

Survey Results & Analysis

London Charity

Property Matters

Survey 2018

Survey Results & Analysis of data
undertaken by Charity Finance Group

In partnership with

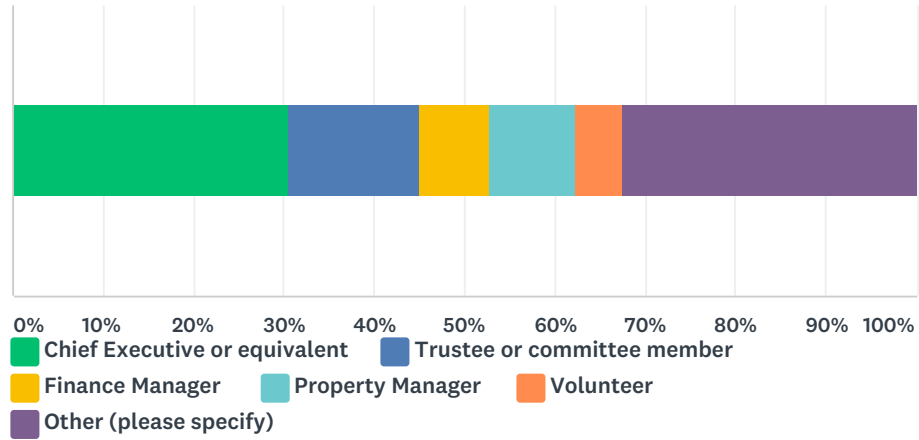


INSPIRING
FINANCIAL
LEADERSHIP



Q1 What is your role in the charity? (Please select)

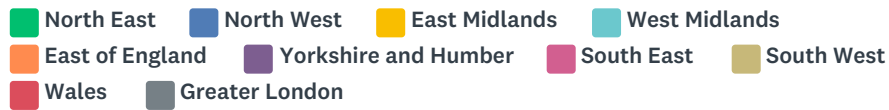
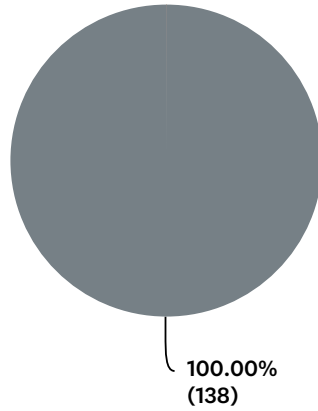
Answered: 138 Skipped: 0



ANSWER CHOICES	RESPONSES	
Chief Executive or equivalent	30.43%	42
Trustee or committee member	14.49%	20
Finance Manager	7.97%	11
Property Manager	9.42%	13
Volunteer	5.07%	7
Other (please specify)	32.61%	45
TOTAL		138

Q2 Which region are you based in?

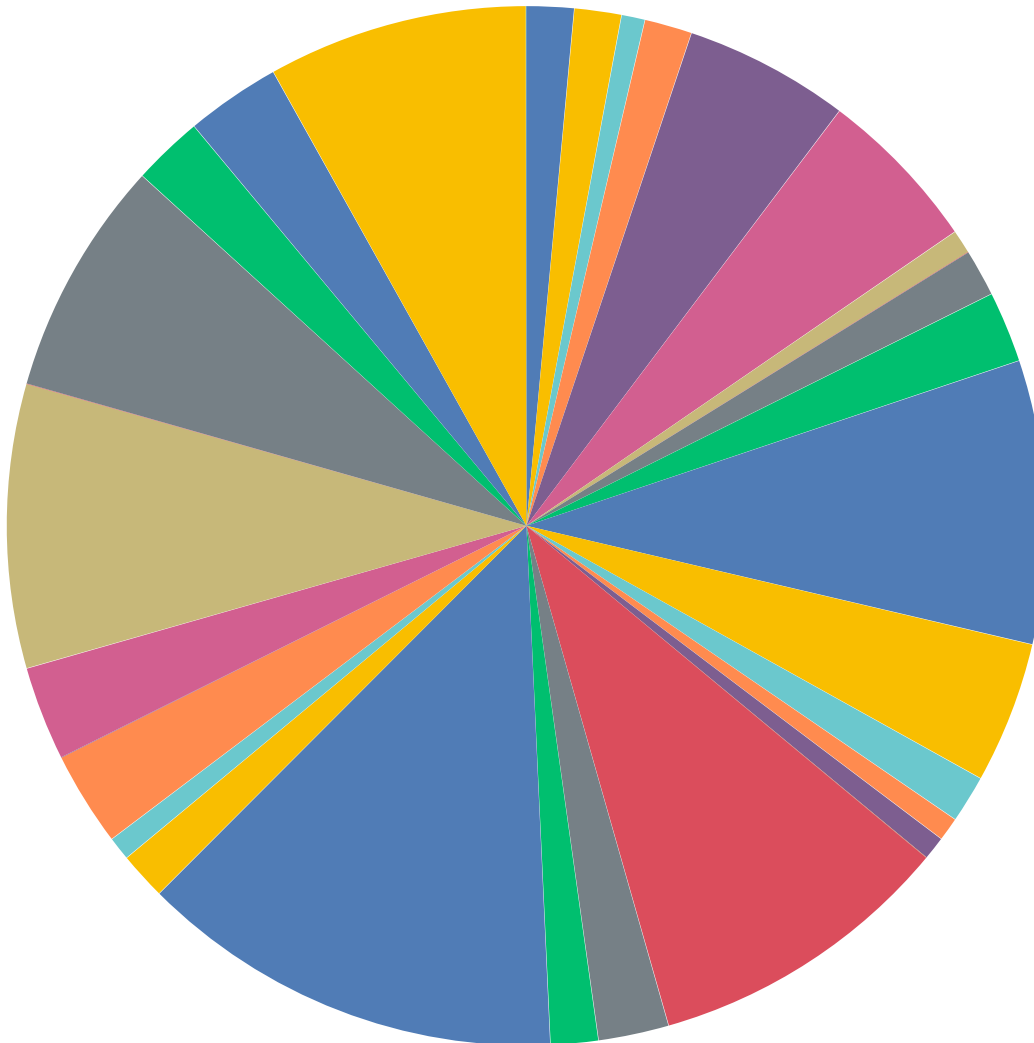
Answered: 138 Skipped: 0



ANSWER CHOICES	RESPONSES	
North East	0.00%	0
North West	0.00%	0
East Midlands	0.00%	0
West Midlands	0.00%	0
East of England	0.00%	0
Yorkshire and Humber	0.00%	0
South East	0.00%	0
South West	0.00%	0
Wales	0.00%	0
Greater London	100.00%	138
TOTAL		138

Q3 As you selected London, can you please select which borough your main office is located in?

Answered: 136 Skipped: 2



- Barking and Dagenham
- Barnet
- Bexley
- Brent
- Bromley
- Camden
- City of London
- Croydon
- Ealing
- Enfield
- Greenwich
- Hackney
- Hammersmith and Fulham
- Haringey
- Harrow
- Havering
- Hillingdon
- Hounslow
- Islington
- Kensington and Chelsea
- Kingston upon Thames
- Lambeth
- Lewisham
- Merton
- Newham
- Redbridge
- Richmond upon Thames
- Southwark
- Sutton
- Tower Hamlets
- Waltham Forest
- Wandsworth
- Westminster

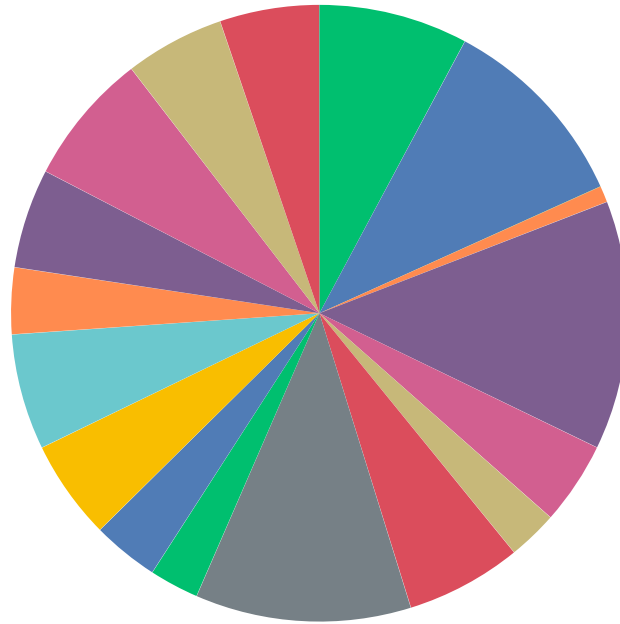
ANSWER CHOICES	RESPONSES	
Barking and Dagenham	0.00%	0
Barnet	1.47%	2

Charity Property Matters Survey 2018

Bexley	1.47%	2
Brent	0.74%	1
Bromley	1.47%	2
Camden	5.15%	7
City of London	5.15%	7
Croydon	0.74%	1
Ealing	0.00%	0
Enfield	1.47%	2
Greenwich	2.21%	3
Hackney	8.82%	12
Hammersmith and Fulham	4.41%	6
Haringey	1.47%	2
Harrow	0.74%	1
Havering	0.74%	1
Hillingdon	0.00%	0
Hounslow	0.00%	0
Islington	9.56%	13
Kensington and Chelsea	2.21%	3
Kingston upon Thames	1.47%	2
Lambeth	13.24%	18
Lewisham	1.47%	2
Merton	0.74%	1
Newham	2.94%	4
Redbridge	0.00%	0
Richmond upon Thames	2.94%	4
Southwark	8.82%	12
Sutton	0.00%	0
Tower Hamlets	7.35%	10
Waltham Forest	2.21%	3
Wandsworth	2.94%	4
Westminster	8.09%	11
TOTAL		136

Q4 What part of the charity sector do you primarily work in (e.g. if you work mainly in providing cultural services, but also work with young people, select culture and recreation).

Answered: 115 Skipped: 23



- Culture and recreation
- Education
- Parent Teacher Associations
- Playgroups and nurseries
- Research
- Health/disability
- Social services
- Scout groups and youth clubs
- Environment
- Community Development
- Village Halls/ Community Centres
- Housing
- Employment and training
- Law and advocacy
- Grant-making foundations
- Umbrella bodies
- International
- Religion/faith based group
- Elderly
- Animal welfare

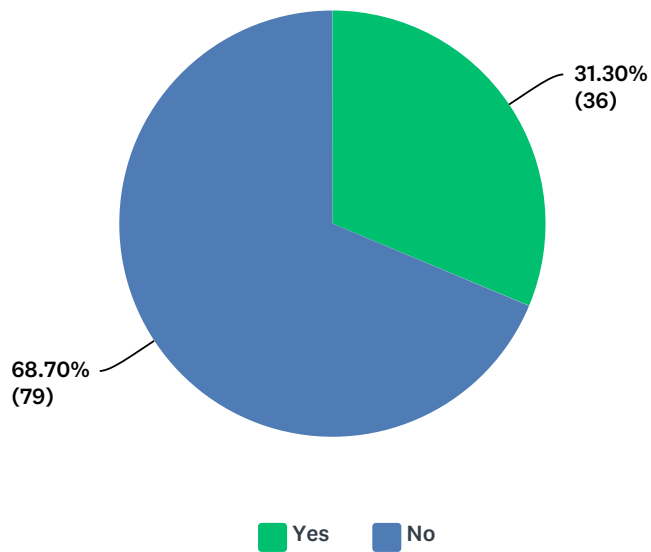
ANSWER CHOICES	RESPONSES	
Culture and recreation	7.83%	9
Education	10.43%	12
Parent Teacher Associations	0.00%	0
Playgroups and nurseries	0.00%	0
Research	0.87%	1
Health/disability	13.04%	15
Social services	4.35%	5
Scout groups and youth clubs	2.61%	3
Environment	6.09%	7
Community Development	11.30%	13

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Village Halls/ Community Centres	2.61%	3
Housing	3.48%	4
Employment and training	5.22%	6
Law and advocacy	6.09%	7
Grant-making foundations	3.48%	4
Umbrella bodies	5.22%	6
International	6.96%	8
Religion/faith based group	5.22%	6
Elderly	5.22%	6
Animal welfare	0.00%	0
TOTAL		115

Q5 Do you own the freehold of any property?

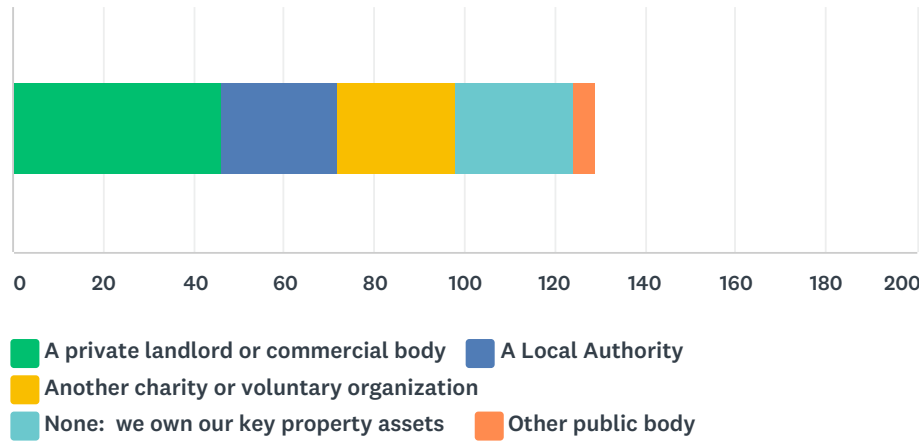
Answered: 115 Skipped: 23



ANSWER CHOICES	RESPONSES	
Yes	31.30%	36
No	68.70%	79
TOTAL		115

Q6 Do you lease property from the following? (Please select all that apply)

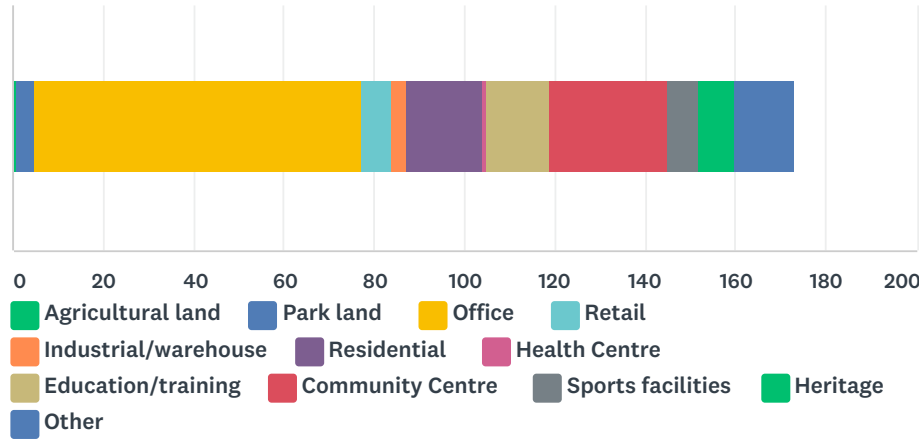
Answered: 115 Skipped: 23



ANSWER CHOICES	RESPONSES	
A private landlord or commercial body	40.00%	46
A Local Authority	22.61%	26
Another charity or voluntary organization	22.61%	26
None: we own our key property assets	22.61%	26
Other public body	4.35%	5
Total Respondents: 115		

Q7 What type of property do you have? (Please select all that apply)

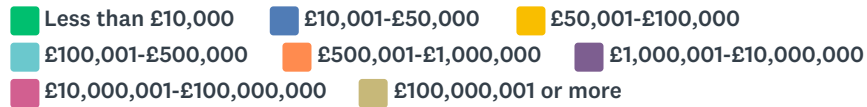
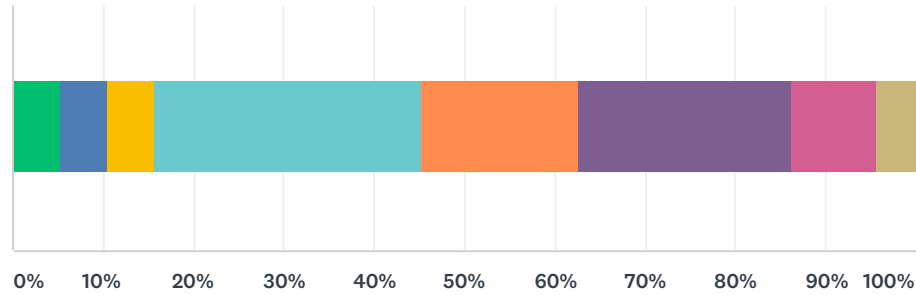
Answered: 115 Skipped: 23



ANSWER CHOICES	RESPONSES
Agricultural land	0.87% 1
Park land	3.48% 4
Office	62.61% 72
Retail	6.09% 7
Industrial/warehouse	2.61% 3
Residential	14.78% 17
Health Centre	0.87% 1
Education/training	12.17% 14
Community Centre	22.61% 26
Sports facilities	6.09% 7
Heritage	6.96% 8
Other	11.30% 13
Total Respondents: 115	

Q8 Please estimate your charity's income in the past year: (please select)

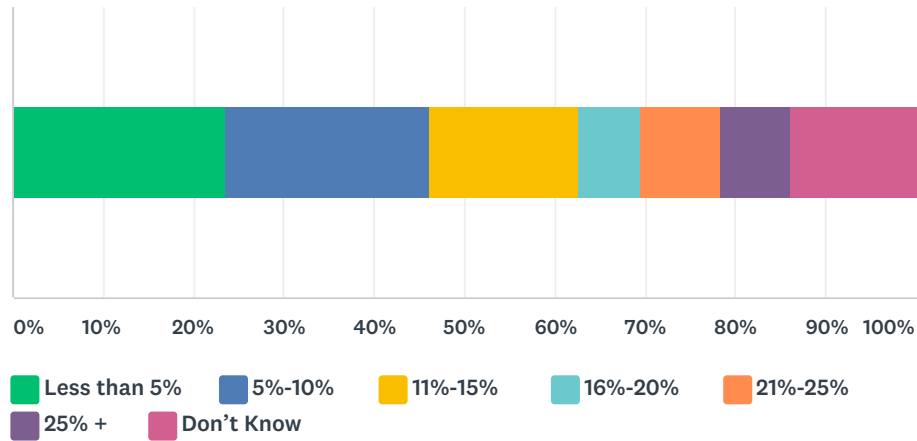
Answered: 115 Skipped: 23



ANSWER CHOICES	RESPONSES	
Less than £10,000	5.22%	6
£10,001-£50,000	5.22%	6
£50,001-£100,000	5.22%	6
£100,001-£500,000	29.57%	34
£500,001-£1,000,000	17.39%	20
£1,000,001-£10,000,000	23.48%	27
£10,000,001-£100,000,000	9.57%	11
£100,000,001 or more	4.35%	5
TOTAL		115

Q9 What percentage of annual expenditure does your charity spend on property costs (rents, rates, utilities, maintenance etc.)

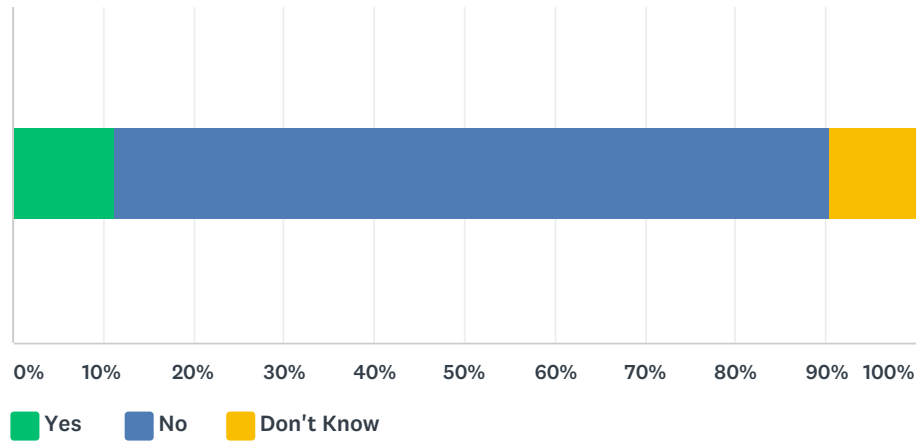
Answered: 115 Skipped: 23



ANSWER CHOICES	RESPONSES	
Less than 5%	23.48%	27
5%-10%	22.61%	26
11%-15%	16.52%	19
16%-20%	6.96%	8
21%-25%	8.70%	10
25% +	7.83%	9
Don't Know	13.91%	16
TOTAL		115

Q10 Has your charity spent money on property management training/education in last three years?

Answered: 115 Skipped: 23



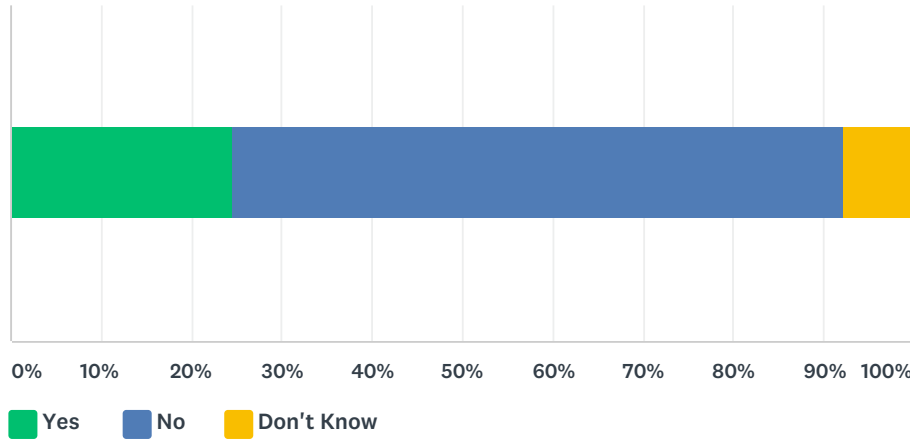
ANSWER CHOICES	RESPONSES	
Yes	11.30%	13
No	79.13%	91
Don't Know	9.57%	11
TOTAL		115

Q11 If you answered yes to the above, roughly how much did you spend annually? (in £)

Answered: 13 Skipped: 125

Q12 Does your charity have a strategic property plan?

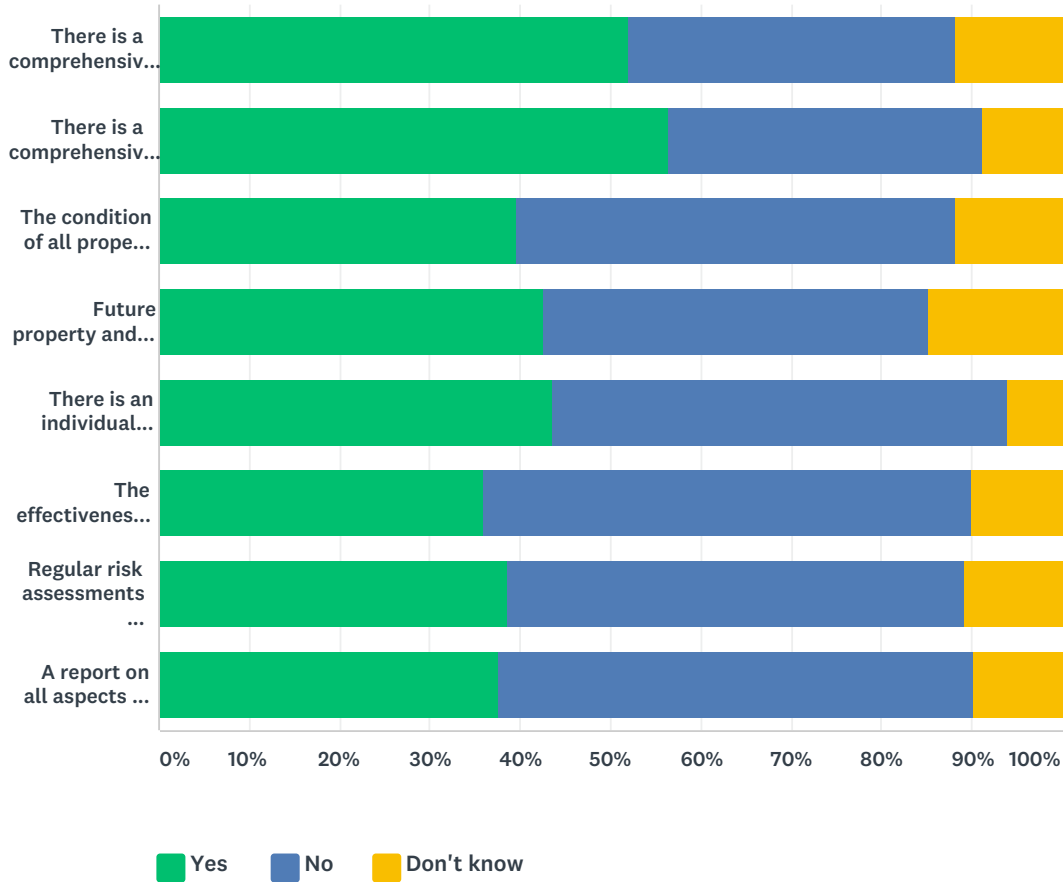
Answered: 102 Skipped: 36



ANSWER CHOICES	RESPONSES	
Yes	24.51%	25
No	67.65%	69
Don't Know	7.84%	8
TOTAL		102

Q13 Please select yes, no or don't know to each to the following questions that best sums up your current management plan and processes. Note: In this set of questions “regularly” means a set or prescribed period of time agreed within your organisation. The length of time will be dependent upon the complexity of the estate and the risks perceived.

Answered: 102 Skipped: 36



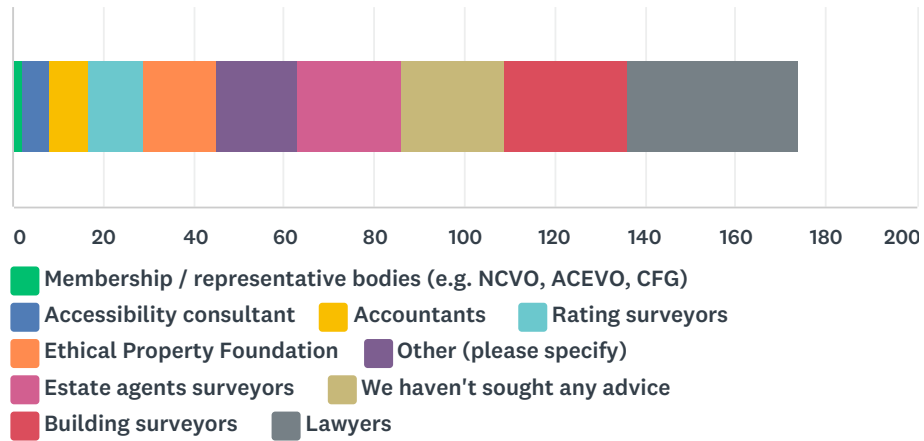
	YES	NO	DON'T KNOW	TOTAL	WEIGHTED AVERAGE
There is a comprehensive list of all property held by the charity detailing:- the floor area (sq.ft./m2) for each property,- how each property is held (freehold/lease etc) and valuation of owned properties- key data such as; address, rent, end of lease, breaks, rent reviews etc	51.96% 53	36.27% 37	11.76% 12	102	1.00
There is a comprehensive annual budget plan for property income and expenditure broken down by:- individual properties and;- by type, such as; rent, rates, maintenance, insurance, energy	56.44% 57	34.65% 35	8.91% 9	101	1.00
The condition of all property held is regularly reviewed and updated including:- a day to day maintenance plan and;- a long term major refurbishment and replacement plan	39.60% 40	48.51% 49	11.88% 12	101	1.00
Future property and space needs are aligned to the business planning cycle	42.57% 43	42.57% 43	14.85% 15	101	1.00

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There is an individual within the organisation with responsibility for property management who has appropriate skills/ knowledge/ experience	43.56% 44	50.50% 51	5.94% 6	101	1.00
The effectiveness of property management contractors and service providers is regularly assessed for cost and performance	36.00% 36	54.00% 54	10.00% 10	100	1.00
Regular risk assessments are made covering all aspects of property management and how it impacts on for example: Financial sustainability, Reputation, Legal compliance, Service delivery, Environmental and Social impact	38.61% 39	50.50% 51	10.89% 11	101	1.00
A report on all aspects of property management, performance, impacts and risks is regularly made to the Trustees	37.62% 38	52.48% 53	9.90% 10	101	1.00

Q14 Have you obtained advice and support regarding property issues and activities from any of the following sources in the past three years?

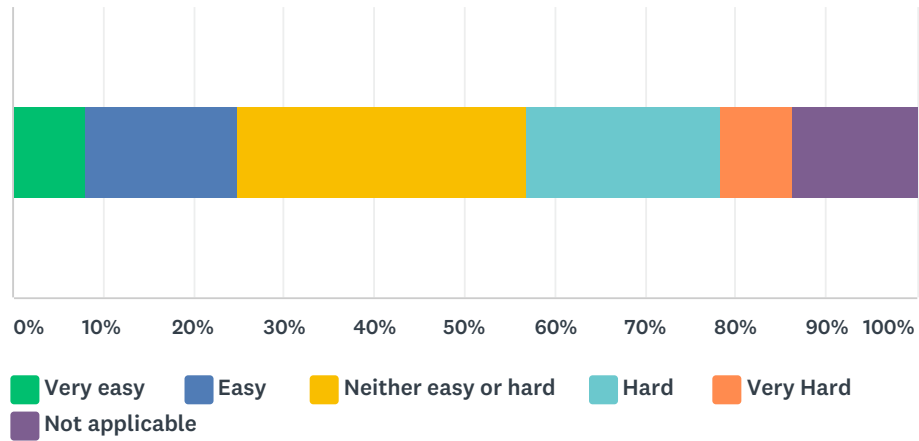
Answered: 88 Skipped: 50



ANSWER CHOICES	RESPONSES	
Membership / representative bodies (e.g. NCVO, ACEVO, CFG)	2.27%	2
Accessibility consultant	6.82%	6
Accountants	10.23%	9
Rating surveyors	13.64%	12
Ethical Property Foundation	18.18%	16
Other (please specify)	20.45%	18
Estate agents surveyors	26.14%	23
We haven't sought any advice	26.14%	23
Building surveyors	30.68%	27
Lawyers	43.18%	38
Total Respondents: 88		

Q15 How easy have you found it to access resources and information that you need to deal with your property related issues?

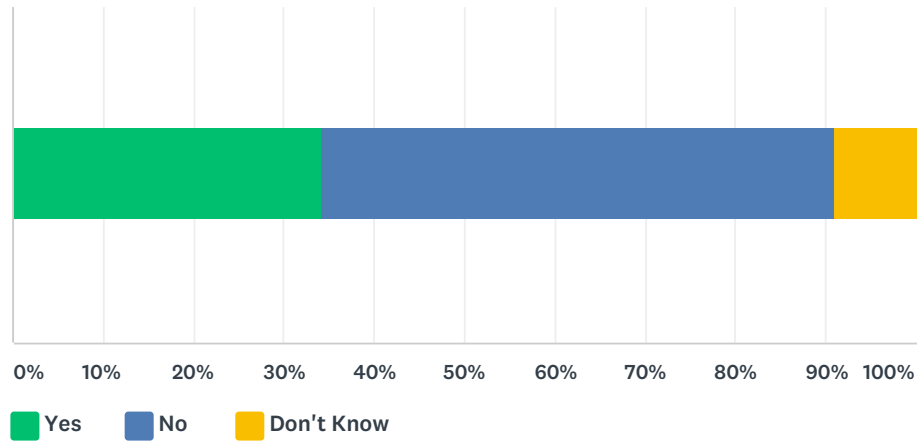
Answered: 88 Skipped: 50



ANSWER CHOICES	RESPONSES	
Very easy	7.95%	7
Easy	17.05%	15
Neither easy or hard	31.82%	28
Hard	21.59%	19
Very Hard	7.95%	7
Not applicable	13.64%	12
TOTAL		88

Q16 In the last three years have you avoided seeking professional advice on property issues due to cost? (Please select)

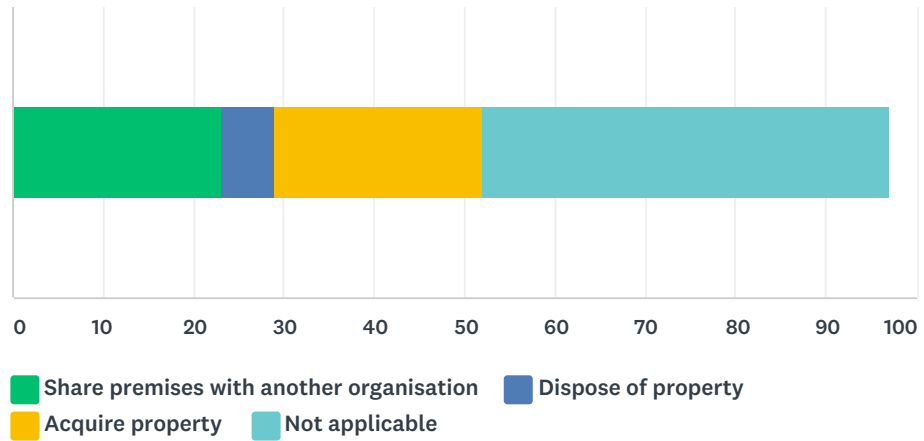
Answered: 88 Skipped: 50



ANSWER CHOICES	RESPONSES	
Yes	34.09%	30
No	56.82%	50
Don't Know	9.09%	8
TOTAL		88

Q17 In the next 12 months my organisation plans to (select any which apply):

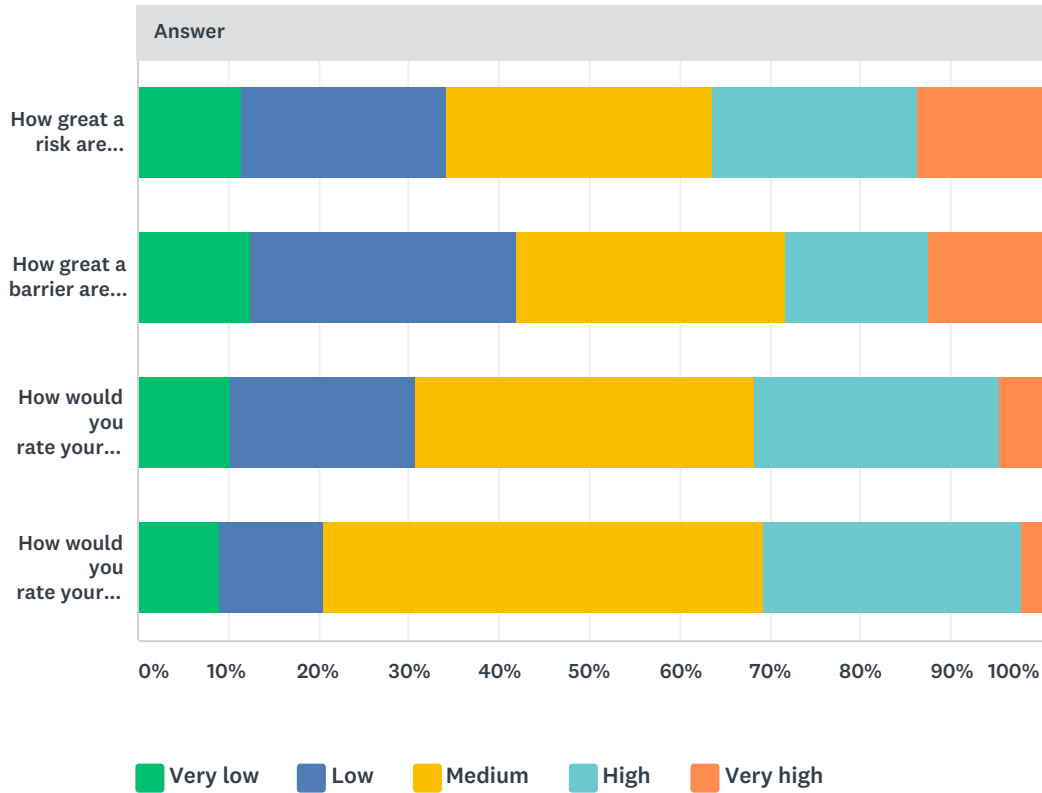
Answered: 88 Skipped: 50



ANSWER CHOICES	RESPONSES	
Share premises with another organisation	26.14%	23
Dispose of property	6.82%	6
Acquire property	26.14%	23
Not applicable	51.14%	45
Total Respondents: 88		

Q18 Please answer the following questions with the options provided:

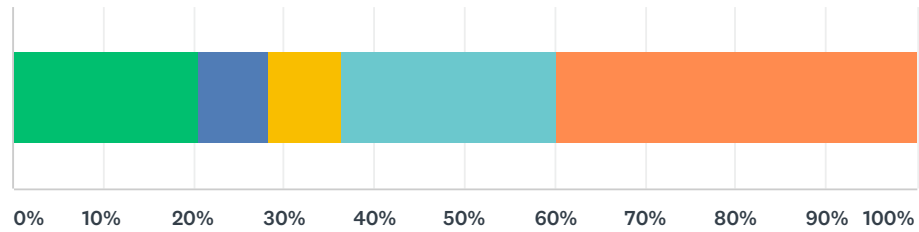
Answered: 88 Skipped: 50



Answer	VERY LOW	LOW	MEDIUM	HIGH	VERY HIGH	TOTAL
How great a risk are property issues to your charity's future financial sustainability?	11.36% 10	22.73% 20	29.55% 26	22.73% 20	13.64% 12	88
How great a barrier are property issues to your charity's ability to deliver its charitable objectives?	12.50% 11	29.55% 26	29.55% 26	15.91% 14	12.50% 11	88
How would you rate your charity's level of knowledge and understanding about the property issues your charity faces?	10.23% 9	20.45% 18	37.50% 33	27.27% 24	4.55% 4	88
How would you rate your confidence that your charity has the expertise to manage its property going forward?	9.09% 8	11.36% 10	48.86% 43	28.41% 25	2.27% 2	88

Q19 Select one of the following statements below that applies to your charity:

Answered: 88 Skipped: 50

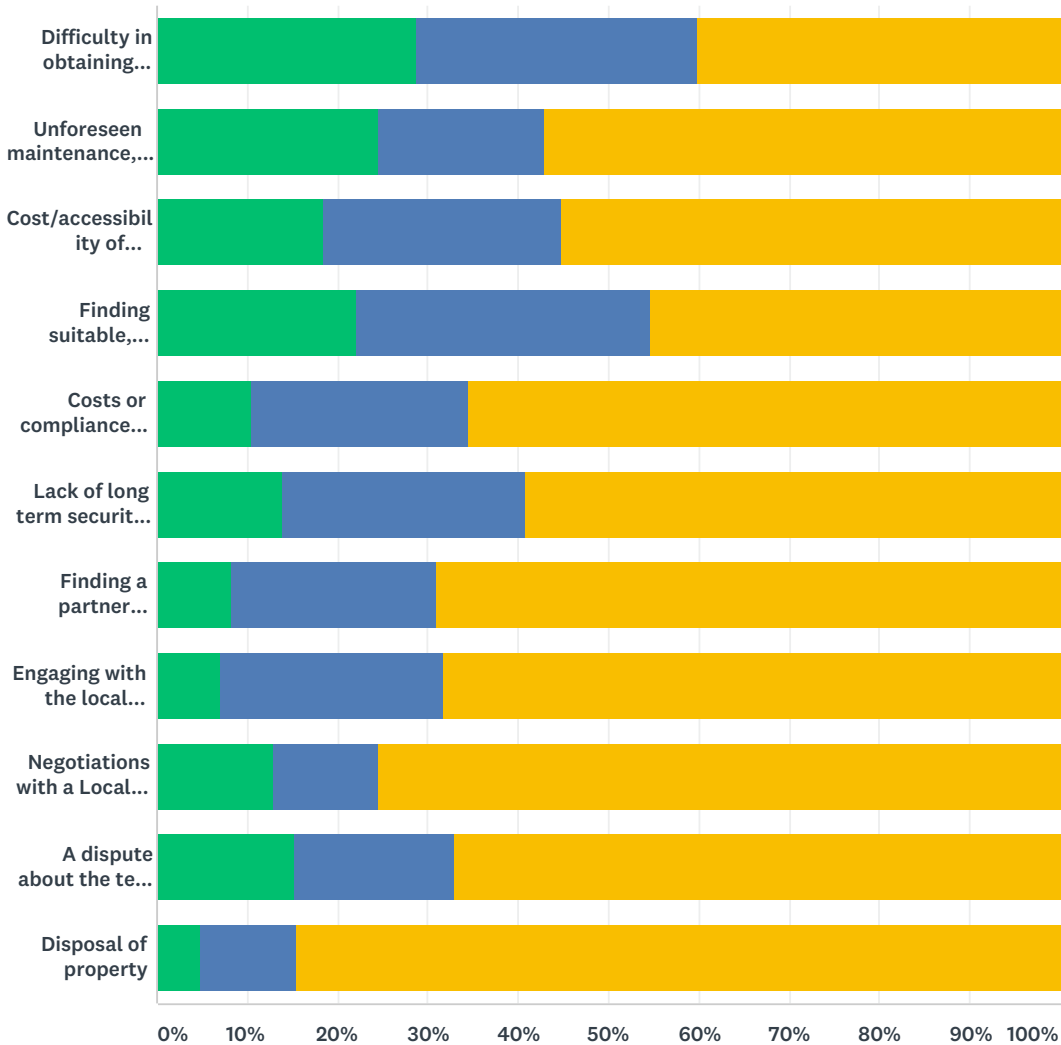


- A lack of affordable accommodation will prevent our charity from meeting demand f
- A lack of space in our current property will prevent our charity from meeting deman
- Our charity has a larger property than we need
- Our premises are not in the right condition or are not suitable for our purposes
- None of these options

ANSWER CHOICES	RESPONSES	
A lack of affordable accommodation will prevent our charity from meeting demand for services	20.45%	18
A lack of space in our current property will prevent our charity from meeting demand for services	7.95%	7
Our charity has a larger property than we need	7.95%	7
Our premises are not in the right condition or are not suitable for our purposes	23.86%	21
None of these options	39.77%	35
TOTAL		88

Q20 Please indicate which of the following issues have been significant for your charity in the past three years or are anticipated to be significant in the next three years (or both):

Answered: 88 Skipped: 50



■ This has been a significant issue in the past three years
■ We anticipate that this will be a significant issue in the next three years ■ N/A

	THIS HAS BEEN A SIGNIFICANT ISSUE IN THE PAST THREE YEARS	WE ANTICIPATE THAT THIS WILL BE A SIGNIFICANT ISSUE IN THE NEXT THREE YEARS	N/A	TOTAL	WEIGHTED AVERAGE
Difficulty in obtaining funding that covers premises costs	28.74% 25	31.03% 27	40.23% 35	87	1.00
Unforeseen maintenance, service charges or major repair costs	24.42% 21	18.60% 16	56.98% 49	86	1.00
Cost/accessibility of professional advice	18.39% 16	26.44% 23	55.17% 48	87	1.00

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Finding suitable, affordable premises	22.09% 19	32.56% 28	45.35% 39	86	1.00
Costs or compliance difficulties arising from health and safety, environmental, access and other regulations	10.34% 9	24.14% 21	65.52% 57	87	1.00
Lack of long term security of tenure due to short term funding	13.95% 12	26.74% 23	59.30% 51	86	1.00
Finding a partner organization to share premises with/other co-location issues	8.33% 7	22.62% 19	69.05% 58	84	1.00
Engaging with the local community/our beneficiaries about the use of our property or planning issues	7.06% 6	24.71% 21	68.24% 58	85	1.00
Negotiations with a Local Authority regarding asset transfers	12.79% 11	11.63% 10	75.58% 65	86	1.00
A dispute about the terms of a lease/dispute with the freeholder	15.29% 13	17.65% 15	67.06% 57	85	1.00
Disposal of property	4.76% 4	10.71% 9	84.52% 71	84	1.00

Q21 Please outline any other property issues your charity has faced in the last three years:

Answered: 51 Skipped: 87

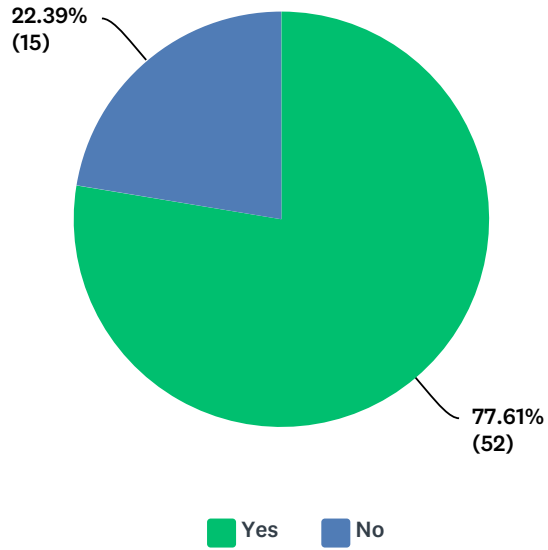
Q22 Details

Answered: 56 Skipped: 82

ANSWER CHOICES	RESPONSES	
Name	98.21%	55
Organisation	98.21%	55
Email	100.00%	56

Q23 I would like to receive a copy of the report detailing the findings of this survey

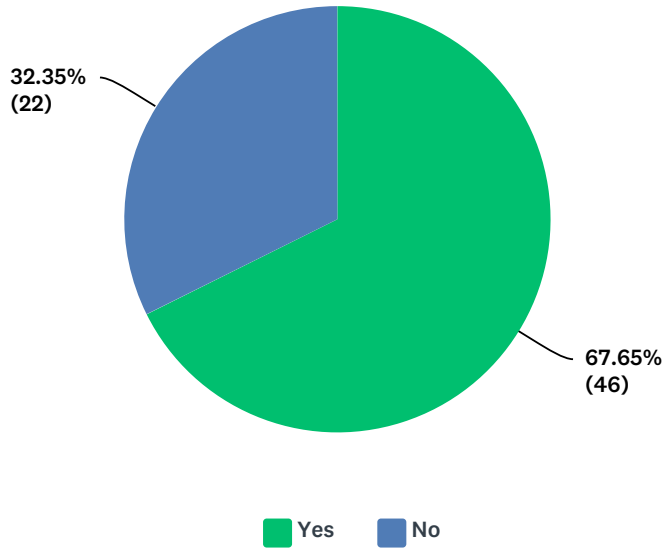
Answered: 67 Skipped: 71



ANSWER CHOICES	RESPONSES	
Yes	77.61%	52
No	22.39%	15
TOTAL		67

Q24 I would like to receive newsletters and other correspondence from The Ethical Property Foundation

Answered: 68 Skipped: 70



ANSWER CHOICES	RESPONSES	
Yes	67.65%	46
No	32.35%	22
TOTAL		68