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**Voluntary action:**

**a way forward**

**A policy framework for the common good**

**Professor Sir Stuart Etherington**

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# Voluntary action: a way forward

A policy framework for the common good

Professor Sir Stuart Etherington

Cass Centre for Charity Effectiveness

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“If we want things to stay as they are, things will have to change”

Giuseppe Tomasi di Lampedusa

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**“Civil society... is a bulwark**

**against an overweening state”**

# About the author

Sir Stuart Etherington was appointed chief executive of NCVO in 1994.

The membership organisation represents 13,000 charities in England. Previously he was chief executive of the Royal National Institute for Deaf People, a leading UK charity.

He has four degrees: a BA in politics, an MA in social planning, an MBA from the London Business School and an MA in international relations and diplomacy. He has been awarded honorary doctorates from both Brunel and Greenwich Universities, and is Honorary Visiting Professor at City University London.

Throughout his career Stuart has been involved in the leadership of voluntary organisations and the policies surrounding them. As such, he has become a leading commentator, through both his writing and his media profile.

Stuart is a member of the Economic and Social Committee of the European Union and the chair of London United. He was chair of the trustees of the Patron's Fund and in 2015 chaired a cross-party review looking at the structure of the regulation of fundraising. He has been a trustee of Business in the Community; chair of the BBC Appeals Advisory Committee; and a member of the Community and Social Affairs Committee of Barclays Bank. He is a former chair of Guidestar UK, a former treasurer of CIVICUS and former chair of CIVICUS Europe, a global civil-society organisation. He has also been a council member of the Institute of Employment Studies, and an advisory group member for both the Policy Centre at the British Academy and for the Lord Mayor's Trust Initiative. He is a visiting professor at Cass Business School, City University.

Previous government appointments have included membership of the Prime Minister's Delivery Unit, the Cabinet Office Performance and Innovation Unit Advisory Board on the Voluntary Sector, and HM Treasury's Cross Cutting Review on the role of the Voluntary Sector.

His leisure pursuits include reading political biographies; going to the theatre, opera and cinema; and watching Surrey County Cricket Club, Blackheath Rugby Club and Charlton Athletic FC. He is also learning Italian. He is a member of the Royal Institute of International Affairs and a member of the Dickens Fellowship.

Stuart was knighted in 2010 for services to the voluntary sector.

**“A bold vision for the role  
that voluntary action can play”**



# Foreword

## Professor Paul Palmer

Sir Stuart Etherington has been a Visiting Professor from the inception of the Centre for Charity Effectiveness (CCE). One of the aims of CCE is to be a conduit for distinguished figures in the sector to present opinions and exchange ideas. This is achieved either in open lecture via our Charity Talk series, now in its 25th year, or through published opinion pieces.

CCE papers are not governed by the usual rules of academia, which require extensive theorising. They are intended to be reflective, informed opinions for dissemination to a wider policy-making and practitioner audience.

Often leading figures are constrained by their position in expressing radical thinking ‘outside the box’, as it is assumed that their personal opinion is associated with their organisation.

By providing a platform, CCE allows such constraints to be overcome. As Oxford’s vice-chancellor recently observed, the role of a university is to be a beacon of free speech and a forum to provide opinions, even if that may upset some people or challenge conventional thinking.

When Sir Stuart approached me, I had no hesitation in requesting that our Centre publish his thoughts.

His paper is a combination of personal opinion, crafted from a long career as a leader of the sector, and expertise drawn from reading a variety of sources. It is a bold vision for the role that voluntary action can play in tackling many of the problems facing UK society, sustaining civil-society organisations and ensuring that we remain an open society.

**Professor Paul Palmer**

Director, Centre for Charity Effectiveness

# Acknowledgements

This report has been made possible by the generous support of the [Calouste Gulbenkian Foundation](#).

I should like to thank those who discussed drafts of the report, including [Michael Brophy](#), [Karl Wilding](#), [Mark Rosenman](#) and [Professor Paul Palmer](#). I should also like to thank the many commentators and voluntary organisations with whom I have been privileged to work and discuss ideas for many years.

The views in this report are my own and do not reflect the views of NCVO. This report has been written in a strictly personal capacity. I apologise in advance for any errors or omissions, which are entirely my responsibility. The views are very much my own and based on personal observations over three decades.

# Executive summary

This report sets out some ideas about how the growth of voluntary associations can be encouraged.

The report is based on a fundamental belief that associational behaviour is generally a force for good. Associations are vehicles for trust and giving. They create community capacity. People and communities should be given as much control as possible as well as the assets that they require.

Civil society, both through the services it can provide and through civic voice, is a bulwark against an overweening state.

The 2016 referendum on EU membership revealed many things about the United Kingdom, not least a profound sense of disconnection between increasingly disempowered communities and decision makers.

The national debt is almost £2 trillion and rising. Demographics will increase the demand on already fully stretched services. Raising taxes by the amount needed to fill the yawning gap would lead to a flight of companies and the more wealthy; indeed the tax take may fall.

The answer surely has to be a renaissance of personal responsibility. We should be in no doubt about the size of that change. Crudely put, civil society has to double in size or more. Clearly in the short term this is impossible, but across several decades there is potential to do so.

The issue is not, as it has been in the past, a binary one: more or less state funding versus more or less personal funding. It is a move towards something new: a shared role, with the state and citizens sharing the burdens of civilised provisions for those of us who need it. The whole may thus become much greater than the parts.

This, coupled with the innovation required as demand for services rises and the willingness of the public to pay via the tax system falls, makes voluntary action and civil association of growing importance.

Why? Because civil association builds connections and creates a sense of belonging. It enables the sharing of problems and the development of joint solutions as well as more civic engagement in democracy and public policy. It connects those with power to those without, and, importantly, builds trust in an increasingly untrustworthy world.

This report is structured around three themes, all of which set out ideas: some strategic and some tactical. They will, I hope, provide some stimulus for policy makers and for the wider debate on the future of civil society being considered by Julia Unwin in her longer-term review, which will report in 2019.

## Chapter one

Chapter one explores the extent to which the big-society agenda addressed some of the issues around the value and growth of civil association. It proposes some significant changes in the institutional framework within which civil society may flourish.

Recommendations include:

- The Office for National Statistics (ONS) and the civil-society sector need to invest in a programme that relates the impact of the sector to agreed wellbeing indicators.
- A substantive review of commissioning practice should be instigated at a high level. At its heart, this should look at alternative co-created solutions.
- A review of the legal regulatory and tax framework should also be established. Its objective should be to create mobility and flexibility among different forms of nonprofit activity and to increase public trust, based on clear definitions of public benefit and a need to rationalise the regulatory and tax framework.
- Consideration needs to be given, in league with appropriate organisations within civil society, to the best way of investing, developing and empowering community leadership.
- A joint initiative should be instigated by the private sector, government and charitable foundations to invest in digital transformation, particularly among smaller organisations.

## Chapter two

Chapter two examines how a more sustainable financial framework might be created. Its focus is on an asset-based strategy and the role that endowments can play at a local and national level.

Recommendations include:

- A significant review of the social-investment industry is required, and an assessment on whether or not the role of Big Society Capital (BSC) needs to change.
- Government and the sector should consider the opportunities presented by dormant assets through a commission on shared assets. The commission itself should then consider the application of unclaimed assets from the private, public and charitable sectors. Its purpose would be to create endowed and matched funds that, together with additional tax reliefs, would create a funding engine locally and nationally for a revitalisation of associational behaviour. This is a significant piece of work but could create a long-term sustainable legacy.
- The Big Lottery Fund (BLF) should become an independent endowed foundation with a small strategic centre and significant regional autonomy.
- The sector should draw up an agreed concordat between national and local organisations, particularly in relation to commissioning and procurement practice.
- A major, time-limited campaign, with clear objectives on reforming existing procurement and commission practice, is required. This needs to be coordinated by and funded from within the sector.
- A small piece of work should be undertaken to establish the potential for ‘charity direct’ at a local level, to assess how this could be developed and how it will affect charities in a tax-efficient manner.

## Chapter three

Chapter three considers the importance of citizen participation as the third leg of a revitalisation strategy.

Recommendations include:

- Significant investment is required to provide high-level strategic capability. Public-service institutions (notably local government and the health service) should consider what services can be provided by volunteers, how they can be recruited and retained, and how capacity can be created to engage people in civic life and policy advocacy.
- Government should consider further pilots of basic universal income (BUI) schemes, with the provision of a citizen's dividend for social beneficial activity.
- A concentrated research effort is required to understand what has led to an increase in young people's participation, and to review the policy implications of this rise.
- As part of the Full-Time Social Action Review, consideration needs to be given as to how the National Citizen Service (NSC) can be dovetailed into existing civil-society activity, providing a pathway to longer-term participation in communities. The review also needs to consider the role of schools in creating the value base upon which voluntary action can be developed.
- Government needs to renew its support for statutory time off for volunteering, and to consider time off for trustee duties.
- The Queen's Award for Voluntary Service needs to be fully funded and integrated into the honours system.
- Further consideration is required by the voluntary and business sector of the transition from work to retirement and the volunteering opportunities this presents.



**“We owe allegiance not just  
to the State but to each other”**

# Introduction

Much has been written about the failure of Big Society, but this story begins earlier and with a different narrative. In telling it, I want to track the various ways in which civil society and the state have interacted, and to speculate on how the debate about the shared society might lead us to tangible policy outcomes.

In pre-welfare-state days, charities, mutuals and cooperatives played a wider role in the provision of 'public welfare'; so too in the immediate post-war Fabian-led reforms that ignored the concerns of William Beveridge's other report, *Voluntary Action*<sup>1]</sup>. This led to more centralised public provision, marginalising voluntary organisations as advocates for more and better public provision. The role was not reversed under Thatcherite reforms. These certainly rolled back the state and increased marketisation in many areas, but paradoxically centralised state power in others.

This story begins with the Deakin Commission's report on the voluntary sector launched in July 1996, just 10 months before Labour, led by Tony Blair, was elected. The report, written by Professor Nicholas Deakin<sup>2]</sup>, set out what could be called a partnership narrative between civil society and the state, and set in train a series of beneficial 'architectural' reforms. These included the Compact (an explicit partnership agreement), beneficial tax reforms and a review of the legal framework both for charities and for the emerging social enterprise movement. This partnership era operated to the benefit of both sectors, but over time became slowly more instrumentalist and transactional as the new public management and contracting era took hold. It was perhaps the zenith of what Michael Oakeshott<sup>3]</sup> would have described as enterprise association.

With the election of David Cameron's Conservative-Liberal Democrat coalition government, the twin pillars of austerity and the big society framed government policy. The big society, while appearing as a new narrative, contained many elements of historic conservative thinking, and so it is worth examining in slightly more detail.

The philosophical underpinnings are perhaps best set out by Jesse Norman in his book *The Big Society*<sup>4]</sup>. Norman drew heavily on Hobbes and Burke but particularly on the writings of the lesser-known conservative philosopher Michael Oakeshott.

Oakeshott had drawn a distinction between civil society, a framework where the function of government is to govern, and an enterprise society, where the function of government is to intervene to achieve social objectives.

Norman, however, went further, suggesting that there may be a third form: what he calls a 'philic association' or 'connected association', based on friendship, ties and affection; one that not just obeys the rules or achieves a goal but also establishes connectivity and creates a sense of culture, identity and belonging. This analysis provided three essential insights for understanding Norman's view of the big society.

The first is that people are social animals creating identity in relation to each other. Another is that in doing so they create institutions and finally, that these institutions stand between the individual and the state: they are buffers, conduits, outlets and guarantors of stability. From this it follows that power should be diffuse. Institutions give shape and meaning to human lives. We owe allegiance not just to the state but to each other and the different institutions that define us; institutions formed by experience. Such thinking has profound implications for the role of civil society vis-a-vis the state and the market, and implies a much greater role for self-governing institutions and the bedrock of a connected society.

So how far did practical policies around the big society live up to the philosophical underpinning articulated by Norman? The first problem was context. It was hard for

<sup>1]</sup> Beveridge W, *Voluntary Action: a report on methods of social advance*, Macmillan 1948

<sup>2]</sup> Deakin N, *Meeting the Challenge of Change: voluntary action in the 21st century*, NCVO 1996

<sup>3]</sup> Oakeshott M, *On Human Conduct*, OUP 1975

<sup>4]</sup> Norman J, *The Big Society: the anatomy of the new politics*, University of Buckingham Press 2010

government to make this case in an environment where significant reductions in public spending were occurring.

The second issue was a certain level of internal contradiction. Those reforms that went with the grain in classical conservative terms tended to be more successful: continuation and acceleration of educational reforms and planning changes, for example. Those that involved major new institutions, such as social investment and the NCS, have yet to achieve significant cut-through. Others, the mutualisation programme for example, were often beset by technical problems. Perhaps most importantly, there was no coherent, easily described policy framework for the big society. Indeed, some commentators would argue that given the nature of the project, there could not be. But just as the state required a strategy to reintroduce markets to previously state-run enterprises, state action will also be required to assist the development of a more profound role for civil-society institutions.

For this, the shared-society vision may be helpful. In a January 2017 speech<sup>5]</sup>, the Prime Minister, Theresa May, discussed the importance of bonds of family, community and strong institutions: ‘There is more to life than individual and self-interest.’ Government activity has, however, been dominated by Brexit, and the sector is still emerging from some practices that lowered trust and required vigorous reform.

Our society has many challenges to deal with: challenges of changing demography; an increased focus on wellbeing; the importance of place, institutions and connectivity in a changing world; the limits of the state; and the impact of technology.

Civil society and voluntary associations have much to offer as we confront these challenges. This report offers some policy options in the context of our shared society. It is structured around three themes to build a stronger voluntary sector and part of a greater shared society.

- **Chapter one** explores the existing institutional framework and how that may change to facilitate voluntary action.
- **Chapter two** examines how the funding environment might be enhanced and made more sustainable, focusing particularly on the role of matched funding assets, endowments and tax reliefs.
- **Chapter three** considers the role of participation and how voluntary action might be further developed.

<sup>5]</sup> Speech by Theresa May at the Charity Commission’s annual meeting on 9 January 2017



# Chapter 1:

## The institutional framework

Perhaps the most important consideration in building an increasingly important and resilient civil society is the institutional framework within which that society operates. If we wish to see new associations flourish and old associations revitalised, then what does the framework to encourage this look like?

As a society, we are attempting to create greater connectivity to increase overall wellbeing, of which economic growth is but one measure. Historically we have tried to measure the scale of voluntary action by its economic impact, and even on an organisational basis its impact by econometric measurement, mainly return on social investment. This, however, misses the crucial point. Civil society contributes not only in economic terms, because it is about building social capital, both bridging and bonding through connectivity. It is also about building the common good, enabling people to build and sustain associations through the altruistic spark of giving time, material and money. Such associations ultimately create the ties and bonds that nurture a civilised society and give people meaning.

Government needs to acknowledge this, not only through awards and praise, important as these are, but also by setting the right framework.

“We cannot simply  
rely on existing ways  
of doing things”

At a macro level, government can do this by promoting more widely the Measuring National Wellbeing programme. Established in November 2010, its objective was to monitor and report on ‘how the UK as a whole is doing these days’. Twice a year the ONS reports against a set of headline indicators, covering areas including include health, environment, finances and crime.

The measures include both objective and subjective data. The ONS is consulting as to how existing monitoring can relate to the United Nations’ sustainable development goals. As part of this, we need a greater understanding of how associational behaviour and engagement with institutions, particularly at a local level, relate to indicators of wellbeing as set out in the ONS wellbeing programme.

My assumption is that they are closely related, but this requires more evidence. So the first task is to ensure that we understand at a macro level how associational behaviour and engagement with institutions relate to wellbeing. Then we must ensure that we have policies in place that stimulate association and engagement: essentially, give people more control than they have had, through funding, ownership and the democratisation of institutions.

The second framework issue is the crisis in public services. This has been driven not only by public-spending restraints but also by changing demographics and the expectations of citizens.

We simply cannot rely on existing ways of doing things. We should experiment, innovate and see citizens as co-creators of outcomes; a role that cannot be left to markets but one that gives civil society a leading role in delivery, organisational form and governance.

Peter Housden<sup>61</sup> set out many of the arguments in his 2016 pamphlet, *Rethinking Public Services for the Future*. In it, he calls for relational public services. Essentially, this would be a switch from ‘we do it to you’ to ‘we do this together’. Four simple words; however, they imply a new paradigm for public service that takes us far beyond the contracting model that has dominated the past 30 years.

<sup>61</sup> Housden P, *Rethinking Public Services for the Future*, Centre for Public Impact, 2016

There are many factors that can be cited as influences on the need for change. Demography and demand for services; growing inequality; limits to tax-based publicly provided services; the digital revolution; and growing agendas of place are a few of the more obvious factors.

However, there is a need to sustain public confidence in services and to maintain the respect of a broad range of practitioners. The more transactional modes implied by new public management that dominated the Blair years achieved many things in relation to outcomes, such as providing a platform for investment, new architecture and the greater empowerment of frontline leaders, but there were also several flaws.

Accountability was perhaps too closely monitored. The quasi-market mechanisms created unresolvable tensions. Improvements in standards remained patchy and, most relevant of all, the systems faced issues that were complex adaptive problems and were not susceptible to simple economic analysis and linear forms of control. In essence, complex adaptive issues were not best dealt with by transactional relationships. So innovative approaches are needed across the public service that recognise some important differences.

Such approaches would recognise several factors. To begin with, that citizens have their own agency, increasingly liberated by new technology and data. This could have quite diverse effects. At the interpersonal level, people will be more equipped to challenge professional judgment, be that in education, health or care. At the organisational level, they may wish to provide direct support, either in money or time, for alternative models of public service, or at least take a more active role in the governance of those that already exist.

This would imply an alternative form of commissioning from public purchasers than that under way at the moment, with purchasing at a scale that not even large civil-society actors can engage with. It also implies that the growth of local solutions with elements of philanthropic and statutory funding would lead to different forms of ownership and multiple outcomes at a micro level.

It would require a growing tolerance of innovation and different design determined by citizens with agency co-creating solutions with professionals. Such arrangements would inevitably be local, placing greater emphasis on the creation of new associational and institutional forms, with an emphasis on innovation, locality and engagement rather than on uniformity and equality.

Such a multitude of revised and new networked associations and institutions would also provide for more fertile democracy at a local level, with the growth of mayors, a decentralisation of tax-raising powers to local government, and alternative funding mechanisms. These are addressed in the next chapter.

The growth in density of associations and freestanding institutions might further encourage connectivity, diversity, and horizontal rather than just vertical engagements, and discourage a dangerous concentration of power. Most importantly, it would recognise that to be human is to be a bundle of capabilities seeking self-expression through the exercise of those capabilities; a dynamic active force that is autonomous, imaginative and creative.

As Norman suggests, we must create an environment ‘to trust people to invest in their virtues and not their faults, to welcome aspiration, energy, innovation and plurality’. The focus on capability echoes many of the thoughts of Amartya Sen.

Britton and Anderson<sup>71</sup> focus on the advantages of a localised capability approach in *The Illustrated Guide to Participatory City*. They identify potential benefits such as creating trust; building capacity and bridging social capital; creating pride; generating new projects; creating attractiveness and a sense of safety; and increasing the capacity of a community to make decisions. All these factors contribute to a sense of wellbeing.

<sup>71</sup> Britton T and Anderson A, *The Illustrated Guide to Participatory City*. tessa@participatorycity.org

Their study also considers why projects don't start, and why they fail. There might be substantial risk, little support, a lack of skills, a reliance on 'heroes', or perhaps concern about the regulatory environment. The latter features strongly in the large-scale study into loneliness by the Joseph Rowntree Foundation.

So, there are constraints on the ability of communities to participate, but there are also answers.

Citizens UK is one, but there are others. We need to consider the best way of investing in the leadership capacity of communities so that we encourage participation from people in those communities, starting from an early age, to create the foundation for greater levels of associational behaviour in the future.

So far, I have discussed developing the institutional framework around civil society; in particular, I have argued for the elevation of wellbeing as a macro indicator of the success of civil society, the implications of the reform of public services and the importance of devolution to the growth of citizen action.

Now it is important to consider the institutions of civil society itself, and the reform that may assist this growth. In particular, is a new taxonomy of organisations required, together with the legal and regulatory structure that might support this?

Civil society consists of a wide range of organisations. Charities, mutuals, cooperatives, community-interest companies and industrial and provident societies all cluster together under this broad banner. There is also some movement of organisations from the public sector into civil society. Examples include the Canal & River Trust, transported from the public sector direct to the charitable sector. This trend may continue, as it has, for example, in housing with the growth of housing associations, and in education via free schools and academies. It may of course be possible that the health service will ultimately be reformed along similar lines. So questions arise as to whether the legal and regulatory framework is adequate for a growing group of civil-society entities.

“We need to consider the best way of investing in the leadership capacity of communities”

To assess this, it may be helpful to go back to first principles, starting with the most historic legal form: charity. Essentially, to become a charity and to enjoy a range of tax privileges and the public confidence implied by registration, two criteria, or hurdles, exist. You must have objectives that are charitable, and you must be able to demonstrate sufficient public benefit. It is the latter criterion that is an essential hallmark of charitable endeavour.

Other legal forms under the broad heading of civil society do not have this strict requirement. Community-interest companies do not have the strict delimiter of public benefit, but lock the assets and constrain the level of private benefit by limiting any dividend payment that can be made.

At the other end of the scale is the latest in organisational form, the B corporation. Essentially this is a for-profit organisation that may have an element of public benefit by virtue of a set of behaviours enshrined in an accreditation structure.

So there is a range of organisational forms displaying varying degrees of public benefit and receiving a range of distinctive tax breaks or, in the case of B corporations, no tax breaks. Undoubtedly, several organisational responses are required in a framework that encourages associational behaviour and the revitalisation of existing community-based institutions, and encourages public trust in them. However, all will have distinctive tax regimes, different constraints and different regulatory frameworks. For some, notably charities, it is virtually impossible to move along this continuation of public benefit without giving up the assets that have been acquired charitably.

This lack of flexibility and multiple regulatory regimes can often confuse and, at worst, inhibit the multiple associational responses that will be required in the post-bureaucratic age. It is therefore necessary to conduct a significant review of the legal and regulatory framework surrounding civil society, reflecting a new taxonomy

“Digital transformation can change the way that citizens engage”

based on various criteria. These might include the nature of governance: assessing, for example, its independence from the state and the extent to which private benefit might accrue to the governors of organisations.

Most importantly, a continuum of organisations based on the extent of public or private benefit would be generated. This would require clearer statutory clarification of the nature of public benefit.

Different tax breaks might accrue to organisations depending on where they sit in this continuum, perhaps into several categories of institution. The largest tax advantages would accrue to the category or organisation that displayed the highest levels of public benefit.

A new statute, however, would need to ensure greater flexibility, ensuring that organisations could opt to change their status without loss of the assets they had acquired under a previous status, while continuing with an asset lock.

For example, a charitable institution might opt for, or be changed to, a lower level of public benefit, retaining the assets that it had acquired while a charity but giving up the tax breaks it received while operating as one. There would have to be a stopgap asset lock to prevent abuse. Such a move would create greater flexibility, for both existing and emerging institutions and associations.

There would be implications for regulation. If this banded system based on public-benefit criteria was adopted, a single public-benefit regulatory body across nonprofit activity could be created to enshrine the flexibility this reform implies. It would create some savings as regulations were merged and, because of the potential differences in tax advantages, those elements of HMRC that deal with civil-society tax issues could be transferred to it, thus reducing the somewhat dysfunctional nature of the relationship that exists between the tax system and the regulatory system.

Indeed, it might suggest that the tax advantages that accrue at various levels of public benefit could be reviewed and simplified. This suggestion would not be easy to achieve, but should at least be examined by a thorough, government-commissioned review.

The technological revolution has far wider effects than just those it has on civil society, but it is worth thinking these through with specific relevance to voluntary organisations. It is possible to categorise the effects in two ways. There are the changes in the institutional framework and associational forms that are driven by the digital age, the subject of this chapter, and then there is the possible effect on patterns of employment and the implications for volunteering and participation: the subject of the next.

Digital transformation can change the way that citizens engage in more networked organisations with connectivity at local level. Simon Parker<sup>8]</sup> links this change with a call for greater devolution and new ways of creating associational behaviour. This has implications both for emerging patterns of associations and for the way in which established, larger voluntary organisations behave and are organised.

Parker and others focus on the local and argue that these changes create space for the emergence of new forms of ownership and control. Old power, based on authority, hierarchy, professional judgment and secrecy, gives way to new power, based on relationships, collaboration and new methods of financing. It is, if you like, a technology-driven rediscovery of the merits of self-help and mutualism, and a new balance between the state, the market and communities. This would be a major disrupter of the way public services are provided: essentially more information-driven, less having it done for you, and more getting support to do it for yourself and for each other.

<sup>8]</sup> Parker S, *Taking Power Back: Putting People in Charge of Politics*, Politics Press 2015

It is likely to be civil institutions and associations, albeit of a different form, that make the transition of this revolution possible, just as thousands of institutions made the transition of the Industrial Revolution possible.

Digital transformation will assist the development of new associational forms and may disintermediate existing forms, creating new connectivity and the ability to construct new communities of place or of purpose. This would enable citizens to contribute in diverse ways, sharing problems and developing joint solutions. It may provide the infrastructure upon which new forms of engagement emerge: the bedrock of a renaissance for citizen engagement.

There is, however, growing evidence that voluntary organisations, particularly but not exclusively smaller bodies, lack the skills or capacity to engage in digital transformation at either volunteer, staff or trustee level. This might warrant a limited-capacity building programme resourced in a joint initiative by business, government and foundations to increase capacity in digital transformation.

There are lessons here too for larger, more traditional organisational forms within civil society. For the elephants will need to learn to dance<sup>91</sup> and, in the process, rediscover their roots to civil society rather than, as in a few cases, slavishly emulating the market. That is not to deny the importance of scale, but it is equally important to create connectivity at local level and with a fuller understanding of roots in associational engagement. It is, for example, interesting that the image of the federal model as a resilient one that embodies scale and association with communities has declined.

Changes do occur within the culture of organisations. The Deloitte Global Human Capital Trends report picks up some of these, in particular the deconstruction of organisations into networks and teams to keep pace with fluidity, and, unpredictably, the importance of networked leaders who recognise that workers, like volunteers, must be engaged and recruited every day. For increasingly, organisations are networks of people who work without formal agreements.

For larger civil-society organisations, this has implications: a move away from hierarchy to networks and a need to understand that they have a community of support.

For people who work for them, donate to them, volunteer for them, govern them and campaign for them, sometimes all at the same time, tethering larger organisations firmly back to their roots in communities of place or purpose is perhaps the largest leadership challenge for this section of civil society.

### Summary of policy proposals

- The ONS and the civil-society sector need to invest in a programme that relates the impact of the sector to agreed wellbeing indicators.
- A review of commissioning practice should be instigated at a prominent level. At its heart, the work should look at alternative co-created solutions and the type of relationship this implies.
- Consideration needs to be given, in league with appropriate organisations in civil society, as to the best way of investing in community leadership.
- A significant review of the legal regulatory and tax framework should be instigated. Its objective should be to create mobility and flexibility among different forms of nonprofit activity, based on clear definitions of public benefit and a need to rationalise the regulatory and tax framework.

<sup>91</sup> Gerstner Jnr L, *Who Says Elephants Can't Dance? How I turned around IBM*, Harper Books 2002

**“The funding landscape for  
civil society has changed  
significantly in the past 20 years”**

## Chapter 2: The financial framework

This section considers the financial resources available, or those that could be developed to drive the multiplicity of civil-society associations and institutions that will emerge and develop as civil society takes on a greater role vis-a-vis the state and the market. Some of these recommendations, particularly in relation to contract funding, do need restating. Some suggest reforms to existing financing mechanisms, particularly in relation to social investment. Some are extensions of schemes that have been developed, albeit in a minor form; for example, match funding and additional philanthropic tax reliefs for specific objectives. Others, involving the release and redirection of charitable assets, are new.

The funding landscape for civil society has changed significantly during the past 20 years. With public money in particular, there has been a significant shift from grants to contracts, both in real and relative terms. The growth in contractual funding reflects the growing transactional nature of the relationship between the state and the sector. This has been an accelerating trend and, despite exhortations to reverse it, one that shows no sign of changing.

Indeed, contracts for large programmes in employment and offender rehabilitation have increasingly been lost by voluntary organisations because of the scale at which those contracts are being let. Even large voluntary organisations cannot hope to operate at the scale of the private sector, lacking as they do the balance sheet or the working capital to compete.

There are policy solutions to some of these problems. There could be assistance in consortia building; a focus on good practice in supply-chain management; a recognition that payment by results creates significant cashflow problems; and an acceptance that in areas where specifying outputs are difficult, grants will be required as a key component in the funding mix. These, together with enhancing the Social Value Act, would all help.

The issue is not that we do not know what is required: the approaches have been endorsed by the NAO<sup>10]</sup> and the House of Lords<sup>11]</sup>. The Office for Civil Society (OCS) within the Department for Digital, Culture, Media and Sport (DCMS) has attempted to influence this with a group looking at place-based incubators and commissioning Kitemarks to encourage best practice.

There is a growing tension between some small and some large service-providing voluntary organisations because of some of the wider changes in commissioning practice. The Lords report might provide a stimulus for a coordinated, high-profile campaign in this area. What may also be required within the sector is a concordat that sets out a partnership approach rather than an adversarial one.

That said, perhaps it is time for a significant concerted effort to change commissioning practice. Without greater focus on changing practice, given the diverse nature of commissioners, change is likely to remain slow. If, however, we are to realise the ambitions of Housden and see citizens as co-creators of outcomes, then even more flexibility would be required from the contracting process.

One of the most fashionable 'new' developments in the financing sector is social investment. This broad term encompasses a range of financing options, all essentially about debt, whether via direct borrowing or bond issues. This was an idea very much associated with the big-society agenda, although the discussion that led to the creation of the wholesale investor Big Society Capital (BSC) predated the Cameron-Clegg coalition government, and other blended-capital (grants and loans) investors

<sup>10]</sup> National Audit Office, *Government Spending with Small and Medium-Sized Enterprises*, March 2016

<sup>11]</sup> House of Lords Select Committee, *Report of Session 2016–17: Stronger Charities for a Stronger Society*

had already existed. The voluntary sector had always borrowed. It was normally asset-based borrowing, and this was a strong feature of financing in certain parts of civil society, notably housing and education.

Together with the NCS, BSC is the final obvious, remaining legacy of the commitment to the policy initiatives that flowed from the big-society policy commitment itself. However, the structuring of BSC has inbuilt problems. Essentially, the money is too expensive. Some of the resources available were provided by the banks on a commercial basis. BSC itself needs to set a rate that sustains itself, and any other intermediaries need to do the same.

This, coupled with a risk-averse climate among the boards of voluntary organisations, has led to a reluctance to access capital in this way unless secured on assets. One response has been to re-create a blended-capital (grants and loans) provider; in effect, to re-create this to ensure investment readiness and to lower risk.

Perhaps the future requires more radical solutions. It is unlikely that the Merlin banks expect these loans to be repaid. If BSC was perceived as an initiative with a limited life, perhaps of up to 10 years, then it could capitalise intermediaries and close. This would reduce the cost of capital even more, having essentially capitalised intermediate lenders and created a market for social investment and brought it to maturity. Such a legacy could be worthwhile.

Ultimately, social investment depends upon civil society's ability to give a return on investment, although 0% loans as part of blended capital might help. This would inevitably mean that civil-society organisations funded in this way would need to generate surpluses from trading. This works in some areas but not in others. It does, however, create entities independent of the state, which in itself would strengthen civil institutions.

Social investment has yet to be promoted seductively to individuals and corporates. If in each and every year a small sum is invested, tax-efficiently via social-investment tax relief, then, subject to an occasional write-off, this will rotate and grow into a significant investment for public benefit.

Many other voluntary organisations use more traditional methods of fundraising. Some of these methods are becoming more highly regulated because of bad practice by a few. However, there may be other, more innovative ways of generating funds at both a national and local level. These might involve a mixture of match via endowments, together with additional tax incentives for those who wish to provide match. It might also be possible to consider what unused assets exist within the charitable sector and how they might be put to more effective use.

The government has twice considered what unclaimed assets might exist within the private sector, principally within the areas of banking and financial services. It has gone out of its way to release these assets so that they may be applied to social good. In the first instance, it was the capital released that has gone some way to boost the social-investment market.

So what assets exist within the charity sector that might be reapplied to other aspects of social endeavour? There are examples of endowments that have been acquired and accumulated since Tudor times, some even earlier. In some cases, innovative trustee boards and leaders have used them to provide fresh solutions to the social problems that their communities face in social care, education and community development. The real scale of these underused or, in some cases, unused assets, or the extent to which they might be reapplied, isn't known. But just as the private sector, and to a more limited extent the public sector, has been encouraged to consider applying underused assets to public benefit, so might the charity sector be encouraged to do likewise.

To begin with, the sector and government should establish a shared asset commission that, in concert with the Charity Commission, should try to establish the



scale of the prize that could be secured, and the steps needed to use these assets more appropriately.

Assets thus released, together with further unclaimed private and even public-sector assets, and with investments directly from government (perhaps partly from a more strategic use of monies generated by Libor fines), could be used to create an asset-based endowment strategy.

One of the key problems with past shared initiatives between the state and the sector is their lack of sustainability. Often they are contracts or, decreasingly, grants and when these stop, organisations are unable to continue. This creates a level of vulnerability and instability.

“Match funding is the means to create sharing”

One potential solution to this, alongside the growth of earned income, is an asset-based strategy, and one approach would be the creation of matched funds. These could be national for projects that could only operate on a national scale; or, perhaps more in keeping with a plurality of associations and citizen initiatives at a local level, they could be local. They could be for a designated purpose, or for a general community purpose operating very locally<sup>12]</sup>.

Match funding is the means to create sharing. If, for example, government requires a big boost, say, for sections of the NHS, then it should offer tax-effective matching to attract the funds to deliver. These may have a capital base but are essentially pass-through funds focused either on national or local priorities.

A matched fund could have a variety of elements. One layer might be permanent endowment from assets released and ring-fenced from civil society, the private and public sectors. The second layer could be a match fund established by government, perhaps varying the ratio of the match depending on levels of deprivation in a particular community: 10 government to 1 citizen contribution in deprived areas, and an inverse ratio in richer areas. Government could be either central or local. The citizen contribution for a match fund could consist of an element of time match, thus encouraging local or national volunteering, depending on the nature of the fund.

The other element of the citizen match would be funds either for capital or revenue, or a gift, or perhaps an investment, depending on the nature of the programme, with appropriate tax breaks to the donor/investor. The beginnings of an institutional framework at a local level already exist in the form of community foundations. National match funds could be established as independent organisations as required.

A network of these match funds could gradually be established at local and national level. They might be called shared-society funds. Some might be large, but others at a neighbourhood level could be very small, providing a stimulus for new associations and citizen action. Indeed, it might be possible for local groups to petition for the establishment of small-scale shared-society funds to address local issues.

In order to augment this development, consideration should be given to the BLF becoming an independent endowed foundation, with a small national coordinating function and greater devolved regional funds. This would create a large body that could, over time, use an element of lottery allocation to build an endowment. This would enable further funding to be available on an independent basis.

A network of funds could eventually provide the framework for a revival of associational activity that reflects a shared commitment from the state and civil society to address social or environmental issues. This, along with the reform of aspects of planning already undertaken by the previous coalition administration, might lead to a renaissance of activity and provide an alternative, if parallel, route to the reforms required in public procurement identified earlier.

Before moving on from the funding framework, let us consider another growing phenomenon that is driven by the digital revolution. That is giving, or in some cases investing direct. This essentially removes the need for all but the loosest of

<sup>12]</sup> Brophy M. *Citizen Power*. Pen and Ink Publicity Ltd 2005 and various unpublished papers

intermediaries by using a digital platform. One example is Kiva, a social-investment platform that enables individuals to invest directly in social projects or small business ventures in poorer areas of the globe. Where it applies to donating rather than investing, it has been called ‘charity direct’<sup>13]</sup>.

It is easy to see how this could develop. Individuals, groups of donors or social investors might be very attracted to engaging directly, either in a planned or spontaneous way. With the number of digital platforms mushrooming, it becomes easier. Witness the success of the disabled man who was mugged in the north-east of England and for whom a concerned fellow citizen raised significant amounts of money through a digital giving platform.

With the growth of private neighbourhood networks such as Nextdoor, it is clear how local not-for-profit initiatives might benefit from local donors and social investors. At present, direct initiatives do not benefit from any tax reliefs, but they could, either by providing a charitable element to the local digital platform, or by considering reliefs to the individual donor or group that donated or invested. As with Kiva, people could offer to, or be charged a small element to sustain the platform.

Given the long time scale under consideration, advances in IT and the growth of crowdfunding platforms, it is not hard to imagine a very significant number of people supporting social need directly and justifying it as charitable to the taxman. Just as the corporate sector has a spectrum of companies underpinned by millions of self-employed workers, so too could civil society have a spectrum of organisations underpinned by millions of direct givers.

Almost all these scenarios assume a creative response from the Treasury and HMRC. In their own interest, they must be involved in creating these new financial frameworks.

**Chapter one** was concerned with the institutional framework that would drive a range of new and revitalised institutions and associations and its philosophical justification.

**Chapter two** has considered the financial framework that might, over time, provide the financial engine that could drive development.

Finally, in **chapter three**, I will turn to that other vital element of citizen engagement, social action through the donation of time and participation.

### Summary of policy proposals

- The sector should draw up an agreed concordat between national and local organisations, particularly in relation to commissioning and procurement practice.
- A significant, time-limited campaign with clear objectives on reforming existing procurement and commissioning practice is required. This should be coordinated by the sector and funded from within it.
- A substantial review is required of the social-investment industry, to examine whether or not the role of BSC needs to change.
- Government and the sector should consider the opportunities presented by assets through a shared-asset commission. The commission could apply unclaimed assets from the private, public and charitable sectors to create endowed and match funds. These, together with additional tax reliefs, would create a funding engine locally and nationally to drive a revitalisation of associational behaviour. This is a major piece of work, but it could create a longer-term sustainable legacy.
- BLF should become an independent endowed foundation with a small centre and significant regional autonomy.

<sup>13]</sup> Brophy M. *Citizen Power*. Pen and Ink Publicity Ltd 2005, page 94

# Chapter 3:

## The participation framework

This chapter considers what we know about participation. It explores what could be built on by incremental change and some more radical solutions, given changing patterns of paid work and the impact of new technologies.

Participation and volunteering are very difficult to generalise about. People engage in a variety of ways, with a variety of motivations. There may be more formal opportunities, either through voluntary or public bodies, and there are a variety of informal forms of engagement, including religious activity, self-help, sport, arts or simply social interaction.

Volunteering is also a social phenomenon. Few people in isolation decide that they will do so. Participation is often stimulated by peer engagement in diverse ways at various stages in life, and may have very different motivations, depending on the stimulus or age of the individual.

Citizens may move in and out of voluntary activity. It is by its nature dynamic. The Pathways Through Participation<sup>14]</sup> project identified four stages of engagement: motivation, trigger, resource and opportunity. The research suggested that upbringing, family and educational and social connections play a key role in shaping participation. So too does the environment in which participants live. Is it one where engaging in associational behaviour is usual?

“So, having engaged, what keeps people involved?”

What are people’s motivations for participating? These are diverse, including a desire to help others, seek influence or forge social relationships. These are intimately connected to an individual’s personality, values and beliefs. However, other influences are also at play that determine participation rates. Joining in might offer practical resources such as skills, knowledge and experience, time, money and health, and less tangible resources such as confidence and a sense of agency. Local institutions, organisations, groups, venues and events all provide people with opportunities.

The project also identified several triggers for participation. These were categorised in three ways. People might offer to volunteer because of an emotion or an experience: perhaps the fear of a threat, or because they want to improve something locally. There might be a life event: a new relationship, retirement, ill health, moving house or having children. Or there might be an outside influence: a disaster; hearing about something for the first time; or just being asked.

So, having engaged, what keeps people involved? Again, there are several factors, all of which could be described as the quality of the experience. Is the contribution making a difference? Does it have impact? Is the experience enjoyable? Do they feel valued? Is the quality of the social relationships with other participants good? Do they have continued access to the right support, resources and opportunities?

There are also reasons why people disengage. Perhaps the experience has not been positive, but it is usually for more practical reasons, such as moving away from an area, not having time, or adjusting to new work or home responsibilities. It is worth noting that the research revealed that formal, public consultations had almost always been a negative experience.

People also get involved in activities that span different categories of participation, such as attending meetings, donating money and helping neighbours.

Such studies provide a robust framework for our understanding of volunteering and participation upon which we might hang appropriate policy responses.

<sup>14]</sup> *Pathways through Participation*, NCVO, Involve, IVR, [pathwaysthroughparticipation.org.uk](http://pathwaysthroughparticipation.org.uk), 2011

So, to recap, there is motivation: living out certain values or beliefs, for example; being concerned about an issue; having an interest; or wanting to put a skill to use.

Then there is enabling: the existence of associations and institutions that act to bridge different activities and groups. These provide the space, conditions and practical support that people need to participate in different ways. We need to recognise that styles and methods of engagement may change over time.

If this work adequately describes a helpful framework to understand these concepts, what is the existing suite of initiatives that attempt to increase levels of participation? They are many and inevitably somewhat fragmented. Some are state initiatives, some come from the sector itself, and others are employee schemes from the private sector.

There are also celebrations of voluntary action; some promoted by the state and some by the sector. There are youth-based programmes and more limited investment in schemes for older people. There is an increasingly distressed network of local development agencies.

There is little significant capacity building at an important level in public-service volunteering; little thought being applied to behavioural insights and incentivisation of volunteering; and very few general impact studies that discuss the value of volunteering to both parties.

My first and second chapters dealt with the need to create an institutional and financing framework to increase the number and range of associations and institutions within civil society. Such a framework would do this by revitalising what exists and stimulating new activity, including the development of mutual and nonprofit alternatives to state services. This would at least provide a range of institutions fulfilling the opportunities part of the equation.

What is also required is a clear policy agenda and investment for the other parts of the strategy. What might deal with motivation, for example?

The bedrock of motivation is clearly a set of values based on altruism: the desire to help others, forged in the main by associations with valued institutions. They might be family, school or religious affiliations, or early engagement with social associations with other people. Voluntary associations, of which there are many, play a key role.

But education policy also needs to reflect a wider social value attached to citizenship. This is particularly true as educational delivery becomes more diversified. A focus on citizenship in schools is welcome, but perhaps it would help to review the extent to which participation in community activity is highlighted within the curriculum. There is a positive trend in the engagement of younger people in voluntary activity, and we need to understand why this is happening. Research in this area is urgently needed, as well as reflection on any beneficial policy that might follow.

Government interventions in this area have been twofold. The largest and perhaps most controversial is the NCS. This is a legacy service from the big-society agenda and has been subject to a range of criticisms, mainly concerned with cost and transparency. However, perhaps the most critical change required is its relationship with other associations and voluntary organisations, such as Scouts, Guides and many other initiatives for young people.

The service provided by the NCS needs to dovetail much more with those existing institutions. Failure to go with the grain easily creates unintended consequences. Much more thought also needs to be given to follow-through. While the three-phase NCS experience may be a good one, it is important that this is part of a journey that embeds future participation in the minds of the young people who attend. This experience needs to be tied back into the communities to which participants are returning.

“Public services are changing beyond recognition”

The ‘I will’ initiative, also funded in part by government, has focused on the participation journey, which is helpful. A social-action review needs to focus on integrating this initiative more closely with resources already existing within civil society. Such a study needs to consider where resources can be usefully deployed, or redeployed to assist smooth transitions in participation pathways. The engagement of schools and youth participatory associations is critical in creating the value base upon which motivation for future associational behaviour is founded as a pattern for life.

There could be similar incentives provided in the workplace for continuing participation. Better work-life balance in general is helpful, but so are specific policies. The coalition government committed to introduce three days’ statutory right to volunteer, and yet this was never pursued. Similarly, the House of Lords has called for consideration of a statutory right to fulfil trustee duties<sup>15]</sup>, like that available to those who serve as magistrates or who need to fulfil trade-union activities. Both initiatives should be pursued to signal state support for voluntary activities.

A similar focus on people moving to retirement and voluntary opportunities has been estimated to increase the economic value of the voluntary sector by £5.3bn<sup>16]</sup>, not including the health and wellbeing benefits to those who volunteer at this stage of their life.

Celebrations of voluntary activities are also important. Volunteers’ Week and Giving Tuesday are two sector-led examples, but more could be done. The Queen’s Award for Voluntary Service should be properly funded and integrated into the honours system. It should be awarded, as are other honours, by members of the royal family as part of a formal honours ceremony.

These are all significant, relatively low-cost ways in which participation could be enhanced and become a lifelong experience that builds on existing initiatives.

Finally, I want to examine two more contentious areas and their implications for participation. Let us look at social action and volunteering: enhancing participation in public services, and the longer-term impact of new technology on patterns of work.

Public services are changing beyond recognition. There are several reasons. The impact of new technology and the availability of information; new patterns of delivery in a way advocated by Housden, as identified earlier; and simply because, with rising demand driven by demography and limitations on the tax take and public expenditure, innovation is required in the way that people engage with services from health and care to libraries.

This requires a rethink by public authorities about the boundaries between paid work and voluntary participation. It will also require investment by them at a high strategic level for a thorough audit of what services can be provided by volunteers and how they can be effectively managed and recruited, service by service.

In some areas, this has already begun. Some hospitals, for example, are working with their associated charitable trusts to do just this. So there may be two ways of tackling the situation. One is to stimulate alternative ways of providing services within the voluntary sector along the lines set out in my opening chapter. Another is to consider how, at a strategic level, significant voluntary programmes can be introduced in a radical way to deliver public services programmes. The latter is a large shift and would warrant a taskforce to consider the options.

Now to the future of work and volunteering. I have already considered the impact of technology as it relates to how citizens may engage in associational forms in the future, but the biggest debate is about the impact of technology, particularly artificial intelligence.

Martin Ford<sup>17]</sup> traced the growth of computing power and a variety of applications in his 2015 book *Rise of the Robots*. Combined with big data, such growth represents a threat, not as in the past to those with little education and low skills, but to skilled

<sup>15]</sup> House of Lords Select Committee, *Report of Session 2016–17: Stronger Charities for a Stronger Society*, para 108, p 29

<sup>16]</sup> Berry L, *Commission on the Voluntary Sector and Ageing*, voluntarysectorageing.org, 2015

<sup>17]</sup> Ford M, *Rise of the Robots: technology and the threat of mass unemployment*, Oneworld Publications, 2015

professionals, including lawyers, scientists and medics. There is potential for increased polarisation of wealth to a shrinking group of people and even greater levels of debt for squeezed consumers.

A conventional response would be to focus on retraining, although there may be diminishing returns to vocational education. Anti-automation attempts may be made, but are unlikely to be successful. However, alternative scenarios have been mooted. Perhaps new types of job will be created, as in previous economic revolutions, and perhaps there will be a permanent loss of significant numbers of jobs.

Either way, society faces a significant level of potentially harmful disruption. Some governments, notably those in Finland and Scotland, are piloting a BUI scheme<sup>18]</sup>; that is, an income guaranteed to all. This is not a cheap option, but it significantly untangles a hugely complex benefits system and creates the flexibility to retrain, start a new enterprise or engage in community activity.

A radical solution might be to pilot a BUI scheme with the payment of a small premium – a citizen’s dividend – for community engagement. This would not be strictly volunteering, as a payment would be offered; nevertheless it might be a way of increasing participation and would be worth considering as part of a pilot programme.

### Summary of policy proposals

- A concentrated research effort is required to understand what has led to a rise in young people’s participation, and to review the policy implications of this.
- As part of the Full-Time Social Action Review, consideration needs to be given as to how NCS can be dovetailed into existing civil-society activity, providing a pathway to longer-term participation in communities. The review also needs to consider the role of schools in creating the value base upon which voluntary action can be developed.
- Government needs to renew its support for statutory time off for volunteering and consider time off for trustee duties.
- The Queen’s Award for Voluntary Service needs to be fully funded and integrated into the honours system.
- Further consideration is required by the voluntary and business sectors as to the transition from work to retirement and the voluntary opportunities that this presents.
- Significant investment is required to provide high-level strategic capability with public-service institutions, notably local government and the health service, to consider what services can be provided by volunteers and how they can be effectively recruited and retained.
- Government should consider further pilots of BUI schemes, with the provision of a citizen’s dividend for social beneficial activity.

18] Sodha S, 'Is Finland's Basic Universal Income a solution to automation, fewer jobs and lower wages?' theguardian.com 19 February 2017









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