performance of the sector.**

It is not an academic study; there are other surveys that serve that purpose. However, we have used questions which appeared in the Pro Bono Australia 2014, 2013 and 2010 Election Manifesto Surveys and the 1100 plus respondents in the 2015 survey are drawn

from the same pool of sector stakeholders – sector leaders and senior managers, volunteers, advisors, and clients. The survey engaged respondents from all states and territories, industries and sizes of Not for Profit organisations.

The survey findings are designed to prompt discussion and offer opinions from the sector. In addition to the many numbers, we focus on what respondents have said – their concerns, their hopes and most importantly their views on how to help the sector thrive.

NOTE: Figures and percentages may vary depending on the number of respondents and the number of responses made to each question. Rounding differences may occur where percentages are rounded up to the nearest whole number

*"Congratulations on the structure of this survey. Very pertinent questions indeed, particularly around leadership and people development."*

*"I commend you for organising the survey."*

*"It will be interesting to hear the final results and the differences within NFP organisations".*

*"Very comprehensive & valuable survey questions so hopefully it leads to equally valuable insight and outcomes."*

*"Your survey is quite inspiring and inductive. Questions are highly professionally constructed to elicit exact response required. Thanks for engaging me in this worth full brainstorming exercise."*

## METHOD

An online survey was designed and analysed by EY. The survey was commissioned and implemented by Pro Bono Australia. More than 1100 respondents completed part or all of the online survey in August 2015.

The survey engaged:

- board members, volunteers, employees of Not for Profit organisations, foundations and social enterprises
- consultants and employees of businesses that support the Not for Profit sector
- employees of government agencies
- academics
- carers, clients and those unemployed and seeking work.

## AN INFORMED AUDIENCE

Most respondents were employed in a Not for Profit or community organisation (52%) or were a volunteer for a Not for Profit (15%). Consultants supporting the Not for Profit sector (6%) and employees of corporate or charitable foundations (5%) were also well-represented.

## RESPONDENTS WERE FROM SENIOR ROLES

Asked to select their two most significant involvements with Not for Profit organisations, respondents most commonly nominated board membership (23%), managerial role (19%), Chief Executive Officer (15%), and volunteering with a Not for Profit (12%).

## HIGH ENGAGEMENT FROM THE SOCIAL SERVICES INDUSTRY

29% of respondents were from social services, including child welfare, youth services, aged care, disability care and emergency relief. Health (14%), community development (11%) and education (11%) were also well represented.

## LARGE ORGANISATIONS WELL-REPRESENTED

48% percent of respondents came from organisations with more than 26 staff, 31% had between six and 25 staff, and 20% had less than five staff.



## 2.0 KEY FINDINGS

Respondents generally stated that the sector overall and their organisations were performing well or average. However they were substantially more positive about their own organisation's performance than the sector as a whole. Respondents stated that the overall trajectory of sector performance is getting worse when reflecting on the past year and forward to the next.

In contrast, the performance of their own organisation has remained the same over the past year and they anticipate a slight improvement in performance over the next year. Overall, respondents to this year's survey were more positive than last year.

**CURRENT SECTOR PERFORMANCE**

- Most respondents stated that the sector was performing well (44%) or average (41%) with a small proportion (15%) stating that the sector was underperforming.
- Respondents from Western Australian (WA) and the Australian Capital Territory (ACT) were most positive about sector performance and one in five (21%) Queensland respondents stating that the sector was underperforming.
- Medium-sized organisations with between six and 25 employees were most positive about sector performance.
- Respondents in the Advocacy and Human Rights and Health industries were most positive (50%) with Environment (35%) and Sport and Recreation (38%) the least positive.

**CURRENT ORGANISATION PERFORMANCE**

- Respondents were more positive about their own organisations performance than they were about the sector. Most respondents stated that their organisations were performing well (59%) or average (24%) with a small proportion (17%) stating that their organisation was underperforming.
- Leaders were marginally more positive (60%) than respondents performing other roles (57%).

- ACT (67%) and WA (66%) were the most positive and Queensland most pessimistic with one in five respondents stating that their organisation was underperforming.
- Respondents of organisations with between six and 10 employees were the most positive (66%) with the smallest organisations (<5 employees) being the most pessimistic with one in four respondents stating that their organisation was underperforming.
- Respondents relating to religious organisations (65%) were the most positive and respondents from environment organisations the most pessimistic with one in four stating that their organisations was underperforming.

**TRAJECTORY OF SECTOR & ORGANISATION PERFORMANCE**

- The trajectories of sector and organisation performance were very different. Respondents were pessimistic about sector performance with a perceived 9% decline in sector performance between 2014 and 2015 and a projected decline of 11% over the next year. This is a perceived 20% drop in sector performance between 2014 and 2016.
- However, when respondents reported on their own organisation they were much more positive with organisation performance between 2014 and 2015 being static and optimism for a small improvement (4%) in organisations performance over the next year.
- International development and health were the most optimistic about both sector and organisations performance over the next year. However, respondent relating to economic and community development, and business and professional organisations were the most pessimistic about sector performance. Whilst respondents relating to environment, and sport and recreation organisations were the most pessimistic about organisational performance over the next year.

## 2.

Respondents were asked to identify one thing that would improve the performance of their organisation. The main themes were funding – especially government funding, collaboration, recruiting and retaining good staff – both paid and volunteers, better governance and leadership, measure and report outcomes, and learn what works.

*“Long term ‘core’ federal funding commensurate with sector need”*

*"Building a sustainable broader income base"*

*“Profit from social enterprise which will enable us to increase financial stability”*

*"Clarity of government funding mechanisms.  
Investment in partnerships with private  
business"*

*“Collaboration and consortia development”*

*“Greater focus on measurement of outcomes and improved collaboration with other agencies”*

*"Recruiting skilled staff to find & secure a diverse range of funding options & develop a plan of funding strategies."*

*"Obtaining more volunteers to implement the projects we would like to perform"*

*"Strong Board with excellent governance skills."*

*“Better measurement, recording and reporting of social outcomes and the value the service provides its constituents “*

*“Designing, prototyping and testing effectiveness and desirability of new services + collaboration with other organisations in same sector”*

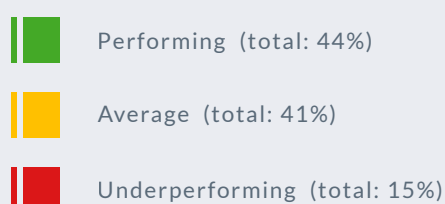


## 2.1 CURRENT SECTOR PERFORMANCE

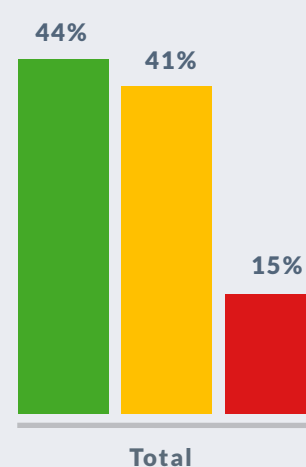
**Q: How would you rate the current overall performance of the Australian Not for Profit sector?**

**SECTOR OVERALL PERFORMANCE**

Over four in 10 (44%) of respondents stated that the sector was currently performing well with a similar proportion (41%) stating that performance was average. However, 15% stated that the sector was underperforming. Sector leaders and managers were more positive about performance (46%) than respondents fulfilling other roles (41%) but there was no difference in the proportion stating that the sector was underperforming.



Role	Total
Other	460
Leaders	653
Total	1113



## 2.2 CURRENT SECTOR PERFORMANCE BY INDUSTRY

Respondents associated with organisations in the Advocacy and Human Rights (50%) and Health (50%) industries were more likely to state that the sector is currently performing well. Whilst respondents associated with Environment (25%), Sport and Recreation (24%) and Business and Professional Associations (21%) industries were more likely to state that the sector was under performing.

Industry	Rank	+	=	-	Total
Advocacy and human rights	1	50%	34%	15%	131
Health	2	50%	37%	13%	292
Foundations and intermediaries	3	47%	34%	19%	97
Social services	4	46%	41%	13%	596
Education	5	46%	38%	16%	219
Culture and the arts	6	46%	38%	16%	99
Business and professional associations	7	44%	35%	21%	66
Economic / community development & housing	8	43%	37%	20%	234
International development	9	42%	45%	13%	91
Sports & recreation	10	38%	38%	24%	55
Environment	11	35%	40%	25%	92

## 2.3 SECTOR PERFORMANCE BY ROLE 2014, 2015, 2016

**Q: How would you rate the current overall performance of the Australian Not for Profit sector?**




**OVER THE PAST YEAR (2014)**

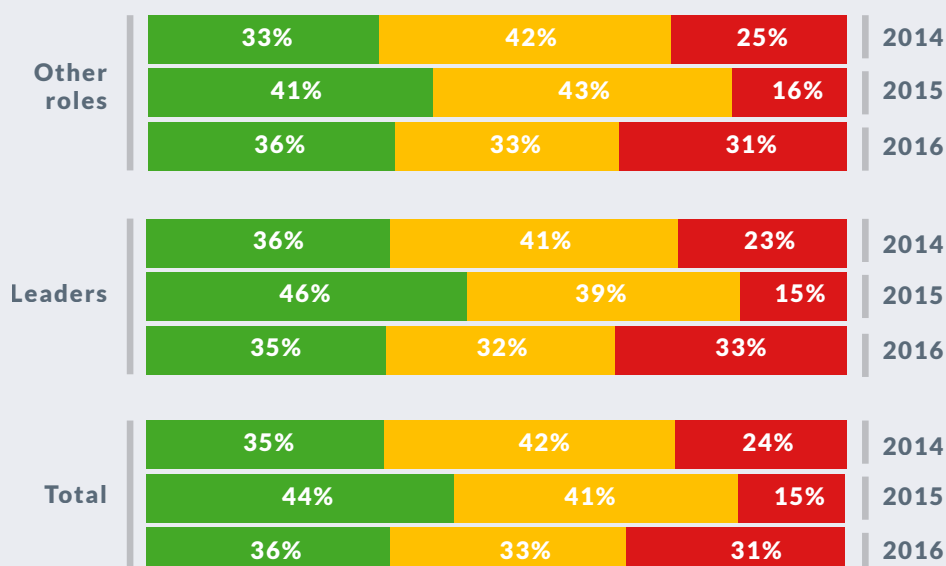
Respondents were split on their perceptions of the performance of the sector over the past year with over a third (35%) stating that the sector had improved and with almost a quarter (24%) stating that sector performance had got worse. These perceptions are slightly more positive than last year (27% improved and 30% worse).

**OVER THE NEXT YEAR (2016)**

Respondents were also split on their perceptions of the performance of the sector over the next year with over a third (36%) stating that the sector will improve over the next year and less than a third (31%) stating that it will get worse. These perceptions are substantially more positive than last year (24% improve and 49% worse).

Role	Other	Leader	Total
Total	460	653	1113

	2014	2015	2016
	Improve	Performing	Improve
	Stay the same	Average	Stay the same
	Worse	Underperforming	Worse



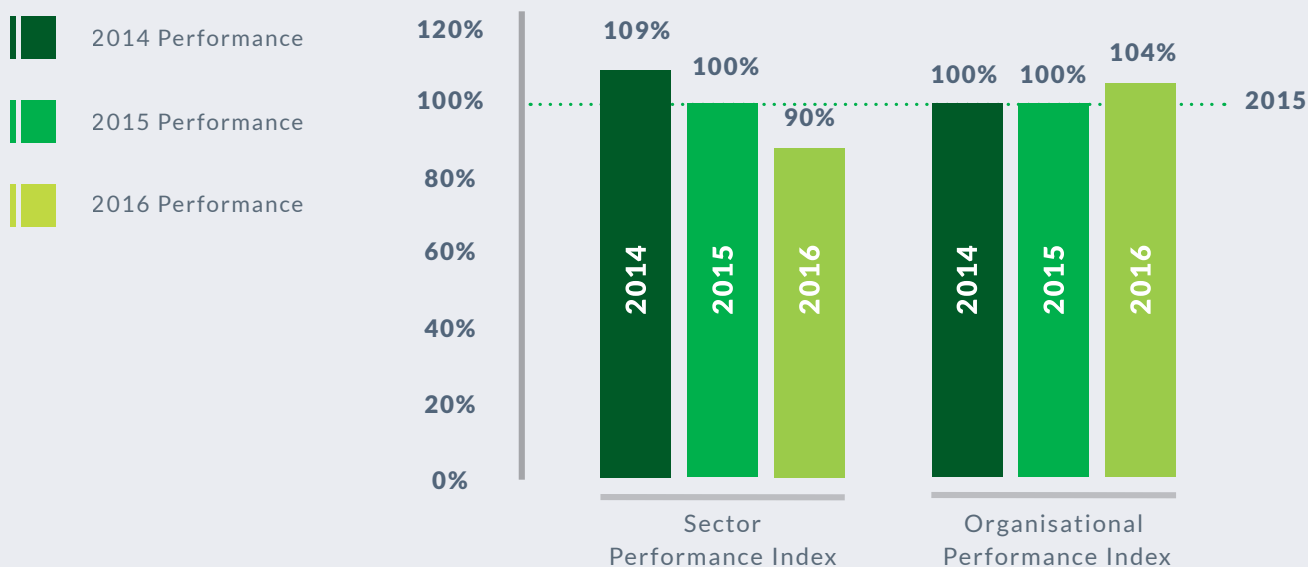


## 2.4 ORGANISATIONAL PERFORMANCE VS SECTOR PERFORMANCE | 2014, 2015, 2016

**Q: How would you rate the current performance of your own Not for Profit organisation or the Not for Profit organisations you advise or support?**

**ORGANISATIONAL PERFORMANCE VS SECTOR PERFORMANCE | 2014, 2015, 2016**

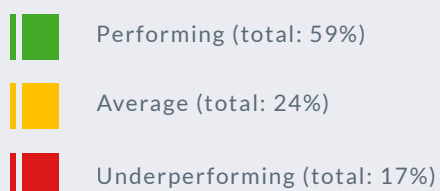
Respondents perceived that sector performance declined by 9% over the last year and will continue to decline by 10% next year – but when talking about their own organisation's performance it remained the same over the last year (only a quarter of 1% decline) and that performance will improve over the next year. However, when considering their own organisations performance, respondents perceive their performance to have remained unchanged over the last year (only a 1% decline) and that performance will improve over the next year by 4%.



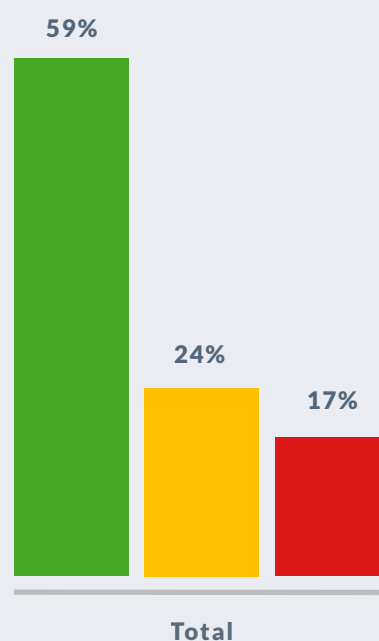
## 2.5 CURRENT OVERALL ORGANISATIONAL PERFORMANCE

**ORGANISATIONAL OVERALL PERFORMANCE**

Respondents' perceptions of their own organisations' performance was substantially higher than sector performance with 6 out of 10 (59%) respondents stating that their organisation was performing well whilst only four out of 10 (44%) thought the sector was performing well. Leaders (60%) were more positive than those performing other roles (57%). Respondents to this year's survey were also more positive than last year (59% compared to 53% in 2014).



Role	Other	Leader	Total
Total	465	646	1111






## 2.6 ORGANISATIONAL PERFORMANCE | 2014, 2015, 2016

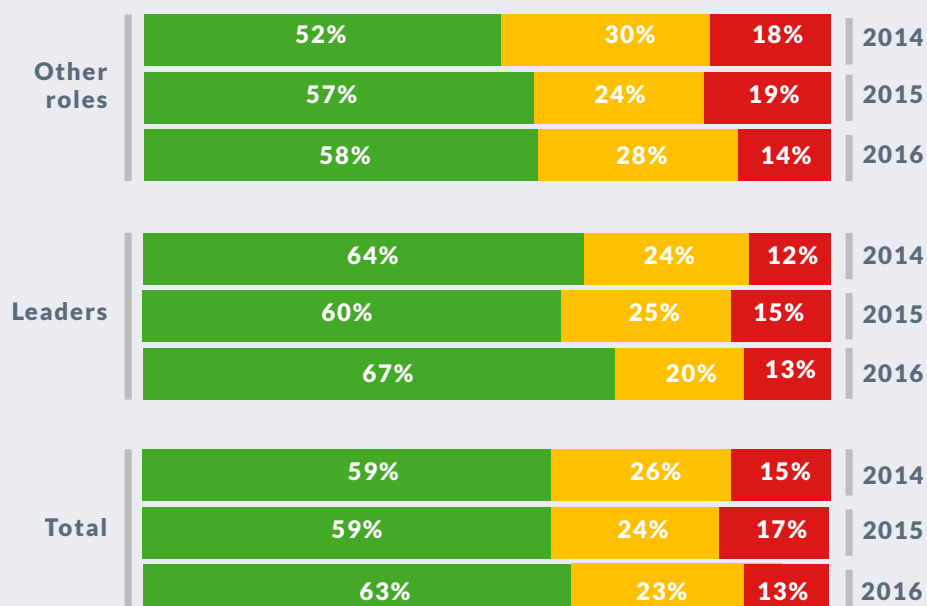
**Q: How would you rate the current performance of your own Not for Profit organisation or the Not for Profit organisations you advise or support?**

**BY ROLE**

Leaders (64%) were substantially more positive about the performance of their organisation over the past year than those fulfilling other roles (52%). Similarly, leaders (67%) were substantially more positive about the performance of their organisation over the next year than others (58%).

Role	Other	Leader	Total
Total	465	646	1111

	2014	2015	2016
	Improve	Performing	Improve
	Stay the same	Average	Stay the same
	Worse	Underperforming	Worse





### 3.0

Most respondents stated that their organisation measures financial performance well but are not doing such a good job on measuring social outcomes and performance measurement for the specific populations they serve such as children and young people.

- Two-thirds of respondents stated that their organisations measure financial performance well, with only one in 10 (11%) stating that their organisation was not. Leaders when compared to those performing other roles were the most positive with almost three in four stating that their organisations measure financial performance well.
- Larger organisations were most positive (71%) about measuring their financial performance but there was little difference amongst different sizes of organisations in relation to measuring social outcomes - except that those respondents relating to organisations with between six and 10 employees who were most positive about social outcomes (50% compared to an average of 44%).

*“Look beyond business model/financial reporting, there needs to be more emphasis on community and social outcomes”*

*"Changing the discourse and attitudes toward*

reporting to one of internal usefulness, critical reflection on work, and as a tool to improve and develop"

- Larger organisations were the most positive about measuring performance in relation to specific groups served.

*"Our R & E team is doing a remarkable job  
measuring program efficacy and reach"*

- Respondents identified a range of challenges in developing their approach to measuring social outcomes:

*“Better IT systems to measure non-financial metrics”*

*“Data on impact & cost benefit across sectors / domains e.g. combining health, welfare and aged care data or homeless, welfare, alcohol & drugs and justice data “*

*"Identified a need for consistent KPIs/measures across the organisation as well as sectors"*

*“Need for qualified staff and Board members”*

*“Too many different reporting requirements from different funders which waste times, resources and money”*



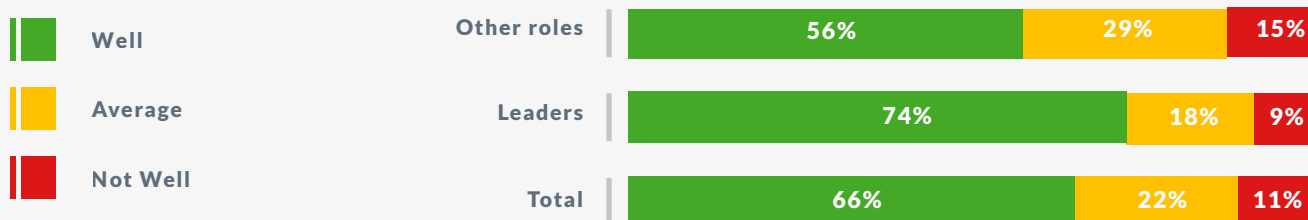
## 3.1 MEASURING ORGANISATIONAL PERFORMANCE BY ROLE

Two-thirds (66%) of respondents thought that their organisation was measuring financial performance well with leaders and managers more positive (74%) than those fulfilling other roles (56%).

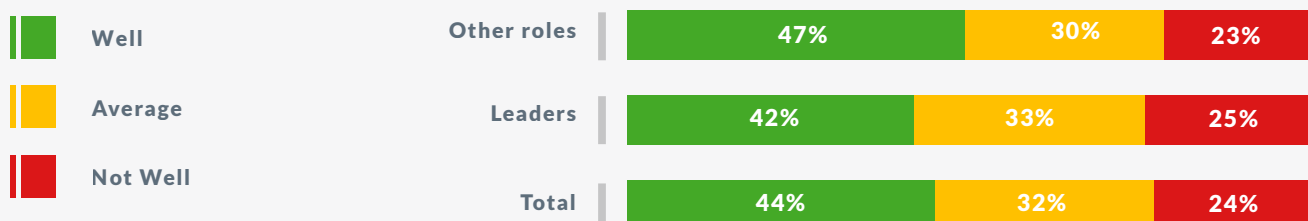
A smaller proportion of respondents (44%) thought their organisation was measuring the delivery of social outcomes well. A similar proportion of respondents (44%) thought their organisation was measuring performance for specific population groups served well.

Role	Total
Other	463
Leaders	652
Total	1115

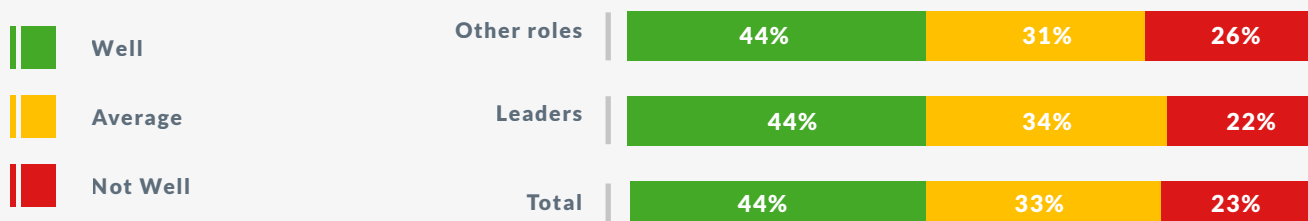
**Q: How well do you think you are measuring your organisations financial performance?**



**Q: How well do you think you are measuring your organisations performance in delivering social outcomes?**



**Q: How well do you think you are measuring organisational performance for the specific population groups you serve?**





## 3.2 MEASURING ORGANISATIONAL PERFORMANCE BY ORGANISATION SIZE

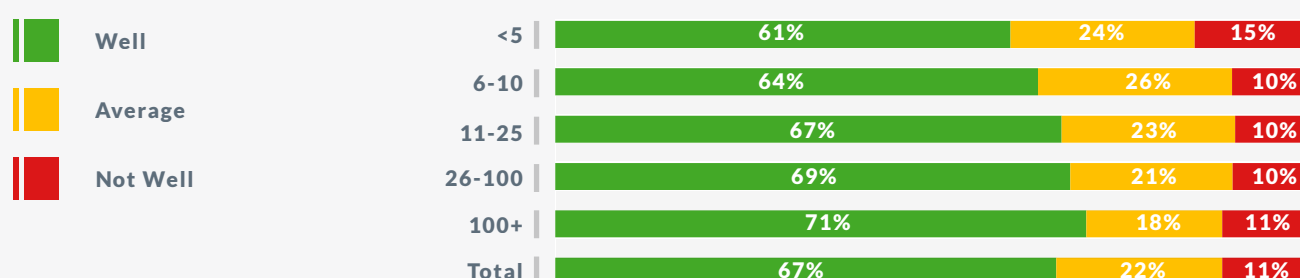
Larger organisations were more likely to think that they are measuring their financial performance well. Seven out of 10 (71%) respondents associated with the largest organisations thought they were measuring financial performance well compared to only six out of 10 (61%) for the smallest organisations.

This relationship to size was not present when considering the measurement of the delivery of social outcomes. Respondents associated with organisations with between 6 and 10 employees were the most likely (50%) to think that their organisation was measuring the delivery of social outcomes well. Whilst respondents associated with organisations with between 11 and 25 employees were most likely (27%) to think their organisation was not measuring the delivery of social outcomes well.

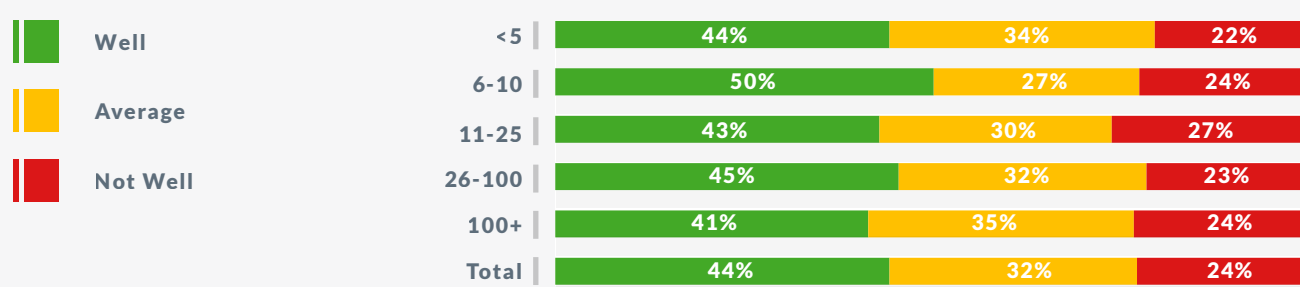
Larger organisations were more likely to think that their organisation is measuring performance well for specific population groups – 26-100 employees (48%) and 100+ employees (46%).

Size	Total
<5	221
6-10	139
11-25	209
26-100	224
100+	299
Total	1092

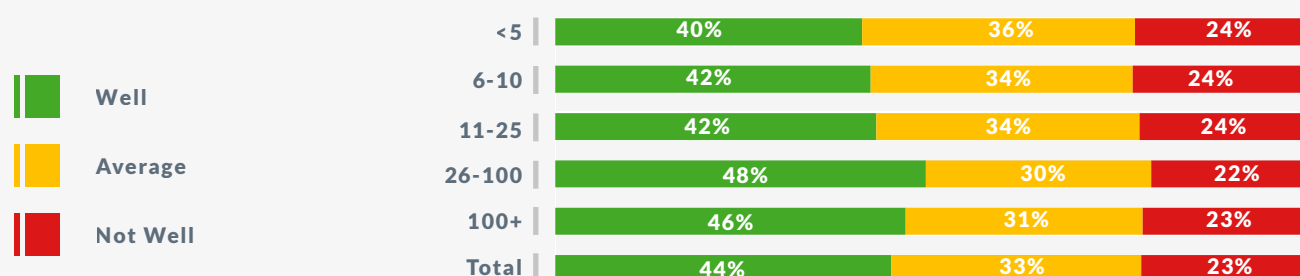
## Q: Measuring financial performance by organisation size



## Q: Measuring delivery of social outcomes



## Q: Measuring performance for specific groups served





#### 4.0 KEY FINDINGS

**Human capital was the most positive influence on the performance of the NFP sector over the past year with government funding, policy and regulation being the most significant negative influence on sector performance.**

##### **POSITIVE INFLUENCE**

- Human capital has been a positive influence over the past year and looking forward to next year – especially volunteers including skilled volunteers followed by paid staff.
- Donations from the public and grants from foundations have been a positive influence over the past year with both featuring as a positive influence when respondents consider the next year along with profit from commercial activities and social enterprise.
- Collaboration with other organisations and collective impact were seen as a positive influence over the past year and looking forward to next year.

##### **NEGATIVE INFLUENCE**

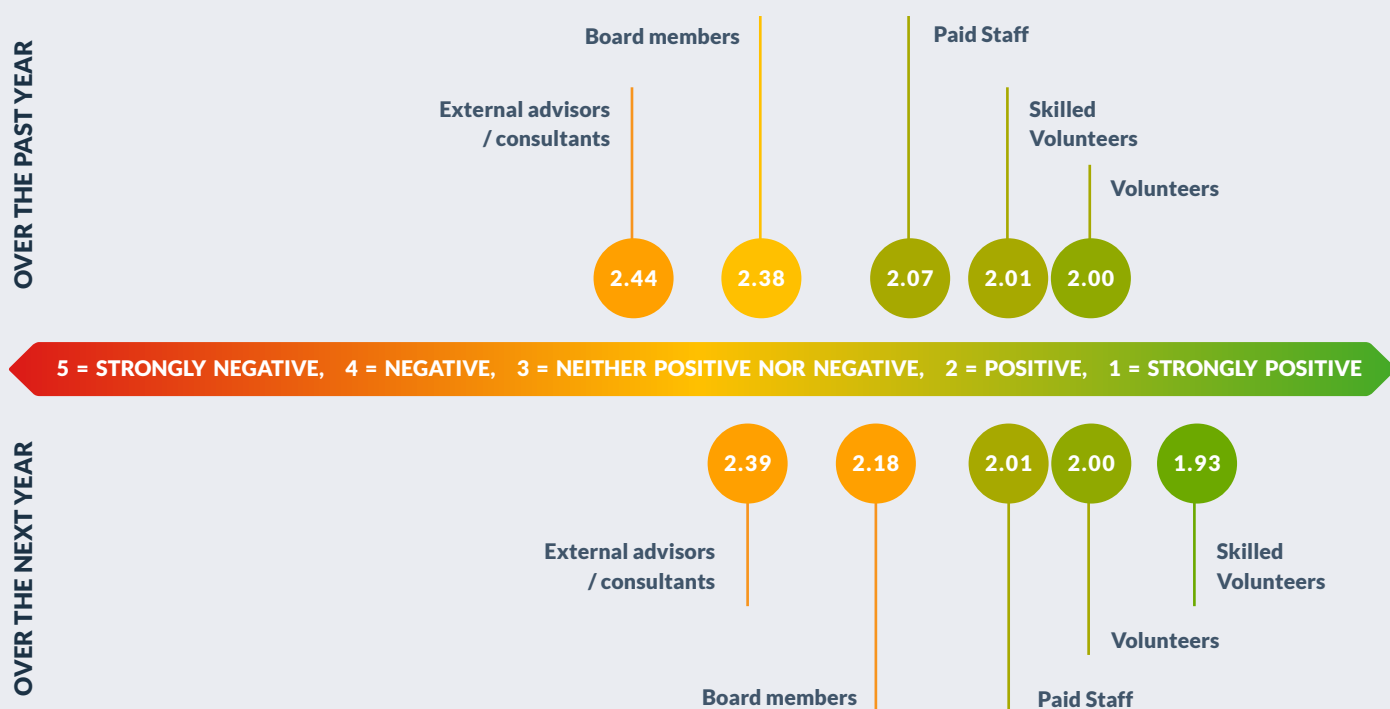
- Government funding has been a negative influence over the past year and is perceived as having further negative influence when looking forward to next year – especially federal funding.
- Government policy and regulation are seen as a negative influence on sector performance especially Federal Government.
- Competition from other organisations is also seen as a negative influence over the past year and looking forward to the next.

## 4.1 HUMAN CAPITAL

**Q: Which of the following do you think will have a positive or negative impact on the performance on your organisation?**

Respondents were asked about the factors which had a positive or negative impact on the performance of their organisations over the past year. The human capital of the Not for Profit sector was identified as making the most positive impact with volunteers (2.00), skilled volunteers (2.01) and paid staff (2.07) rated the highest.

When asked about the impact of human capital over the next year, skilled volunteers (1.93) was rated the highest followed by volunteers (2.00) and paid staff (2.01). Respondents rated board members as having an increasing impact over the next year (2.38 past year and 2.18 next year).



Influencer	OVER THE PAST YEAR		OVER THE NEXT YEAR	
	Number of respondents	% of all respondents	Number of respondents	% of all respondents
Volunteers	955	85.3%	923	82.5%
Skilled volunteers	911	81.4%	963	86.1%
Paid staff	1039	92.9%	1033	92.3%
Board members	1074	96.0%	1049	93.7%
External advisors / consultants	940	84.0%	927	82.8%

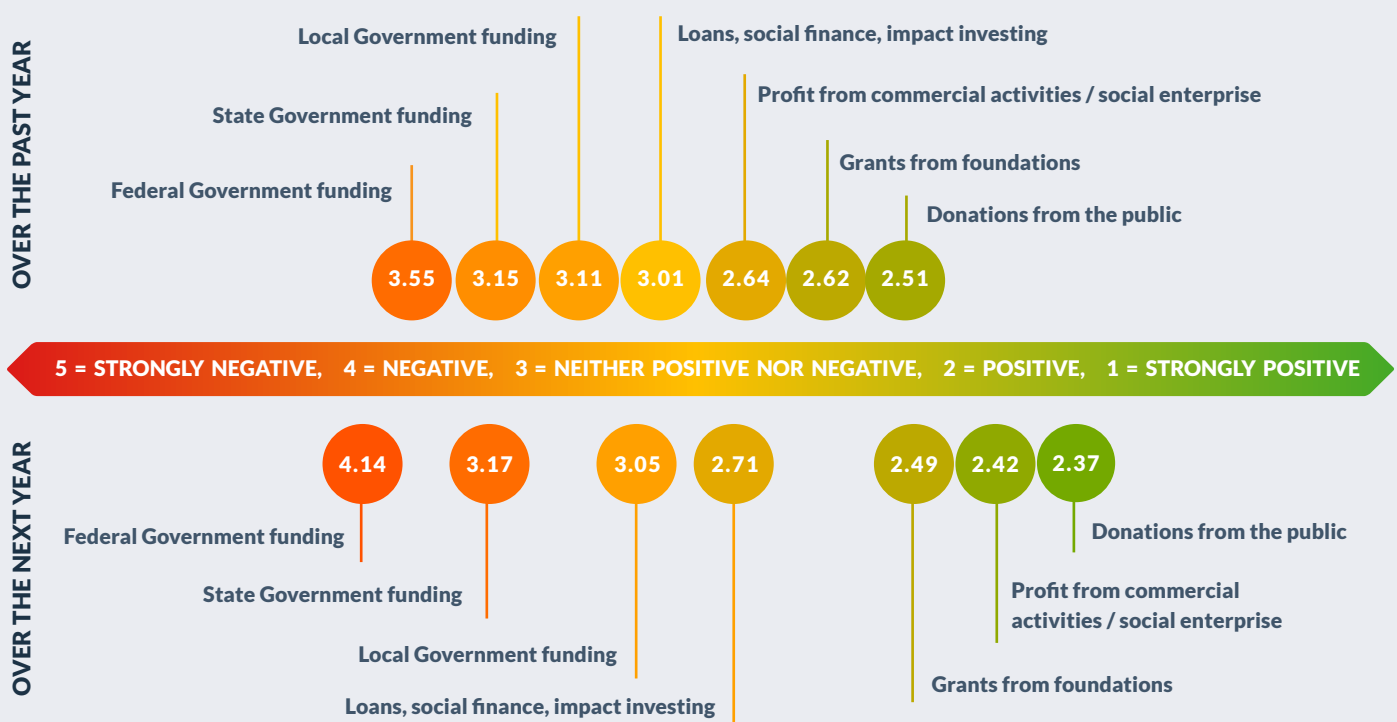
## 4.2 FUNDING

**Q: Which of the following do you think will have a positive or negative impact on the performance on your organisation?**

Respondents identified funding from non-government sources as having the most positive impact (rating 2.51) over the past year whilst government funding, especially Federal Government funding, was seen as the most negative (3.55). Respondents, when asked about the impact on the next year, hardened their perceptions with higher positive ratings for non-government sources of funding and higher negative ratings for government funding – especially Federal Government funding which received almost universal negative impact from respondents (93% - 58% negative and 35% strongly negative).

Donations from the public were rated as having the most positive impact, followed by grants from foundations and profits from commercial activities or social enterprise. All these funding sources had stronger positive ratings when respondents were asked about the impact on the next year.

Loans, social finance and impact investing was only identified as a factor by less than half (45%) of the respondents and overall the impact was rated neither positive nor negative. However, the rating for loans, social finance and impact investing was higher when asked about the impact on the next year.



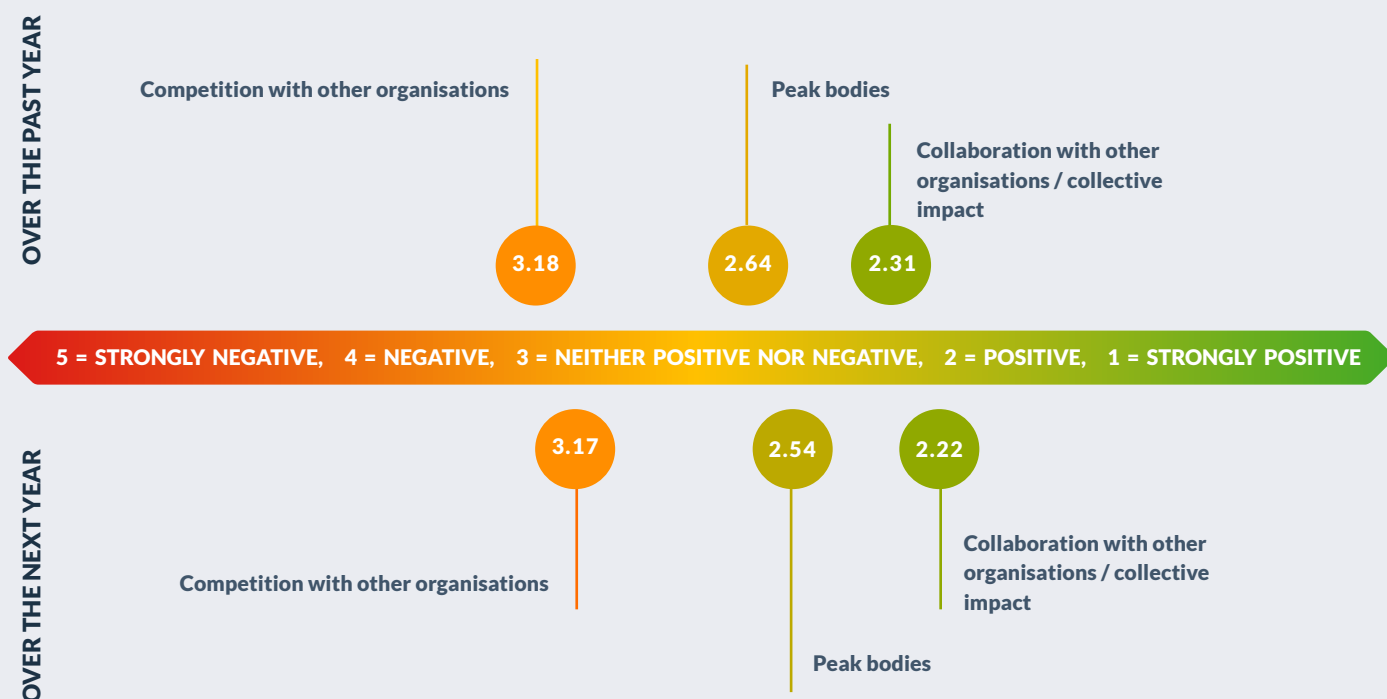
Influencer	OVER THE PAST YEAR		OVER THE NEXT YEAR	
	Number of respondents	% of all respondents	Number of respondents	% of all respondents
Donations from the public	894	79.9%	890	80%
Grants from foundations	864	77.2%	798	71%
Profit from commercial activities / social enterprise	769	68.7%	874	78%
Loans, social finance, impact investing	505	45.1%	612	55%
Local Government funding	720	64.3%	728	65%
State Government funding	915	81.8%	636	57%
Federal Government funding	931	83.2%	550	49%

## 4.3 NOT FOR PROFIT SECTOR RELATIONSHIPS

**Q: Which of the following do you think will have a positive or negative impact on the performance on your organisation?**

Respondents identified collaboration with other organisations including collective impact as having a positive impact on the performance of their organisation over the past year (2.31) and that this impact will continue next year (2.22). Peak bodies were also rated as having a positive impact on their organisation's performance (2.64 past year 2.54 next year).

Competition was rated as having had a negative impact on performance over the past year (3.18) and that will continue next year (3.17).



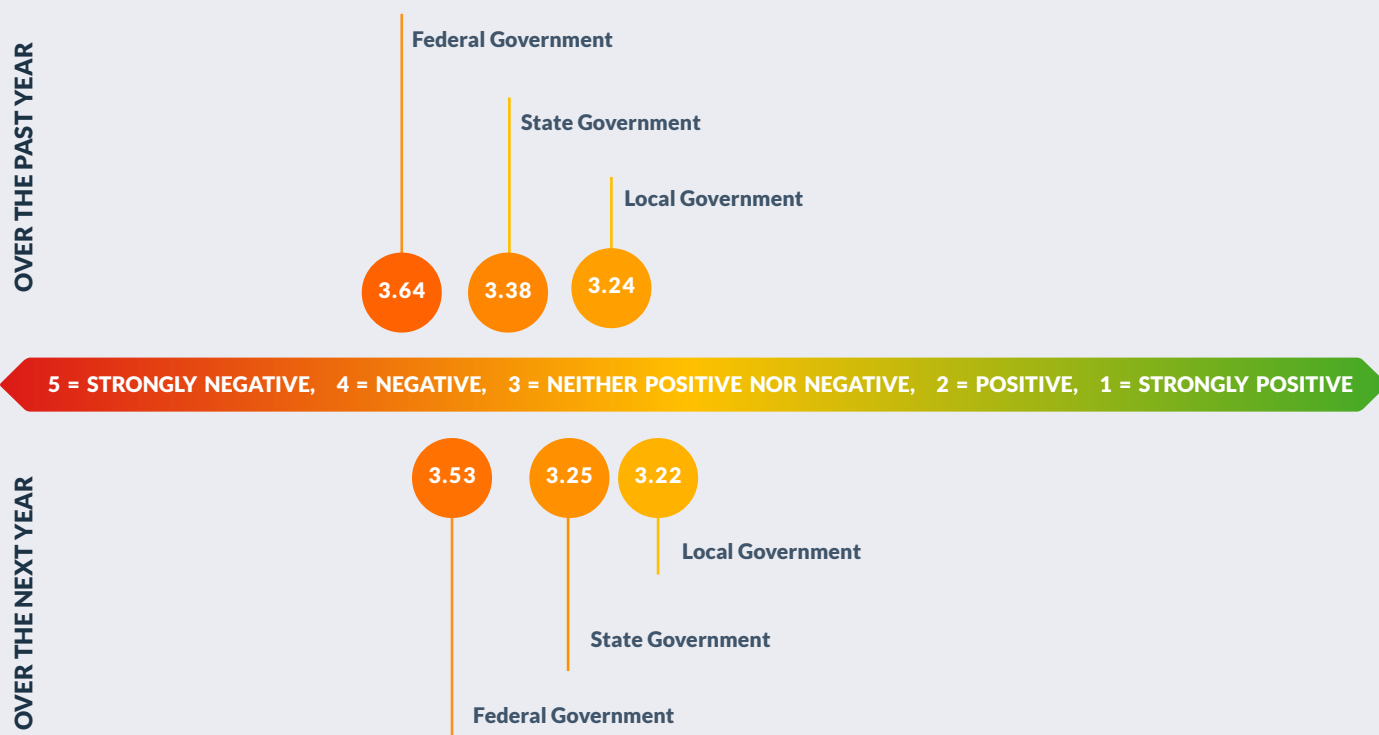
Influencer	OVER THE PAST YEAR		OVER THE NEXT YEAR	
	Number of respondents	% of all respondents	Number of respondents	% of all respondents
Collaboration with other organisations / collective impact	1030	92%	1016	91%
Peak bodies	970	87%	959	86%
Competition with other organisations	967	86%	953	85%



## 4.4 GOVERNMENT POLICY AND REGULATION

**Q: Which of the following do you think will have a positive or negative impact on the performance on your organisation?**

Respondents rated government policy and regulation as having a negative impact on the performance of their organisations over the past year with Federal Government policy and regulation being rated the most negative (3.64). Respondents ,when asked about the impact on the next year, were less negative for State (3.38 past year 3.25 next year) and Federal Government (3.64 past year 3.53 next year) policy and regulation.



Influencer	OVER THE PAST YEAR		OVER THE NEXT YEAR	
	Number of respondents	% of all respondents	Number of respondents	% of all respondents
Local Government	794	71%	747	66.8%
State Government	973	87%	922	82.4%
Federal Government	1009	90%	954	85.3%





## 5.0 KEY FINDINGS

Respondents also offered other priority areas including in relation to facilitating working collaboratively and the challenges in trying to work collaboratively:

*“Reduce duplication of NFPs – too many NFPs working on the same causes – need to work together”*

*“Facilitate collaboration between organisations so they can focus on meeting community needs.”*

*“Access to timely information is extremely difficult to obtain and tendering arrangements currently preclude building a collaborative environment”*

Respondents were also asked “what other initiatives the government should support to strengthen the role of Not for Profit organisations”. The following themes were identified: support for collaboration, invest in building the evidence base for the sector, recognition of the economic contribution of the sector, Federal and State collaboration, investment in capacity building, incentives for business, and a dedicated Minister to drive sector policy.

*“Continue to implement Productivity Commission NFP recommendations”*

*“State and Federal Governments should work together better. they blame each other for gaps in the system yet neither will fix the issue.”*

*“Research into understanding NFPs and evidence to inform strategic direction that enhance the capabilities for NFPs to flourish “*

*“Investing in economic/cost benefit analysis to identify potential social benefit bonds”*

*“Recognise that NFPs are one of the largest employers in Australia and provide more support on that basis alone.”*

*“More incentives for private sector contribution - government funding is stretched as it is “*

*“The development of a blueprint for the sector along with a dedicated Minister (Cabinet and ERC level) to drive policy that recognises the social and economic contribution and potential of the sector.”*

## KEY FINDINGS

## ORGANISATION CAPACITY BUILDING

Respondents stated that NFPs spend less of their budgets on organisation capacity building such as education and training than they would like to. The priorities for investing in capacity building include leadership and management, strategy and governance.

- Half of respondents stated that their organisations spent less than 2% of their budgets on organisation capacity building including education and training with four out of five spending less than 5%.
- Three-quarters of respondents would ideally like their organisation to spend more on capacity building.
- The priorities for investing in capacity building were education and training relating to:
  - Leadership and management
  - Strategy
  - Governance
  - Outcomes and impact measurement
  - Stakeholder engagement
  - Evaluation.

*“More funding for organisational capacity development/ internal investment as it is not a donor priority.”*

*“Scholarships/subsidy for education/training of Board Directors. Establish channels for Not for Profits to access consultancy services (free or minimal cost)”*

## 5.1 PRIORITY FUNDING INITIATIVES FOR GOVERNMENT

**Q: Which of the following initiatives should be a priority for the government?**

Respondents were clear about what was the highest priority for government with commitments to improving funding agreements (1.39) which was supported by 96% of respondents expressing a view. A commitment to a minimum of three year contracts was the highest rated (1.32) and followed by a commitment to a 6-month end notice period (1.47).



## 5.2 PRIORITY WORKFORCE INITIATIVES FOR GOVERNMENT

Strengthening the human capital contribution to the Not for Profit sector was also identified as a priority for government with scholarship/subsidy for the education and training for sector leaders and managers (1.87) and a co-ordinated program of support for volunteerism (1.87) being highest rated. A small but still significant proportion of respondents were supportive of the promotion of a standard for paid volunteering days for employees of large corporates & government agencies (2.19).



## 5.3 PRIORITY SECTOR DEVELOPMENT INITIATIVES FOR GOVERNMENT

**Q: Which of the following initiatives should be a priority for the government?**

Respondents identified the following sector development initiatives as being the highest priority:

- Mechanism to expand & strengthen partnerships between business and NFPs (1.66)
- Social Finance Task-force (1.71)
- National public campaign to promote philanthropy / charitable & workplace giving (1.74)
- Program to support the development of social enterprises / co-op / mutuals delivering public services (1.76)
- Continued expansion of community foundations and private ancillary funds, and the formulation of social impact bonds and payment by results / for success mechanisms were also seen as a priority but were not rated as highly as those listed above.

5 = LOW PRIORITY 1 = HIGH PRIORITY

**1.66** Mechanism to expand & strengthen partnerships between business and NFPs

**1.71** Social Finance Task-force

**1.74** National public campaign to promote philanthropy / charitable & workplace giving

**1.76** Program to support the development of social enterprises / co-op / mutuals delivering public services

**1.98** Program to support the continued expansion of community foundations

**2.00** The formulation of social impact / benefit bonds

**2.12** Program to support the continued expansion of private ancillary funds

**2.21** Payment by results / for success mechanisms

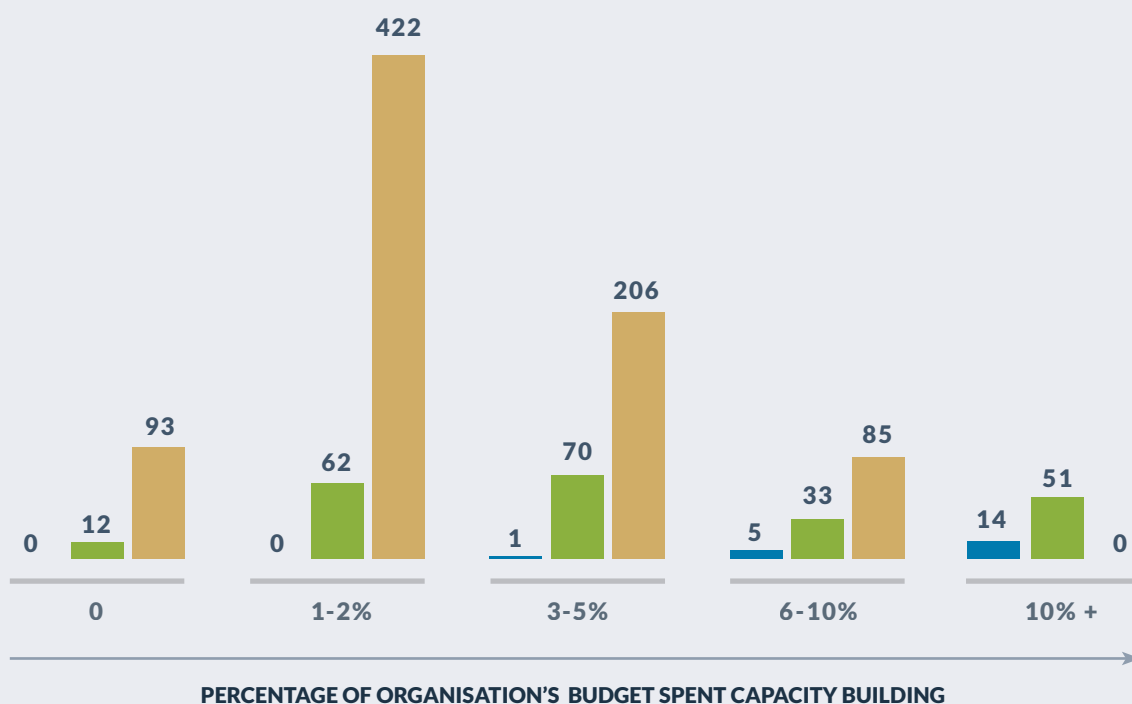
Priority initiative for government	Rating	Relevance	
		Number of respondents	% of all respondents
Mechanism to expand & strengthen partnerships between business and NFPs	1.66	1088	97.2%
Social Finance Task-force	1.71	1048	93.7%
National public campaign to promote philanthropy / charitable & workplace giving	1.74	1098	98.1%
Program to support the development of social enterprises / co-op / mutuals delivering public services	1.76	1043	93.2%
Program to support the continued expansion of community foundations	1.98	1003	89.6%
The formulation of social impact / benefit bonds	2	941	84.1%
Program to support the continued expansion of private ancillary funds	2.12	858	76.7%
Payment by results / for success mechanisms	2.21	1001	89.5%



## 5.4 INVESTMENT IN CAPACITY BUILDING

**Q: What proportion of your current annual expenditure is on organisational capacity building and professional development?**

Over half of respondents stated that their organisations spends less than 2% of their budget on organisation capacity building and almost nine out of 10 (76%) state that they would ideally like to spend more. Even those that have larger organisation capacity building budgets would ideally like to spend more, three-quarters of respondents where their organisations spend between 3% and 5% of capacity building stated that ideally they would spend more.

**Respondents who would like to..**

- Ideally spend less | 2%
- Ideally spend the same | 22%
- Ideally spend more | 76%

Budget Spent	0	1-2%	3-5%	6-10%	10%+	Total
% of Respondents	89%	87%	74%	69%	0%	76%
Number of respondents	105	484	277	123	65	1054

## 5.5 PRIORITIES IN CAPACITY BUILDING

**Q: How important are the following types of organisational capacity building and professional development for your organisation?**

The survey asked respondents to identify the priorities for investment in capacity building through education and training. Respondents identified leadership and management (1.27), strategy (1.31), governance (1.42) and outcomes/impact measurement (1.47) as the most important elements of organisational capacity building.

Priority initiative for government	Rating	Relevance	
		Number of respondents	% of all respondents
Leadership & management	1.27	1096	97.9%
Strategy	1.31	1097	98.0%
Governance	1.42	1095	97.9%
Outcomes / impact measurement	1.47	1087	97.1%
Stakeholder engagement	1.52	1093	97.7%
Evaluation	1.54	1087	97.1%
Attraction & retention of people	1.56	1082	96.7%
Organisation culture	1.56	1083	96.8%
Financial management & accounting	1.67	1087	97.1%
Advocacy & public policy	1.69	1059	94.6%
Cultural competency	1.7	1056	94.4%
Risk management & legal issues	1.71	1080	96.5%
Fundraising	1.72	1071	95.7%
Social media	1.85	1081	96.6%
Program/product/service design	1.88	1060	94.7%
Volunteer management	1.96	1053	94.1%
Investment including social Inv.	2.00	1031	92.1%
Coaching & facilitation	2.02	1067	95.4%
Social entrepreneurship & enterprise	2.08	1032	92.2%

## 5.5 PRIORITIES IN CAPACITY BUILDING





## 6.0 KEY FINDINGS

As in previous State of the Sector Surveys, respondents continued to show strong support for the Australian Charities and Not for Profit Commission's (ACNC) reduction in red tape, however this year's survey respondents saw the ACNC's advocacy role as most important.

- Respondents preferred the ACNC (58%) as the sector regulator followed by co-regulation (30%) with less than one in 20 preferring regulation by the Australian tax Office (ATO) and there was little support for self-regulation (7%).
- In terms of the nature of the regulatory system, recognition of the advocacy role and reduction in red tape were the most frequently stated elements. In addition there was strong support for using one report many times, a national register and fundraising harmonisation.

Respondents were asked “what specific regulatory measure would you like to see government take to enhance and strengthen the role of NFPs”. The main themes identified were support for the ACNC, reduction in red tape, and recognition of advocacy.

*“The current coalition government should support and resource adequately the ACNC. The role of the ACNC should be to educate the NFP entities particularly the small ones, encourage mergers of similar entities to achieve economies of scale and efficiency and introduce value adding performance reports that link finances with outputs and outcomes.”*

*“A strong ACNC that will be able to co-ordinate all financial and reporting regulations across all states/territories - ensuring consistency”*

*"Less red tape"*

*“Harmonisation of the various states fundraising legislations - the current system is confusing, and time consuming.”*

*"Risk based regulation rather than one size fits all"*

*“One stop shop” “Remove the current duplication of reporting to funding bodies and the ACNC”*

*“Withdraw opposition to advocacy by NFPs”*

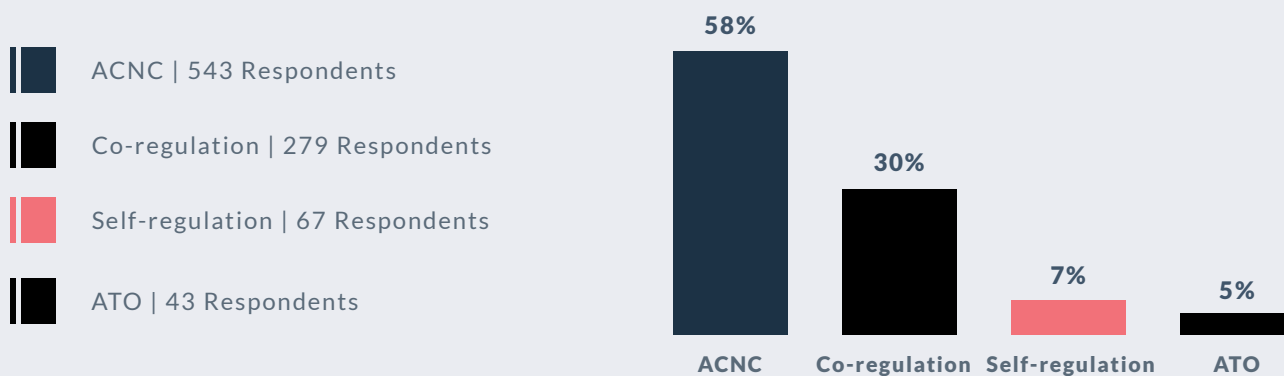
*"Accreditation of high performing charities"*



## 6.1 PREFERRED REGULATORY SYSTEM

**Q: What type of regulatory framework would you prefer for the Not for Profit sector?**

Almost six out of 10 (58%) respondents preferred the Australian Charities and Not for Profit Commission (ACNC) followed by three out of 10 (30%) for a Co-regulation system. A small minority preferred a self-regulation system (7%) with only one in 20 preferring the Australian Taxation Office (ATO).



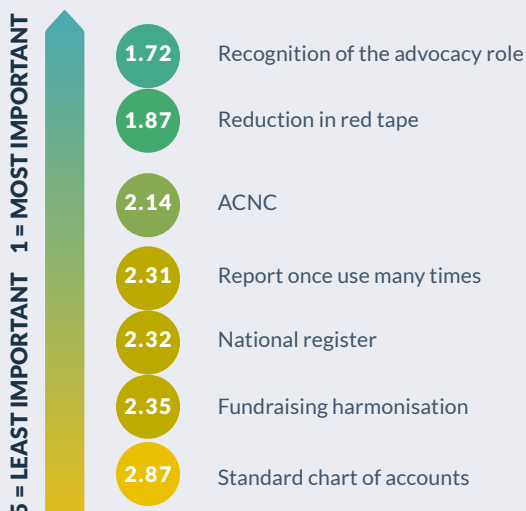
## 6.2 REGULATION OF A THRIVING NOT FOR PROFIT SECTOR

**Q: Thinking about the next year, how important do you think the following will be in developing a thriving Australian Not for Profit sector?**

Respondents were asked about the importance of some specific aspects of government regulation to creating a thriving Not for Profit sector. Respondents identified the recognition of the advocacy role of Not for Profit organisations (1.72), reduction in red tape (1.87) and the Australian Charities and Not for Profit Commission (2.14) as having the highest importance.

Nine out of 10 (89%) respondents thought recognition of the advocacy role was important with almost two-thirds (62%) stating it was extremely important. Four out of five (80%) respondents thought the ACNC would have an important role in creating a thriving sector.

Four out of five respondents thought that reporting once and using many times, the National Register of Charities and Not for Profit organisations and Harmonising Fundraising Legislation were important.



Regulation aspect	Rating	Number of respondents
Recognition of the advocacy role	1.72	1111
Reduction in red tape	1.87	1111
ACNC	2.14	1111
Report once use many times	2.31	1106
National register	2.32	1110
Fundraising harmonisation	2.35	1110
Standard chart of accounts	2.87	1106





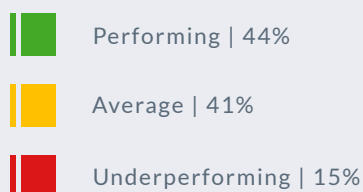
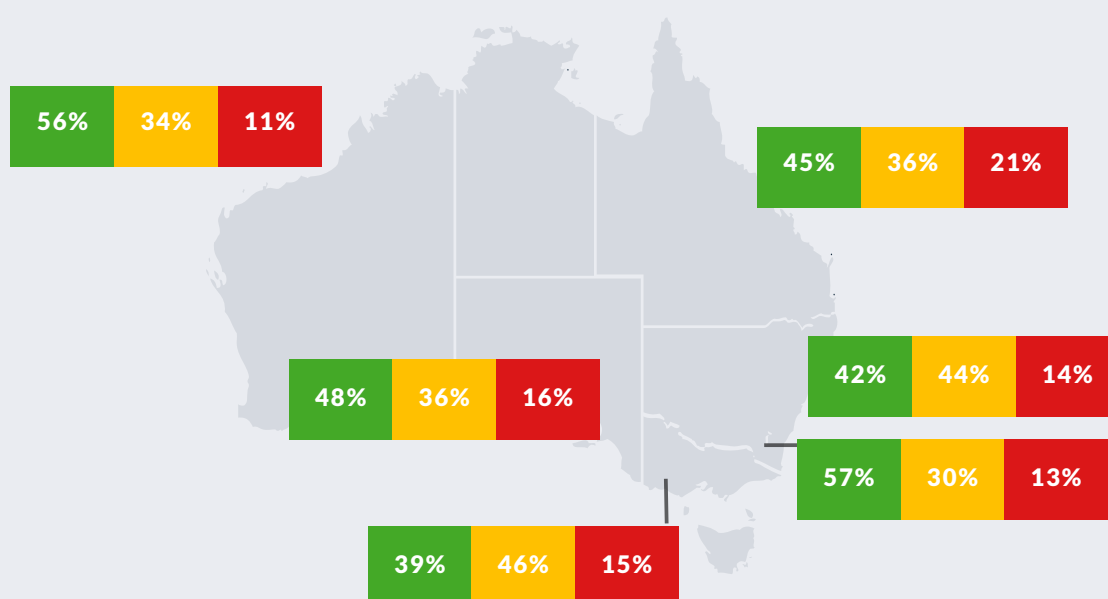
CHAPTER	CONTENTS	PAGE
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## 7A.1 CURRENT SECTOR PERFORMANCE BY STATE

**Q: How would you rate the current overall performance of the Australian Not for Profit sector?**

### BY STATE / TERRITORIES

Respondents from the ACT (57%) and WA (56%) were the most positive about current sector performance. However respondents from Victoria were less likely to say the sector was performing (39%) and respondents from Queensland more likely to state the sector was underperforming (21%).



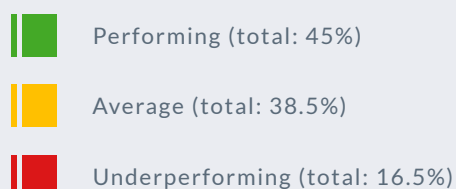
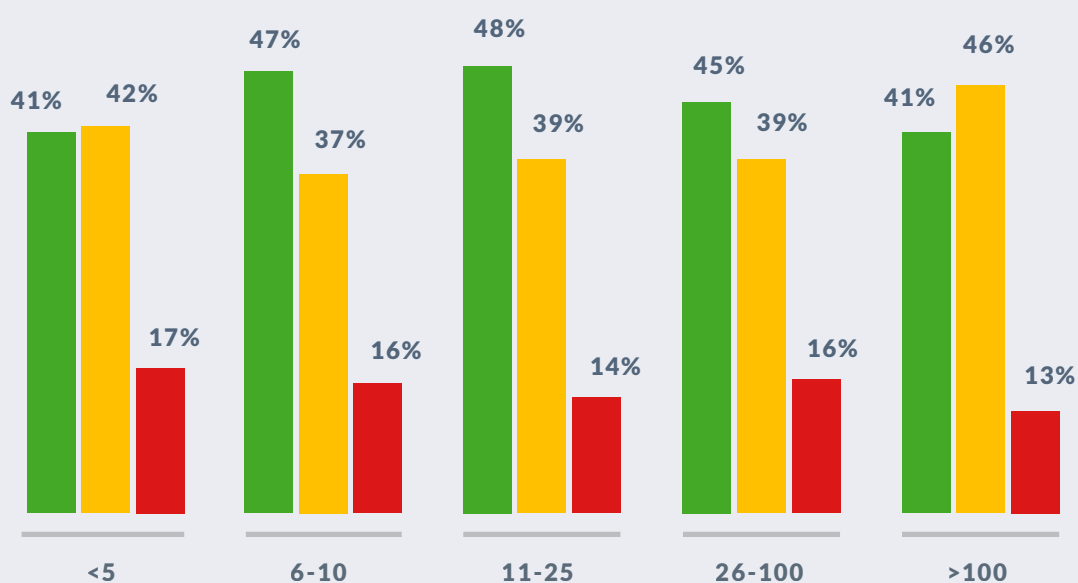
State	ACT	NSW	QLD	SA	VIC	WA	Total
Total	47	329	170	62	370	19	997

## 7A.2 CURRENT SECTOR PERFORMANCE BY ORGANISATION SIZE

**Q: How would you rate the current overall performance of the Australian Not for Profit sector?**

### BY ORGANISATION SIZE

Respondents associated with organisations with between six to 10 (47%) and 11 to 25 (48%) employees were more likely to state that the sector is currently performing well. Respondents associated with the largest organisations with over 100 employees were more likely to say that sector performance was average.



Employees	<5	6-10	11-25	26-100	100+	Total
Total	47	329	170	62	370	978

## 7A.3 SECTOR PERFORMANCE BY STATE AND TERRITORIES | 2014, 2015, 2016

**Q: How would you rate the current overall performance of the Australian Not for Profit sector?**


#### OVER THE PAST YEAR (2014)

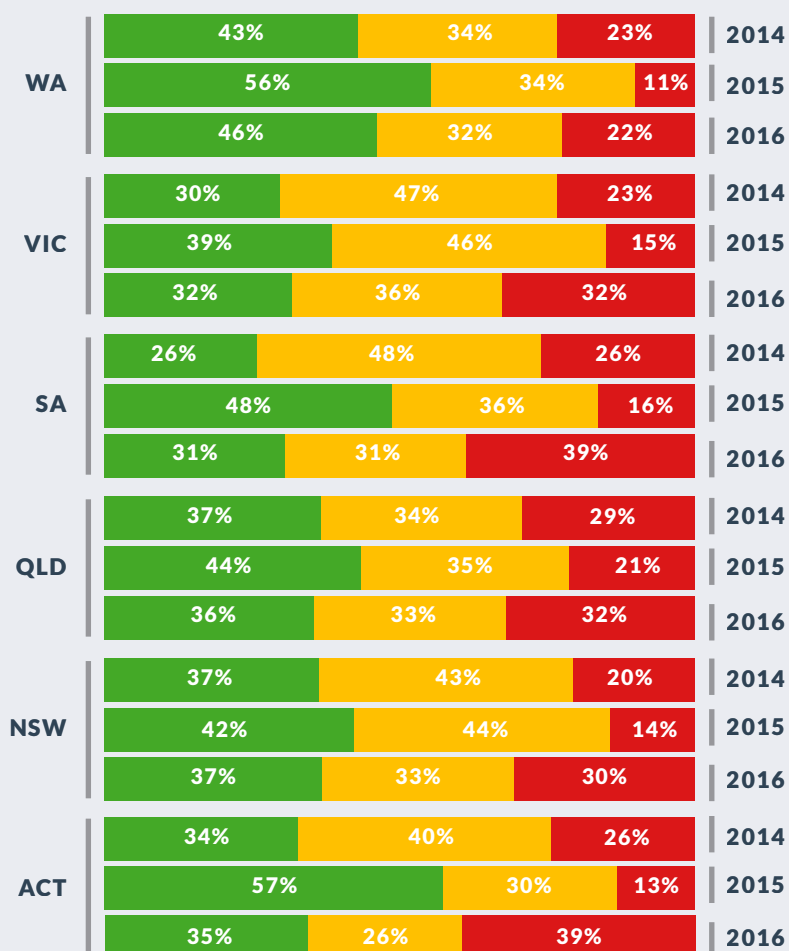
Respondents from WA were more likely to state that the sector's performance had improved (43%) over the past year and respondents from SA (48%) and VIC (47%) more likely to say that performance had stayed the same. However, respondents from QLD were more likely to state that sector performance had got worse over the past year.

#### OVER THE NEXT YEAR (2016)

Respondents from WA were more likely to state that the sector performance will improve over the next year whilst respondents from ACT and SA (39%) were more likely to state that sector performance will get worse.

State	Total
ACT	47
NSW	328
QLD	171
SA	62
VIC	370
WA	95
Total	1073

	2014	2015	2016
	Improve	Performing	Improve
	Stay the same	Average	Stay the same
	Worse	Underperforming	Worse



## 7A.4 SECTOR PERFORMANCE BY ORGANISATION SIZE | 2014, 2015, 2016

**Q: How would you rate the current overall performance of the Australian Not for Profit sector?**

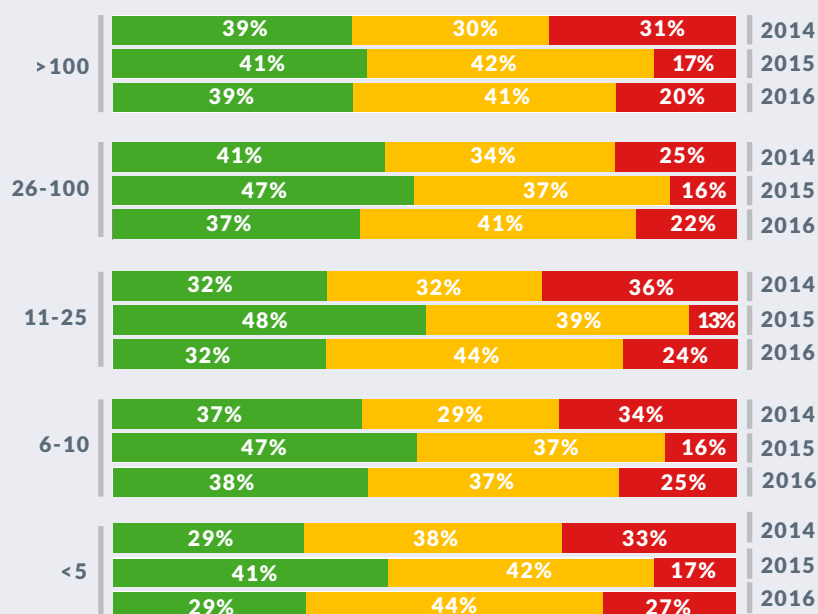
#### OVER THE PAST YEAR (2014)




Respondents from the largest organisations were more likely to state that the sector performance has improved (39%) over the past year whilst those from the smallest organisations with less than five employees were more likely (33%) to state that the sector performance had worsened.

#### OVER THE NEXT YEAR (2016)

Respondents associated with organisations employing over 26 people are more likely to state that the sector will improve over the next year whilst smaller organisations were more likely to state that sector performance will get worse.

Employees	Total
<5	221
6-10	140
11-25	209
26-100	223
100+	300
Total	1093



	2014	2015	2016
 Improve	Improve	Performing	Improve
 Stay the same	Stay the same	Average	Stay the same
 Worse	Worse	Underperforming	Worse

## 7A.5 SECTOR PERFORMANCE BY INDUSTRY 2014, 2015, 2016

**Q: How would you rate the current overall performance of the Australian Not for Profit sector?**

**OVER THE PAST YEAR (2014)**

Respondents associated with organisations in international development (41%), health (40%) and foundations and Intermediaries (39%) were more likely to state that sector performance had improved over the past year. Whilst those associated with environmental (26%), Business & professional (26%) and Economic & community development (28%) were more likely to state that sector performance had got worse.

**OVER THE NEXT YEAR (2016)**

Respondents associated with organisations in foundation and intermediaries (44%), international development (44%), Health (43%) and Religion (42%) industries were the most positive about the performance of the sector over the next year. Respondents in Sport and Recreation were more likely to say that performance will stay the same with those associated with Economic and Community Development the most pessimistic.



## 7A.5 SECTOR PERFORMANCE BY INDUSTRY 2014, 2015, 2016

Industry	2014			2015			2016			Total	Rank
	+	=	-	+	=	-	+	=	-		
Religion	30	33	15	36	32	10	33	32	13		
	39%	42%	19%	46	41	13	42%	41%	17%	83%	1
International development	37	42	12	38	41	12	40	34	17		
	41%	46%	13%	42%	45%	13%	44%	37%	19%	81%	2
Foundations	38	39	20	275	245	76	42	32	22		
	39%	40%	21%	46%	41%	13%	44%	33%	23%	77%	3
Advocacy & human rights	43	58	30	145	108	39	45	48	37		
	33%	44%	23%	50%	37%	13%	35%	37%	29%	72%	4
Culture & arts	32	45	22	145	108	39	40	32	27		
	32%	46%	22%	50%	37%	13%	40%	32%	27%	73%	5
Environment	20	48	24	100	83	36	34	32	25		
	22%	52%	26%	46%	38%	16%	37%	35%	28%	73%	6
Sport & recreation	13	30	12	275	245	76	14	24	16		
	24%	55%	22%	46%	41%	13%	26%	44%	30%	70%	7
Advocacy & human rights	43	58	30	145	108	39	45	48	37		
	33%	44%	23%	50%	37%	13%	35%	37%	29%	72%	8
Education	73	101	47	100	83	36	75	78	67		
	33%	46%	21%	46%	38%	16%	34%	36%	31%	70%	9
Health	117	121	55	145	108	39	126	77	89		
	40%	41%	19%	50%	37%	13%	43%	26%	31%	70%	10
Social services	224	228	144	275	245	76	219	189	187		
	38%	38%	24%	46%	41%	13%	37%	32%	31%	69%	11
Business & professional	17	32	17	100	83	36	22	22	22		
	26%	49%	26%	46%	38%	16%	33%	33%	33%	67%	12
Economic & community dev.	88	81	64	38	41	12	87	66	80		
	38%	35%	28%	42%	45%	13%	37%	28%	34%	66%	13
TOTAL	389	462	262	38	41	12	397	363	350		
	35%	42%	24%	42%	45%	13%	36%	33%	32%	69%	

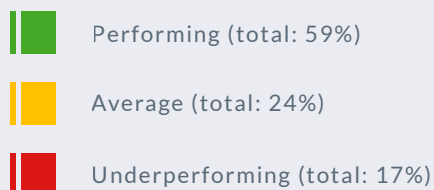
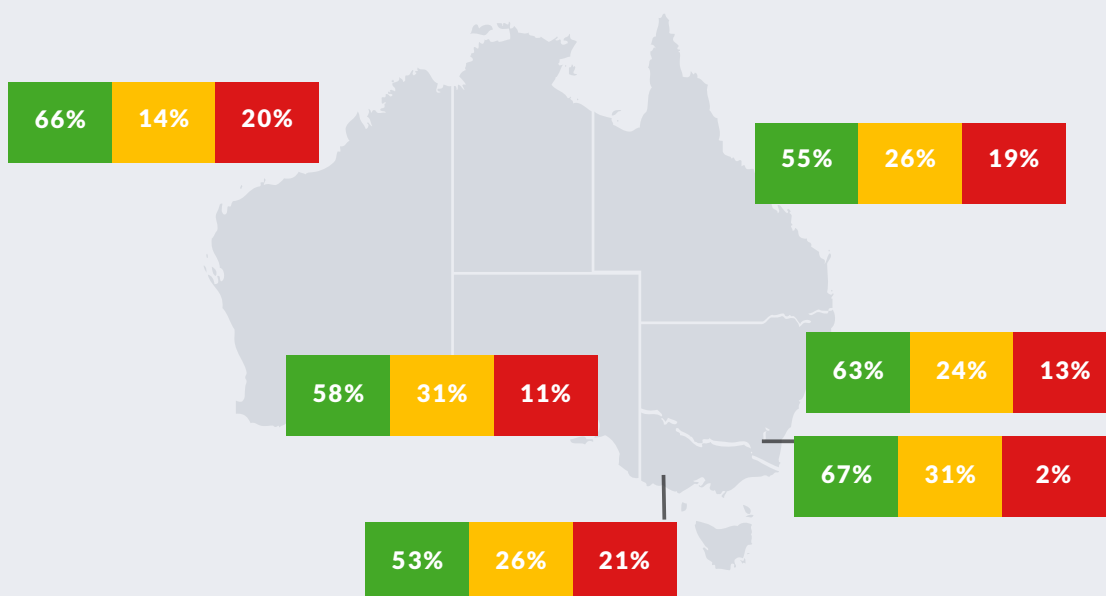
Please note: 2014 performance shows responses of perceived performance over the past year, 2015 shows perceived current performance and 2016 reflects respondents predictions on future sector performance.

## 7B.1 CURRENT ORGANISATION PERFORMANCE BY STATE

**Q: How would you rate the current performance of your own Not for Profit organisation or the Not for Profit organisations you advise or support?**

### BY STATE / TERRITORIES

Respondents based in the ACT were the most positive about their own organisation's performance with two-thirds (67%) stating it was performing well and three out of 10 (31%) stating performance was average with only 2% stating that their organisation was under performing. Two thirds of respondents based in WA stated that their organisation was performing well but one in five thought their organisation was under performing with similar levels under performing in Victoria (21%) and QLD (19%).



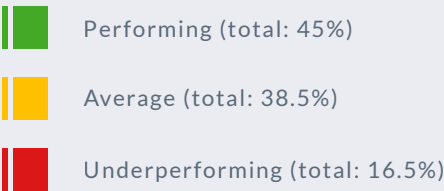
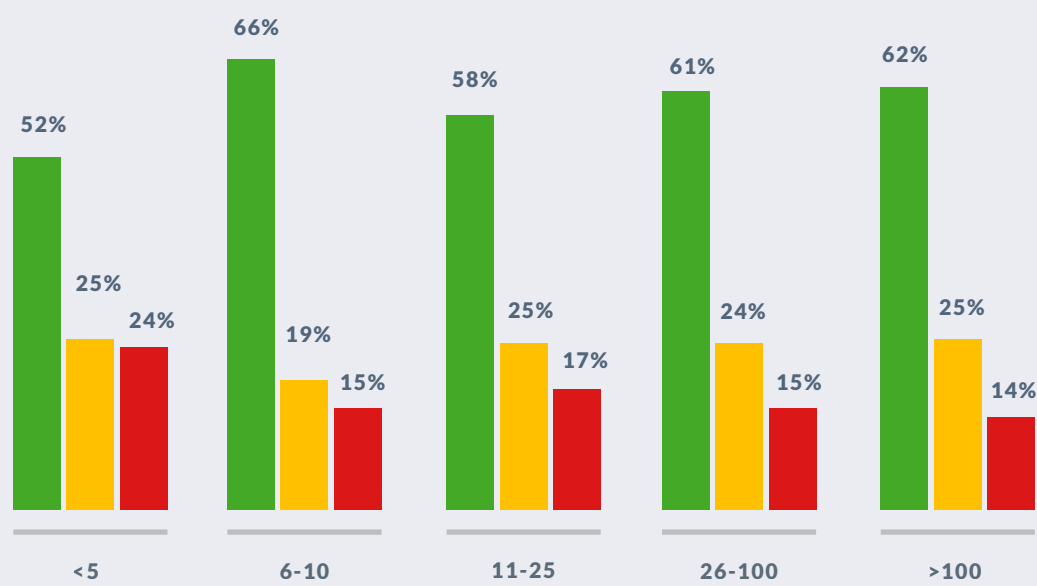
State	ACT	NSW	QLD	SA	VIC	WA	Total
Total	47	329	170	62	370	19	997

7B.2 CURRENT ORGANISATIONAL PERFORMANCE BY ORGANISATION SIZE

Q: How would you rate the current performance of your own Not for Profit organisation or the Not for Profit organisations you advise or support?

BY ORGANISATION SIZE

There is little variation in the perception of current performance across different sizes of organisation. Respondents associated with organisations with between six and 10 employees were most likely (66%) to state that their organisation was performing well whilst the smallest organisations with five or less employees were most likely (24%) to state that their organisation is underperforming.



Employees	<5	6-10	11-25	26-100	100+	Total
Total	47	329	170	62	370	978

## 7B.3 CURRENT ORGANISATIONAL PERFORMANCE BY STATE | 2014, 2015, 2016

**Q: How would you rate the current performance of your own Not for Profit organisation or the Not for Profit organisations you advise or support?**

#### OVER THE PAST YEAR (2014)

There was little variation in the responses across states and territories with regard to organisation performance over the past year. WA respondents were the most positive, two-thirds stated that the performance of their own organisation had improved. Respondents from SA were more likely (30%) to state that the performance of their organisation had stayed the same over the past year.

#### OVER THE NEXT YEAR (2016)

Respondents based in WA and SA were the most positive about the performance of their organisation over the next year with over two-thirds (71%) of WA respondents stating that their organisations' performance will improve and two-thirds (68%) of SA respondents. Respondents in ACT (28%) and VIC (28%) were more likely to say that the performance of their organisation will stay the same. Respondents in QLD were the most pessimistic with almost one in five (17%) stating that the performance of their organisation will worsen.

State	2014			2015			2016		
	+	=	-	+	=	-	+	=	-
ACT	30	14	1	28	12	6	26	13	7
NSW	208	79	42	197	87	45	213	73	42
QLD	93	45	33	98	44	28	109	32	29
SA	36	19	7	33	24	5	42	14	6
VIC	197	95	78	209	101	61	217	104	50
WA	62	13	19	63	19	13	67	19	9
Total	654	271	186	655	295	163	705	259	148

## 7B.4 ORGANISATION PERFORMANCE BY ORGANISATIONAL SIZE | 2014, 2015, 2016

**Q: How would you rate the current performance of your own Not for Profit organisation or the Not for Profit organisations you advise or support?**

#### OVER THE PAST YEAR (2014)

There was also little variation across different size of organisation in relation to organisation performance over the past year. Respondents associated with the smallest organisations were least likely (53%) to say that their organisation's performance had improved.

#### OVER THE NEXT YEAR (2016)

Respondents associated with larger organisations were the most likely (66%) to state that their organisations' performance will improve over the next year. Whilst respondents associated with organisations with between 11 and 25 employees were most likely (18%) to state that the performance of their organisation will get worse over the next year.

Size	2014			2015			2016		
	+	=	-	+	=	-	+	=	-
<5	117	65	37	113	54	52	132	60	27
6-10	88	36	17	92	27	21	89	30	21
11-25	120	52	37	120	51	36	123	47	38
26-100	137	53	32	135	53	33	147	46	29
100+	183	79	38	185	75	41	199	70	32
Total	645	285	161	645	260	183	690	253	147

## ABOUT PRO BONO AUSTRALIA

Pro Bono Australia was established in 2000. One of Australia's first social businesses, it offers media, jobs and resources for the common good to over one million people nationally. Certified in 2013 as a B Corp organisation, today it acts as the central online hub for the Not for Profit sector, the broader Social Economy and those wanting to engage with it.

### **WE REPORT, BROADCAST, CONNECT, ENABLE, AND ADVOCATE FOR THE SECTOR.**

Visit Pro Bono Australia if you want to keep up with newsworthy issues, volunteer your professional skills, search for paid work in the sector, educate yourself, find a Not for Profit organisation to donate to, read about businesses and what they do to support resilient Australian communities or build your capacity through education.

At our core is the belief that a robust and engaged civil society is of utmost importance, and that the organisations making this a reality are supported, encouraged and given a voice. Pro Bono Australia provides the platforms required for this to occur.

### **PRO BONO AUSTRALIA ACTS AS A GATEWAY TO THE SOCIAL ECONOMY**

Pro Bono Australia does not claim to represent the sector. We engage broadly with those within the sector, investigating and examining varying opinions, raising concerns and voicing issues that are often not aired by the mainstream media.

Operating for over 15 years, collaboration is at the heart of how we work. We have established a credible, trusted community voice, a voice that responds to the issues and questions you raise through our surveys and via our site.

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