

# The State of Tasmania's Community Service Sector, 2015

Prepared for:  
Tasmanian Council of Social Service (TasCOSS)

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# Abbreviations

<b>ACNC</b>	Australian Charities and Not-for-Profits Commission
<b>ATSI</b>	Aboriginal and Torres Strait Islander
<b>CCD</b>	Community cultural development
<b>CPD</b>	Continuing professional development
<b>DHHS</b>	Department of Health and Human Services (Tasmania)
<b>DSS</b>	Department of Social Services (Australian Government)
<b>HACC</b>	Home and Community Care
<b>NDIS</b>	National Disability Insurance Scheme
<b>SPRC</b>	Social Policy Research Centre
<b>TasCOSS</b>	Tasmanian Council of Social Service

# Foreword

TasCOSS is excited to provide the first-ever comprehensive overview of Tasmania's community sector. The *State of the Sector Report* provides an extensive evidence base and understanding of the Tasmanian community sector, its organisations, their strengths and challenges. It has been a priority for TasCOSS as the peak body for Tasmania's community sector.

While change and reform are constant in our sector, we are entering an unprecedented period of accelerating and multi-layered change.

In particular, models of consumer directed care, choice and control are dominating the way we deliver services. This is accompanied by individual funding models and a move away from block funding. We are now in a world of 'commissioning frameworks' and 'purchasing for outcomes' in contrast to traditional output models. These reforms come at both State and national levels and are impacting significantly on the sector's business models and the support models delivered to clients.

The *State of the Sector Report* validates what we know to be true:

## **We are Tasmanian.**

We are local, specialised, niche, and closely connected by strong networks in the communities where we work.

## **We are professional.**

Our boards of governance are highly professional and operate strategically with planning and skills relevant to the missions and values of the organisations they govern.

## **We are a large employer of Tasmanians.**

We employ 10,000 Tasmanians and contribute approximately \$50 million to the Tasmanian economy through expenditure in Tasmanian communities.

## **We enable much more to happen than government funding provides for.**

Our capacity to harness support from philanthropic and donation bases is one of many examples of the value add and value for money we bring to government. This, in turn, is value for the individuals and community we work with.

Our volunteer base adds value many times over and is an essential part of our sector.

## **And we face challenges.**

While small is often a good thing, in a fast-paced and changing funding environment, it also involves a risk to viability. Of all the opportunities and challenges the *State of the Sector Report* highlights, the number of very small organisations with limited funding sources and budgets is a risk. It cannot be ignored as it is a risk to clients first and foremost.

This report will not sit on the shelf. It will be scribbled on, much thumbed, dog eared, coffee stained and importantly, used by the sector organisations, peak bodies and government to ensure that we have a strong, viable and relevant sector far into the future, ensuring Tasmanians continue to have access to the diverse range of quality services our sector provides.



*Kym Goodes, TasCOSS CEO*

# Executive Summary

## Context

Community service organisations provide essential services, assisting people through experiences of disadvantage and hardship, strengthening communities, and promoting inclusion, diversity, health and wellbeing. This report provides unprecedented detail about community service organisations which were operating in Tasmania in 2015. It explores the issues impacting on their capacity and sustainability, including their paid and voluntary workforce; their governance arrangements; experiences of collaboration; funding and financial status; and relationships with government. The data comes from a survey completed by 207 organisations operating in Tasmania in November 2015 (response rate of 58.5%). The findings provide baseline information for monitoring how the sector is changing over time, and can help inform initiatives to develop sector capacity and effectiveness.

## Estimating the contribution of Tasmania's community sector

Responses to workforce, income and expenditure questions provide a basis for estimating the total contribution of Tasmania's community sector. We estimate that Tasmania's community service organisations employed 9,066 people, or 3.7% of Tasmania's workforce. In the 2014-2015 year, Tasmania's community service organisations spent \$481.0 million. This was 94.5% of the \$509.1 million in income that the sector received from a mix of public, philanthropic and commercial sources.

## About responding organisations

The 207 organisations that answered the survey were spread across Tasmania. Only 13% also operated on the mainland, and 2.4% operated overseas. Together, these organisations delivered a diverse range of services. Community development, health-related services, and disability services were among the most common. More than 1 in 4 organisations (27.5%) were registered to deliver services to participants of the National Disability Insurance Scheme, highlighting the widespread impact of national disability policy reform in Tasmania.

## Size of organisations

Data about the amount of income received in the 2014-2015 year confirms that while some community service organisations in Tasmania have large scale operations, the sector mostly consists of very small organisations making highly specialised, localised contributions. Half of responding organisations had total annual incomes under \$385,000. One in five organisations had incomes under \$150,000. While the largest 10% of organisations had incomes over \$5.8 million, the smallest 10% had incomes under \$38,500.

## For-profit providers in Tasmania

Like in other states, Tasmania's community service sector is undergoing a rapid process of marketisation, which may increase the presence of private profit-oriented service providers. In 2015, for-profit providers had a small presence in Tasmania, focused on disability service provision. Thirty for-profits were identified, and 11 for-profits responded to the survey. No significant differences were evident in the size of for-profits and non-profits. However, compared with non-profits, higher proportions of for-profits were operating with low financial reserves, and for-profits also had low engagement of volunteers. Whereas the involvement of volunteers is a key characteristic of non-profit community service organisations, only one of the 11 for-profits which responded reported involving volunteers.

## Volunteers in Tasmania's community sector

Tasmania's community service sector relies heavily on volunteers. Overall, 9 in 10 organisations (88.9%) involved volunteers. Half of the organisations that responded said it was becoming more difficult to recruit volunteers, and many felt their organisation lacked resources to properly support volunteers. Of those which hosted volunteers through Work for the Dole, more than half felt their organisation had insufficient resources to properly develop participants' skills, or to cover the costs of administering the program.

## Paid staff in Tasmania's community sector

Most community service organisations in Tasmania operate with very few paid staff. One in eight (12.6%) had no paid staff, and a further 30.4% had between 1 and 5 employees. However, around 1 in 10 organisations employed more than 100 paid staff. Over 1 in 3 paid employees were in organisations whose main activity was disability service provision (35.8%). A further 17.7% were in organisations focused on ageing and carer services.

Almost three quarters of paid staff were employed part time (73.7%), which is more than double the figure of 35.7% for Tasmania's workforce as a whole (ABS, 2015). However, the proportion of community service employees working full and part time varied across organisations and service types. Among organisations whose main service type was in the broad category of ageing and carer, there were particularly high rates of part time employment: 89.8% of staff in these organisations were employed part time.

Overall, 7 in 10 employees in community service organisations were employed on a permanent / ongoing basis. There were high rates of permanent employment in organisations focused on housing services, and those whose main service type was financial support, employment and social enterprise. Permanent employment was much less prevalent in organisations whose main service type was in the categories of Community development, community cultural development (CCD) and Aboriginal and Torres Strait Islander (ATSI) services.

While most organisations reported having some resources to support and develop staff, these resources were rarely reported to cover organisation's staff development needs. Three

in four had budgets to support conference attendance and training, for example, but many fewer had resources for backfilling and professional supervision.

## Governance

Governance is a strength of Tasmania's community sector. Most respondents felt relationships with Boards or Management Committees were effective and productive. A high proportion of organisations (86.4%) had a strategic or business plan, and the vast majority said these plans were used regularly. Boards or Management Committees were more likely to be dominated by women than men. However, the small number which had a paid position (14) were more likely than voluntary boards to be male dominated.

## Collaboration in Tasmania's community sector

Community service organisations collaborate to support clients and achieve their mission. More than 2 in 3 organisations said that compared with 12 months prior, they were collaborating more often and with a wider range of organisations, and that their collaborations were more strategic, and more effective. Some felt more time, staff and information would help improve collaboration, and some felt that competition had undermined the sector's collaborative ethos.

## Resourcing Tasmania's community sector

### Public funding

Three quarters of responding organisations received income from the Tasmanian Government in the last financial year (76.3%), and on average, it constituted 38.5% of organisation's total income. More than half of organisations received Australian Government funding (56.5%), and it comprised around a quarter of organisation's total income, on average.

There was, however, much variation in the funding mix across organisations. Tasmanian Government funding was particularly important to organisations whose main service type was in the category of Community development, CCD and ATSI services. For organisations whose main service type was in the broad categories of 'ageing and carer', Australian Government funding made a much higher than average contribution to total income.

While respondents largely agreed that government funding enables high quality service provision, funding inadequacy and insecurity appears widespread. Less than half agreed that Tasmanian Government funding provides organisations with enough money to pay staff rates appropriate to their skills, and few reported that it covered evaluation or sector development costs. Only 1 in 5 respondents agreed that their organisation is advised of funding renewals long enough in advance, and only one in three agreed that Tasmanian Government funding contracts are long enough to achieve outcomes.

## Private funding

While public funding is the most important source of income for Tasmania's community service organisations, many also receive income from philanthropic and commercial sources. More than half of organisations had income from donations and fundraising in the last financial year (53.1%). On average, it contributed 9.0% of organisation's total income, although this was substantially higher in health related services. More than 2 in 5 organisations reported income from client fees and charges (41.5%), and it contributed 8.3% of total income, on average, although this was much higher for those whose main service type was housing (presumably due to social housing rents).

## Financial Status

More than 3 in 4 organisations had a fairly balanced budget for the 2014-15 financial year, defined as spending within 20% of their year's income. However, less than half (44.9%) said their organisation usually kept at least three months of expenses in reserve. Organisations whose main service type was ageing and carer services were least likely to keep a three month reserve (only 21.4% did so). Financial status had improved over the last 12 months for more organisations than it had worsened for. Those with incomes over \$5 million were most likely to say their general financial position had improved.

Reflecting general trends of improved financial status, respondents were more likely to report that income from the Tasmanian or Australian Governments had increased than decreased in the last 12 months. However, 13.0% had experienced loss of income from the Tasmanian Government, and 18.1% had lost income from the Australian Government. Further, 18.0% said they had experienced loss of income from donations or philanthropic sources, although a higher proportion (25.3%) said their philanthropic income had grown. Commercial income had grown for 1 in 4 organisations (25.2%), and fallen for only 6.4%.

Notwithstanding some gains in income, many organisations are functioning under intense resource pressures. While organisations have attempted to improve efficiency without impacting on clients, 23.2% said that in the last 12 months they have responded to funding loss by reducing staff hours, and 22.2% said they have reduced staff numbers. Substantial numbers said they tightened eligibility for services, introduced or increased client fees, increased waiting times, and reduced the amount of service on offer. As well as funding levels, funding uncertainty remains a major concern.

## Engagement with Government

Around 7 in 10 organisations felt they had effective relationships with the Tasmanian Government around advocacy, and 57.2% felt communication was effective. However, there is considerable scope to improve consultation, and relationships around funding, negotiating performance indicators, and policy advice and development. Less than half of organisations felt their relationships with the Tasmanian Government around these issues were effective. Relationships with the Australian Government in all domains could be improved, with many organisations perceiving that key national initiatives, including Department of Social Services (DSS) Tendering Processes, have had negative impacts in Tasmania.

# 1 Introduction

This report profiles non-government community service organisations operating in Tasmania in 2015. These organisations work closely with communities, with each other, and with governments, to address complex individual and community needs, and to promote community development, social inclusion, health and wellbeing.

Community services in Tasmania are delivered in a context of high social and economic disadvantage. Rates of disability, long-term health conditions, social security receipt and unemployment are high in Tasmania relative to other parts of Australia; while educational attainment and household incomes and wealth are low (ABS, 2013; TCCI, 2015). As well as addressing the high rates of disadvantage in the State, Tasmania's community sector is also significant as a major employer, and source of employment growth (TCCI, 2015).

Recognising the importance of the community service sector, this research was designed to provide current, accurate and relevant information about the strengths of Tasmania's community services sector and the challenges organisations face, to improve recognition of sector issues and inform strategies to build capacity and sustainability.

## 1.1 Research aims

The research arises from a partnership between the Tasmanian Council of Social Service (TasCOSS) and the Social Policy Research Centre (SPRC) to survey community service organisations operating in Tasmania, so as to better understand their characteristics, strengths and challenges. The research was based on similar surveys conducted in NSW in 2014 and 2015 (see Cortis and Blaxland, 2014, 2015), but adapted to reflect the issues affecting organisations in Tasmania, in close consultation with TasCOSS.

Specifically, the project aimed to:

- establish a database of core sector information, which identifies the characteristics of not-for-profit and for profit community service providers in Tasmania, and the diversity of issues and challenges faced by different parts of the sector;
- capture information about the economic value of the community sector to Tasmania;
- develop an understanding of current models of engagement between the Tasmanian community sector and government, including what is working well and how engagement, capacity and sustainability can be improved;
- give voice to a diverse range of community sector perspectives on key aspects of service delivery in Tasmania, and how these can be improved; and
- build resources with which to raise awareness of current issues affecting community organisations in Tasmania, and strategies for building strong, capable and high quality organisations to address inequality and disadvantage.

## 1.2 Methodology

The survey instrument was based on similar surveys conducted in NSW in 2014 and 2015, but carefully adapted for Tasmania, in partnership with TasCOSS. The Tasmanian survey was designed around a series of modules, covering service delivery and staffing, volunteers, paid staff, governance, engagement with government, financial capacity and sustainability, and future priorities for the sector. Particular effort was made to build on and not duplicate other information, including information collected as part of the annual ACOSS Community Sector Survey, and reporting by community service organisations which are registered charities to the Australian Charities and Not-for-Profits Commission (ACNC).

### Sampling frame and distribution

TasCOSS led the development of the sampling frame, applying their extensive knowledge of Tasmanian organisations to accurately compile and refine lists of organisations and their CEOs. The sampling frame consisted of:

- non-profit organisations and private businesses receiving funds from the Department of Health and Human Services (DHHS) to deliver services or conduct activities in Tasmania;
- not-for-profit and private providers recorded on the Tasmanian Government Tenders list as successful in gaining contracts to deliver community health or welfare services;
- TasCOSS members;
- charities listed on the ACNC register as being based in Tasmania and providing social services; and
- organisations and businesses registered to deliver NDIS in Tasmania.

The aggregated list of organisations from these sources was cleaned to ensure that only community service providers were included. Community service providers were defined as those providing health or welfare services to the community, or peak body services. This excluded the following: residential aged care services, child care services, Job Network providers (where they were solely employment service providers), churches and parishes, mainland based organisations fundraising in Tasmania but providing no direct services in the state, schools, the University of Tasmania, animal and environmental charities, Foundations, research centres, community halls and associations, historical societies, museums and heritage centres. Also excluded were community service programs run by local government. Arts groups were included if their primary purpose was community cultural development (CCD).

As indicated above, the sampling frame included some private businesses (n=30), based on lists of those registered as providers for the NDIS or those in receipt of Government contracts for the provision of community services. The list of NDIS providers was cleaned to



ensure that only businesses whose primary focus was providing services to people experiencing disability or other forms of disadvantage were included.

Finally, the consolidated list was cleaned to remove duplicate records, indicated by identical names, email addresses, or Australian Business Numbers. This ensured only one survey was sent to each organisation. Invitations to participate in the survey and unique survey links were distributed to email addresses on the final list. Addresses that bounced back were checked and replaced where possible, resulting in a final sampling frame of 354 organisations, 207 of which provided complete, usable survey responses (a 58.5% response rate).

## **Strategies to maximise survey response**

To help achieve the high survey response, TasCOSS provided advance notice of the survey to all organisations in the sampling frame and identified the relevant individual to complete the survey, and updated contact details. This involved phoning each organisation, as well as providing information about the survey in newsletters and communications with member organisations and the wider community sector. The Department of Health and Human Services (DHHS) also provided advance notice of the survey to their partner organisations. Email addresses which bounced back were checked and corrected or substituted where possible. Non-respondents were followed up with two email reminders during the three weeks that the survey was open. A final reminder was sent out on the day the survey was scheduled to close, alerting non-respondents that it was extended for two more days. In addition, through the survey period TasCOSS phoned non-respondents to remind them about the survey and provide any assistance. Finally, to encourage participation, the research team offered those who completed the survey an opportunity to leave their details to enter a prize draw to win an iPad for their organisation.

## **Response analysis**

Of the 354 organisations in the final sampling frame, 207 surveys were completed, representing a response rate of 58.5%. This is substantially higher than response rates achieved in similar surveys, and means results can be interpreted with confidence.<sup>1</sup> By comparison, the recent surveys of the community services sector in NSW upon which the Tasmanian survey was based achieved response rates of 37.6% (Cortis and Blaxland, 2014) and 35.9% (Cortis and Blaxland, 2015). Further, the response rate is well above the typical range for web-based organisational surveys requiring input from senior executives, and is higher than for other large-scale surveys of the community sector conducted in Australia. This is most likely because of the role of TasCOSS in alerting organisations to the survey through a personal phone call, which helped in ensuring the survey was sent to the most appropriate person, and encouraging participation and addressing any concerns.

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<sup>1</sup> The response rate gives a confidence interval of 4.4, which means we can be 95% certain that results for all 354 organisations would be within 4.4 percentage points of the results reported for the 207 responding organisations.

As intended, the survey was in most cases completed by a chief executive officer (CEO), director or general manager (64.3%), or by a state, area, or other senior manager (20.7%). This indicates the survey was completed by those in the best positions to provide accurate information, giving good credibility to the survey results.

## **Analysis and reporting**

Survey responses were analysed to identify key characteristics and perspectives across Tasmania's community sector as a whole, and to examine any differences among respondents in different types of organisations. Analysis involved a range of comparisons based on size, main service type, and location. For the purposes of brevity we report only breakdowns showing differences of interest. Most often, these differences were based on the size of organisations, measured either in terms of income in the last financial year, or staff numbers in the last pay period. We report numbers of respondents as well as percentages in some cases, and percentages only, where the number of respondents is clear. Where respondents skipped questions, or where questions were asked of only a subset of respondents, the sample for each question may be less than 207, as indicated throughout.

## 2 About responding organisations

### 2.1 Locations of operations

The survey asked respondents to select which areas of Tasmania their organisation operated in, using the three categories used by Tasmania’s Department of Health and Human Services (DHHS):

- North-West (including Burnie and Strahan);
- North (including Launceston and surrounds); and
- South (including the Greater Hobart area).

The survey also asked respondents to indicate whether they operated anywhere on the Australian mainland, or overseas.

Overwhelmingly, responding organisations reported operating in Tasmania only. Only 27 (13.0%) reported also operating on the mainland, and five (2.4%) said they also operated overseas (see Table 1). More than 7 in 10 organisations operated in the Southern region of Tasmania (72.0%), and 65.4% operated in the North. Around three in five (60.1%) reported operating in the North-West.



Table 2 shows that of those organisations which reported having some operations in the South, around a third (32.2%) did not operate in any other area. Among those operating in the North, 13.5% only operated in that region. Among organisations in the North–West, the majority also had operations in other areas: 14.4% operated only in the North–West. Overall, around half (113 organisations, or 54.6%) operated in more than one region of Tasmania.

**Table 1 Locations of operations**

Locations	n	%
<b>Regions in Tasmania</b>		
North	136	65.4
North West	125	60.1
South	149	72.0
<b>Other areas</b>		
Mainland	27	13.0
Overseas	5	2.4

Note: As respondents were able to indicate more than one area, the results do not sum to 207.

**Table 2 Organisations operating in more than 1 region**

Region of operation	Did not operate in another region		Operated in 1 or more other regions		All	
	n	%	n	%	n	%
North	28	13.5	108	86.5	136	100
North-West	18	14.4	107	85.6	125	100
South	48	32.2	101	67.8	149	100

## 2.2 Main service type

Respondents were asked to select the main type of service they were providing in Tasmania, for example the service type which was their main source of income, and then to select any other service types they delivered. Table 3 provides a breakdown of organisations' main service types<sup>2</sup>. Subsequent analysis combines these service types into eight broad categories, as per the table subheadings. These eight categories group together broadly similar services, but may not perfectly reflect the diversity and specificity in the community service sector. Notwithstanding, the smaller number of categories is helpful for understanding key areas of community service provision.

As shown in Table 3, survey respondents were from organisations providing a wide range of main service types. A little over 1 in 5 services (21.3%) said their main service type was in the broad category of health and health promotion. There was also a large number of organisations whose main service type was in the category of 'Community development, CCD and ATSI services' (38 services, of which 28 listed 'community development' as their main service type). There were 32 organisations whose main service type was disability services (15.5%), and twenty-nine (13.9%) in the category of adult, family, children and youth services. Fourteen respondents (6.8%) reported that their main service type was 'peak body'.

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<sup>2</sup> Note that while the survey offered separate categories of 'health promotion' and 'health prevention', these have been combined in the Table. Similarly, 'jobseeker' and 'training' services have been combined, and 'sexual and reproductive health' have been combined with 'women's health', due to small numbers in these categories.

**Table 3 Main service type**

	n	%
<b>Community development, community cultural development (CCD) and ATSI services</b>	<b>(38)</b>	<b>(18.4)</b>
Aboriginal and Torres Strait Islander health and support	4	1.9
Community development	28	13.5
Migrant, refugees, and asylum seeker services	4	1.9
Community cultural development	2	1.0
<b>Ageing and carer</b>	<b>(14)</b>	<b>(6.8)</b>
Carer support	2	1.0
Non-residential services for older people (including Home and Community Care (HACC) and respite)	10	4.8
Transport services	2	1.0
<b>Disability</b>	<b>(32)</b>	<b>15.5</b>
Disability (other than employment or mental health)	32	15.5
<b>Financial support, employment and social enterprise</b>	<b>(15)</b>	<b>(7.2)</b>
Jobseeker and training services	4	1.9
Emergency relief	2	1.0
Financial support (including NILS, financial literacy, financial counselling)	3	1.4
Social enterprise	6	2.9
<b>Adult, family, children and youth</b>	<b>(29)</b>	<b>(14.0)</b>
Family, relationship and parenting	9	4.3
Children's services	8	3.9
Youth services	7	3.4
Sexual assault service	2	1.0
Domestic and family violence service	3	1.4
<b>Health, health promotion</b>	<b>(44)</b>	<b>(21.3)</b>
Health condition specific services	13	6.3
Health promotion and prevention	7	3.3
Alcohol, tobacco and other drugs	2	1.0
Mental health services	5	2.4
Sexual, reproductive and women's health	3	1.4
Palliative care	2	1.0
Other health service	12	5.8
<b>Housing</b>	<b>(12)</b>	<b>(5.8)</b>
Community housing	5	2.4
Homelessness	7	3.4
<b>Legal, information, advocacy and peaks</b>	<b>(23)</b>	<b>(11.1)</b>
Information, advice and referral	2	1.0
Legal services	3	1.4
Consumer advocacy	4	1.9
Peak body	14	6.8
<b>Total</b>	<b>207</b>	<b>100.0</b>

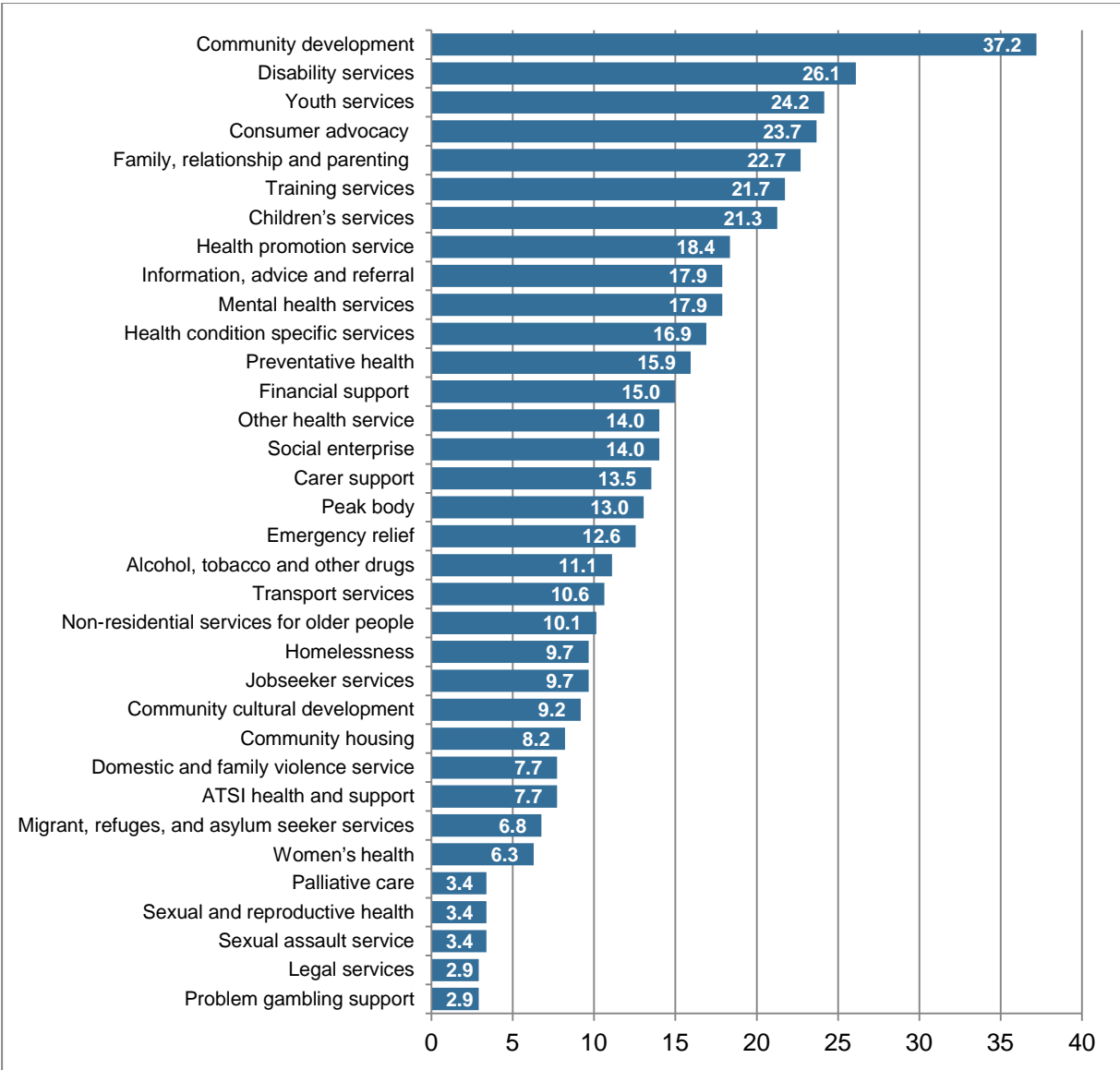
## 2.3 Other service types

Respondents were also asked which other types of services their organisations delivered. On average, organisations indicated 3.6 other types of services, in addition to their main service type, indicating the diversity and breadth of contribution made by each organisation. A

breakdown showing the number of organisations which selected their main and other service types is in Appendix A (see Table 33). Many service types were more likely to be delivered as 'other' rather than 'main services'. Emergency relief was the main service type for two organisations, but was delivered by 26 in total. Similarly, financial support was delivered by 31 organisations, but was the main service type for only three. Youth services were delivered by 50 services but were the main service type for only seven organisations.

The proportion of organisations delivering each service type, as either the main or other service, is shown in Figure 1. Overall, the most common service type delivered was community development, selected by 77 organisations (37.2%). Disability services, youth services, consumer advocacy, family services, training and children's services were also delivered by more than one in five organisations.

**Figure 1 Proportion of organisations delivering service type (as either main service or other service) (n=207)**



## 2.4 Involvement with NDIS

As indicated above, a large number of organisations delivered disability services as their main or other service type. As such, many organisations were expected to be involved with National Disability Insurance Scheme (NDIS). To capture this, respondents were asked if they were registered to provide NDIS (Table 4).

More than 1 in 4 responding organisations (27.5%) reported that they were registered to provide NDIS in Tasmania, while 8.3% were unsure. All 11 private for-profit businesses who responded to the survey said they were registered to provide NDIS. Among not-for-profits, 23.3% were registered to provide NDIS, and 8.8% were unsure.<sup>3</sup>

**Table 4 Provision of NDIS by non-profit and for-profit status**

Type of organisation	Registered to provide NDIS in Tasmania		Not registered to provide NDIS in Tasmania		Not sure		All	
	n	%	n	%	n	%	n	%
Not-for-profit	45	23.3	131	67.9	17	8.8	193	100.0
Private (for-profit) business	11	100.0	0	0.0	0	0.0	11	100.0
Total	56	27.5	131	64.2	17	8.3	204	100.0

Note: Three not-for-profit organisations did not answer the NDIS question.

Of the 56 organisations which reported being registered to provide NDIS, 26 said their main service type was disability services, and seven said it was non-residential care for older people (including HACC). Smaller numbers reported their main service type was community housing, mental health, carer support, health-specific services, family services, jobseeker and training services, children's services, emergency relief, and ATSI services. This demonstrates the wide range of community service organisations involved in NDIS in Tasmania.

## 2.5 Annual income (size)

Organisation's was measured according to their total income for the 2014-15 financial year. Organisations were instructed to provide an estimate in dollars, and to include income related to their organisation's operations in Tasmania only. The seven respondents who chose not to answer the question were directed to a subsequent question inviting them to provide an estimate of income in one of five ranges, or to select the option 'I prefer not to say' (which was selected by only two respondents). Prior to analysis, the reported information was checked and cleaned.<sup>4</sup>

<sup>3</sup> The disparity between for-profit and not-for-profit reflects the inclusion of for-profits in the sample based on the list of NDIS providers in Tasmania.

<sup>4</sup> Five respondents who provided information in the ranges (rather than as a number) were assigned an income set at the midpoint of the range selected. Those who preferred not to provide income information were assigned

Based on the resulting data, organisations reported \$2,187,884 in income on average. However, this mean figure was influenced by the 12 organisations which reported incomes of \$10 million or more. Of more interest is the median figure of \$385,178, which means half of the Tasmanian organisations in the survey reported incomes under this figure.

## Income deciles

Analysis of income levels in each of the 10 income deciles (each which contain 20 or 21 organisations) provides insight into the size of community sector organisations. Table 5 shows the upper level cut-point for each income decile, that is, the highest income reported by each decile. This indicates that relatively large proportions of organisations had very low incomes. In particular:

- The smallest 10% of organisations reported less than \$38,520 in income in the 2014-15 financial year.
- The second lowest 10% of organisations reported between \$38,521 and \$150,000 (indicating that 20% of organisations received less than \$150,000).
- The third lowest decile received between \$150,000 and \$201,200, indicating that 30% of organisations received less than \$201,200.

Smaller proportions of responding organisations had very high incomes:

- The largest 10% of organisations reported income in a very wide range: between \$5.8 million and \$62.7 million (the highest reported figure).
- The largest 20% of organisations received over \$1.94 million (above the 8<sup>th</sup> decile).

## Size categories based on income

The size of organisations can also be understood by examining the proportion of organisations with income in particular ranges. A breakdown by income level is provided in Table 6 and Figure 2. This shows that around 1 in 9 organisations (23, or 11.1%) reported income which was very low (under \$50,000). Around double this proportion (22.7% of all respondents) reported income between \$50,000 and \$250,000. 1 one in 8 organisations (12.0%) had more than \$5 million in income.

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the median annual income figure for the sample (\$385,178). Organisations were also assigned the median income figure in 19 cases where there were obvious errors, such as where reported incomes were very low (under \$1000) but organisations reported employing paid employees.

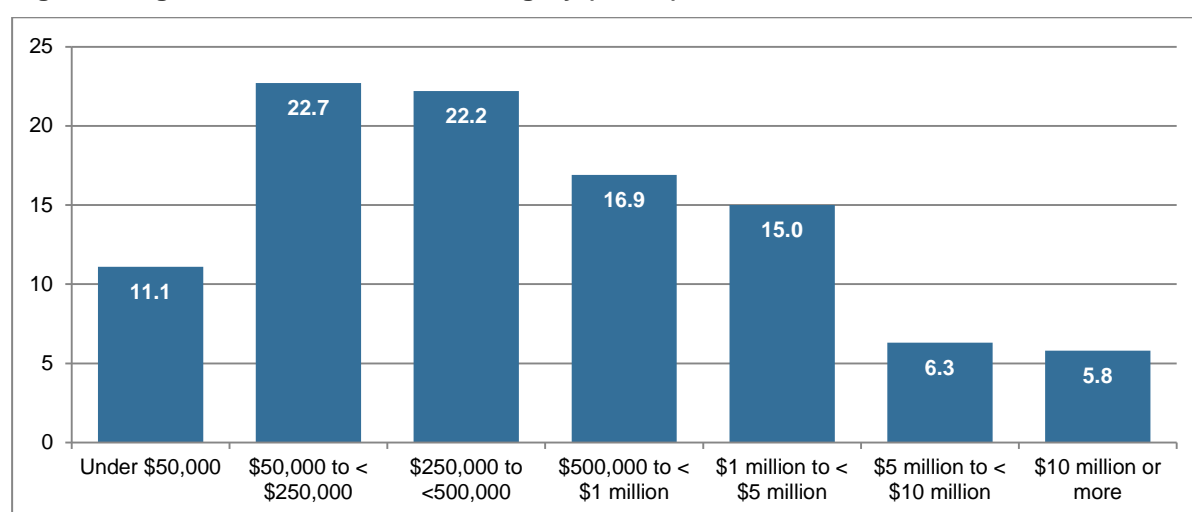


**Table 5 Upper cut-points for deciles, organisation's income in Tasmania**

	Upper cut-point (\$)
1 <sup>st</sup> decile (Smallest 10% of organisations)	\$38,520
2 <sup>nd</sup> decile	\$150,000
3 <sup>rd</sup> decile	\$201,200
4 <sup>th</sup> decile	\$351,700
5 <sup>th</sup> decile	\$385,178
6 <sup>th</sup> decile	\$623,459
7 <sup>th</sup> decile	\$895,190
8 <sup>th</sup> decile	\$1,939,914
9 <sup>th</sup> decile	\$5,818,056
10 <sup>th</sup> decile (highest reported figure)	\$62,696,783

**Table 6 Organisations' income ranges**

	n	%
Under \$50,000	23	11.1
\$50,000 to < \$250,000	47	22.7
\$250,000 to < \$500,000	46	22.2
\$500,000 to < \$1 million	35	16.9
\$1 million to < \$5 million	31	15.0
\$5 million to < \$10 million	13	6.3
\$10 million or more	12	5.8
Total	207	100

**Figure 2 Organisations in each size category (n=207)**

## 3 Volunteers in Tasmania's community sector

Community service provision relies on the engagement of both paid workers and volunteers. The survey firstly asked whether volunteers were involved in the organisation in any way. Those which did involve volunteers were then asked a range of questions relating to their experience with volunteers.

### 3.1 Numbers of volunteers

Volunteers contribute to the work of most Tasmanian community service organisations. In total, 184 organisations (88.9%) reported that volunteers were involved in their organisation in some way. Among the 23 organisations which did not have volunteers involved, 10 were private-for-profit businesses, registered to deliver NDIS. Only one for-profit respondent reported having volunteers involved.

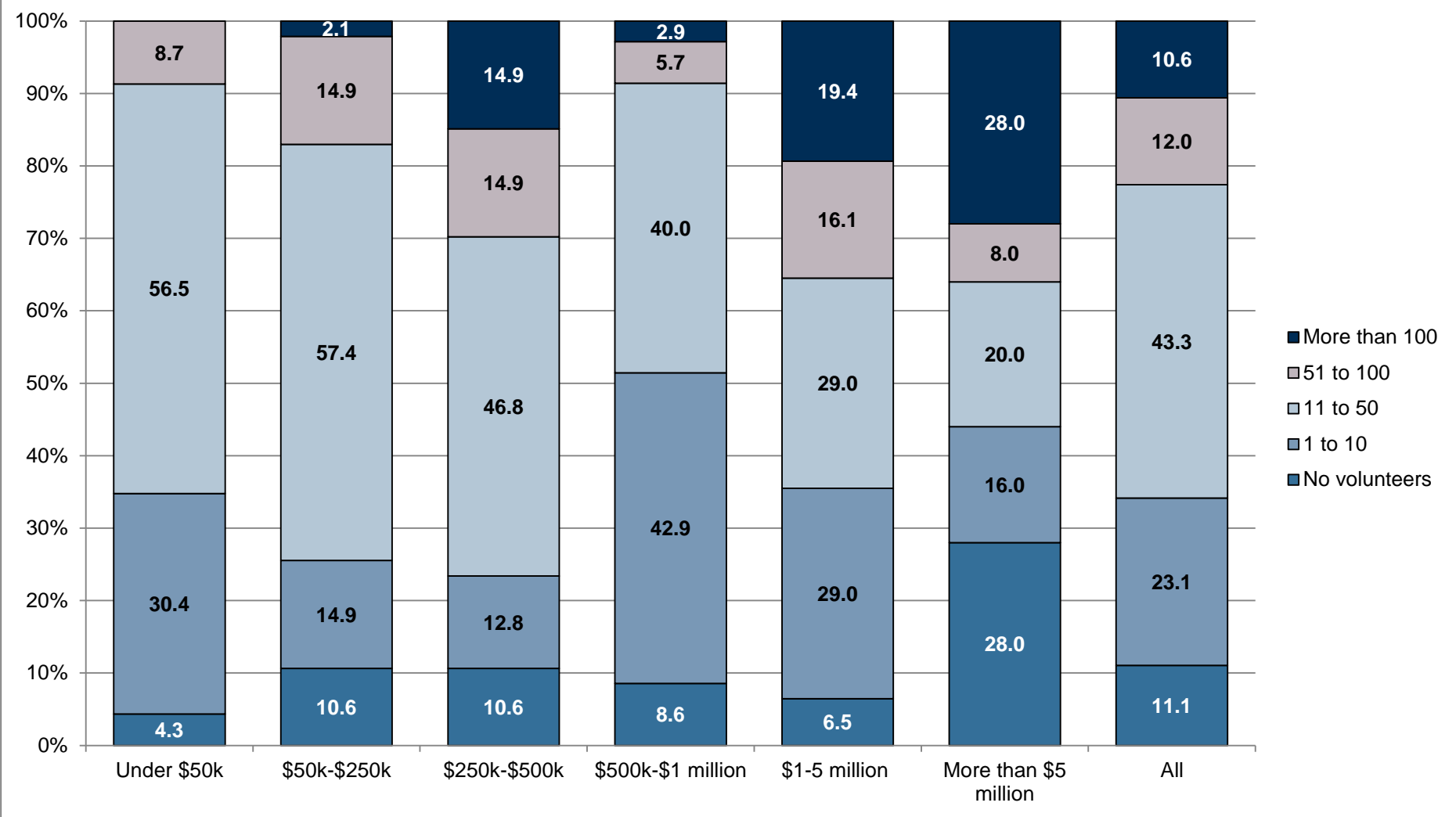
Figure 3 shows the proportion of organisations with different numbers of volunteers, measured in ranges. Among all organisations:

- Around 1 in 9 organisations (11.1%) had no volunteers;
- Almost 1 in 4 (23.1%) had between 1 and 10 volunteers;
- Slightly more than 2 in 5 (43.3%) had between 11 and 50;
- Around 1 in 8 (12.0%) had between 51 and 100 volunteers, and
- Around 1 in 10 (10.6%) had more than 100 volunteers.

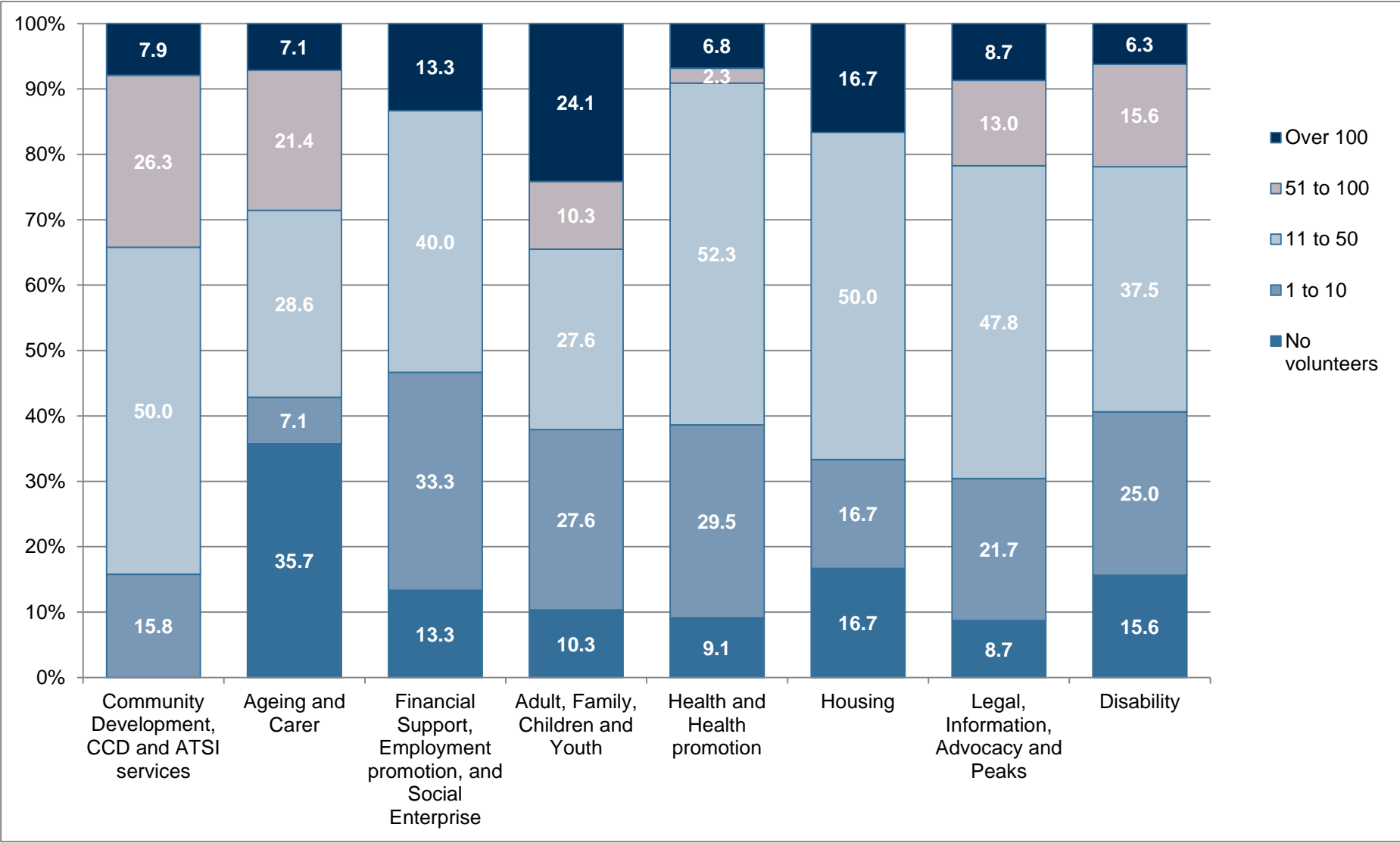
However, this differed according to the size of the organisation (see Figure 3). Among larger organisations (with more than \$5 million), 28% had no volunteers and the same proportion had more than 100 volunteers. Among very small organisations (with annual income of less than \$50,000), 4.3% had no volunteers, 30.4% had between 1 and 10 and 56.5% had between 11 and 50, but none had more than 100 volunteers, reflecting lack of capacity for very small organisations to engage with high numbers of volunteers.

Figure 4 shows that organisation whose main service was in the category of adult, children, family and youth tended to engage higher numbers of volunteers, with 24% having more than 100 volunteers. All organisations with community development, CCD and ATSI services as their main service type engaged volunteers, with over one in three reporting more than 50 volunteers.

**Figure 3 Numbers of volunteers, by income category (% of organisations)**



**Figure 4 Number of volunteers, by main service type (% of organisations)**

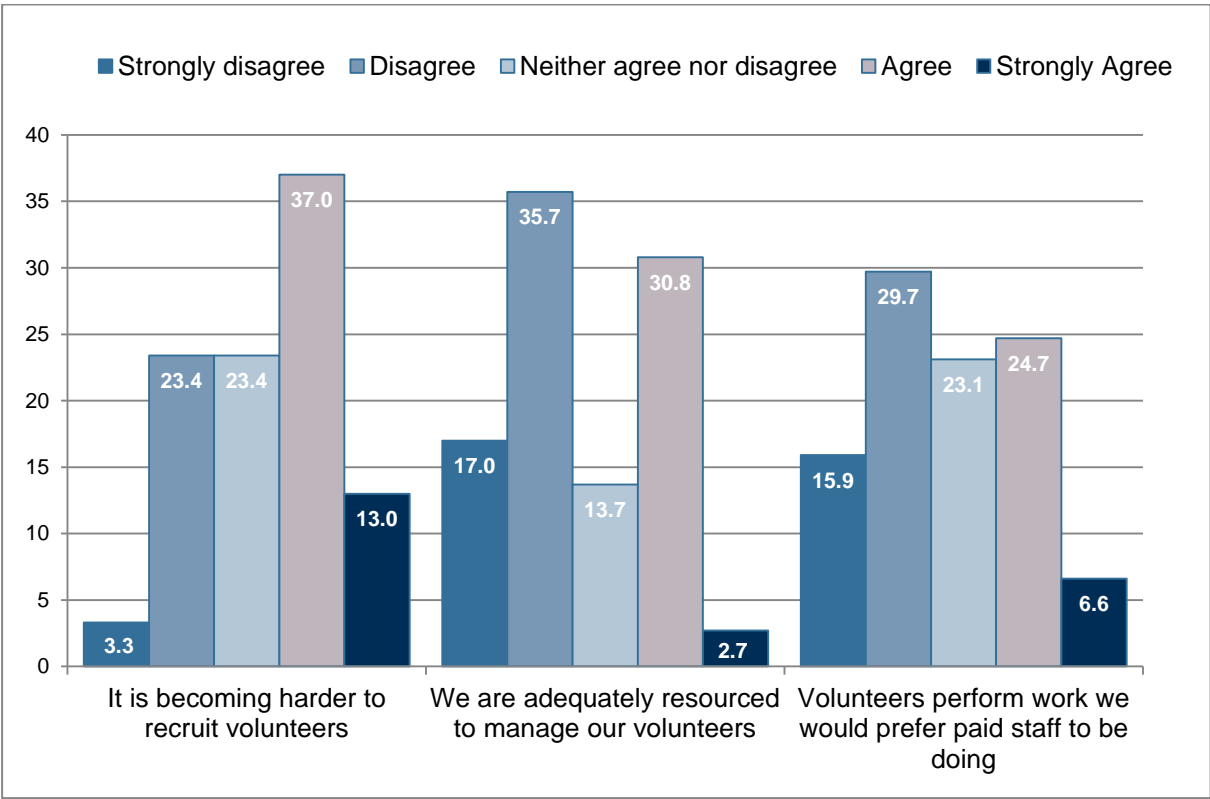


### 3.2 Experiences of managing volunteers

The 184 respondents which reported that their organisation had volunteers were asked how strongly they agreed with a series of statements about their experiences of managing volunteers. Figure 5 shows the proportions of organisations which agreed and disagreed with the statements.

- Overall, 50.0% of organisations with volunteers agreed or strongly agreed that it is becoming harder to recruit volunteers: 37.0% reported they agreed and 13.0% reported they strongly agreed.
- Around 1 in 3 agreed or strongly agreed they were adequately resourced to manage their volunteers (33.5%). However, more than half (52.7%) disagreed or strongly disagreed with the statement.
- Almost half disagreed or strongly disagreed that volunteers perform work they would prefer paid staff to be doing (45.6%). Fewer than this agreed or strongly agreed (31.3%).

Figure 5 Experiences of managing volunteers



### 3.3 Supporting volunteers

Organisations with volunteers were also asked whether they had a budget to support various aspects of involving, managing and developing volunteers. Just under half of those with volunteers had a budget for training them (46.2%). Slightly fewer had a budget for the administration associated with volunteers (43.5%) or for assisting volunteers with the costs of volunteering (44%).

**Table 7 Proportion of organisations which had a budget to support volunteers**

	Had a budget		Did not		All	
	n	%	n	%	n	%
Training volunteers	85	46.2	99	53.8	184	100
Administration associated with managing volunteers	80	43.5	104	56.5	184	100
Assisting volunteers with the costs of volunteering (eg transport, food)	81	44.0	103	56.0	184	100

### 3.4 Hosting volunteers through Work for the Dole

Among the 184 organisations which had volunteers involved, 39 (21.2%) reported that they were host organisations for Work for the Dole. A relatively high proportion of organisations whose main service type was in the category of community development, CCD and ATSI services were host organisations for Work for the Dole (20 organisations, 52.6%). In contrast, only one organisation in the category of 'health and health promotion' was involved with Work for the Dole, although two were unsure. A breakdown by main service type is in Table 34, Appendix A- Supplementary Tables.

These 39 organisations were asked questions about how well resourced they were with respect to Work for the Dole. Respondents were split on each measure, with close to half feeling that on balance they were well resourced to deliver Work for the Dole and slightly more than half feeling poorly resourced to do so.

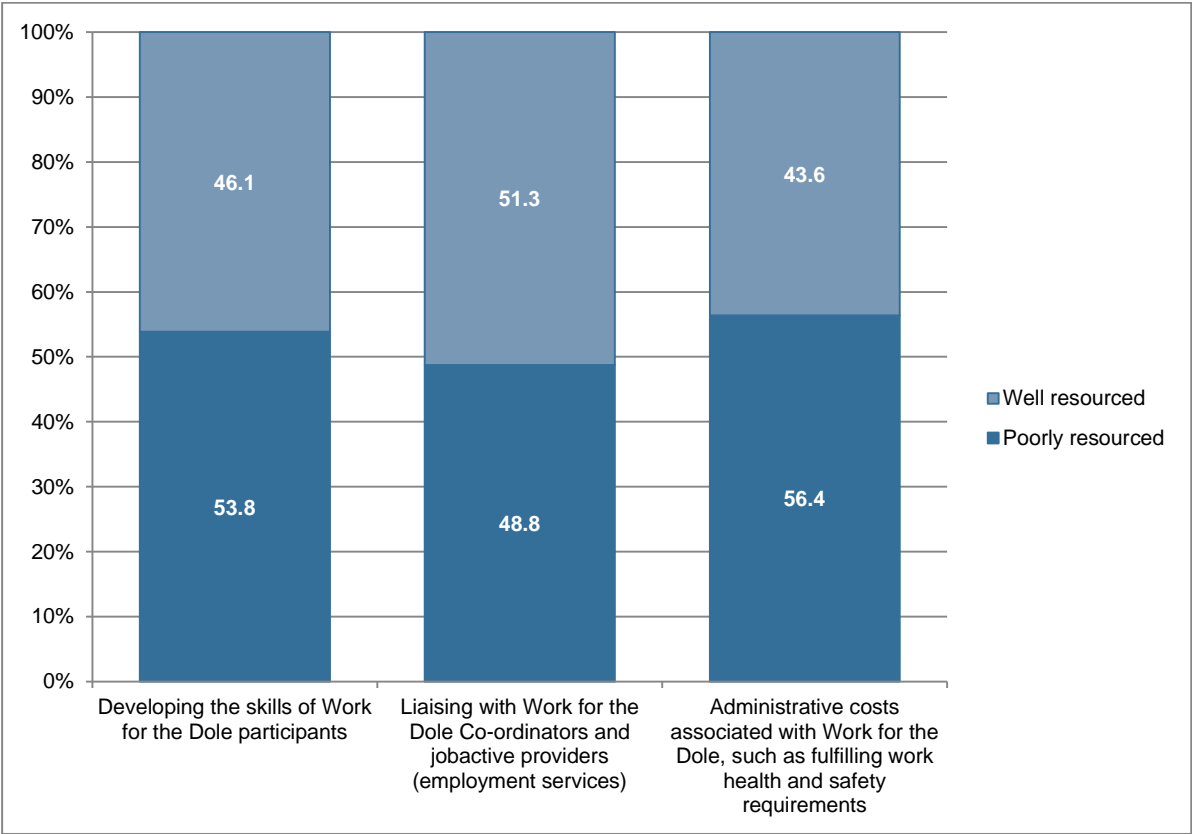
Overall, resourcing of organisations to provide Work for the Dole is sub-optimal, and may undermine the capacity of the program to achieve the best possible outcomes for unemployed people. A little over half of organisations said they were very or poorly resourced for developing the skills of Work for the Dole participants (53.8%). A little under half (48.7%) said they were very or poorly resourced for liaising with Work for the Dole co-ordinators and jobactive providers. Over half (56.4%) reported being poorly resourced for the administrative costs associated with Work for the Dole, such as fulfilling work health and safety requirements.

Figure 6 shows the proportion of organisation which said they were very or poorly resourced, or fairly or very well resourced on each measure.

**Table 8 Perspectives on resources to support aspects of Work for the Dole (% , n=39)**

	Very poorly resourced	Fairly poorly resourced	Fairly well resourced	Very well resourced	Total
Developing the skills of Work for the Dole participants	12.8	41.0	41.0	5.1	100
Liaising with Work for the Dole Co-ordinators and jobactive providers (employment services)	7.7	41.1	46.2	5.1	100
Administrative costs associated with Work for the Dole, such as fulfilling work health and safety requirements	12.8	43.6	35.9	7.7	100

**Figure 6 Organisations which felt they were well or poorly resourced for Work for the Dole (%)**



# 4 Paid employees in Tasmania's community sector

After exploring issues relating to volunteers, the survey asked respondents several questions about paid staff. Questions about employment characteristics, turnover and staff development were skipped for the 26 organisations which reported having no paid staff in the last pay period.

## 4.1 Numbers of paid staff

Respondents were asked how many full time and part time staff they had in Tasmania. The survey software was programmed to sum these figures to provide the total number of employees for the organisation. Together, responding organisations employed 8,037 staff. The number of paid staff in each organisation ranged between 0 and 820. While the average number of staff in each organisation was 38.8, this figure was influenced by the small number of large employers in the sample. More telling is the median figure of seven, which indicates that half of responding organisations had seven or fewer paid staff.

Figure 7 shows the proportion of organisations by the number of paid staff organised into categories. Thirty percent of organisations had between 1 and 5 staff, and around 1 in 8 (12.6%) had no paid staff. A small number of organisations had very high numbers of staff: around 1 in 10 organisations reported more than 100 paid staff. Six organisations had more than 300 paid employees.

**Figure 7 Proportion of organisations by numbers of staff.**

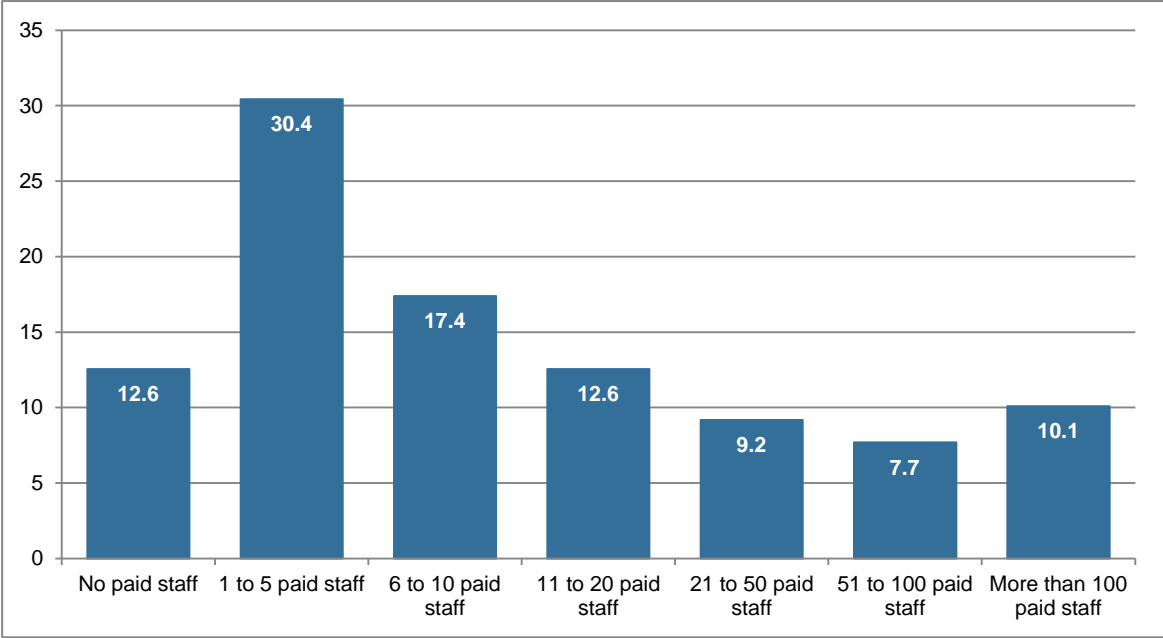


Table 9 shows the distribution of paid staff in a different way, using deciles. This indicates that the smallest 10% of organisations had no employees (indeed, as shown above, 12.6% had no paid staff). The 2nd bottom decile had up to two employees, indicating that 20% of



organisations had two or fewer paid staff. The third bottom decile of organisations had up to three paid staff.

At the other end of the distribution, the 10% of organisations which had the most paid staff had between 106 and 820 employees. The largest 20% of employers had more than 43 staff. Overall, the pattern of the distribution of paid staff in Table 9 shows that the overwhelming majority of Tasmanian community service organisations have very few paid staff.

**Table 9 Cutpoints for deciles, numbers of paid staff**

	Number of staff at cutpoint for decile
1 <sup>st</sup> decile cutpoint (Smallest 10%)	0
2 <sup>nd</sup> decile	2
3 <sup>rd</sup> decile	3
4 <sup>th</sup> decile	5
5 <sup>th</sup> decile	7
6 <sup>th</sup> decile	10
7 <sup>th</sup> decile	18
8 <sup>th</sup> decile	43
9 <sup>th</sup> decile	106
10 <sup>th</sup> decile (highest reported figure)	820

## 4.2 Employment characteristics

Together, responding organisations had 8,037 staff. More than 1 in 3 employees (35.8%) were in organisations whose main service type was disability<sup>5</sup> (see Table 10). Of the 8,037 paid staff, 2,111 were employed full time (26.3%) and 5,926 were employed part time (73.7%). The proportions working full and part time differed according to organisation's main service type (Table 11). In the categories of housing, and in legal, information, advocacy and peaks, more than 3 in 5 employees were employed full time (63.9% and 68.6% respectively). By contrast, in organisations which were focused on ageing and carer services, there were very low rates of full time employment: only 1 in 10 were employed full time (10.2%).

The proportion of staff working on a permanent basis also differed by main service type (Figure 8). While 7 in 10 employees were employed on a permanent / ongoing basis overall (69.7%), this was much higher in organisations whose main service type was housing (89.1%), and those focused on financial support, employment and social enterprise (94.3%). Permanent employment was much lower in organisations whose main service type was community development, CCD and ATSI services (51.8%).

<sup>5</sup> As many organisations deliver multiple service types, staff in services whose main type is disability may be employed to deliver other types of services delivered by the organisation. As such, it should not be assumed all the organisations staff are delivering services associated with their main service type.

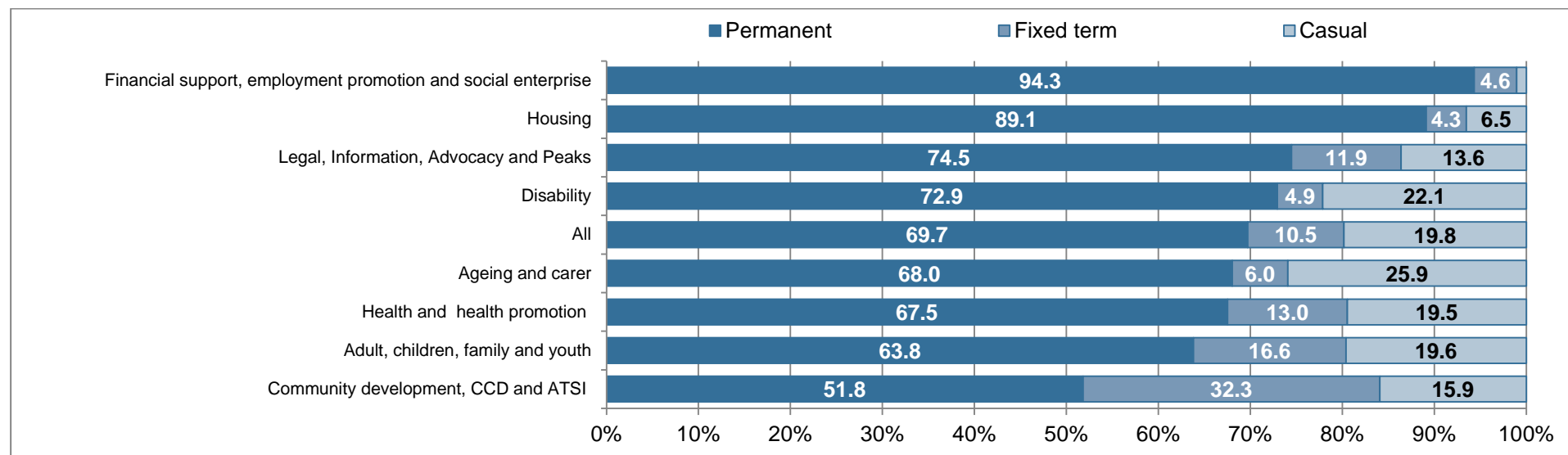
**Table 10 Number of staff by main service type**

	<b>Total number of staff</b>	<b>% of responding organisation's total staff</b>
Community development, CCD and ATSI services (n=38)	712	8.9
Ageing and carer (n=14)	1423	17.7
Disability (n=32)	2874	35.8
Financial support, employment promotion and social enterprise (n=15)	388	4.8
Adult, children, family and youth (n=29)	1330	16.5
Health, and health promotion (n=44)	777	9.7
Housing (n=12)	230	2.9
Legal, Information, Advocacy and Peaks (n=23)	303	3.8
<b>Total</b>	<b>8037</b>	<b>100.0</b>

**Table 11 Number of staff working full and part time basis**

	Full time		Part time		Total number of staff	
	n	%	n	%	n	%
Community development, CCD and ATSI services	221	31.0	491	69.0	712	100.0
Ageing and carer	145	10.2	1278	89.8	1423	100.0
Disability	630	21.9	2244	78.0	2874	100.0
Financial support, employment promotion and social enterprise	128	33.0	260	67.0	388	100.0
Adult, children, family and youth	441	33.1	889	66.8	1330	100.0
Health and health promotion	191	24.6	586	75.4	777	100.0
Housing	147	63.9	83	36.1	230	100.0
Legal, Information, Advocacy and Peaks	208	68.6	95	31.4	303	100.0
Total	2111	26.3	5926	73.7	8037	100.0

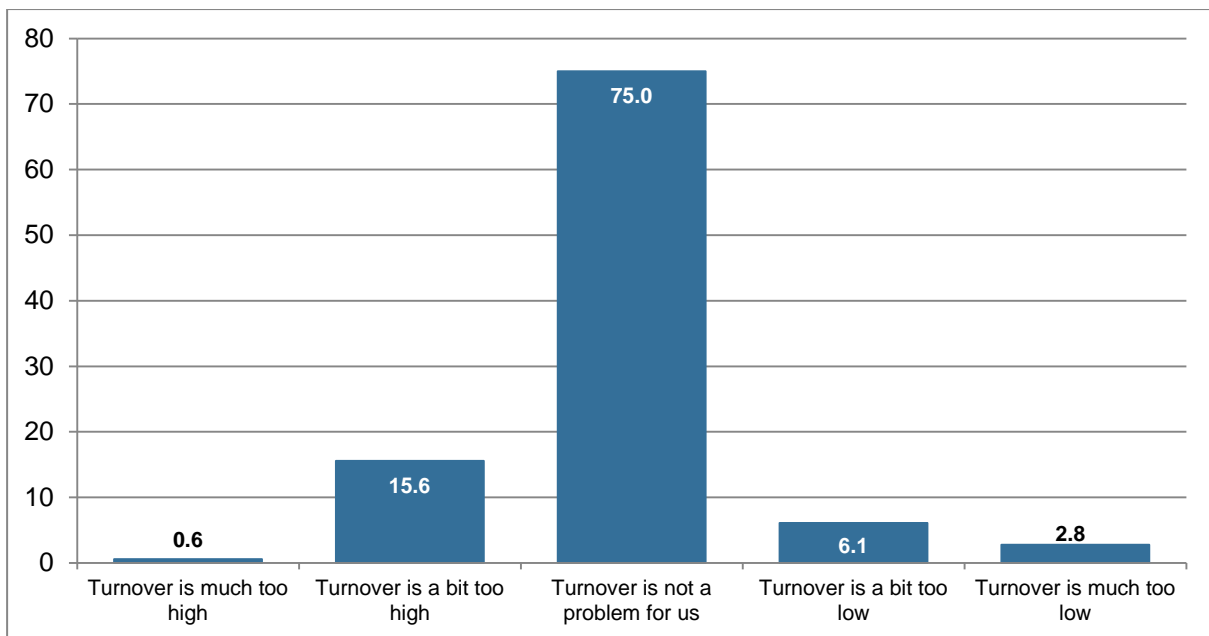
**Figure 8 Permanent, fixed term and casual, by main service type (%)**



## 4.3 Staff turnover

The survey asked respondents to rate their perceptions of turnover in their organisations. Of the 180 organisations that answered the question, three quarters (75.0%) said that turnover was not a problem in their organisation. However, 28 organisations (15.6%) said turnover was a bit too high and one said it was much too high (see Figure 9). The 29 organisations who said turnover was too high were thinly spread across most categories of main service type. However, 15 were delivering disability services as their main or other service type, indicating this may be an area where high turnover is experienced.

**Figure 9 Respondents' perceptions of turnover in their organisation (% , n=180)**



Respondents who felt turnover was too high in their organisation were asked which kind of paid staff had been hard to retain in the last 12 months. Most commonly, respondents reported that it had been difficult to retain professionals with qualifications (21 organisations), senior or middle level managers (18 organisations), other practitioners (14 organisations), and administrative staff (14 organisations)

The survey also asked respondents about their organisation's experiences of attempting to recruit paid staff to their organisation. Overall, 118 organisations (65.2% who answered the question) had advertised a paid position in the last 12 months. Of these, 40 (33.9%) said it was difficult to find suitable staff to fill senior management positions, and 12 (10.2%) had found it hard to find middle level managers. Thirty-one organisations (26.2%) reported that it was hard to find suitable staff to fill professional positions, and 37 (31.4%) found it hard to find other practitioners. Eighteen respondents (15.3%) said their organisation had found it hard to fill administrative positions.

## 4.4 Supporting paid employees

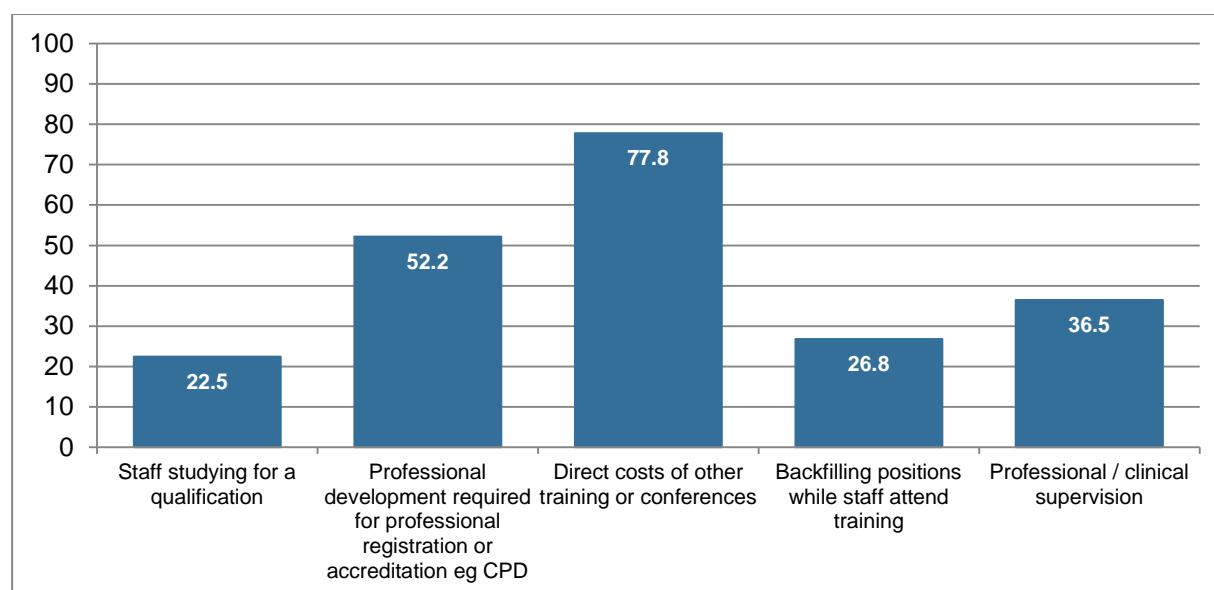
A series of questions were asked to capture organisations' capacity to support staff. Respondents were asked if they had a budget to support staff studying for a qualification, and for professional supervision and professional development, including costs of attending training or conferences, and backfilling.

Table 12 shows that less than a quarter had budget to support staff studying for a qualification (22.5%). More than this - around half - had a budget to support staff in their professional development required for professional registration or accreditation (52.2%). Over three quarters (77.8%) had a budget for the direct costs of other kinds of training or conferences. However, only a quarter had budget to backfill positions while staff attend training.

**Table 12 Proportion with a budget to support staff**

	Had a budget		Did not		Not sure		All	
	n	%	n	%	n	%	n	%
Staff studying for a qualification	40	22.5	131	73.6	7	3.9	178	100
Professional development required for professional registration or accreditation, eg CPD (continuing professional development)	93	52.2	82	46.1	3	1.4	178	100
Direct costs of other training or conferences	140	77.8	36	20.0	4	2.2	180	100
Backfilling positions while staff attend training	48	26.8	127	70.9	4	2.2	179	100
Professional / clinical supervision	65	36.5	108	60.7	5	2.8	178	100

**Figure 10 Proportion of organisations with a budget to support staff**



## 4.5 Assistance from Skills Tasmania

Skills Tasmania offers grants and assistance for training and workforce development. Respondents were asked if, in the last 12 months, they had applied for funding from Skills Tasmania to help pay for training their workforce. Three quarters of the 180 respondents (75%) said they did not apply in the last 12 months and a further 6.1% said they were unsure. Only 8.3% of respondents reported they had applied and had their applications granted in full, with almost as many having their application partially granted. Five said they were unsuccessful.

Of the 15 organisations who said their application was granted in full, four said their main service type was disability, and four said non-residential services for older people. Seven were organisations with incomes over \$5 million.

**Table 13 Whether organisation had applied for funding from Skills Tasmania to help pay for training**

	n	%
Applied, and application was granted in full	15	8.3
Applied, and application partially granted	14	7.8
Applied but unsuccessful	5	2.8
Have not applied in last 12 months	135	75.0
Not sure	11	6.1
Total	180	100.0

## 5 Governance

A series of questions were included to explore governance issues across the sector, and respondents' perceptions of their governance arrangements. Questions explored organisations' strategic or business plans, and their Boards or Management Committees, including Board membership and effectiveness.

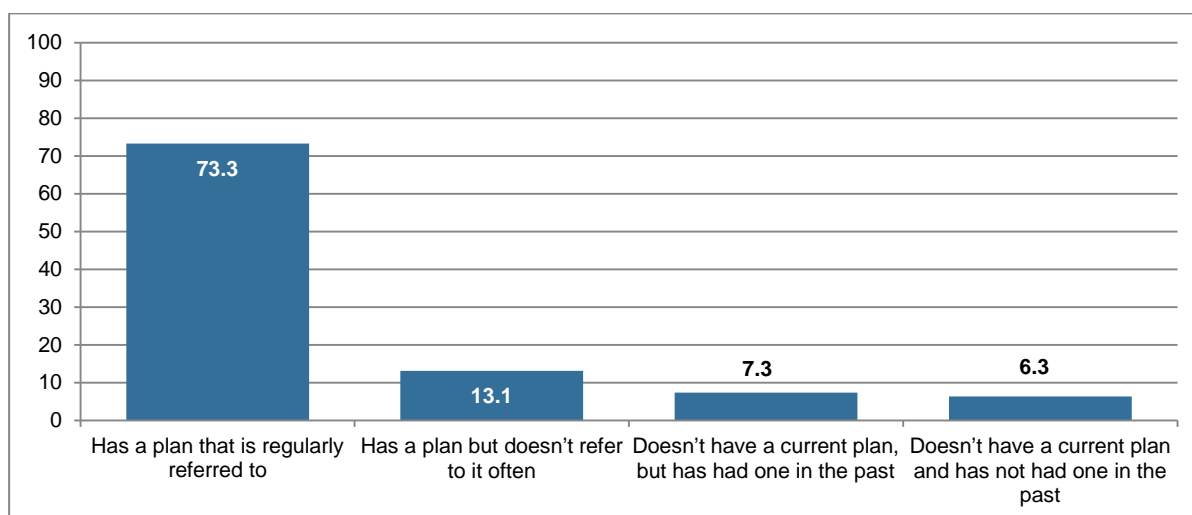
### 5.1 Organisations with a strategic or business plan

The vast majority of organisations reported having a current strategic or business plan (86.4%). This is shown in Table 14 and Figure 11. Almost 3 in 4 organisations had a plan that they regularly referred to (73.3%) and a further 13.1% had one but did not refer to it often.<sup>6</sup> Among the 28 organisations which did not have a current plan, 15 said they had one in the past. The 13 organisations that said they had never had a plan were small. All 13 had five or fewer paid staff, and 11 had incomes under \$250,000.

**Table 14 Organisations with a current strategic or business plan**

	n	%
Has a plan that is regularly referred to	151	73.3
Have a plan but don't refer to it often	27	13.1
Don't have a current plan, but have had one in the past	15	7.3
Don't have a current plan and have not had one in the past	13	6.3
All	206	100.0

**Figure 11 Organisations with a current strategic or business plan**



<sup>6</sup> These figures are similar to those found in NSW (Cortis and Blaxland, 2015). In NSW and 2015, 70.8% of organisations reported that they had a plan that was regularly referred to, and 16.4% reported that they had one but did not refer to it often (87.2% in total).

## 5.2 Boards and Management Committees

Respondents were asked if their organisation had a Board or Management Committee. Almost all (199 organisations, or 96.1%) said they did. Of the eight organisations which said they did not have one (seven organisations) or were unsure (one organisation), all but one were private for-profit businesses.

Those with a Board or Management Committee were then asked a series of questions about the composition and functioning of their governance body. Almost half of organisations with a Board or Management Committee (45.7%) reported that their governance body was composed of about the same numbers of men and women. Of the remainder, organisations were more likely to have female than male-dominated Boards or Committees. Seventy organisations had female dominated boards or committees (35.1%), and 15 of these were comprised of all women. Thirty-eight organisations (19.1%) had male dominated Boards or Committees, and five were entirely comprised of men.

**Table 15 Gender composition of Boards and Management Committees**

	n	%
All women	15	7.5
Mostly women and some men	55	27.6
About the same numbers of men and women	91	45.7
Mostly men and some women	33	16.6
All men	5	2.5
Total	199	100.0

## 5.3 Paid Board or Management Committee positions

Very few respondents reported that any positions on their Board or Management Committee were paid. Ten (5.0%) reported that all positions were paid, one reported that around half were paid, and three reported that a minority of positions were paid. However, the vast majority of organisations had Boards or Management Committees which operated on an entirely voluntary basis (185 organisations, or 93.0%). Of the 14 organisations that had any paid positions, 10 were organisations which had a total annual income of over \$500,000. Four of the 14 organisations which had any paid positions were female dominated, eight were male dominated and two were roughly balanced. Organisations with paid governance positions were spread across categories of main service type. However, four indicated that their main service type was non-residential services for older people.

Table 16 shows the number of organisations with various supports for Boards and Committees, ranked according to the most common form of support. Nine in 10 respondents (89.9%) reported having a reporting system to inform decision making, while around 8 in 10 (79.4%) had written explanations of roles and responsibilities, and induction processes for new members (78.4%). A little under two-thirds had a policy relating to recruitment of new



members (64.8%), and less than half had funds to provide training to new members (45.7%). This suggests that while some aspects are strong, there is scope to develop supports for organisational governance.

**Table 16 Organisations with supports for Boards and Committees**

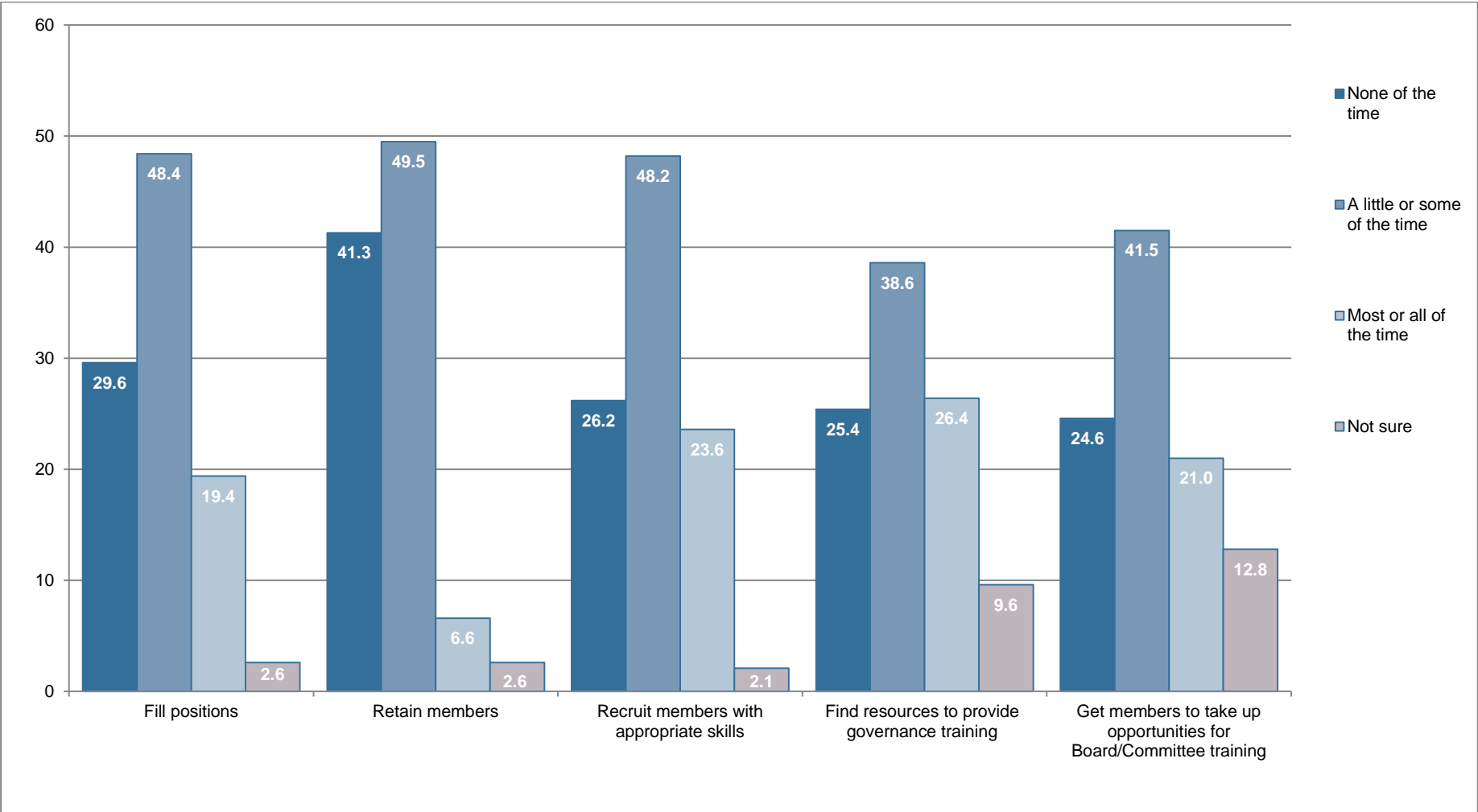
	n	%
A reporting system (eg staff or financial reports than informs decision making	179	89.9
Written explanations of members’ roles and responsibilities	158	79.4
Induction processes for new members	156	78.4
A process for resolving conflict	155	77.9
Policy relating to recruitment of new members	129	64.8
Funds to provide training to members	91	45.7

### 5.4 Difficulties recruiting Board Members

Most organisations had no, or only occasional difficulty recruiting board members, and retaining members does not appear a major problem. However, Figure 12 shows that 19.4% reported having difficulty filling positions most of the time or all of the time. Almost a quarter (23.6%) had difficulties recruiting members with appropriate skills, and around the same number had difficulty finding resources to provide governance training (26.4%).

These difficulties were examined for the 14 organisations which had any paid positions on their Board and Management Committee. Interestingly, none of these 14 organisations reported experiencing difficulty filling positions, or retaining members ‘all of the time’ or ‘most of the time’. Only 1 of the 14, an organisation for which a minority of board positions were paid, said they had difficulties recruiting members with appropriate skills ‘all of the time’. Although further research would be required to draw definitive conclusions, this provides some suggestion of the impact of payments for board and committee members.

**Figure 12 Frequency of difficulties in recruiting, retaining and developing Board and Committee Members**



## 5.5 Recruitment priorities

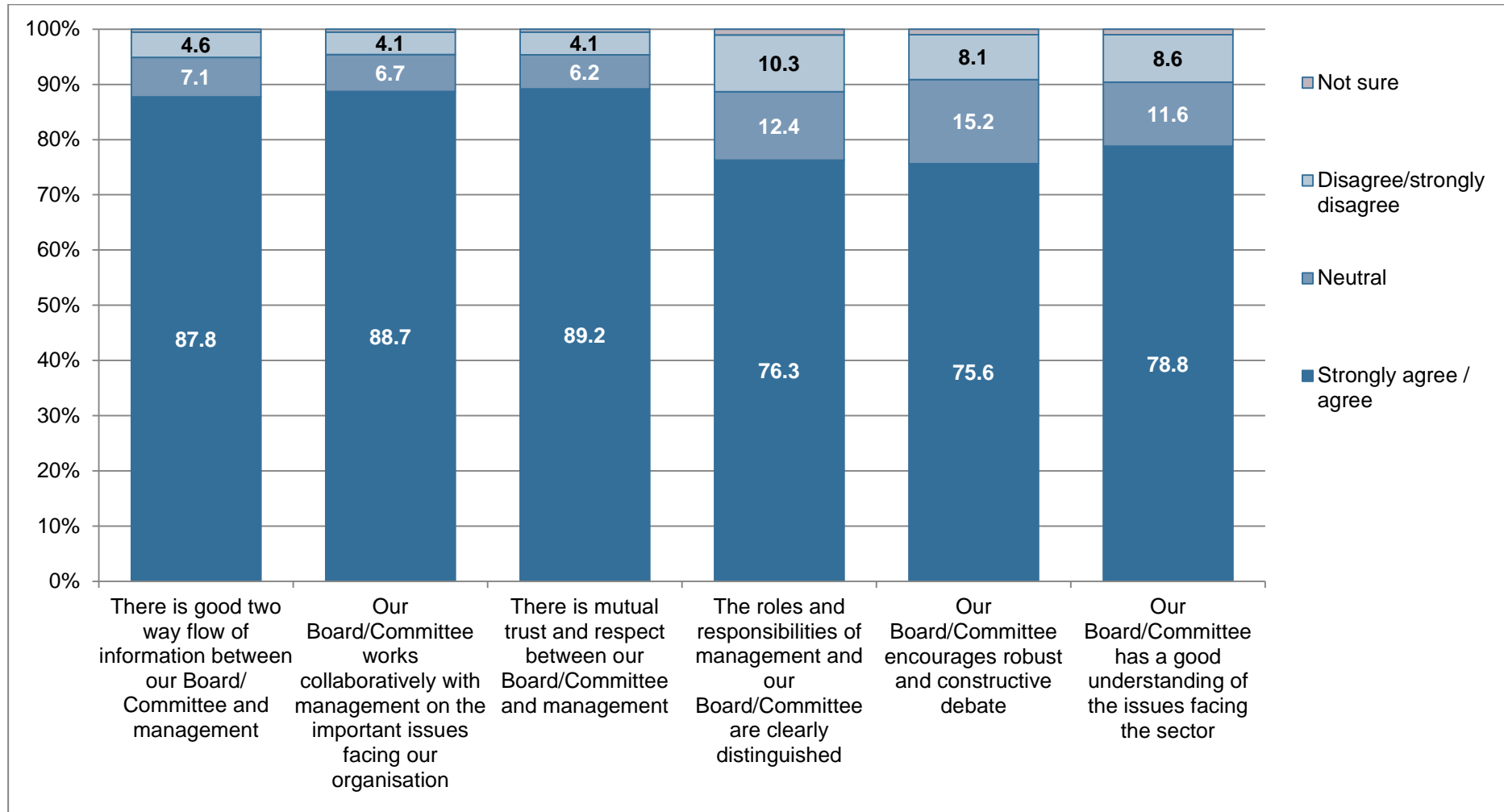
Respondents were asked whether last time they filled a position on their Board or Management Committee, it was most important to find someone with particular skills, or someone to represent a particular group, or whether they had another priority. This question was designed as an indicator of skill and representational priorities in Board recruitment. Overall, 136 out of the 196 organisations which answered the question indicated that it was most important to find someone with particular skills (69.4%) and 40 said it was most important to find someone to represent a particular group (20.4%). Twenty organisations said they had another priority, giving examples like 'any person willing to devote time' and someone with 'drive, commitment and enthusiasm'.

## 5.6 Functioning of Boards and Management Committees

The 199 organisations with a Board or Management Committee were also asked questions about the functioning of these governance bodies, and how effectively they worked with management. This shows that governance is a strength of Tasmania's community sector, with most respondents reporting effective, productive relationships with Boards or Management Committees.

On all indicators, the majority of respondents agreed or strongly agreed with the statements posted (see Figure 13, full data in Table 35, Appendix A- Supplementary Tables). Almost 9 in 10 respondents agreed or strongly agreed that there was mutual trust and respect between their governance body and management (89.2%); that their governance body works collaboratively with management on important issues (88.7%) and that there was good two way flow of information between the Board or Committee and management (87.8%). More than 3 in 4 respondents agreed or strongly agreed that their Board or Committee had a good understanding of the issues facing the sector (78.8%); that the roles and responsibilities of management and governance bodies were clearly distinguished (76.3%); and that their Board or Management Committee encourages robust and constructive debate (75.6%). Of those who did not agree or strongly agree, larger numbers were neutral than in disagreement with the statements.

**Figure 13 Agreement with statements about the functioning of Boards and Management Committees (n=199)**



## 6 Collaboration among Tasmania's community service organisations

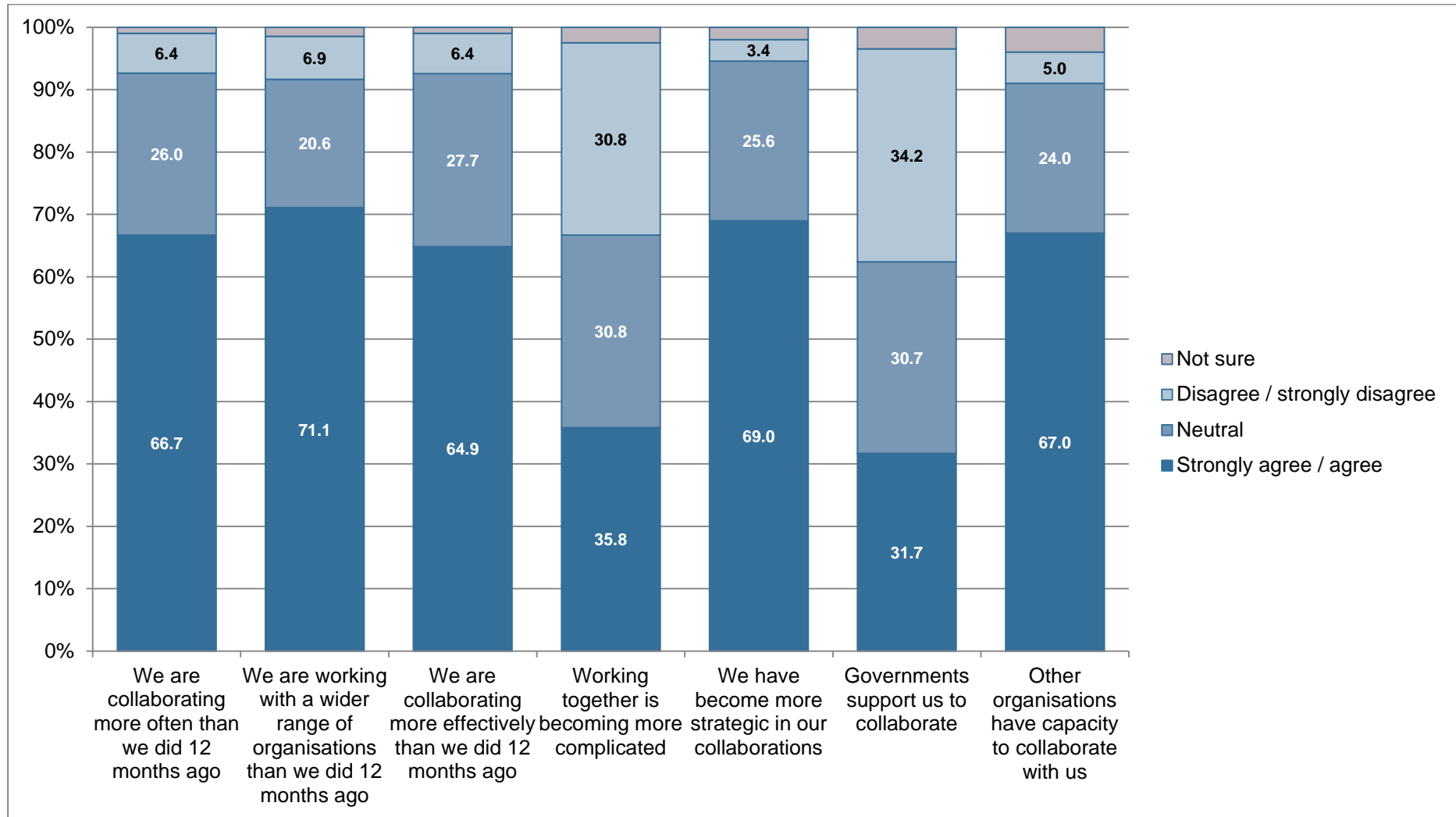
Community service organisations work across sectoral, organisational and professional boundaries to ensure services are accessible, comprehensive, complementary, responsive and co-ordinated around population needs (Scott, 2005). To explore collaborative capacity, survey respondents were asked a series of questions about their experience of working with other organisations in the last twelve months, and how collaboration had changed in the last year. Respondents were asked how strongly they agreed or disagreed with seven statements relating to working together. Results suggest an increasing focus on collaboration, although on each measure, many respondents were neutral.

### 6.1 Experiences of collaboration

Many organisations reported they are collaborating more intensively, strategically and effectively than 12 months prior. Figure 14, and the detailed data in Table 36, Appendix A-Supplementary Tables, shows that:

- Two thirds of respondents agreed or strongly agreed that their organisation was collaborating more often than 12 months ago (66.7%), and only 6.4% disagreed or strongly disagreed.
- 71.1% agreed or strongly agreed that they were working with a wider range of organisations than they did a year previously, and only 6.9% disagreed.
- 64.9% agreed or strongly agreed that they were collaborating more effectively than 12 months ago, and only 6.4% disagreed.
- Almost 7 in 10 (69.0%) agreed or strongly agreed that they were becoming more strategic in their collaborations. While 1 in 4 (25.6%) reported they were neutral on this measure, only 3.4% disagreed.
- 2 in 3 respondents agreed or strongly agreed that other organisations have capacity to collaborate with them (67.0%) and only 5 % disagreed.
- Respondents were split as to whether working together was becoming more complicated. The largest group (35.8%) agreed or strongly agreed with the statement, but 30.8% disagreed and the same proportion was neutral.
- Similarly, respondents were divided on the issue of availability of support to collaborate. More than 1 in 3 (34.2%) disagreed or strongly disagreed with the statement 'Governments support us to collaborate', while 31.7% agreed, and 30.7% were neutral.

**Figure 14 Agreement with statements on collaboration**



## 6.2 Initiatives to improve collaboration

The survey asked 'What could be done to help your organisation work more effectively with other organisations?' While some organisations said they felt they were already collaborating well with other organisations, others felt they needed more time, staff or information to collaborate, or felt competition was impeding collaboration. Typical responses included:

Funding for paid staff would make it easier for us to be represented at peak meetings. (Very small organisation providing services regarding a particular health condition)

Less competition between organisations for funding. This makes open and healthy collaboration difficult. (Large organisation providing health services)

We are all volunteers, with jobs, families and other commitments. It is hard to find time to do the basic management and governance work of the organisation, let alone collaborating with other organisations. Can you wave a magic wand and provide us with a few extra hours in the week? (Small organisation providing community housing)

Of those who offered suggestions on what would help them better work with other organisations, the most common ideas were for training, workshops and forums that would bring organisations together to explore common interests and collaborative strategies. For example, one felt they needed:

To have a clearer picture of which organisations are doing similar work. To have an accurate overview of the [disease we are concerned with] in Tasmania and how we can each target a particular area of need to avoid doubling up. (Very small organisation providing services regarding a specific health condition)

Others thought the following initiatives would be helpful for building collaborative capacity:

Coordinate professional forums for us to meet at and liaise better. (Small organisation providing health promotion services)

Providing forums for like-minded organisations to see the benefits of working together would be valuable. An example is the number of community services who have to pay staff for a 24/7 on call service. There is duplication and it is a huge cost but with some cooperation several services could group together and share the costs yet still be effective and meet the needs of the clients. (Very large organisation providing services for older people)

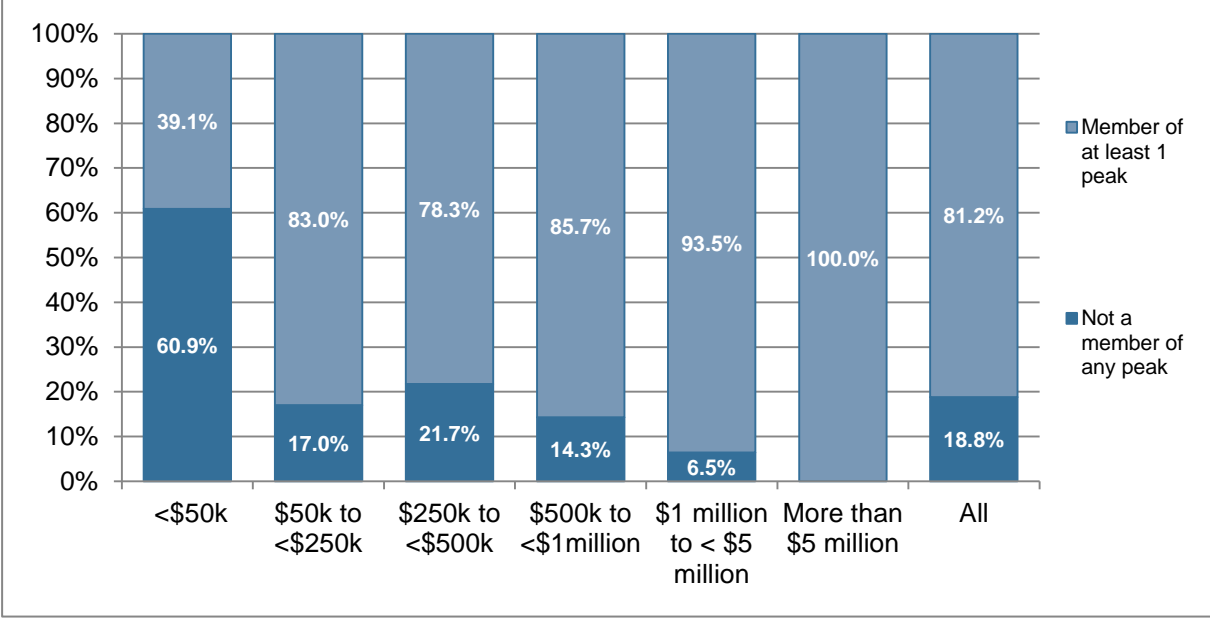
For discussion of organisations' initiatives around amalgamations, mergers and shared services, see Section 10.1 Mergers and sharing of services.

## 6.3 Peak body membership

Community service organisations are also represented and co-ordinated through a number of peak bodies. Organisations were asked if they were members of any of 13 peak agencies, or any others. More than 4 in 5 organisations (81.2%) reported being a member of at least one peak body, with a little under 1 in 5 (18.8%) reporting that they were not a member of any peak agency (see Figure 15).

Among very small organisations (with less than \$50,000 in annual income), less than half were members of any peak bodies (39.1%, compared with 81.2% overall). In contrast, over 90% of organisations with incomes over \$1 million were members of peak bodies, and all organisations with incomes over \$5 million were members of at least one peak body. Among the for-profit providers in the sample, peak body membership was low, only 5 of 11 respondents were members of any peak agencies.

**Figure 15 Proportion of organisations which were members of any peak body, by annual income (%)**





## 7 Income from government sources

As discussed in Section 2.5, respondents reported their organisation's total income in dollars for the 2014-15 financial year. They also reported the percentage of their organisation's total revenue from various sources. Of the 207 respondents, 158 received some income from the Tasmanian Government (76.3%). More than half (117 organisation, or 56.5%) received some income from the Australian Government. Much smaller numbers reported receiving any amount of income from local government sources (15 organisations, or 7.2%).

Table 17 provides the proportion of organisations in each income range that received any income from Tasmanian, Australian and local governments, and the mean amount received (and standard deviation, as an indicator of spread)<sup>7</sup>. Among all organisations, the Tasmanian Government tended to be the main source of sector funding, contributing to more than three quarters of organisations. On average, this amounted to 38.5% of total income, although there were large differences in this figure across organisations. In general, larger organisations were more likely than others to receive income from the Tasmanian Government. However, among organisations with incomes between \$50,000 and \$250,000, Tasmanian Government funding made a relatively high contribution to total income: 51.2%, on average (see Table 17 and Figure 16).

Table 18 and Figure 17 show receipt of public funding by main service type. Among housing; community development, CCD and ATSI services, ageing and carer; and disability services, over 4 in 5 organisations received Tasmanian government funding. State Government funding constituted over 40% of income, on average, among housing; community; disability; and legal, information, advocacy and peaks.

Australian Government funding was the next most common income source, after income from the Tasmanian Government. Federal funding was reported by more than half of organisations (56.5%) and on average, it constituted 24.4% of total income. However, this differed greatly among organisations. All organisations whose main service type was in the ageing and carer category received Australian government funding. Those in the \$1-\$5 million range were most likely to receive income from the Australian Government (90.3% received it). Those with incomes under \$50,000 were least likely to report receiving any income from the Australian Government, and as a result, it made only a modest contribution to total income for these organisations, on average.

Table 19 and Figure 18 provide a breakdown by region. Compared with all organisations, those operating only in the North West, and not in other areas, were slightly less likely to report receiving any income from the Tasmanian Government, while those operating only in the South were less likely to receive Australian Government funding. Higher proportions of those operating only in the North said they received income from local government (17.9% compared with 7.2% overall).

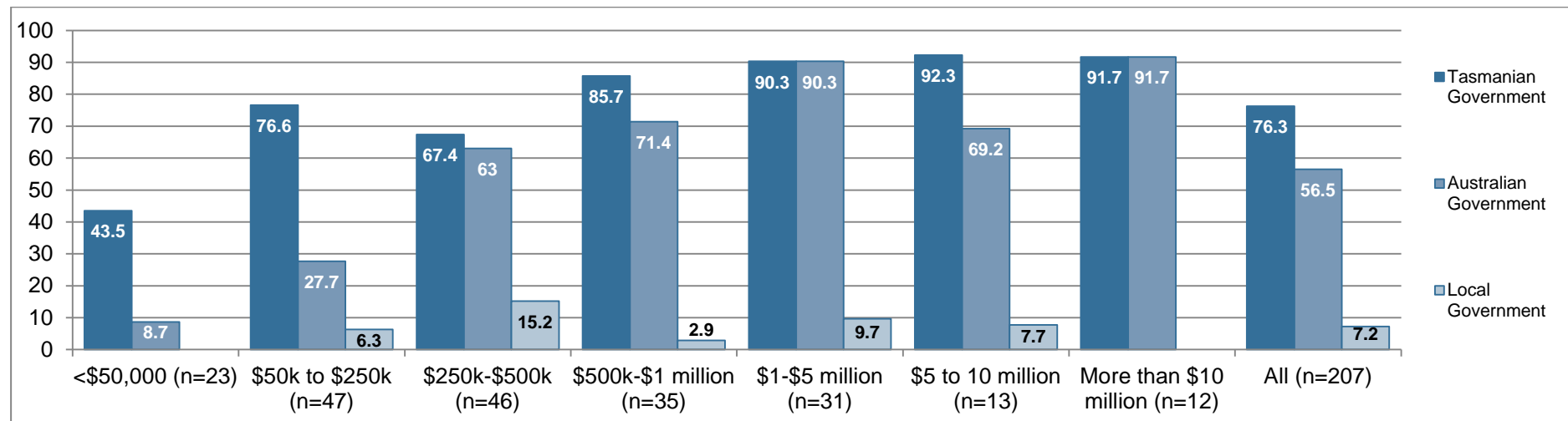
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<sup>7</sup> Low standard deviations indicate that figures tend to be close to the mean, while high standard deviations indicate larger distance from the mean.

**Table 17 Percentage of revenue from government sources, by size category**

	Tasmanian Government			Australian Government			Local Government		
	% that received any	Mean %	SD	% that received any	Mean %	SD	% that received any	Mean %	SD
<b>&lt;\$50,000 (n=23)</b>	43.5	17.0	29.2	8.7	3.8	17.7	0	0.0	0.0
<b>\$50k to \$250k (n=47)</b>	76.6	51.2	39.8	27.7	13.4	29.1	6.3	0.3	1.6
<b>\$250k-\$500k (n=46)</b>	67.4	32.7	32.0	63.0	28.8	32.3	15.2	6.8	1.0
<b>\$500k-\$1 million (n=35)</b>	85.7	45.7	33.4	71.4	27.8	27.6	2.9	0.0	0.2
<b>\$1-\$5 million (n=31)</b>	90.3	41.4	31.7	90.3	41.9	31.9	9.7	0.2	0.9
<b>\$5 to 10 million (n=13)</b>	92.3	27.5	31.5	69.2	21.8	28.3	7.7	0.2	0.6
<b>More than \$10 million (n=12)</b>	91.7	38.5	33.5	91.7	37.3	34.0	0	0.0	0.0
<b>All (n=207)</b>	76.3	38.5	35.1	56.5	24.4	31.1	7.2	0.5	3.3

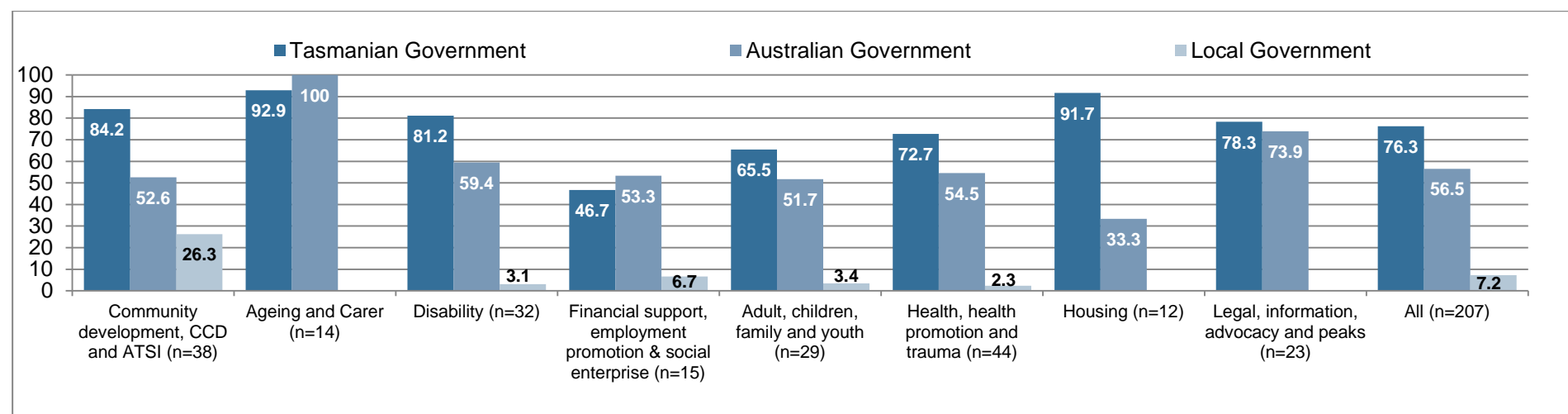
**Figure 16 Percentage of organisations with any amount of income from public sources, by income range (%)**



**Table 18 Percentage of revenue from government sources, by main service type**

	Tasmanian Government			Australian Government			Local Government		
	% that received any	Mean %	SD	% that received any	Mean %	SD	% that received any	Mean %	SD
<b>Community development, CCD and ATSI (n=38)</b>	84.2	50.0	34.4	52.6	21.4	30.1	26.3	2.1	7.3
<b>Ageing and Carer (n=14)</b>	92.9	15.0	14.4	100.0	61.1	22.7	0.0	0.0	0.0
<b>Disability (n=32)</b>	81.2	47.1	33.4	59.4	21.6	30.6	3.1	0.1	0.4
<b>Financial support, employment promotion &amp; social enterprise (n=15)</b>	46.7	13.7	20.4	53.3	23.4	31.4	6.7	0.7	2.6
<b>Adult, children, family and youth (n=29)</b>	65.5	33.6	36.7	51.7	17.8	25.4	3.4	0.0	0.2
<b>Health, health promotion and trauma (n=44)</b>	72.7	35.8	38.4	54.5	22.0	32.4	2.3	0.3	1.7
<b>Housing (n=12)</b>	91.7	45.1	33.2	33.3	10.2	22.0	0.0	0.0	0.0
<b>Legal, information, advocacy and peaks (n=23)</b>	78.3	46.4	34.2	73.9	31.8	32.7	0.0	0.0	0.0
<b>All (n=207)</b>	76.3	38.5	35.1	56.5	24.4	31.1	7.2	0.5	3.3

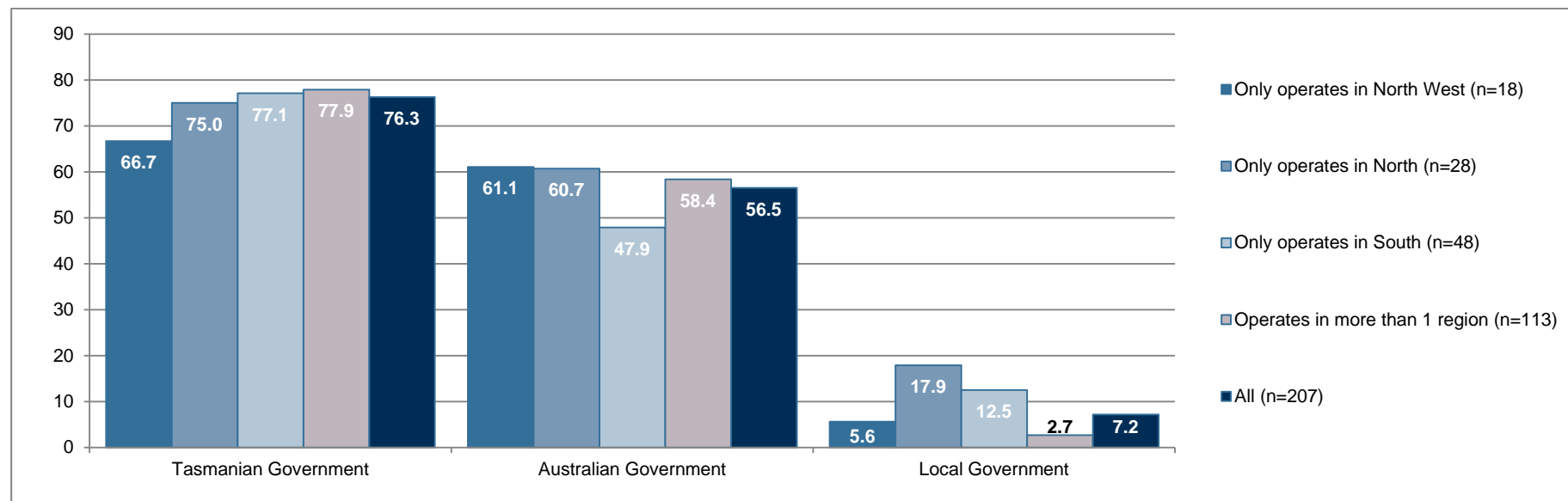
**Figure 17 Percentage of organisations with any amount of income from public sources, by main service type (%)**



**Table 19 Percentage of revenue from government sources, by region**

	Tasmanian Government			Australian Government			Local Government		
	% that received any	Mean %	SD	% that received any	Mean %	SD	% that received any	Mean %	SD
Only operates in North West (n=18)	66.7	29.6	35.6	61.1	33.9	37.1	5.6	0.6	2.4
Only operates in North (n=28)	75.0	41.1	35.2	60.7	33.1	34.1	17.9	2.6	8.4
Only operates in South (n=48)	77.1	49.5	37.6	47.9	16.4	26.4	12.5	0.2	0.8
Operates in more than 1 region (n=113)	77.9	34.7	33.1	58.4	24.1	30.6	2.7	0.1	1.1
All (n=207)	76.3	38.5	35.1	56.5	24.4	31.1	7.2	0.5	3.3

**Figure 18 Percentage of organisations with any amount of income from public sources, by region (%)**



## 7.1 Perceptions of Tasmanian Government funding arrangements

Those who reported income from the Tasmanian Government for the 2014-15 financial year, or those who said they currently received Tasmanian Government funding, were asked how strongly they agreed or disagreed with a series of statements about funding adequacy and funding processes in Tasmania.

### Perceptions of funding adequacy

Figure 19 shows the proportion of respondents that disagreed and agreed with each of a series of statements about the adequacy of Tasmanian Government funding. Full data, which distinguishes strong levels of agreement and disagreement, is in Table 37, Appendix A- Supplementary Tables. Although many respondents were neutral on the measures, the data suggests large numbers of organisations perceive funding to be inadequate in key areas. There were only two areas in which more than half of organisations found funding to be adequate:

- 57.7% of respondents agreed or strongly agreed that funding from the Tasmanian Government enables them to provide high quality services (although 22.8% disagreed).
- A little over half (52.9%) agreed that funding covers the minimum amount of service they are contracted to provide, although 27.3% disagreed that this was the case.

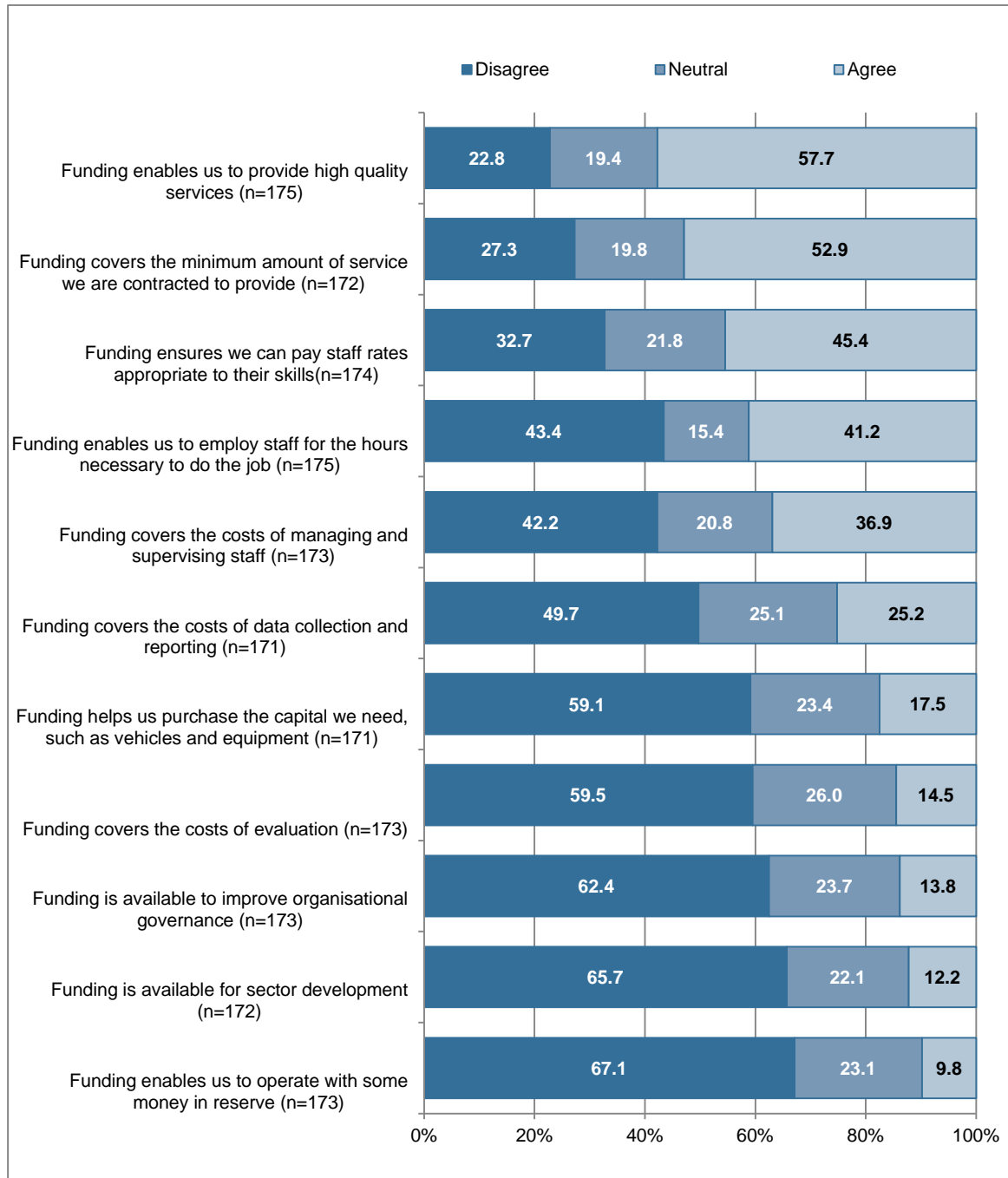
Less than half agreed with all other statements. In terms of staffing:

- Less than half of respondents (45.4%) agreed that funding ensures they can pay staff rates appropriate to their skills; and 32.7% disagreed that this was the case.
- Around 2 in 5 organisations (41.2%) agreed that funding ensured they can employ staff for the hours necessary to do the job, but slightly more disagreed (43.4%).

On many measures, more than half of respondents said they disagreed and disagreed, indicating funding is most often perceived as inadequate:

- Around 3 in 5 respondents disagreed that Tasmanian Government funding helped purchase the capital they needed; covered evaluation costs, or improved organisational governance.
- Less than 1 in 10 organisations (9.8%) agreed that funding enabled them to operate with some money in reserve, and more than 2 in 3 disagreed (67.1%).
- 2 in 3 disagreed that funding was available for sector development (65.7%).

**Figure 19 Agreement with statements about the adequacy of Tasmanian Government funding**



### Perceptions of funding processes

Figure 20 shows the proportion of respondents that disagreed and agreed with each of a series of statements about administration processes for Tasmanian Government funding. Full data is in Table 38, Appendix A- Supplementary Tables. High proportions of respondents were neutral on many of the measures, however, on some measures, higher proportions of respondents agreed than disagreed with the statements:

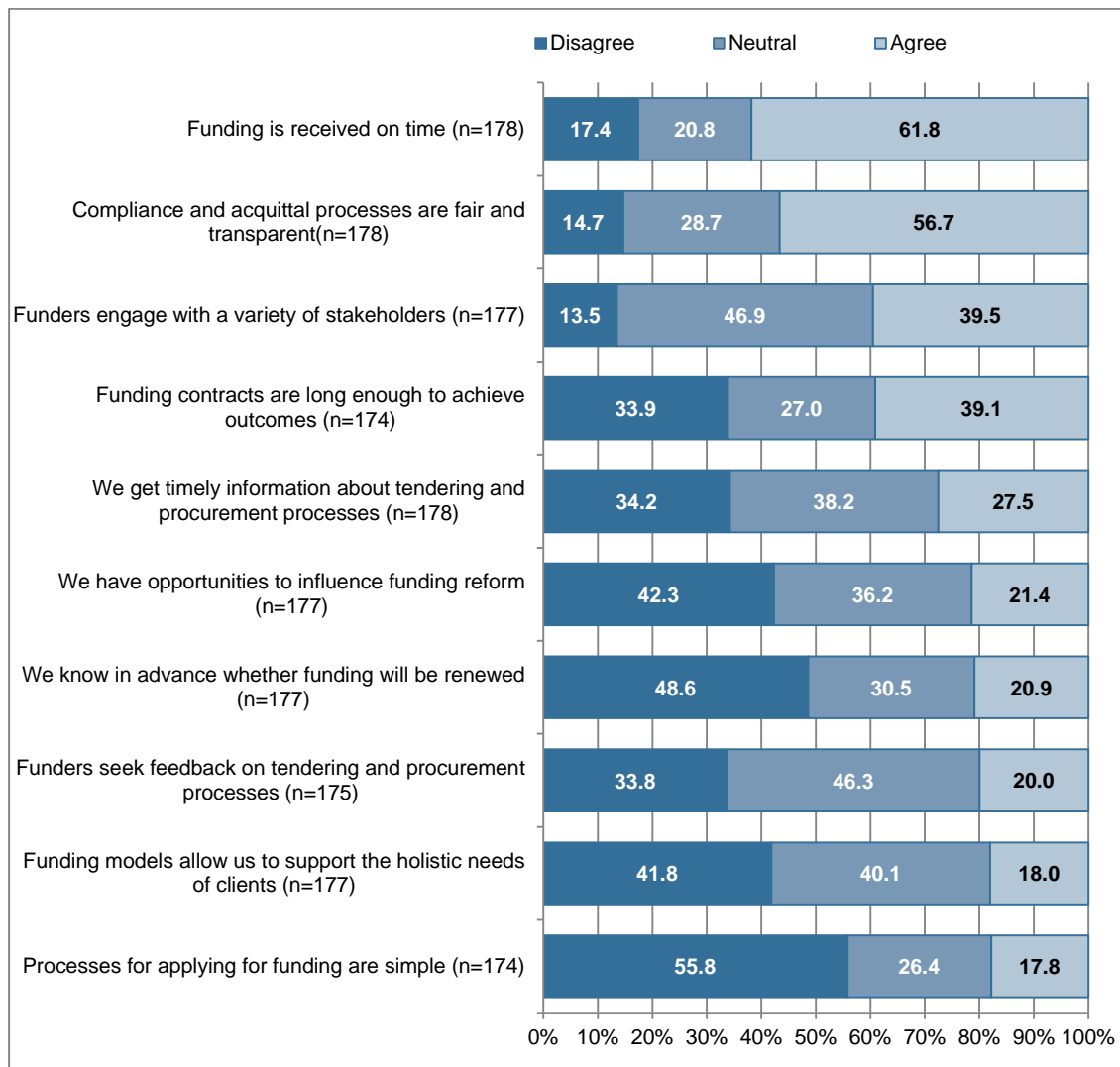
- More than 3 in 5 respondents agreed that funding is received on time (61.8%), while 17.4% disagreed.

- More than half agreed that compliance and acquittal processes are fair and transparent (56.7%), while 14.7% disagreed.

However, the data shows areas where funding processes could be improved:

- Around half of organisations disagreed that they know enough in advance whether funding will be renewed (48.6%) and only 1 in 5 agreed (20.9%).
- More than half of organisations disagreed that processes for applying for funding are simple (55.8%), while 17.8% agreed.
- While 2 in 5 organisations agreed that funding contracts are long enough to achieve outcomes (39.1%), a substantial large proportion disagreed with the statement (33.9%).
- 2 in 5 organisations (41.8%) disagreed that funding models allow them to support the holistic needs of clients, while only 18.0% agreed.

**Figure 20 Agreement with statements about Tasmanian Government funding processes**



## 8 Income from private sources

As discussed above, government funding is the most important source of income for Tasmania's community service sector. However, organisations also receive income from private sources. To explore this, survey respondents were asked to report the percentage of their organisation's total revenue from client fees and charges (including social housing rents); membership fees; business activities, including social enterprise; donations and fundraising; grants from philanthropic foundations or funds; and other private funding. Trends in the receipt of the two main forms of market or commercial income (client fees and charges, and business activities) and the two main forms of philanthropic income (donations and fundraising and grants from philanthropic foundations and funds) are analysed below.

### 8.1 Commercial income

The two main forms of market or commercial income were client fees and charges, and business activities. Table 20 shows the percentage of organisations receiving any income from client fees and charges and business activities, and the mean proportion of income coming from these sources.

- Overall, 41.5% of organisations reported having any income from client fees and charges (see also Figure 21).
- On average, client fees and charges contributed 8.3% of organisation's total income.

However, receipt of market income differed based on organisation's size, main service type, and region (Figure 21, Figure 22, Table 22 ). Higher proportions of organisations with annual incomes over \$500,000 reported having income from client fees and charges, and for business activities.

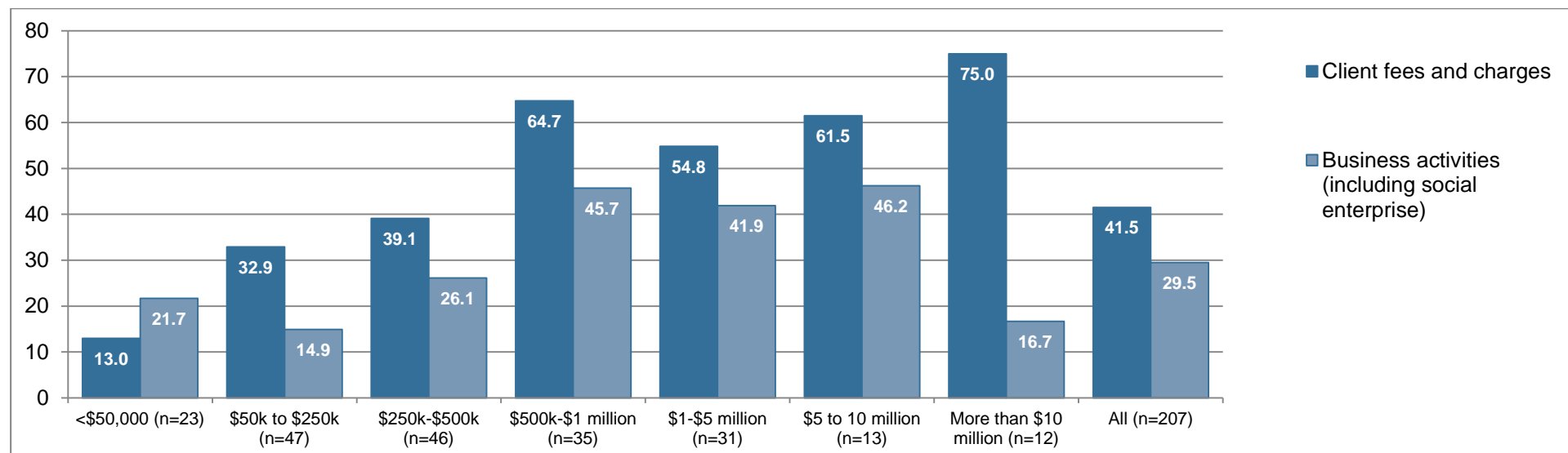
Table 21 and Figure 22 provide information on receipt of client fees and charges, and business activities, by main service type. More than 9 in 10 organisations ageing and carer organisations received income from client fees, and 75% of those whose main service type related to housing did so. . Only 13% of legal, advocacy information and peaks received income from client fees and charges, although this may reflect the peaks in that category, who would charge member rather than client fees. Table 22 and Figure 23 show that among organisations operating only in the North West, relatively low proportions accessed income from client fees or business activities.



**Table 20 Percentage of revenue from main market sources, by size category**

	Client fees and charges (including social housing rents)			Business activities (including social enterprise)		
	% that received any	Mean %	SD	% that received any	Mean %	SD
<\$50,000 (n=23)	13.0	5.2	17.4	21.7	13.3	29.0
\$50k to \$250k (n=47)	32.9	10.4	24.9	14.9	3.6	14.5
\$250k-\$500k (n=46)	39.1	7.5	20.0	26.1	4.8	12.8
\$500k-\$1 million (n=35)	64.7	4.2	8.2	45.7	10.8	24.6
\$1-\$5 million (n=31)	54.8	5.5	9.2	41.9	5.9	14.5
\$5 to 10 million (n=13)	61.5	9.8	14.6	46.2	12.0	18.4
More than \$10 million (n=12)	75.0	26.5	36.5	16.7	0.8	2.3
All (n=207)	41.5	8.3	19.8	29.5	6.9	18.4

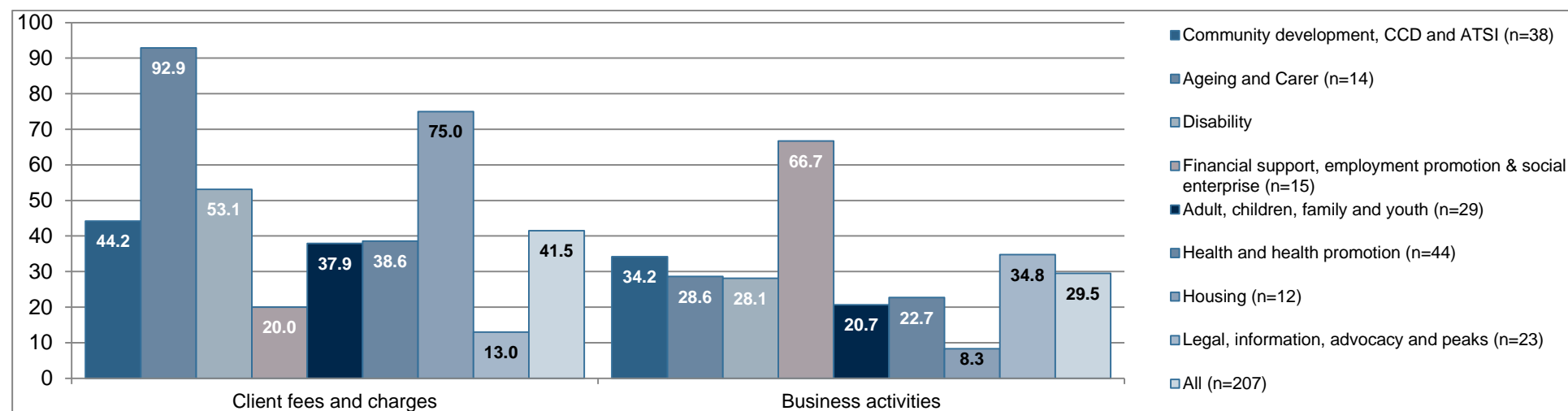
**Figure 21 Organisations with income from main market sources, by income category**



**Table 21 Percentage of revenue from main market sources, by main service type**

	Client fees and charges (including social housing rents)			Business activities (including social enterprise)		
	% that received any	Mean %	SD	% that received any	Mean %	SD
Community development, CCD and ATSI (n=38)	44.2	2.1	3.9	34.2	6.4	18.1
Ageing and Carer (n=14)	92.9	14.6	15.1	28.6	4.4	7.8
Disability	53.1	7.1	11.3	28.1	7.0	18.3
Financial support, employment promotion & social enterprise (n=15)	20.0	1.1	2.8	66.7	36.1	36.2
Adult, children, family and youth (n=29)	37.9	12.1	27.0	20.7	2.4	9.3
Health, health promotion and trauma (n=44)	38.6	10.1	24.6	22.7	4.5	14.8
Housing (n=12)	75.0	32.3	36.5	8.3	3.0	10.4
Legal, information, advocacy and peaks (n=23)	13.0	0.2	0.7	34.8	2.3	4.8
All (n=207)	41.5	8.3	19.8	29.5	6.9	18.4

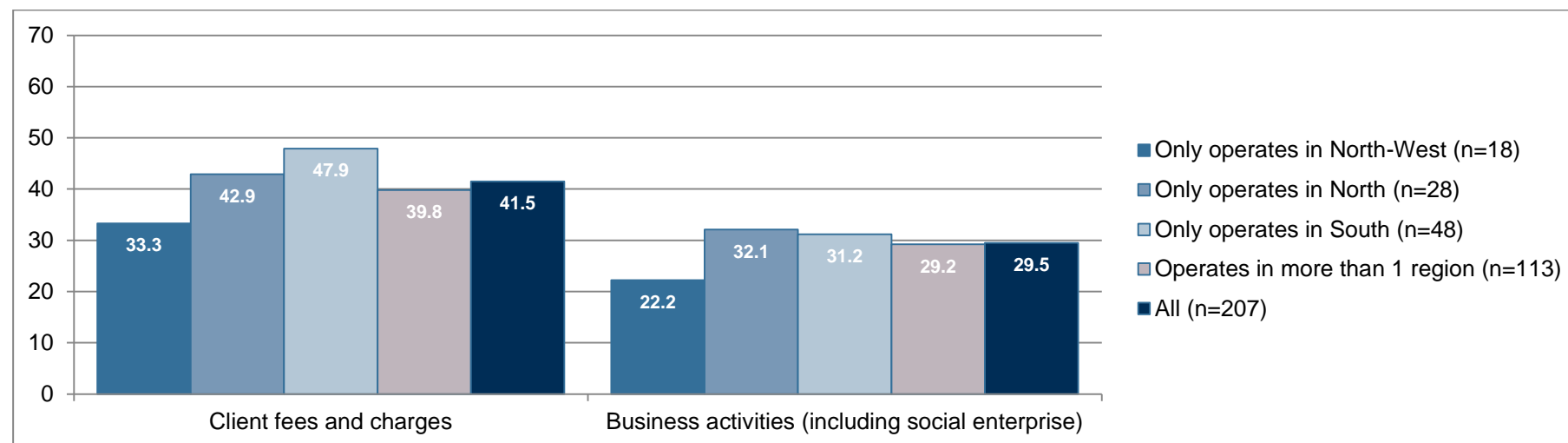
**Figure 22 Organisations with income from main market sources, by main service type**



**Table 22 Organisations with income from main market sources, by region**

	Client fees and charges			Business activities (including social enterprise)		
	% that received any	Mean %	SD	% that received any	Mean %	SD
Only operates in North-West	33.3	3.6	6.7	22.2	9.2	5.6
Only operates in North	42.9	4.6	8.8	32.1	8.8	4
Only operates in South	47.9	12.0	24	31.2	7.1	2.9
Operates in more than 1 region	39.8	8.4	20.9	29.2	6.0	1.5
All	41.5	8.3	19.8	29.5	6.9	1.3

**Figure 23 Organisations with income from main market sources, by region of operations**



## 8.2 Philanthropic income

The two main forms of philanthropic income were donations and fundraising, and grants from philanthropic foundations and funds. Overall:

- 53.1 % of organisations reported receiving any income from donations and fundraising; and
- 31.9% reported receiving any income from philanthropic foundations and funds.

On average, donations and fundraising contributed 9.0% of organisation's total income, while income from philanthropic foundations and funds contributed 3.9%, on average.

Table 23 and Figure 24 show the proportions of respondents which reported receiving income from these two income sources, and the mean proportion of income received from each. This shows that while small organisations were more likely than others to receive income from donations, larger organisations were more likely to access income from philanthropic foundations or funds.

Table 24 and Figure 25 show some differences in the proportions of respondents receiving income from the main philanthropic sources based on organisation's main service type. This shows that organisations whose main service type was in community development, CCD and ATSI, and those in the housing category, were more likely than others to report income from either source of philanthropy. Low proportions of organisations whose main service was ageing and carer received either type of philanthropic income. Further, the average contribution these income sources made to total income differed by main service type. Specifically:

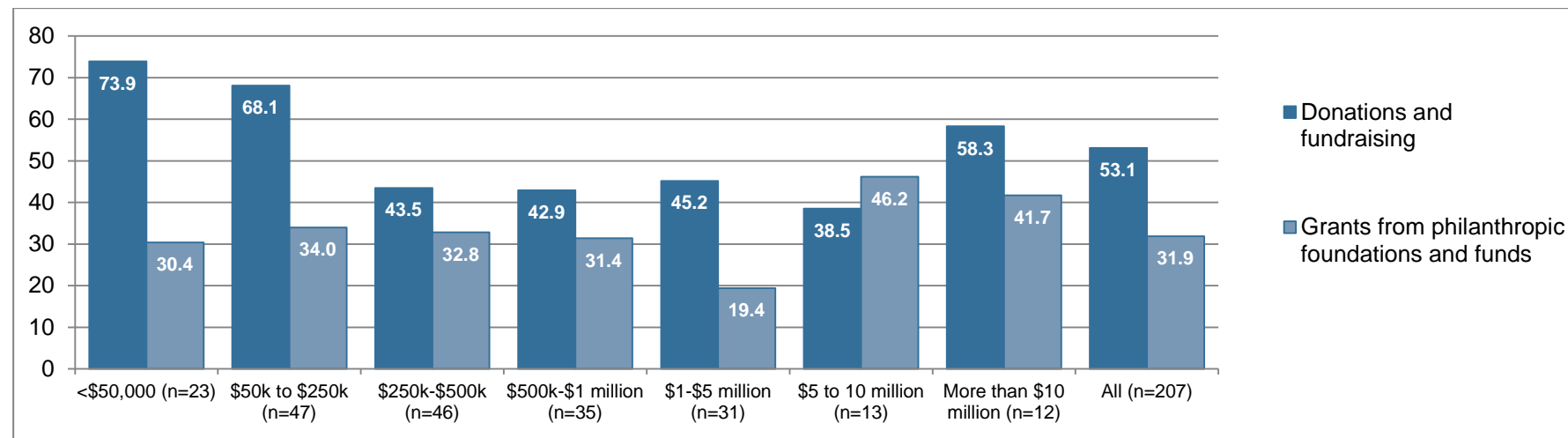
- organisations whose main services were health-related reported that donations and fundraising contributed a higher proportion of total income than others (18.3% compared with 9.0% overall)
- those delivering legal, advocacy, information or peak body services, and family, children and youth services reported that income from philanthropic foundations and funds made higher than average contributions to total income (7.3% and 6.7% respectively).

Figure 26 shows that organisations operating only in the North West or only in the South were slightly more likely to report income from donations than others. A very small proportion of those operating only in the North West had any income from philanthropic foundations or funds: 2 of 18 organisations, or 11.1% compared with 31.9% overall.

**Table 23 Percentage of revenue from main philanthropic sources, by size category**

	Donations and fundraising			Grants from philanthropic foundations and funds		
	% that received any	Mean %	SD	% that received any	Mean %	SD
<\$50,000 (n=23)	73.9	33.0	38.8	30.4	10.2	24.4
\$50k to \$250k (n=47)	68.1	7.6	16.7	34.0	5.7	16.9
\$250k-\$500k (n=46)	43.5	7.2	18.3	32.8	2.5	6.0
\$500k-\$1 million (n=35)	42.9	3.4	8.1	31.4	4.3	8.1
\$1-\$5 million (n=31)	45.2	1.7	3.2	19.4	0.5	1.3
\$5 to 10 million (n=13)	38.5	16.1	31.5	46.2	2.2	3.2
More than \$10 million (n=12)	58.3	2.9	4.2	41.7	0.5	0.7
All (n=207)	53.1	9.0	21.3	31.9	3.9	12.5

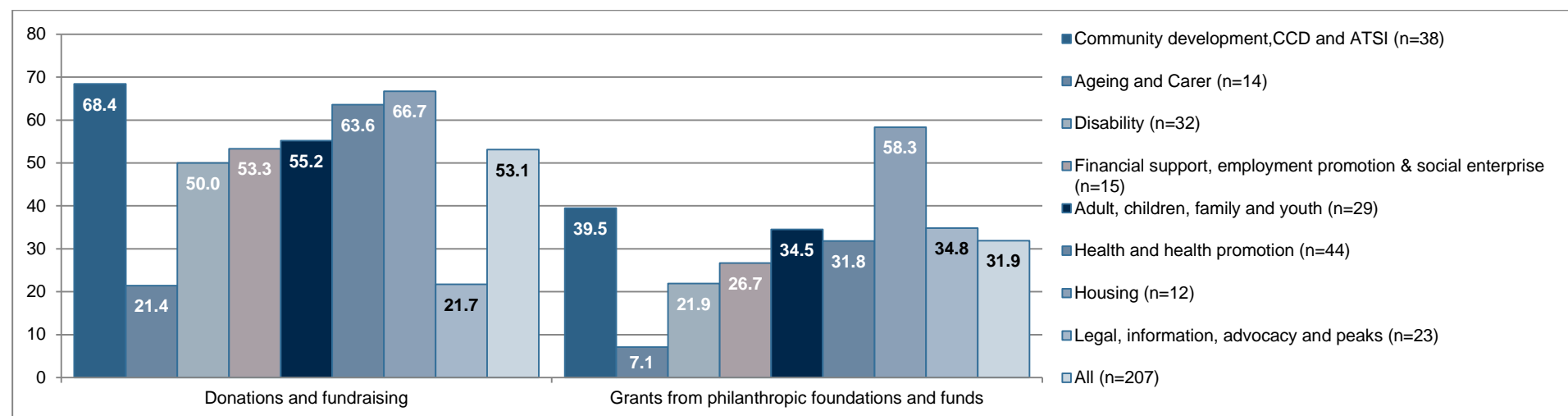
**Figure 24 Organisations with income from donations and fundraising, and philanthropic grants, by income category**



**Table 24 Percentage of revenue from main philanthropic sources, by main service type**

	Donations and fundraising			Grants from philanthropic foundations and funds		
	% that received any	Mean %	SD	% that received any	Mean %	SD
Community development, CCD and ATSI (n=38)	68.4	6.1	16.2	39.5	2.3	4.2
Ageing and Carer (n=14)	21.4	1.1	2.9	7.1	0.1	0.5
Disability (n=32)	50.0	9.5	22.4	21.9	3.3	10.5
Financial support, employment promotion & social enterprise (n=15)	53.3	11.5	20.2	26.7	2.7	6.5
Adult, children, family and youth (n=29)	55.2	8.2	18.5	34.5	6.2	19.3
Health and health promotion (n=44)	63.6	19.1	32.0	31.8	4.5	15.8
Housing (n=12)	66.7	4.3	6.6	58.3	3.2	5.7
Legal, information, advocacy and peaks (n=23)	21.7	0.4	1.1	34.8	7.3	15.1
All (n=207)	53.1	9.0	21.3	31.9	3.9	12.5

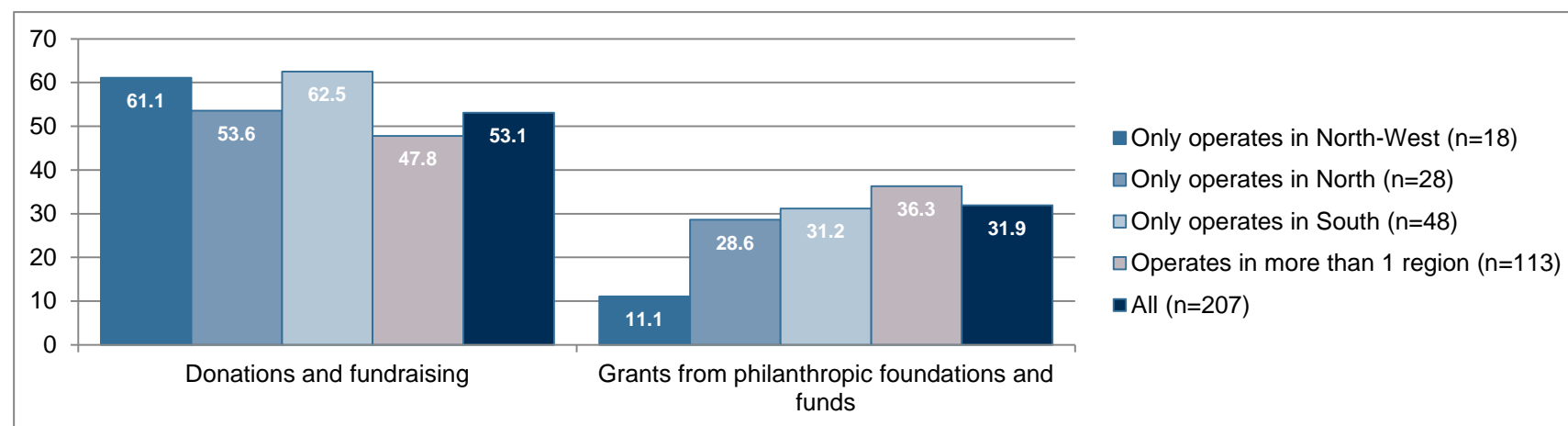
**Figure 25 Organisations with income from donations and fundraising, and philanthropic grants, by main service type**



**Table 25 Percentage of revenue from main philanthropic sources, by region**

	Donations and fundraising			Grants from philanthropic foundations and funds		
	% that received any	Mean %	SD	% that received any	Mean %	SD
Only operates in North-West	61.1	7.1	15.6	11.1	0.6	1.6
Only operates in North	53.6	4.4	7.5	28.6	3.4	7.9
Only operates in South	62.5	6.7	17.9	31.2	5.5	20.1
Operates in more than 1 region	47.8	11.4	25.1	36.3	4	9.8
All	53.1	9	21.3	31.9	3.9	12.5

**Figure 26 Organisations with income from main philanthropic sources, by region**



## 9 The financial status of Tasmania's community service organisations

### 9.1 Expenditure

Organisations were asked approximately how much money they spent in Tasmania in the last 12 months. For the 185 organisations which answered, the mean expenditure was \$2,232,207, although this was driven by a small number of large spending respondents: most organisations spent substantially less. Indeed, the median expenditure was \$380,000: half of organisations spent less than this figure. Many spent much less: the lowest spending 10% of charities spent under \$4,000, and the lowest spending 20% of charities spent under \$34,400.

Expenditure figures were compared with total income to estimate the proportion of organisations which had fairly balanced budgets. This was defined where organisations spent within 20% of their income in the year, that is, where expenditure was between 80% and 120% of income. While not a perfect measure of financial prudence, this follows the methodology used to assess the proportion of Australia's charities, based on information reported by charities to the Australian Charities and Not-for-profits Commission (Cortis et al, 2015). Like the national charities data, the assessment of budgets in Tasmania's community service organisations is based on data for one year only, and does not capture the reasoning behind spending decisions for the year. Further, the 20% threshold is fairly arbitrary, and results may reflect temporary fluctuations in income and spending. Notwithstanding, it provides a broad indication of organisation's financial status.

Overall, it appears that most Tasmanian organisations operated fairly balanced budgets for the last financial year. Of the 171 organisations which provided valid expenditure and income data:

- 76.6% had a fairly balanced budget for the 2014-15 year, with expenditure data within 20% of income.
- In around 1 in 6 organisations (16.4%), expenditure was more than 20% below income for the year (indicating a surplus).
- For 12 organisations (7.0%), the reported level of expenditure was more than 20% higher than income for the year (indicating a deficit).

These figures are close to the national estimates of levels of prudence among social service charities (Cortis et al, 2015). Using 2014 data, around 72.3% of Australia's social service charities were found to have a fairly balanced budget in 2014, with 18.4% having a surplus of over 20%, and 9.2% having a deficit of 20% or more.



## 9.2 Financial reserves

Respondents were asked if their organisation held a financial reserve, and if so, how much. Results are shown below. Overall, more than 1 in 5 reported that they usually had a reserve to cover more than six months of expenses, and an additional 22.9% usually had a reserve to cover 3 to 6 months. However, 13.2% had a very small reserve: less than one month of expenses.

**Table 26 Amount of money usually held as a financial reserve**

	n	%
Less than 1 month of expenses	27	13.2
1 to 3 months of expenses	53	25.9
3 to 6 months of expenses	47	22.9
More than 6 months of expenses	45	22.0
Not sure	27	13.2
Other	6	2.9
All	205	100

**Figure 27 Proportion of organisations by amount of money usually held in reserve**

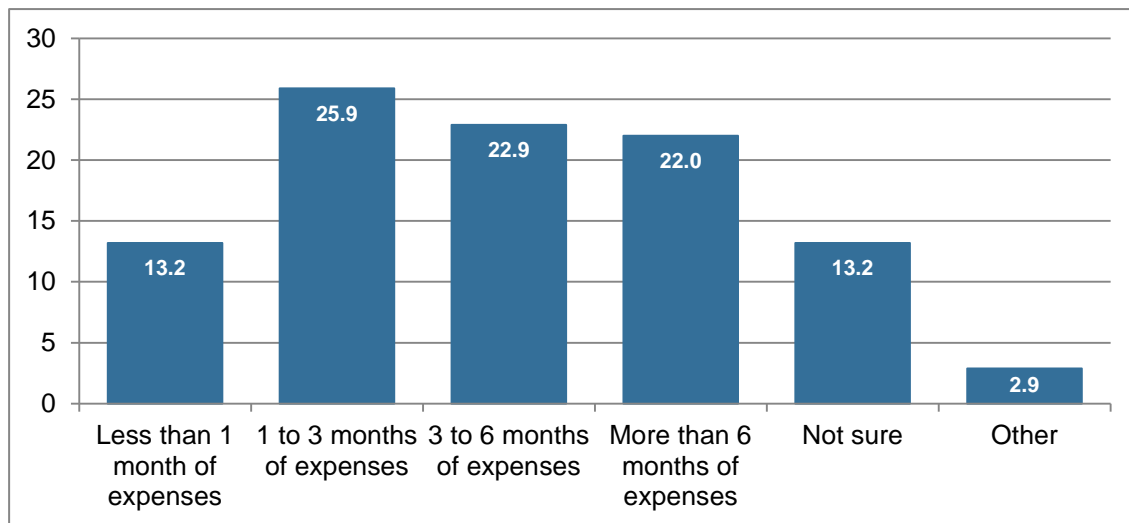
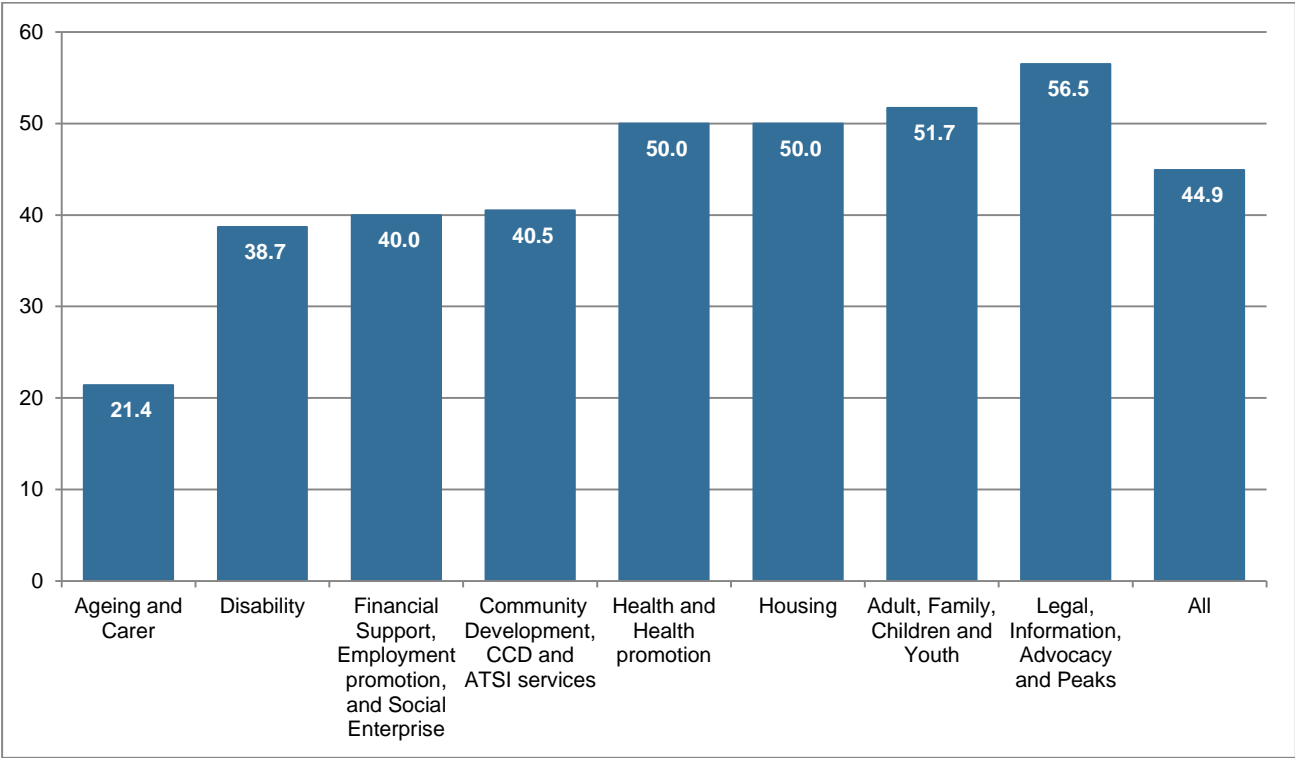


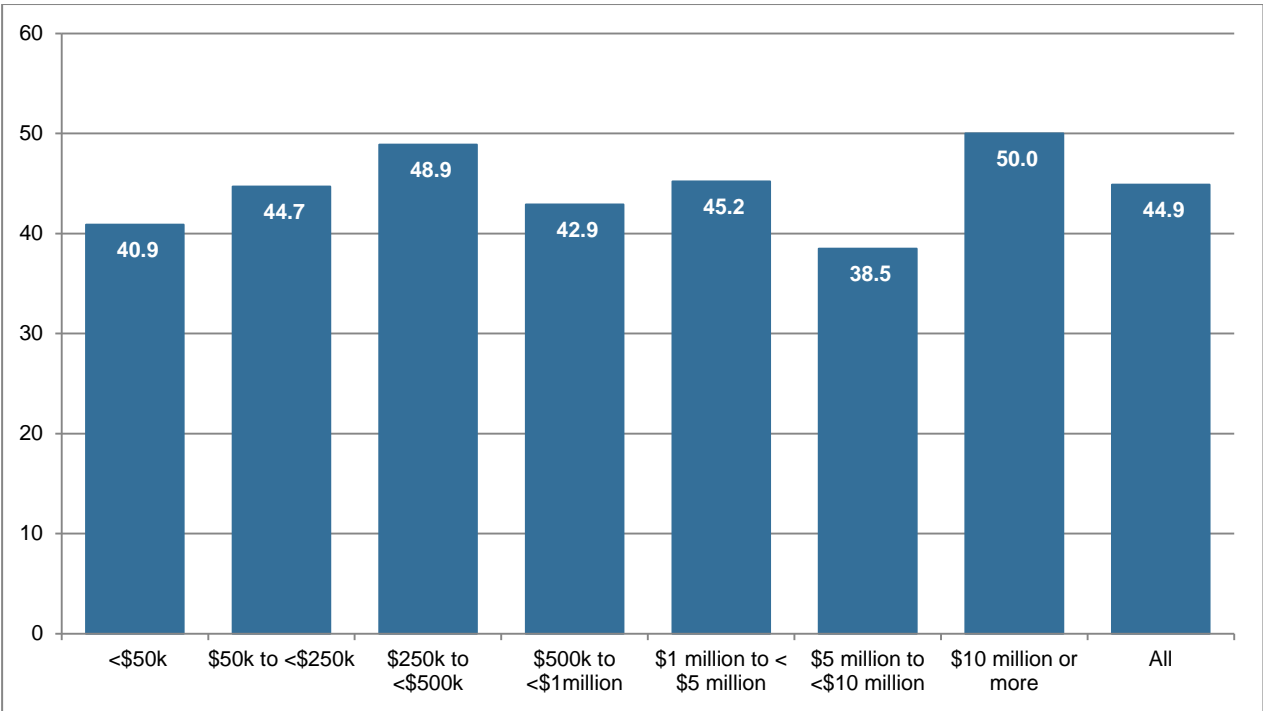
Figure 28 shows that the proportion of organisations which usually had at least three months in reserve differed according to organisation's broad category of main service type. Overall, 44.9% of organisations usually kept three months of expenses in reserve. However, this was much lower among those whose main service type was in the ageing and carer category (21.4%), and highest among legal, information advocacy and peaks (56.5%).

Variation based on annual income was less pronounced (see Figure 29). However, the finding that only 50% of organisations with \$10 million or more, and 38.5% of those in the \$5 to \$10 million range had a financial reserve to cover three months is concerning, as financial difficulties among these large organisations would have very high impact on the sector.

**Figure 28 Proportion of organisations which usually keep at least 3 months of expenses in financial reserve, by main service type**



**Figure 29 Proportion of organisations which usually keep at least 3 months of expenses in financial reserve, by annual income**



A further interesting finding is the low proportion of for-profit organisations which usually held a financial reserve which would cover at least 3 months of expenses: Only 2 organisations out of the 11 for-profits that responded said they usually had a reserve of this level (18.2%).

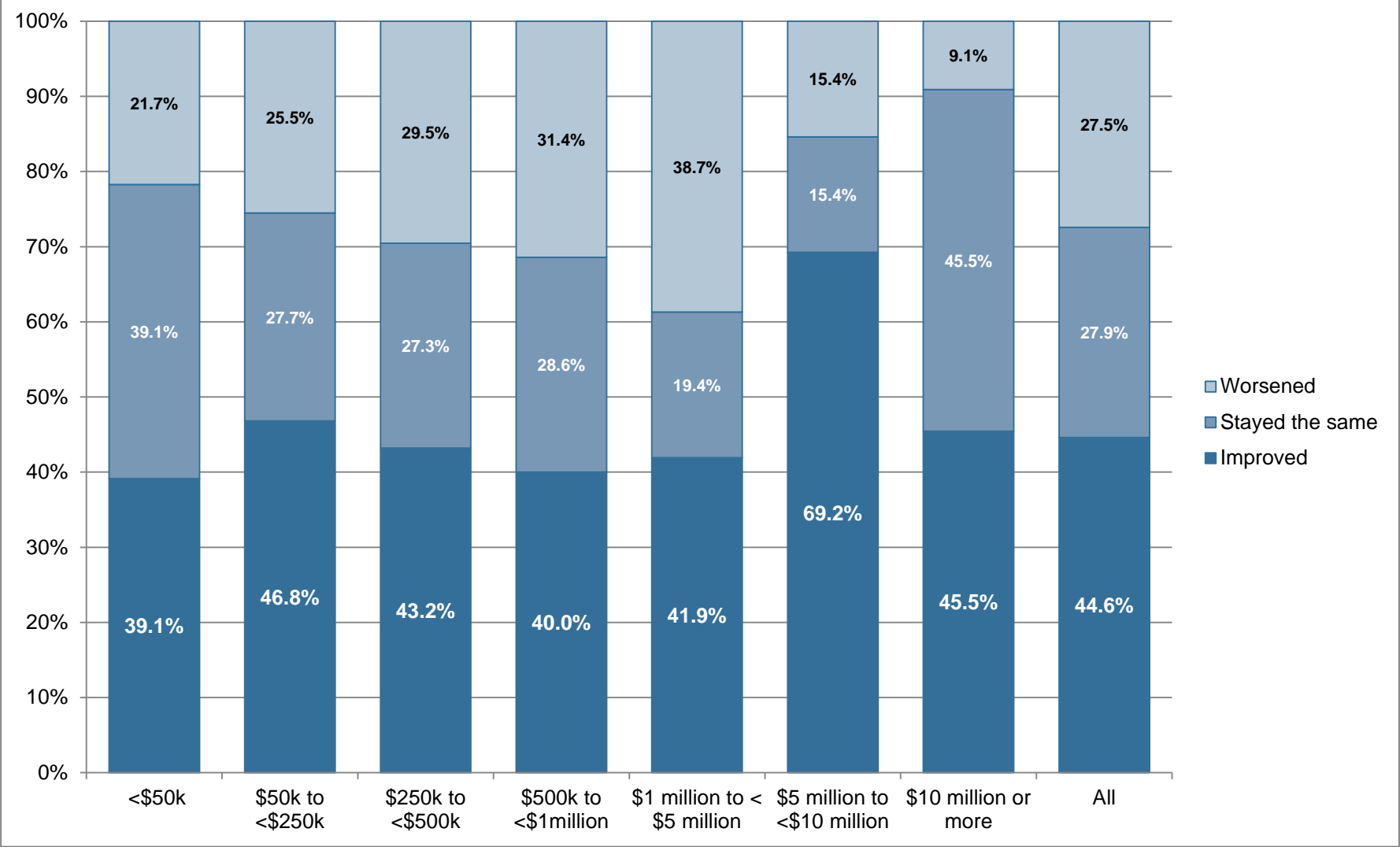
### 9.3 Change in organisation's financial status

Figure 30 shows the proportion of respondents who reported that their organisation's general financial position had improved, stayed the same or worsened in the last 12 months, based on income category. Overall, 44.6% said their financial status had improved, 27.9% said it had remained steady, and 27.5% said it had worsened.

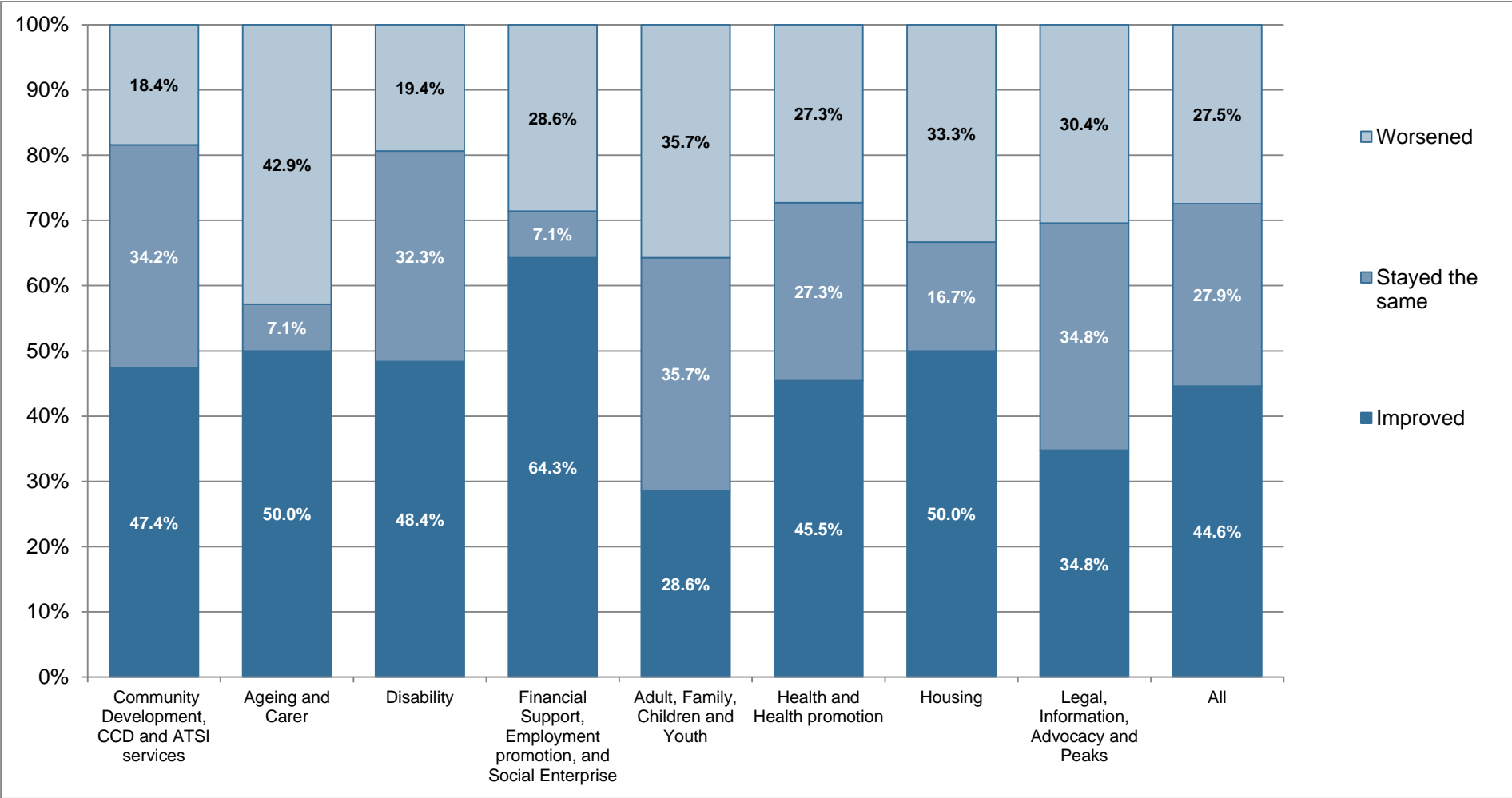
Organisations in the \$5 million to \$10 million bracket were most likely to report their financial status had improved in the last 12 months. Among those with incomes under \$50,000, a relatively low proportion said their financial status had improved, but a high proportion said it had stayed the same. Those with incomes in the \$1 million to \$5 million range were most likely to report their status had worsened.

Figure 31 shows change in financial status by main service type. For organisations in the category of adult, family, children and youth, and those in housing, and ageing and carer, at least 1 in 3 said their financial status had worsened in the last 12 months.

**Figure 30 Proportion of organisations whose general financial position improved, stayed the same, and worsened in the last 12 months, by income**



**Figure 31** Proportion of organisations whose general financial position improved, stayed the same, and worsened in the last 12 months, by main service type



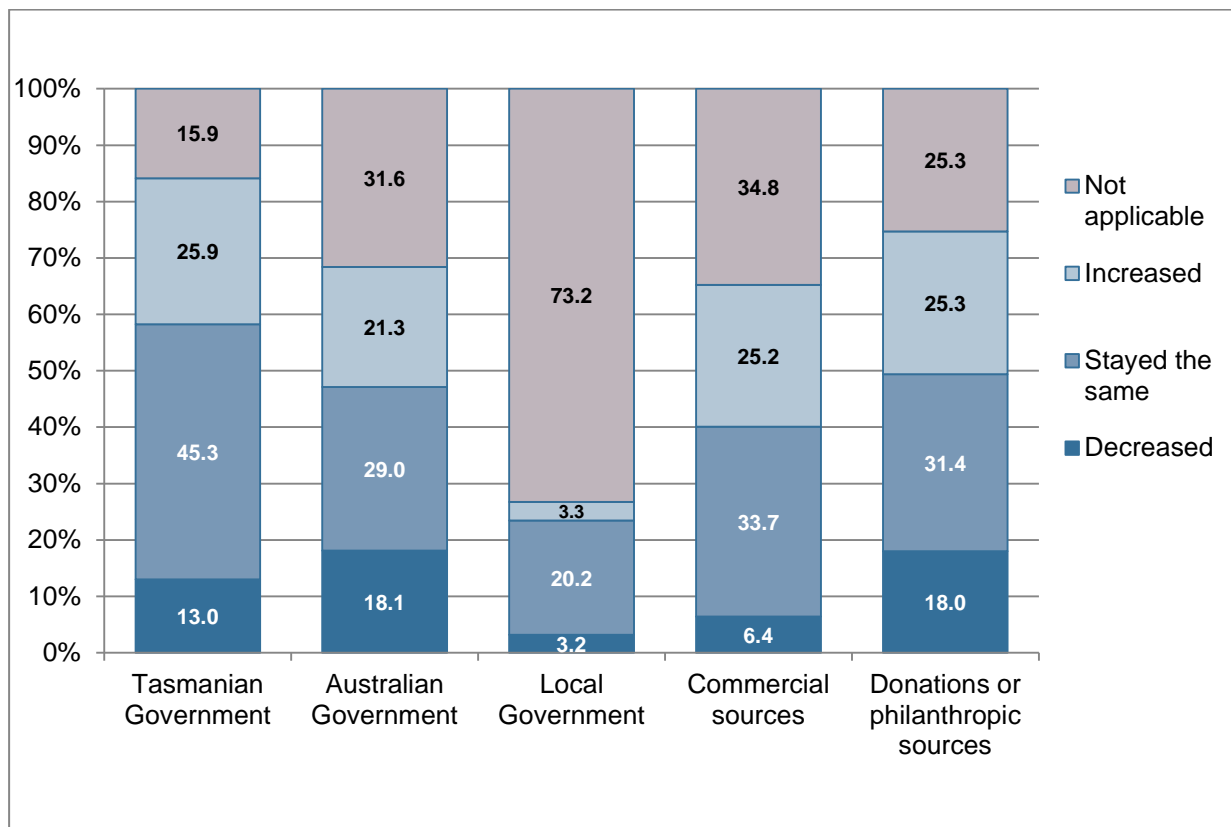
## 9.4 Changes in funding sources

The survey also asked about changes in levels of funding from various sources (see Table 27 and Figure 32). The largest groups reported that the level of funding had stayed the same or increased. However, almost 1 in 5 organisations said they had experienced a loss of funding from the Australian Government (18.1%), while 13.0% had experienced a decrease in Tasmanian Government funding. Many had also experienced loss of income from donations or philanthropic sources: this was the case for 18.0% of organisations.

**Table 27 Change in level of funding in the last 12 months**

	Tasmanian Government	Australian Government	Local Government	Commercial sources	Donations or philanthropic sources
Decreased	13.0	18.1	3.2	6.4	18.0
Stayed the same	45.3	29.0	20.2	33.7	31.4
Increased	25.9	21.3	3.3	25.2	25.3
Not applicable	15.9	31.6	73.2	34.8	25.3
All	100	100	100	100	100

**Figure 32 Proportion of organisations which reported income from various sources had increased or decreased in the last 12 months**



While those who reported a decrease in funding tended to do so for one type of funding only, 30 organisations (14.5%) organisations reported that more than one type of funding had decreased in the last 12 months (28). Of the 30 which had a decrease in two or more funding sources, nine had a decrease in both Tasmanian and Federal funding, and nine had a decrease in both Tasmanian and philanthropic funding.

**Table 28 Organisations by numbers of funding sources reduced**

	n	%
No decrease in any funding source	132	63.8
Decrease in 1 funding source	45	21.7
Decrease in 2 or more funding sources	30	14.5
All	207	100

## 10 Responses to resource pressures

The survey asked respondents if their organisations had done certain things to obtain additional resources in response to financial pressures (see Table 29). Around two in five organisations (40.6%) reported having drawn on their organisation's financial reserves, and about the same number (38.6%) had conducted new fundraising activities. Almost 1 in 3 (31.4%) had not done any of the listed actions.

**Table 29 Actions to obtain additional resources in the last 12 months**

	n	%
Drawn on organisation's financial reserves	84	40.6
Requested additional funds from a 'parent' organisation	21	10.1
Attempted to sell assets or investments for the primary purpose of meeting financial obligations	10	4.8
Conducted new fundraising activities	80	38.6
Taken out a loan to expand activities or infrastructure	16	7.7
None of these	65	31.4

Also designed to explore responses to resource pressures, a further question asked what organisations had done as a result of reduced income in the last 12 months, including adjusting their approach to service delivery and staffing (a full list of options is in Table 30). One in three (32.4%) said they had not had to respond in any of the listed ways, as their funding had not been reduced. However, more than 2 in 3 had done at least one of these things.

The most common responses to loss of income are changes intended to improve efficiency with minimal impact on clients:

- Around 1 in 3 had introduced more efficient processes to reduce overheads.
- More than 1 in 4 (27.5%) said they undertook strategic business planning or commenced new fundraising (25.1%).

However, many organisations had taken measures likely to compromise the level and quality of services available in Tasmania, including reducing staffing and service capacity as a result of loss of income:

- Almost 1 in 4 organisations had reduced staff hours (48 organisations, 23.2%).
- More than 1 in 5 had reduced numbers of staff (46 organisations, or 22.2%).
- 33 organisations (15.9%) said they had tightened eligibility for services in the last 12 months.
- Around 1 in 8 had introduced or increased fees (27 organisations, or 13.0%).



- 25 (12.1%) had increased waiting times, and the same number had reduced the *amount* of service on offer.
- 1 in 9 organisations had turned clients away who would previously have been accepted, and the same number reduced the *range* of services on offer (each reported by 23 organisations, or 11.1%).

**Table 30 Responses to reduced funding in the last 12 months**

	n	%
Introduced more efficient processes to reduce overheads	68	32.9
Undertook strategic business planning to reconfigure activities	57	27.5
Commenced new fundraising activities	52	25.1
Reduced staff hours	48	23.2
Reduced staff numbers	46	22.2
Tightened eligibility for services	33	15.9
Introduced or increased fees for service	27	13.0
Increased waiting time for services	25	12.1
Reduced the amount of service on offer to clients	25	12.1
Turned clients away who would previously have been accepted	23	11.1
Reduced the range of services on offer	23	11.1
Partnered with another organisation	17	8.2
Closed an office or service delivery site	15	7.2
Reduced consultation or consumer engagement	10	4.8
Merged or amalgamated with another organisation	7	3.4
None of these, our funding was not reduced	67	32.4

## 10.1 Mergers and sharing of services

Respondents were asked if their organisations had explored merging, or had undertaken a merger with another organisation, or if they had considered or made an arrangement to share services.

While a relatively small number reported having merged with another organisation in the last 12 months (3.4%), many more had talked with another organisation about the possibility (31 organisations, or 15.0%). More than 1 in 6 had made an arrangement to share services (32 organisations, or 15.5%), and 37% reported having talked with another organisation about the possibility of sharing services. Just under half had not undertaken any of these things (48.3%).

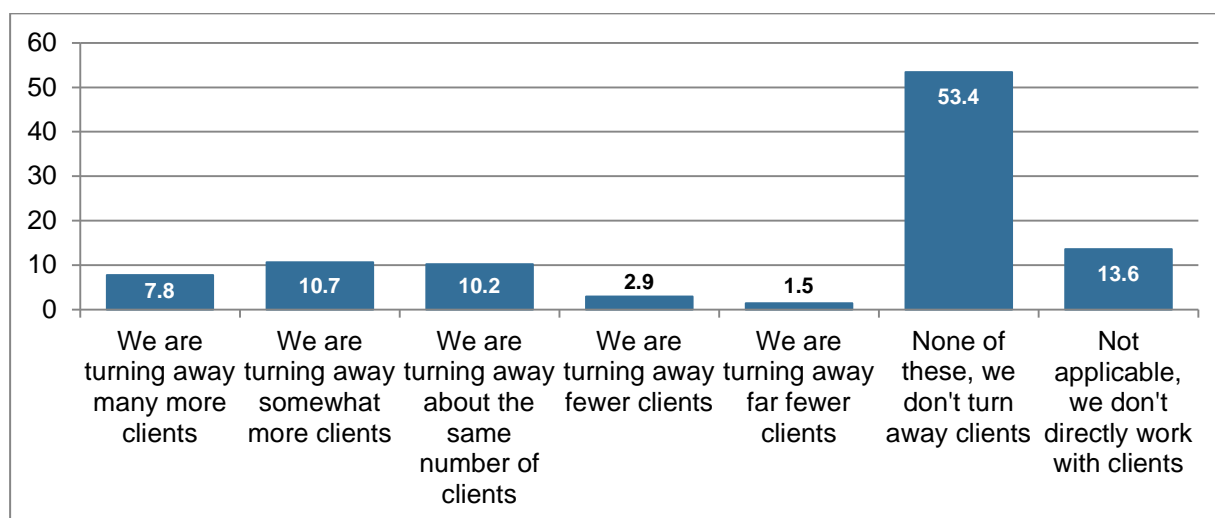
**Table 31 Experiences of mergers and sharing of services**

	n	%
Merged with another organisation	7	3.4
Talked to another organisation about possibly merging	31	15.0
Made an arrangement to share services	32	15.5
Talked with another organisation about the possibility of sharing services	77	37.2
None of these	100	48.3

## 10.2 Turning away clients

To measure changes in service capacity over the last 12 months, respondents were asked to report how the numbers of clients being turned away compared with the same time last year. More than half said they did not turn clients away (53.4%), or that the question was not applicable as they did not work directly with clients (13.6%) (see Figure 33). Among others, most reported they were turning higher numbers of clients away than the previous year, and very few said they were turning away fewer. A breakdown by main service type is in Figure 42, Appendix B- Supplementary Charts. Most notably, 50% of housing organisations reported that they were turning away more clients than the same time last year.

**Figure 33 Perceptions of how many clients are turned away, compared with same time last year**



## 10.3 Comments on financial status and pressures

Services were given an opportunity to comment on their organisations' financial status. Of the 48 respondents who did so, nearly half wrote that their financial status was uncertain into the future. For many this was because of fixed term funding cycles, for example:

Our three year funding comes to an end on 30 June 2016. Not sure beyond that date.  
(Large organisation providing domestic and family violence services).

Another spoke of the disruption to the whole community of the uncertainty associated with short term funding cycles:

It is hard to say, as we have no guarantee of federal funding beyond Jun 2016. Again, I will lose good staff, clients will lose confidence in our service's ability to provide them ongoing support, and the community will get jumpy. This happens every 12 months. It is a truly dreadful way to provide a much-needed community service where our clients are increasing in numbers and complexity each year. (Large organisation providing tobacco, alcohol and other drugs services).

This very large organisation providing mental health services, in contrast, felt that funding secured for three years and minimal costs meant their financial status was steady and good.

My understanding is that the government funding received is set for 3 years and with outlay on wages minimal (only 2 staff), and vehicle I imagine things will remain relatively stable.

For other respondents it was policy change that made their organisations financial future uncertain. For most of these respondents, this was due to their immanent transition into the NDIS.

In transitioning to the NDIS all of our current income will be subject to change. The lack of information on the timing of the transition to the NDIS and a number of issues with the policy and pricing arrangements make this very uncertain. (Very large organisation providing mental health services).

A few services said their current levels of funding were inadequate and projected to continue to be inadequate. A handful of organisations were facing a significant loss of funding. Some described, for example, that they were suffering from:

Losing significant funding from [the] Tasmanian Health Department and this is not being replaced. (Medium-sized organisation offering training services).

Another explained:

Unless dramatic changes occur through our current negotiations with the Department of Prime Minister & Cabinet this organisation will close. (Aboriginal service).

## 11 Estimates of the total size and contribution of Tasmania's community service sector

### 11.1 Estimates of total sector income

Together, the 207 organisations that responded to the survey had income totalling \$452,892,022. This can be used as a basis for calculating the total annual income of the sector for the 2014-15 year, including estimates for survey non-respondents. Of the 147 organisations that did not complete the survey, 146 were assumed to have income at the median level (\$385,178). An estimate of \$10 million was made for one large non-responding organisation, based on annual reports. On this basis, non-responding organisations together had income of \$66,235,988. We therefore estimate that in the 2014-2015 year, Tasmania's community service sector had over \$500 million in income (\$509,128,010).

### 11.2 Estimated total expenditure by Tasmania's community service organisations

Together, the 171 organisations which responded to the question reported expenditure of \$407,778,223 in the 2014-15 financial year. Assuming that the 36 organisations which did not complete the question spent at median levels (\$400,000), and that the 147 that did not attempt the survey also had that level of expenditure, we estimate that the total expenditure of Tasmania's community service sector was \$480,978,223 for the 2014-2015 year. Estimated expenditure was approximately 94.5% of estimated income.

### 11.3 Estimates of workforce size

Tasmania's community service sector workforce is important to the quality and sustainability of service delivery, but also to employment opportunities, as Tasmania's health and social assistance industry is one of the State's most significant source of employment growth (TCCI, 2015).

Together, the 207 responding organisations employed 8037 paid staff. Assuming the 147 organisations in the sampling frame which did not answer the survey employed the median number of staff (7), we estimate that 9066 people worked in Tasmania's community service industry. As there were 241,900 employees in Tasmania in November 2015, we estimate that non-government community service workers constitute around 3.7% of Tasmania's workforce.

## 12 Sector engagement with the Tasmanian Government

A series of questions were asked about responding organisations' involvement with the Tasmanian Government, and their experiences of engagement and priorities for the future. Community service organisations' experiences of involvement with the Tasmanian Government, and their perceptions of their relationships with the Tasmanian Government are particularly important, as the Tasmanian Government is the key source of funding to the sector. As shown in Table 17, 76.3% of responding organisations received income from the Tasmania Government in the last financial year. Although there was much variation among organisations, on average, Tasmanian Government funding accounted for 38.5% of organisation's total annual income.

### 12.1 Involvement with the Tasmanian Government

Organisation's most common form of involvement with the Tasmanian Government was receipt of funding: around three quarters of organisations said they received Tasmanian Government funding (75.8%). More than half said they were involved as advocates for clients or disadvantaged people in Tasmania (55.6%) and 37.7% said they were involved in an advisory or policy development capacity (see Table 32).

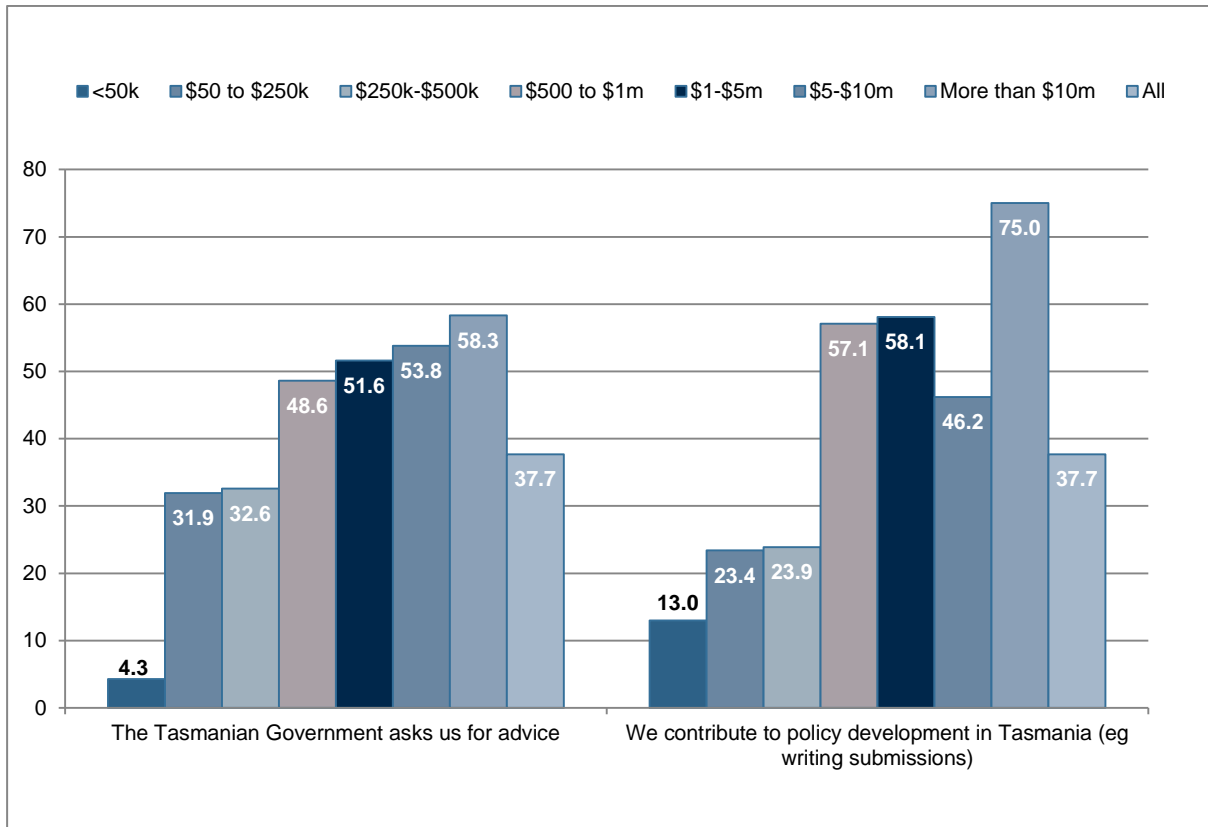
Around 1 in 8 responding organisations said they had no involvement with the Tasmanian Government.

**Table 32 Involvement with the Tasmanian Government**

	n	%
Receive Tasmanian Government funding (contracts or grants) to perform activities	157	75.8
We advocate for clients or disadvantaged people in Tasmania	115	55.6
The Tasmanian Government asks us for advice (eg to participate in committees)	78	37.7
We contribute to policy development in Tasmania (eg writing submissions)	78	37.7
We receive in-kind support (eg accommodation) from the Tasmanian Government	23	11.1
None, we have no involvement with the Tasmanian Government	25	12.1

Table 39 (see Appendix A- Supplementary Tables) provides a breakdown based on the size of organisations. Most notably, higher proportions of larger organisations said the Tasmanian Government asks them for advice. This is depicted in Figure 34.

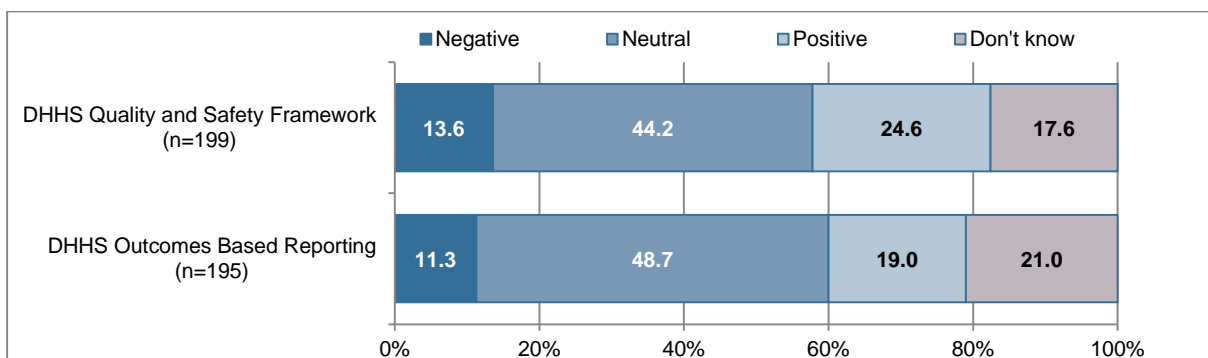
**Figure 34 Involvement in advice and policy development, by size**



## 12.2 Impact of Tasmanian Government initiatives

Organisations were asked about the impact of two Tasmanian Government initiatives (see Figure 35, with full data in Table 41, Appendix A). High proportions of respondents felt these initiatives had had a neutral impact on their organisation: 44.2% felt the impact of the DHHS Quality and Safety Framework was neutral, and a further 17.6% were unsure. Almost half (48.7%) felt the impact of Outcomes Based Reporting (DHHS Outcomes Purchasing Framework) was neutral, and a further 21% were unsure.

**Figure 35 Perceived impact of Tasmanian initiatives**

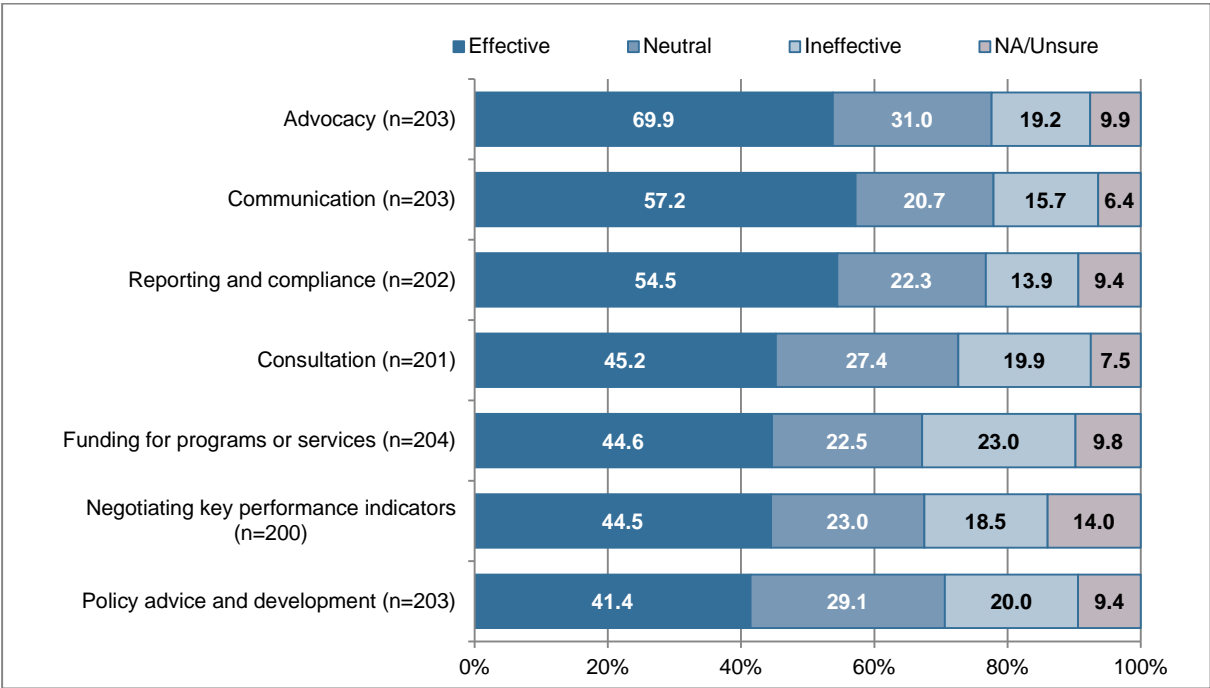


However, higher proportions felt the initiatives had been positive than negative. Around 1 in 4 respondents felt the Quality and Safety Framework had positive impact (24.6%) and 1 in 5 felt DHHS Outcomes Based Reporting was positive for their organisation, with fewer respondents seeing these to have negative impacts. In interpreting these results, it should be noted that the sample would include organisations which do not yet have outcomes measures included in their DHHS contracts.

### 12.3 Perceptions of relationships with the Tasmanian Government

Respondents were also asked to report on the effectiveness of key areas of their relationship with the Tasmanian Government. Although large proportions were neutral or unsure on each measure, higher proportions of respondents felt their relationships with government were effective than ineffective (see Figure 36, with full data in Table 40, Appendix A- Supplementary Tables). Around 7 in 10 felt their relationships around advocacy were effective (69.9%), and 57.2% felt communication was effective. Smaller proportions reported effective relationships around policy advice and development (41.4%), negotiating key performance indicators (44.5%) and funding for programs or services (44.6%).

Figure 36 Perception of effectiveness of relationships with Tasmanian Government



### 12.4 Improving relationships with the Tasmanian Government

To understand more about their relationship with the Tasmanian Government, services were asked an open ended question, “Do you have any comments about how relationships between community organisations and the Tasmanian Government could be improved?”

The most common responses related to better government communication and greater understanding from government about community services. This comment from a medium

sized peak body echoes the concerns of many regarding 1) a need for improved communication about government decisions and conveying critical information, particularly about funding, 2) a sense that departmental employees do not sufficiently understand the community services sector and 3) difficulties forming relationships due to frequent changes among departmental staff.

Until recently we have had a very positive relationship with Tasmanian Government staff ... However, with the recent changes to staffing, restructuring, reduction in staff and loss of corporate knowledge this has meant that many decisions regarding funding are being made without consultation etc. Considerable work needs to be done to upskill Departmental staff. (Medium-sized peak body)

A small organisation offering disability services, for example, was concerned that they had received too little information about the forthcoming transition to the NDIS.

This is a bad time to ask this question as we commence our transition to NDIS and are faced with the cessation of block funding from the DHHS. There is very little information ... whilst we are just 6 months away from the business model change we have to adopt we are unsure of funding and process and procedure at this time... Too much being done in too little time leaving clients in a vacuum and organisations fearful of the unknown.

Others, such as this small organisation engaged in community development spoke of a lack consultation, or consultation that was not genuine or with unrealistic timeframes.

The Tasmanian Government are very supportive of [our service type]. However ... there has been no consultation with the community about the need, which can cause doubling up of services. This is not necessary in small communities.

Large organisations were more likely than smaller services to say they had regular or meaningful communication with the Tasmanian Government, with one very large organisation that provides preventative health services, for example saying 'We have been able to see the Minister for Health on a regular basis.' Another noted:

Probably can't do much more than they are already doing. They have allowed time for consultation re the Family Violence Action Plan and the Affordable Housing Strategy, probably better with the latter as consultations took place both North and South... The Minister, Jacqui Petrusma certainly puts the effort in to engage with services where time permits. (Large organisation providing homelessness services)

Like the above homelessness service, several other organisations mentioned the difficulties of travelling from the west or the north to consultation meetings in the east or the south.

For some organisations, relationships with government were difficult due to frequent changes of staff in departments. A typical comment was given by this very small organisation working in community development:

It is difficult to communicate with the government because we are not sure where or who we should communicate with.

Many organisations said that they felt the Tasmanian Government did not sufficiently understand the community service sector. A medium-sized organisation catering to people with a specific health condition, for example, said:



Maybe having government staff volunteer for a day in an NGO might enable a greater appreciation of how challenging it can be at times to spread limited resources to meet community demand.

Similarly, a very large organisation providing disability services said it would be helpful to have:

More capable Tasmanian Government staff who fundamentally understand service delivery and program management.

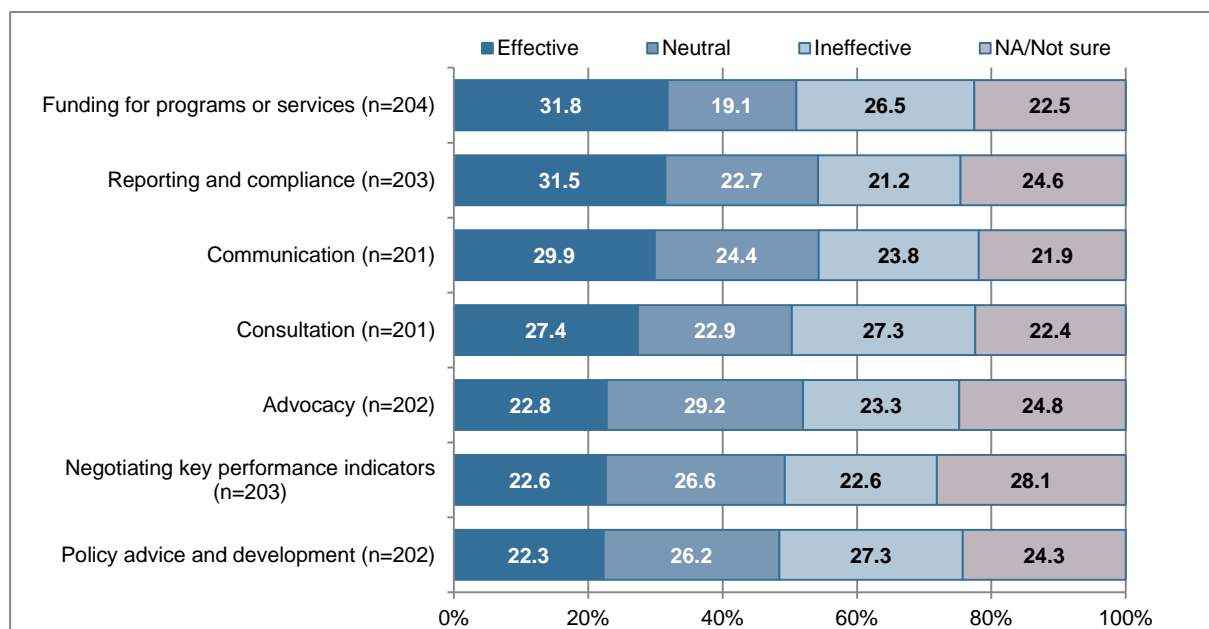
## 13 Involvement with the Australian Government

The survey also asked a series of questions about involvement with the Australian Government, including the effectiveness of relationships, and impact of Australian Government initiatives. Relationships with the Australian Government are particularly important, as more than half of respondents (117 organisations, or 56.5%) said their organisation received funding from the Australian Government. On average, it constituted 24.4% of organisation's total income (Table 17, Section 8).

### 13.1 Effectiveness of relationships with the Australian Government

Respondents also reported on the effectiveness of key areas of their relationship with the Australian Government. Large proportions were neutral or unsure on each measure. However, higher proportions of respondents felt their relationships with government were effective than ineffective (see Figure 37, and Table 42, Appendix A- Supplementary Tables). Around 3 in 10 organisations reported relationships were effective around funding for programs or services (31.8%), reporting and compliance (31.5%) and communication (23.8%). However, on these measures substantial numbers also reported relationships were ineffective. More respondents felt relationships around policy advice and development were ineffective (27.3%) than effective (22.3%). However, as mentioned above, many respondents were neutral or unsure, or said the question was not applicable to their organisation.

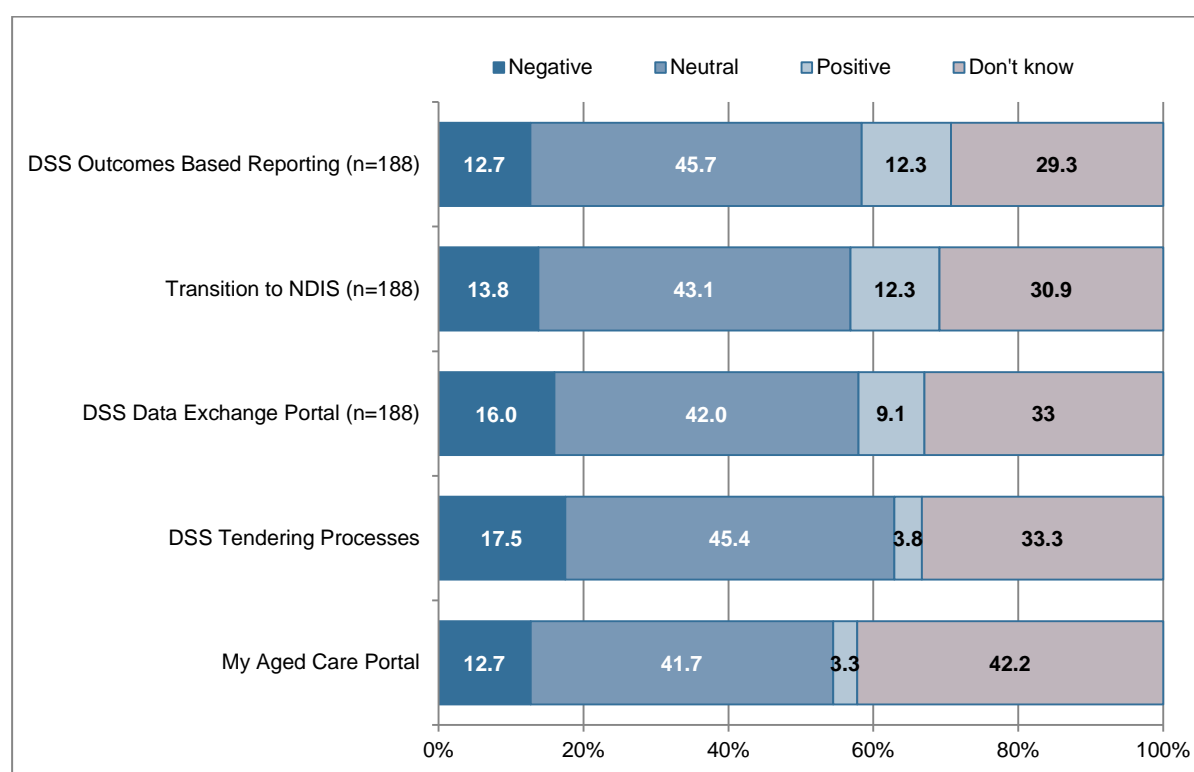
**Figure 37 Perception of effectiveness of relationships with the Australian Government**



## 13.2 Impact of Australian Government initiatives

Respondents were asked about the effect Australian Government initiatives had had on their organisation, using a five-point scale ranging from strongly negative to strongly positive. Large proportions felt each initiative had had a neutral impact on their organisation, and many others said they didn't know what the impact was. However, smaller proportions reported that the impacts had been positive than negative. In particular, only 3.3% felt the My Aged Care Portal had a positive impact, and 12.7% said it had been negative. Similarly, 3.8% felt DSS Tendering Processes had a positive impact, but many more (17.5%) felt the impact was negative.

**Figure 38 Perceived impact of Australian Government initiatives**



## 13.3 Improving relationships with the Australian Government

Services were given an opportunity to comment on what would make for better relationships with the Australian Government. The survey asked 'Do you have any comments about how relationships between community organisations and the Australian Government could be improved?'

Among the services who responded, the most common area for improvement related to communication. Generally, this was about more communication, rather than specific aspects of communication. A very small organisation providing services including financial support said, 'Any communication would be an improvement.' And a very large organisation that offered non-residential services for older people said:

More frequent forums with service providers so they actually know what is happening out there. They hide away!

Communication could possibly be improved by maintaining consistent contact points within Australian Government departments. For example, one respondent said they like to:

...deal with the same person on a regular basis. We are constantly dealing with different people, mostly who know very little about our organisation. (Very large organisation providing consumer advocacy)

Funding relationships were also felt to be an area that could be improved, either through expanding the funding pool to allow more funding or more organisations to be funded, or through better communication about funding.

Ensuring timely information about changes and funding agreements e.g. it does not help relationships when you are 2mths out from the end of the financial year with a funding agreement about to finish and don't know what is happening. (Large organisation providing consumer advocacy)

Several organisations said they had no relationship or no meaningful relationship with the Australian Government. Some felt that they distance made relationship difficult to develop:

It is very difficult for us to have any relationship with Government as all communication is conducted online or by phone. We rarely have face to face relationships due to our isolated address. (Very small organisation engaged in community development)

One organisation suggested that Australian Government representatives based locally could help address this issue:

Local officers with delegations to respond to local needs. (Very large organisation offering family, relationship and parenting services).

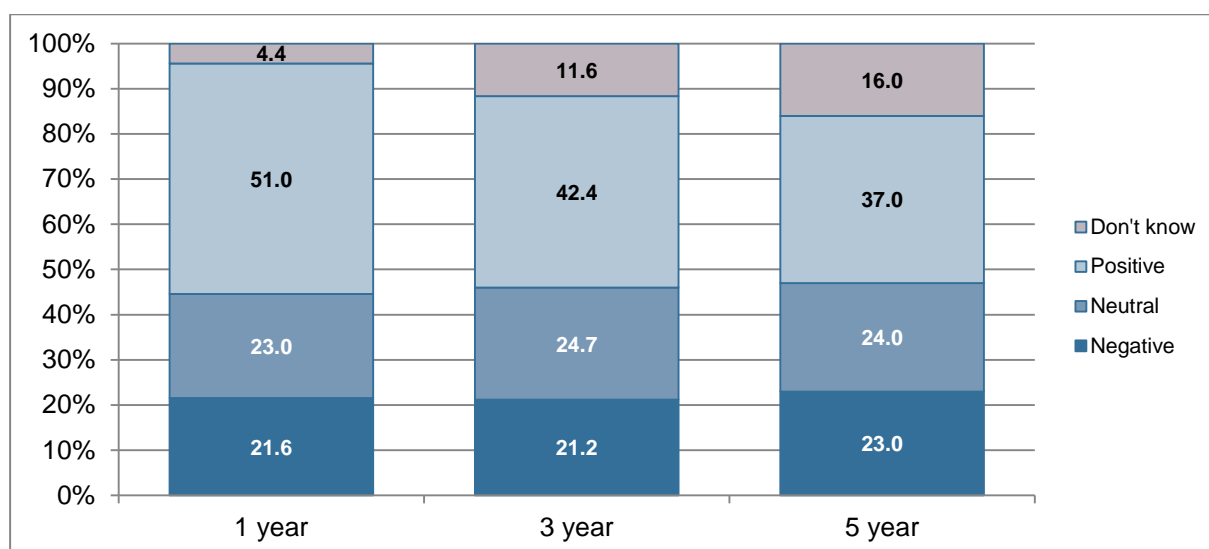
## 14 The future of Tasmania's community services sector

The survey also reflects perspectives on the future of Tasmania's community service sector. Respondents reflected on their organisation's future financial status, and highlighted some priorities for supporting the sector.

### 14.1 Financial outlook

Most respondents felt the financial future of their organisation was either neutral or slightly positive. A little over half (51%) had a positive outlook for the next year, although lower proportions had positive outlooks for the next three and five years (42.4% and 37.0% respectively). More than 1 in 5 felt the 1-year, 3-year and 5-year outlook to be slightly or strongly negative (see Figure 39, and Table 44, Appendix A).

**Figure 39 Respondents' 1 year, 3 year and 5 year financial outlook (n=204)**



### 14.2 Supporting Tasmania's community service sector

Respondents also articulated some key priorities for the future of the sector. When asked, 'What 3 things do you think should be done to help support community service organisations in Tasmania?' respondents overwhelmingly listed funding as a key priority.

Most often, suggestions related to the need for greater funding certainty – suggesting more notice needed to be given that funding would be reallocated, and extending funding periods to three or five years. Typical responses included:

Longer term funding arrangements (peak body)

Adequate, long-term government funding for service organisations (large community cultural development (CCD) service)

Clearer information about funding availability (extra large health-related organisation)

As well as greater funding certainty, respondents also articulated the need for increased levels of funding. Reflecting findings from other parts of the survey, several services explained that they need more funding in order to employ more staff, to pay staff appropriately and cover pay increases and to provide the level of service that is needed. Responses included the following:

Increased funding to provide extra staffing to support clients (large homelessness service)

Increase funding to social housing for NDIS disability clients who are coming into the system (extra large disability service)

Realistic financial support to support increasing community needs (small community development organisation)

Another key priority for respondents related to relationships with government. In general, responding organisations wanted better communication and consultation and greater understanding and recognition from government about community services. For example:

Recognition of and more resourcing for the 'preventative' work undertaken by community service organisations (peak body)

Better communication between departments and service organisations (large training service)

Improved communication with government (large alcohol, tobacco and other drugs service)

Other services used the opportunity to suggest better reporting and compliance processes from government. Often, they identified a reduction in reporting requirements or 'red tape' as a priority, with many articulating the need for simplified processes. Comments included:

Reducing compliance reporting (very small family, relationship and parenting service)

Simplified funding agreement (large training service)

Small organisations should not be expected to spend huge amounts of time reporting (small community development organisation)

### 14.3 Final comments

At the end of the survey, respondents were given a final opportunity to comment on the community services sector, when they were asked 'And before we finish, is there anything else that you would like to tell us about community services in Tasmania?'

Many organisations used this space to point out the strengths of Tasmania's community services sector. The comments included:

Community services in Tasmania have a very strong service delivery network to enhance outcomes for shared clients. We all work well together and possibly because we are a small state all get to know each other really well and are all passionate about the work we do for betterment of outcomes for our client group. (large homelessness service)

Community services are integral in the operation of Tasmanian communities. We love what we do ... We see our work as integral to the goal of our State Government (small health promotion service)

The sector is a vibrant and dynamic one, with passionate staff and volunteers. This strength needs to be nurtured. (very small migrant, refugee and asylum seeker service)

Sometimes services spoke of the value of their work while lamenting the difficult circumstances in which they operate. For example,

There is an enormous amount of hard work, time and effort being contributed voluntarily by people through community organisations that provide essential services to create a healthy and equitable society. However without the full support of government and other sectors in society these efforts will be/are unsustainable, at the expense of everyone. Often these efforts are further stretched through engagement with costly and inefficient bureaucratic processes utilising time, energy and resources that could instead be providing services to people who need them. (small health service)

It seems people are being asked/expected to do more and more with less (or at best the same) resources. Well-being and strategizing to avoid staff burnout is a major issue for management/CEOs. Most people who work in community services are passionate and committed and are used to doing more than paid hours to make things better. Currently more and more and more hours unpaid hours are barely making a dent on outstanding work. (medium consumer advocacy organisation)

Others also spoke only of feeling stretched and under-resourced:

Governments get good value for money - we are running on the smell of an oily rag. We cannot continue to absorb costs; some of our funding will in effect be the same base rate as six years ago at the end of our grant deed. This is not sustainable. Less money for football teams - more for the community sector. (large peak body)

The community services are constantly being asked to do more with resources. It is appropriate that the organisation is professional but the impost at times on reporting, administration is growing and this takes the time and effort away from delivering the service. (large tobacco, alcohol and other drugs service)

One attributed this to poor recognition of Tasmanian circumstances in national policy:

The Tasmanian people are suffering from a reduction in services and this will continue as the current Commonwealth models of care are predicated on population density that are not achievable in Tasmania. (large non-residential care service)

Others associated the difficulties faced by the sector with limited recognition of the value they contribute to Tasmania. For example, this medium-sized service that supports people with a specific health condition noted:

There is a wealth of experience, knowledge and skills in the community sector that is somewhat under-valued and under-utilised.



## 15 Conclusions

Community organisations in Tasmania promote community development, inclusion, diversity, and wellbeing, and provide essential services for people experiencing disadvantage. Through their advocacy work and direct service delivery these organisations provide a means to achieve positive social change. This report has provided new information, much of which has been collected for the first time, about the activities and operations of Tasmanian community service organisations. This includes data about the paid workforce and volunteers; governance, boards and management; collaboration within the sector and engagement with governments; public and private income sources, financial status; and reflections on the future of the community service sector in Tasmania.

The data can be used as the basis for continued monitoring of sector characteristics and perspectives over time. Unlike other surveys, this survey used a comprehensive sampling frame which was purposefully constructed to consist of community service organisations which receive funding from the main Tasmanian Government funding agencies, members of TasCOSS, social service charities, and services involved in NDIS. The survey was completed by leaders from 207 out of 354 organisations, representing a very high 58.5% response rate. This means the findings can be interpreted with confidence.

Based on the information about income and expenditure collected, we estimate that the total income of Tasmanian community service organisations was around \$509.1 million in the 2014-2015 year. Estimated expenditure by the sector was approximately 94.5% of estimated income at \$481.0 million.

The community service sector is also a major employer in Tasmania. Based on the survey data, we estimate the state has 9066 community service workers in Tasmania, representing around 3.7% of Tasmania's total workforce. However, rates of part time work in the sector are much higher than the workforce average. Underemployment and prevalence of non-permanent employment may compromise the sector's capacity to attract skilled staff, especially in some areas of service delivery.

Overall, the data attests to the strengths and contribution of Tasmania's community service sector. Governance is a strength of the sector, although for some organisations, it could be improved. Most respondents felt their Boards or Management Committees were effective and productive, although there is some scope to formalise roles and improve aspects of Board functioning.

The results also highlight the challenging circumstances under which Tasmania's community service organisations are operating, with widespread perceptions of financial inadequacy and funding insecurity. While many organisations have seen their financial status improve in the last 12 months, many organisations reported that funding reductions have affected service provision, and many are operating with limited financial reserves.

Resource pressures are a key issue in organisation's relationships with government. The research highlights scope to improve relationships with the Tasmanian Government around funding, performance measurement, and policy development.

Overall, the report provides unprecedented detail about the characteristics of community service organisations in Tasmania, and the issues and challenges they face. This information can help underpin strategies to build sector capacity, sustainability, and engagement, to ensure the sector can fully realise its goals. It can also be used as a baseline to track changing sector characteristics and experiences over time.

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## Appendix A- Supplementary Tables

**Table 33 Organisations by main service type and other service type**

	Main service type	Other service type	All organisations providing service type	% of organisations providing service type
	n	n	n	%
<b>Community development, community cultural development (CCD) and ATSI services</b>				
Aboriginal and Torres Strait Islander health and support	4	12	16	7.7
Community development	28	49	77	37.2
Migrant, refugees, and asylum seeker services	4	10	14	6.8
Community cultural development	2	17	19	9.2
<b>Ageing and carer</b>				
Carer support	2	26	28	13.5
Disability services (other than employment or mental health)	32	22	54	26.1
Non-residential services for older people (including HACC and respite)	10	11	21	10.1
Transport services	2	20	22	10.6
<b>Disability services</b>				
Disability services (other than employment or mental health)	32	22	54	26.1
<b>Financial support, employment and social enterprise</b>				
Jobseeker services	1	19	20	9.7
Training services	3	42	45	21.7
Emergency relief	2	24	26	12.6
Financial support (including NILS, financial literacy, financial counselling)	3	28	31	15.0
Social enterprise	6	23	29	14.0
Problem gambling support	0	6	6	2.9
<b>Adult, family, children and youth</b>				
Family, relationship and parenting	9	38	47	22.7
Children's services	8	36	44	21.3
Youth services	7	43	50	24.2
Sexual assault service	2	5	7	3.4
Domestic and family violence service	3	13	16	7.7
<b>Health and health promotion services</b>				
Health condition specific services	13	22	35	16.9
Preventative health	3	30	33	15.9
Health promotion service	4	34	38	18.4
Alcohol, tobacco and other drugs	2	21	23	11.1
Mental health services	5	32	37	17.9
Sexual and reproductive health	1	6	7	3.4
Women's health	2	11	13	6.3
Palliative care	2	5	7	3.4
Other health service	12	17	29	14.0
<b>Housing</b>				
Community housing	5	12	17	8.2
Homelessness	7	13	20	9.7
<b>Legal, information, advocacy and peaks</b>				
Information, advice and referral	2	35	37	17.9
Legal services	3	3	6	2.9
Consumer advocacy	4	45	49	23.7
Peak body	14	13	27	13.0
<b>Total</b>	<b>207</b>	<b>765</b>	<b>950</b>	<b>-</b>

**Table 34 Host organisations for Work for the Dole by main service type**

		Organisation was a host organisation for Work for the Dole	Was not	Not sure	Total
Community Development, CCD and ATSI services	n	20	16	2	38
	%	52.6%	42.1%	5.3%	100.0%
Ageing and Carer	n	1	8	0	9
	%	11.1	88.9	0	100.0
Financial Support, Employment promotion, and Social Enterprise	n	4	8	1	13
	%	30.8%	61.5%	7.7%	100.0%
Adult, Family, Children, and Youth	n	4	21	1	26
	%	15.4%	80.8%	3.8%	100.0%
Health and Health Promotion services	n	1	37	2	40
	%	2.5%	92.5%	5.0%	100.0%
Housing	n	2	8	0	10
	%	20.0%	80.0%	0.0%	100.0%
Legal, Information, Advocacy and Peaks	n	0	20	1	21
	%	0.0%	95.2%	4.8%	100.0%
Disability	n	7	20	0	27
	%	25.9%	74.1%	0.0%	100.0%
Total	n	39	138	7	184
	%	21.2%	75.0%	3.8%	100.0%

**Table 35 Agreement with statements about the functioning of Boards and Management Committees (n=199)**

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	Not sure
There is good two way flow of information between our Board/ Committee and management	47.4	40.3	7.1	3.6	1.0	.5
Our Board/Committee works collaboratively with management on the important issues facing our organisation	48.7	40.0	6.7	3.1	1.0	.5
There is mutual trust and respect between our Board/Committee and management	53.6	35.6	6.2	2.6	1.5	.5
The roles and responsibilities of management and our Board/Committee are clearly distinguished	37.1	39.2	12.4	9.3	1.0	1.0
Our Board/Committee encourages robust and constructive debate	26.9	48.7	15.2	5.1	3.0	1.0
Our Board/Committee has a good understanding of the issues facing the sector	27.8	51.0	11.6	6.1	2.5	1.0

**Table 36 Agreement with statements about collaboration**

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	Not sure
We are collaborating more often than we did 12 months ago	27.5	39.2	26.0	4.9	1.5	1.0
We are working with a wider range of organisations than we did 12 months ago	25.0	46.1	20.6	6.4	.5	1.5
We are collaborating more effectively than we did 12 months ago	21.8	43.1	27.7	5.4	1.0	1.0
Working together is becoming more complicated	10.0	25.9	30.8	26.9	4.0	2.5
We have become more strategic in our collaborations	18.2	50.7	25.6	2.5	1.0	2.0
Governments support us to collaborate	5.4	26.2	30.7	23.8	10.4	3.5
Other organisations have the capacity to collaborate with us	15.0	52.0	24.0	3.5	1.5	4.0

**Table 37 Agreement with statements about the adequacy of Tasmanian Government funding**

	Strongly disagree		Disagree		Neutral		Agree		Strongly agree	
	n	%	n	%	n	%	n	%	n	%
Funding enables us to provide high quality services (n=175)	20	11.4	20	11.4	34	19.4	64	36.6	37	21.1
Funding enables us to employ staff for the hours necessary to do the job (n=175)	34	19.4	42	24.0	27	15.4	50	28.6	22	12.6
Funding ensures we can pay staff rates appropriate to their skills(n=174)	27	15.5	30	17.2	38	21.8	57	32.8	22	12.6
Funding covers the minimum amount of service we are contracted to provide (n=172)	25	14.5	22	12.8	34	19.8	68	39.5	23	13.4
Funding covers the costs of managing and supervising staff (n=173)	31	17.9	42	24.3	36	20.8	48	27.7	16	9.2
Funding covers the costs of data collection and reporting (n=171)	30	17.5	55	32.2	43	25.1	34	19.9	9	5.3
Funding covers the costs of evaluation (n=173)	36	20.8	67	38.7	45	26.0	15	8.7	10	5.8
Funding helps us purchase the capital we need, such as vehicles and equipment (n=171)	49	28.7	52	30.4	40	23.4	25	14.6	5	2.9
Funding enables us to operate with some money in reserve (n=173)	51	29.5	65	37.6	40	23.1	14	8.1	3	1.7
Funding is available for sector development (n=172)	48	27.9	65	37.8	38	22.1	20	11.6	1	0.6
Funding is available to improve organisational governance (n=173)	44	25.4	64	37.0	41	23.7	21	12.1	3	1.7



**Table 38 Agreement with statements about Tasmanian Government funding processes**

	Strongly disagree		Disagree		Neutral		Agree		Strongly agree	
	n	%	n	%	n	%	n	%	n	%
We get timely information about tendering and procurement processes (n=178)	15	8.4	46	25.8	68	38.2	45	25.3	4	2.2
Processes for applying for funding are simple (n=174)	29	16.7	68	39.1	46	26.4	28	16.1	3	1.7
Funding is received on time (n=178)	11	6.2	20	11.2	37	20.8	91	51.1	19	10.7
Funding contracts are long enough to achieve outcomes (n=174)	29	16.7	30	17.2	47	27.0	63	36.2	5	2.9
We know in advance whether funding will be renewed (n=177)	34	19.2	52	29.4	54	30.5	33	18.6	4	2.3
Compliance and acquittal processes are fair and transparent(n=178)	9	5.1	17	9.6	51	28.7	91	51.1	10	5.6
Funders engage with a variety of stakeholders (n=177)	8	4.5	16	9.0	83	46.9	65	36.7	5	2.8
Funders seek feedback on tendering and procurement processes (n=175)	19	10.9	40	22.9	81	46.3	35	20.0	0	0
We have opportunities to influence funding reform (n=177)	22	12.4	53	29.9	64	36.2	36	20.3	2	1.1
Funding models allow us to support the holistic needs of clients (n=177)	31	17.5	43	24.3	71	40.1	30	16.9	2	1.1

**Table 39 Involvement with the Tasmanian Government, by size**

	<50k		\$50 to \$250k		\$250k-\$500k		\$500 to \$1m		\$1-\$5m		\$5-\$10m		More than \$10m		All	
	n	%	n	%	n	%	n	%	n	%	n	%	n	%	n	%
Receive Tasmanian Government funding (contracts or grants) to perform activities	9	39.1	36	76.6	33	71.7	28	80.0	27	87.1	12	92.3	12	100.0	157	75.8
The Tasmanian Government asks us for advice (eg to participate in committees)	1	4.3	15	31.9	15	32.6	17	48.6	16	51.6	7	53.8	7	58.3	78	37.7
We contribute to policy development in Tasmania (eg writing submissions)	3	13.0	11	23.4	11	23.9	20	57.1	18	58.1	6	46.2	9	75.0	78	37.7
We advocate for clients or disadvantaged people in Tasmania	8	34.8	25	53.2	24	52.2	22	62.9	21	67.7	6	46.2	9	75.0	115	55.6
We receive in-kind support (eg accommodation) from the Tasmanian Government	2	8.7	1	2.1	4	8.7	4	11.4	6	19.4	2	15.4	4	33.3	23	11.1
None, we have no involvement with the Tasmanian Government	6	26.1	4	8.5	10	21.7	4	11.4	1	3.2	0	0	0	0	25	12.1

**Table 40 Perceptions of effectiveness of relationships with the Tasmanian Government**

	Very ineffective		Mostly ineffective		Neutral		Mostly effective		Very effective		Not applicable / not sure	
	n	%	n	%	n	%	n	%	n	%	n	%
Funding for programs or services (n=204)	20	9.8	27	13.2	46	22.5	67	32.8	24	11.8	20	9.8
Policy advice and development (n=203)	19	9.2	22	10.8	59	29.1	69	34.0	15	7.4	19	9.4
Reporting and compliance (n=202)	10	5.0	18	8.9	45	22.3	85	42.1	25	12.4	19	9.4
Negotiating key performance indicators (n=200)	14	7.0	23	11.5	46	23.0	70	35.0	19	9.5	28	14.0
Advocacy (n=203)	11	5.4	28	13.8	63	31.0	61	30.0	20	9.9	20	9.9
Communication (n=203)	9	4.4	23	11.3	42	20.7	83	40.9	33	16.3	13	6.4
Consultation (n=201)	13	6.5	27	13.4	55	27.4	69	34.3	22	10.9	15	7.5

**Table 41 Perceived impact of Tasmanian Government initiatives on respondent's organisation**

	Strongly negative		Slightly negative		Neutral		Slightly positive		Strongly positive		Don't know	
	n	%	n	%	n	%	n	%	n	%	n	%
DHHS Quality and Safety Framework (n=199)	6	3.0	21	10.6	88	44.2	33	16.6	16	8.0	35	17.6
DHHS Outcomes Based Reporting (n=195)	5	2.6	17	8.7	95	48.7	23	11.8	14	7.2	41	21.0

**Table 42 Perceptions of effectiveness of relationships with the Australian Government**

	Very ineffective		Mostly ineffective		Neutral		Mostly effective		Very effective		Not applicable / not sure	
	n	%	n	%	n	%	n	%	n	%	n	%
Funding for programs or services (n=204)	29	14.2	25	12.3	39	19.1	49	24.0	16	7.8	46	22.5
Policy advice and development (n=202)	29	14.4	26	12.9	53	26.2	38	18.8	7	3.5	49	24.3
Reporting and compliance (n=203)	20	9.9	23	11.3	46	22.7	48	23.6	16	7.9	50	24.6
Negotiating key performance indicators (n=203)	23	11.3	23	11.3	54	26.6	39	19.2	7	3.4	57	28.1
Advocacy (n=202)	26	12.9	21	10.4	59	29.2	39	19.3	7	3.5	50	24.8
Communication (n=201)	21	10.4	27	13.4	49	24.4	47	23.4	13	6.5	44	21.9
Consultation (n=201)	27	13.4	28	13.9	46	22.9	42	20.9	13	6.5	45	22.4

**Table 43 Perceived impact of Australian Government initiatives on respondent's organisation**

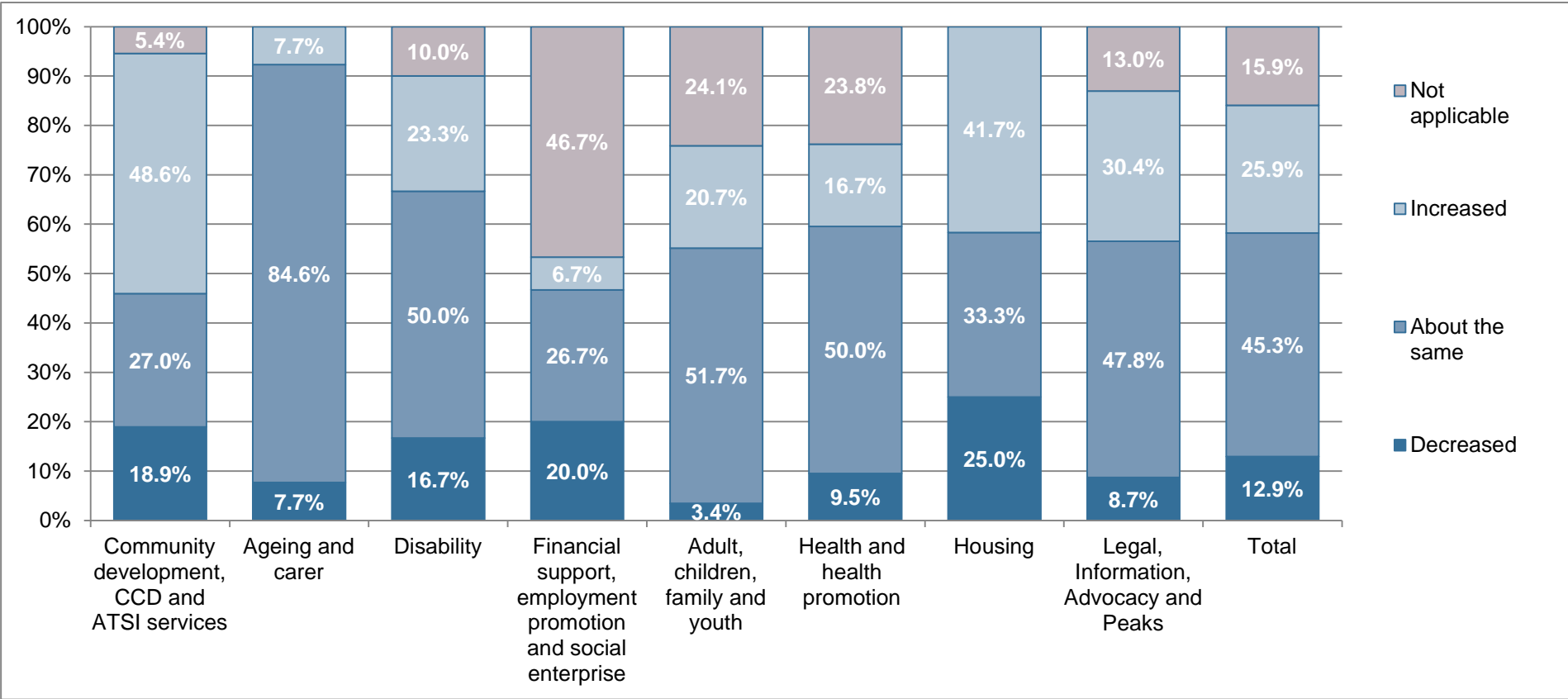
	Strongly negative		Slightly negative		Neutral		Slightly positive		Strongly positive		Don't know	
	n	%	n	%	n	%	n	%	n	%	n	%
DSS Outcomes Based Reporting (n=188)	4	2.1	20	10.6	86	45.7	15	8.0	8	4.3	55	29.3
DSS Data Exchange Portal (n=188)	8	4.3	22	11.7	79	42.0	12	6.4	5	2.7	62	33.0
Transition to NDIS (n=188)	9	4.8	17	9.0	81	43.1	15	8.0	8	4.3	58	30.9
DSS Tendering Processes (n=183)	19	10.4	13	7.1	83	45.4	4	2.2	3	1.6	61	33.3
My Aged Care Portal (n=180)	15	8.3	8	4.4	75	41.7	6	3.3	0	0.0	76	42.2

**Table 44 Rating of organisation's financial status in coming years (% , n=204)**

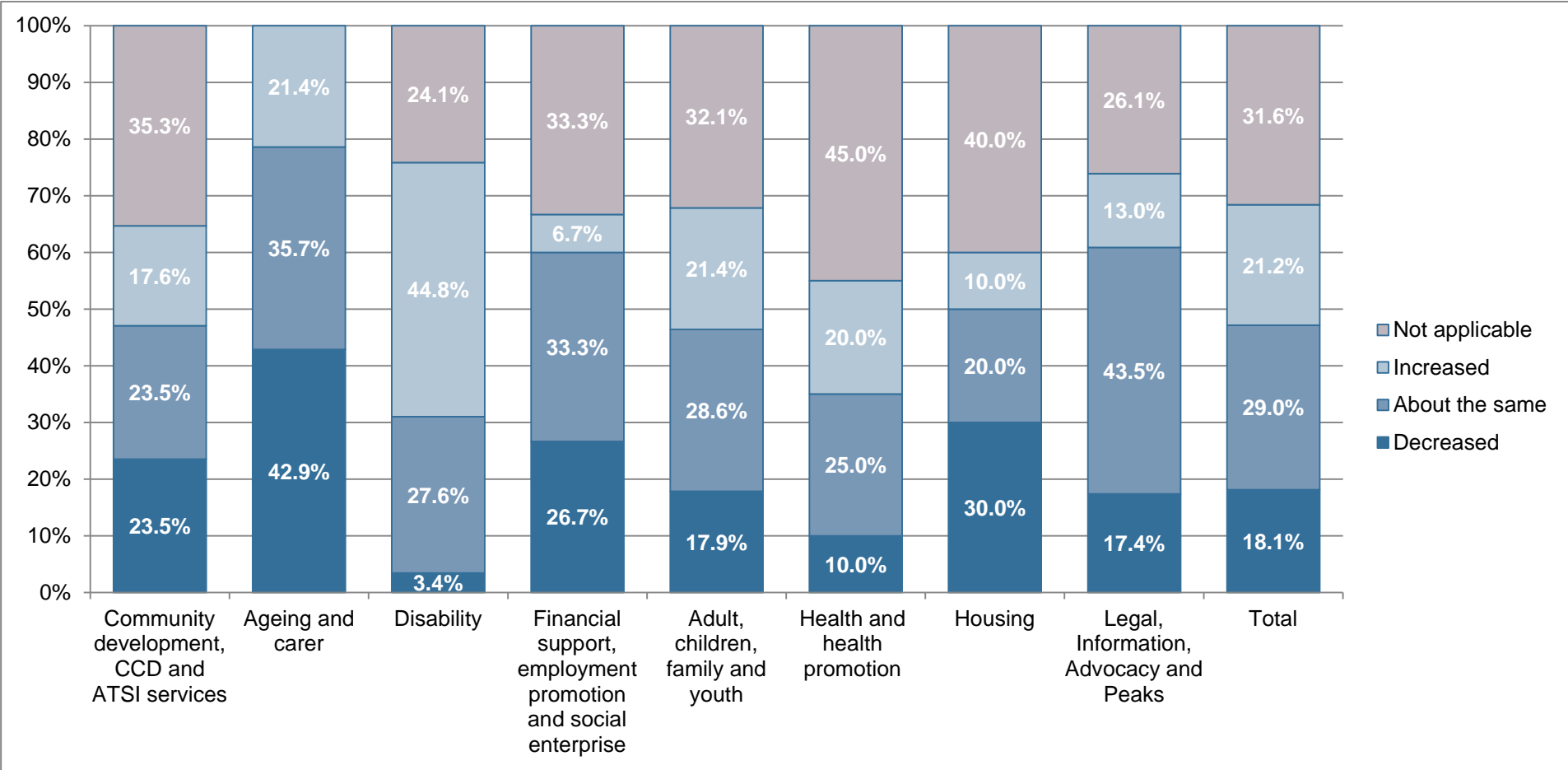
	1 year	3 years	5 years
Strongly negative	4.4	8.6	11.5
Slightly negative	17.2	12.6	11.5
Neutral	23.0	24.7	24.0
Slightly positive	35.8	30.3	25.0
Strongly positive	15.2	12.1	12.0
Don't know	4.4	11.6	16.0
All	100.0	100.0	100.0

# Appendix B- Supplementary Charts

Figure 40 Organisations experiencing changes in income from the Tasmanian Government in the last 12 months, by main service type (%)



**Figure 41 Organisations experiencing change in income from the Australian Government in the last 12 months, main service type (%)**



**Figure 42 Perceptions of numbers of clients being turned away, compared with same time last year, main service type (%)**

