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CSO Comprehensive Market Research: key findings

June 29th, 2015,
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Outline

- General information on CSOs
- Governance: Board, Membership, Participation and Accountability
- Resources available and their management
 - Human resources, staffing and HR management
 - Financial and other resources
- Collaboration with NGOs, Public and Business institutions
- Organizational development needs

General information on CSOs

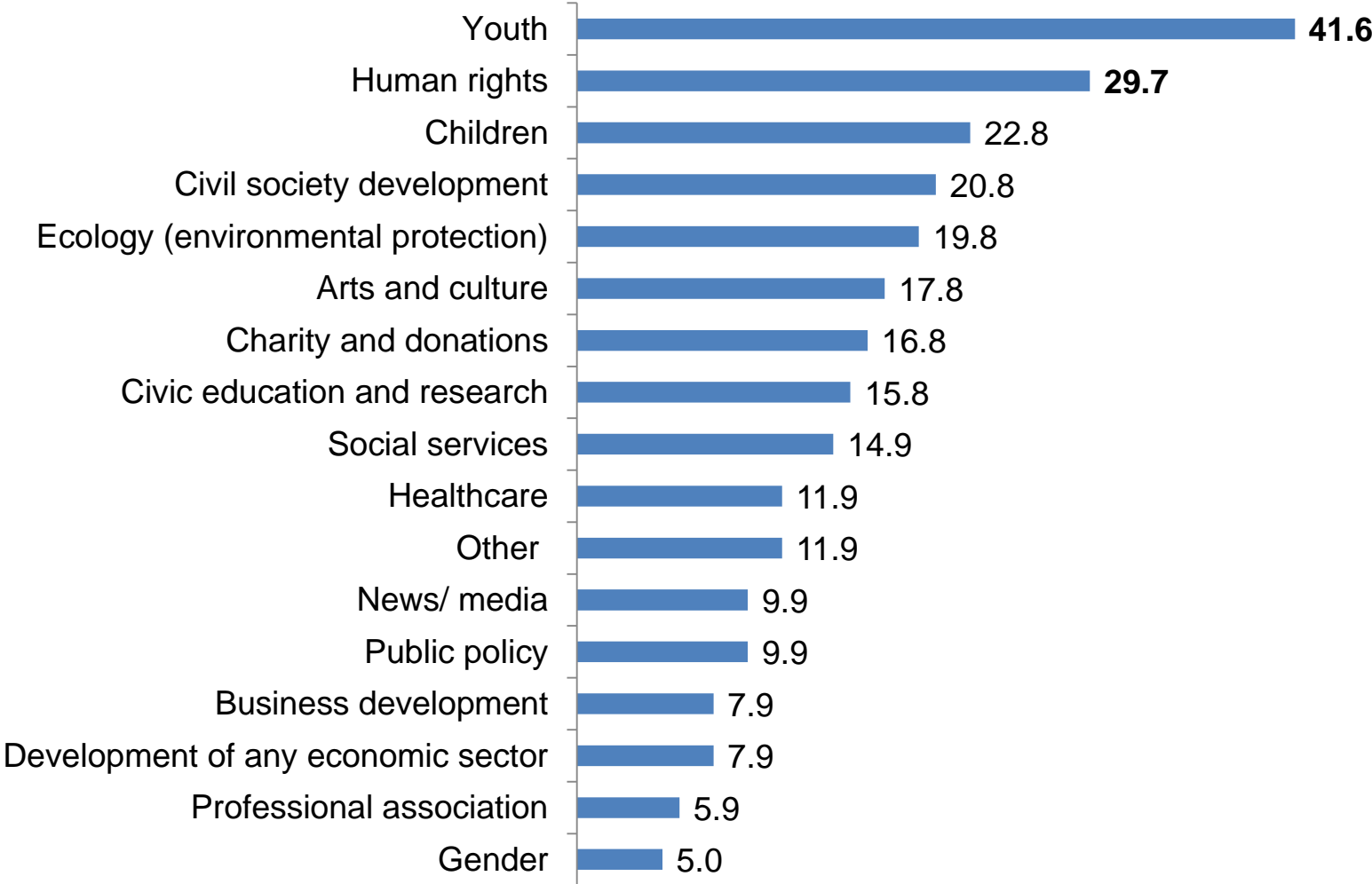
Introduction to survey

- The purpose of the research is to assess the CSO demand for capacity building and services.
- The research includes a quantitative survey among 101 CSOs in all marzes of Armenia (40 – Yerevan, 61 – regions; 17 foundations, 84 NGOs).
- Respondents: heads of organizations.
- Average years of operation: 10 years.

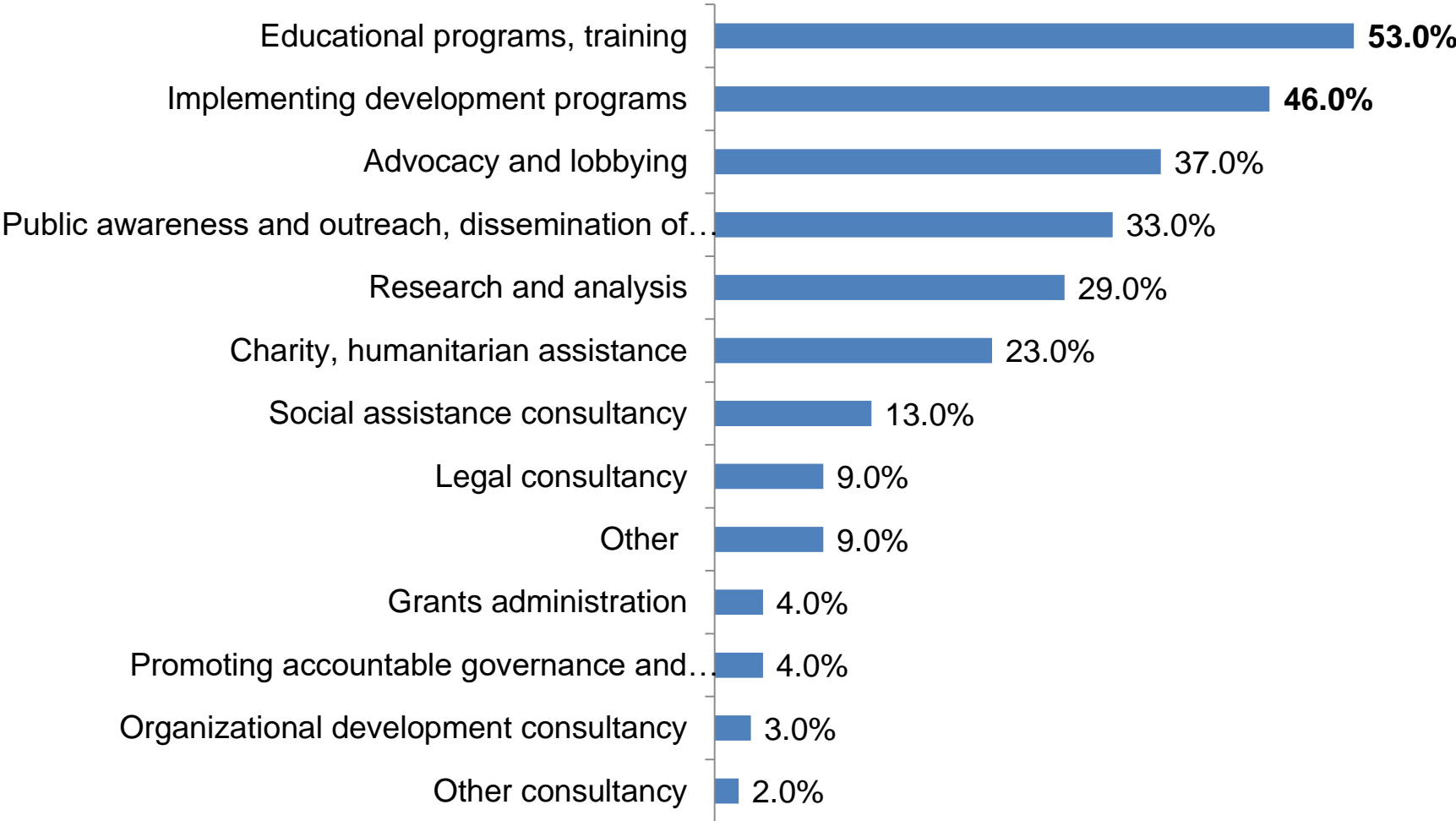
Respondents' profile

- Presidents -70%, directors-25%
- Average age - 45.6 (22-68)
- With university education - 82%, postgraduate -13%
(each third studied abroad)
- Within the organization-9.6 years
- Work in CSO is main employment for 50%
- 58% are engaged in scientific or other work outside
- 34% teach alongside the CSO work
- 9 out of 10 are completely (5) or mostly (4) satisfied with their job
- 8.5 out of 10 often or always work overtime mostly because "they enjoy their work" (6).

Q2. What are the main target areas of your organization's activities? (% of cases, up to 3 responses)



Q3. In which of the following activities is your organization engaged? (% of cases, up to 3 responses)

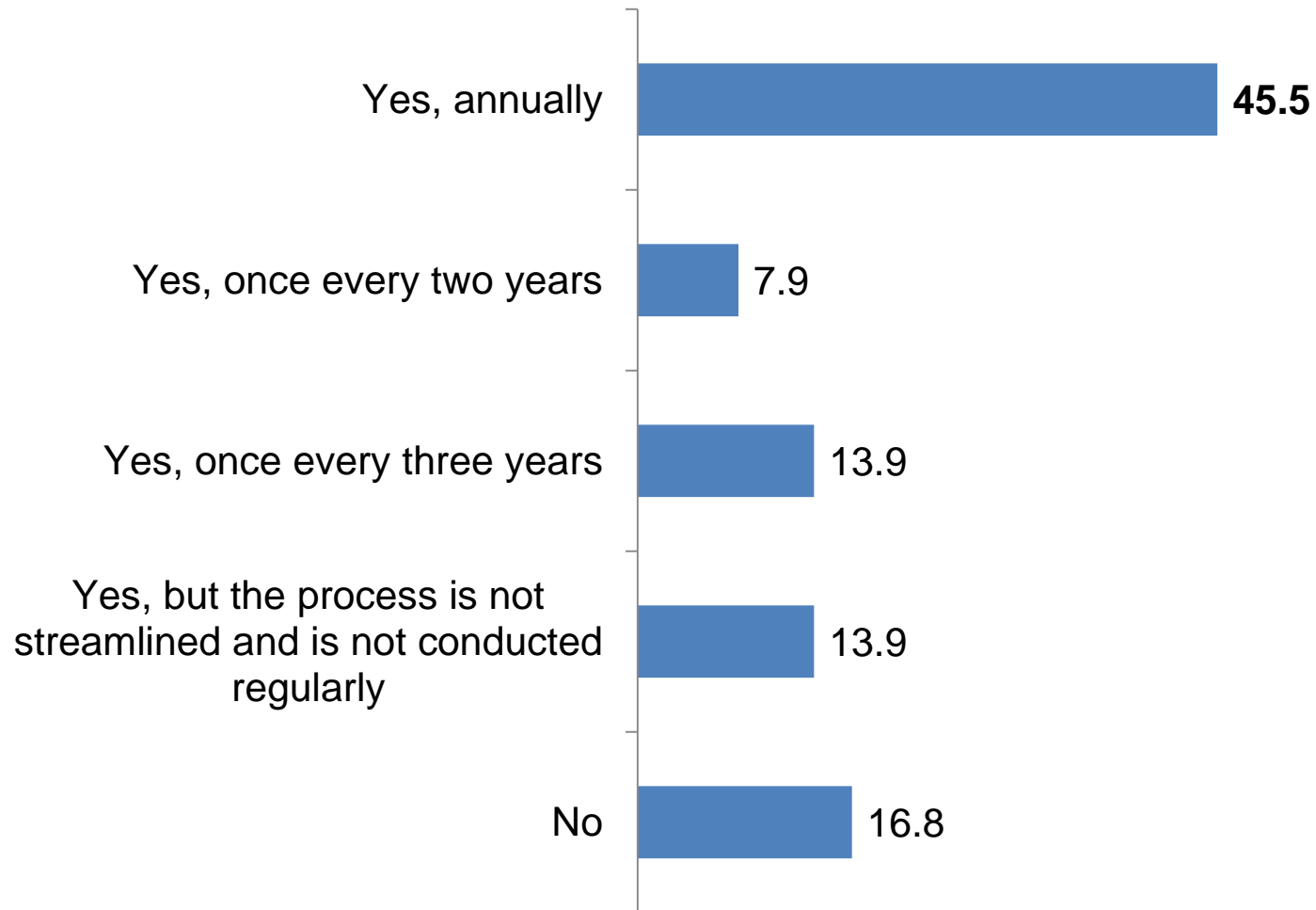


Public Policy is “baked” in Yerevan and development programs are implemented in Marzes

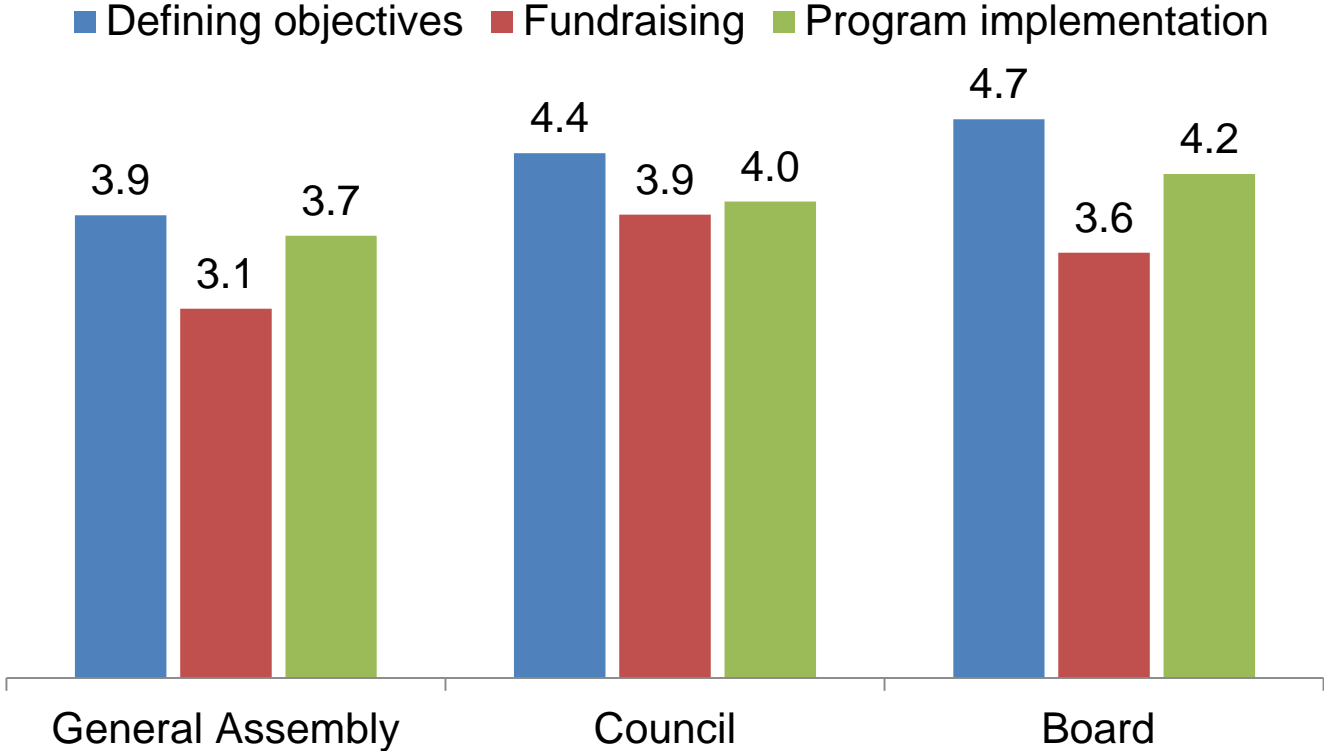
- Most of CSOs working in the area of public policy and news/media are based in Yerevan, while most of those engaged in charity and youth are in regions.
- Yerevan-based CSOs are more often engaged in research and analysis, public awareness and outreach, as well as legal consulting, while regional CSOs are majority among those who promote accountable governance and implementing development programs.

Governance, Participation and Accountability

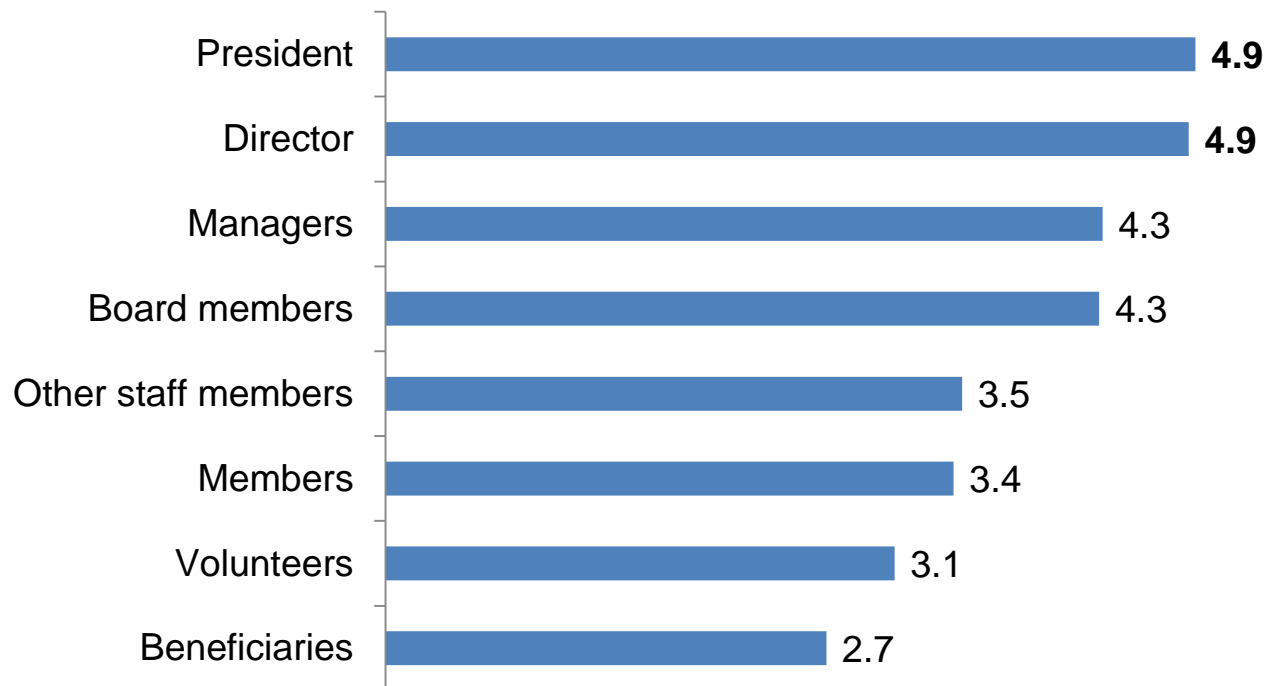
Strategic Planning: Q24. Does your organization conduct strategic planning? (%)



Q30. How often do the following bodies contribute to defining objectives, fundraising, and implementing programs? (1-never, 5-always), *average*

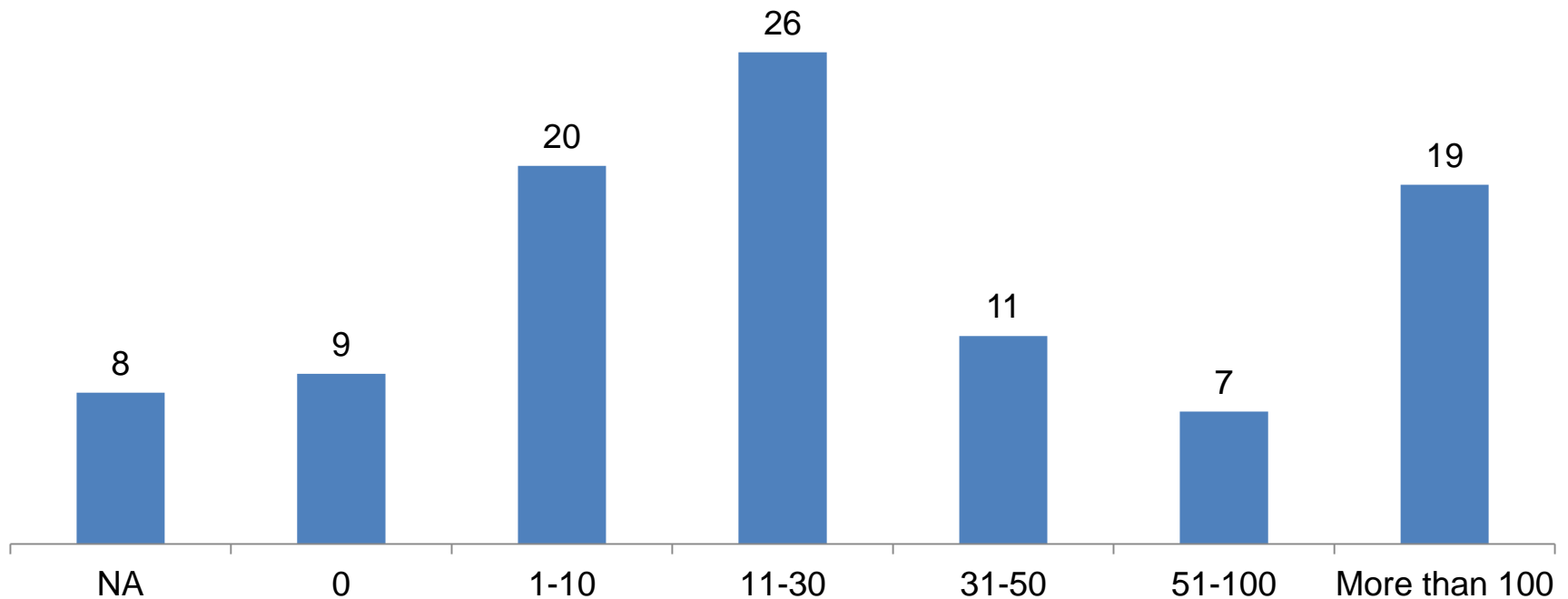


Participation Q14. How frequently are the following persons or groups involved in making decisions on matters of organizational programming? (average rate, 1=never, 5=always)



- Beneficiaries are the least involved group. 10 CSOs replied NA, 20 CSOs –never about participation of beneficiaries in their programming.

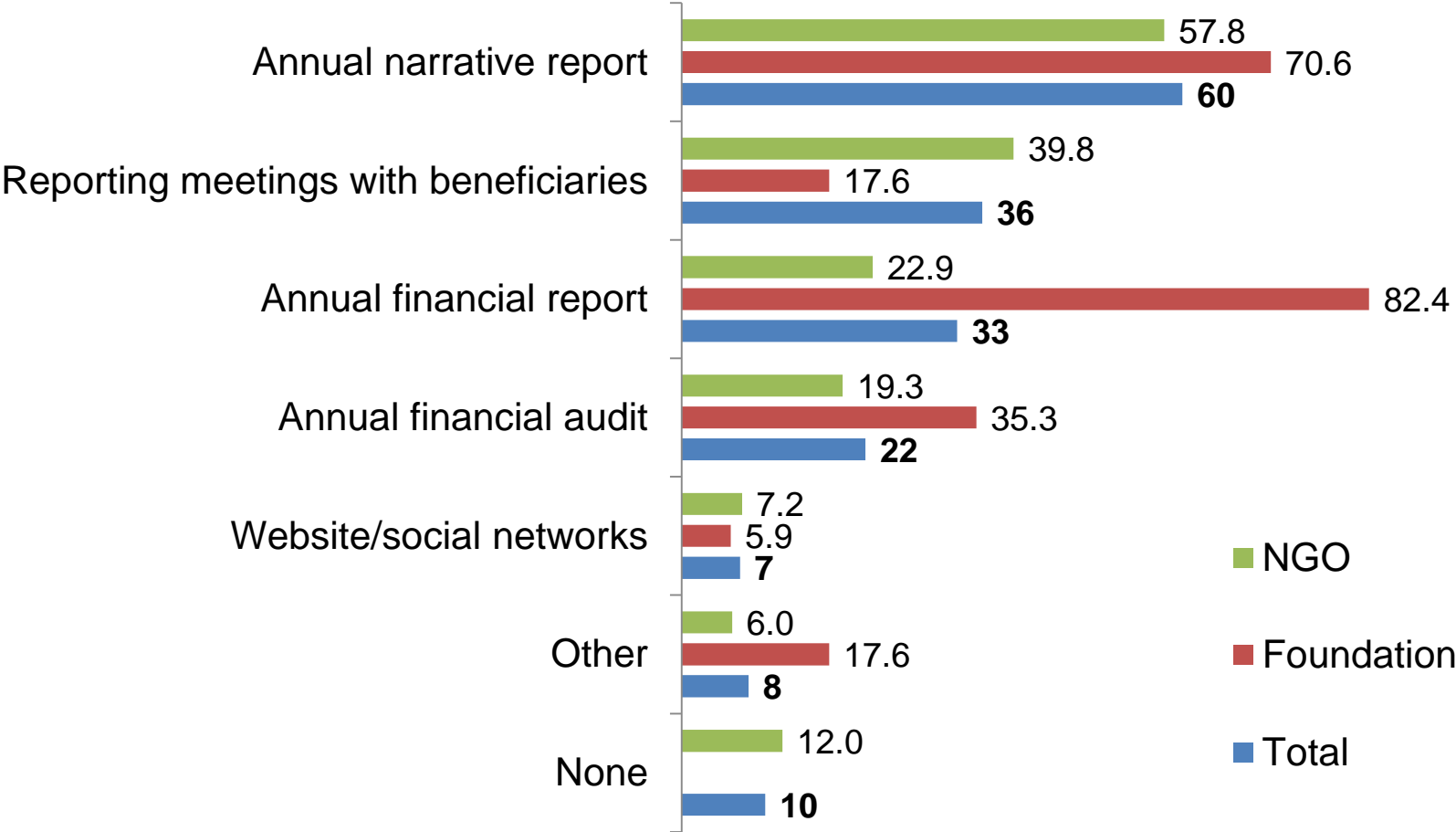
Membership: Q8. How many members does the organization have? (% of cases)



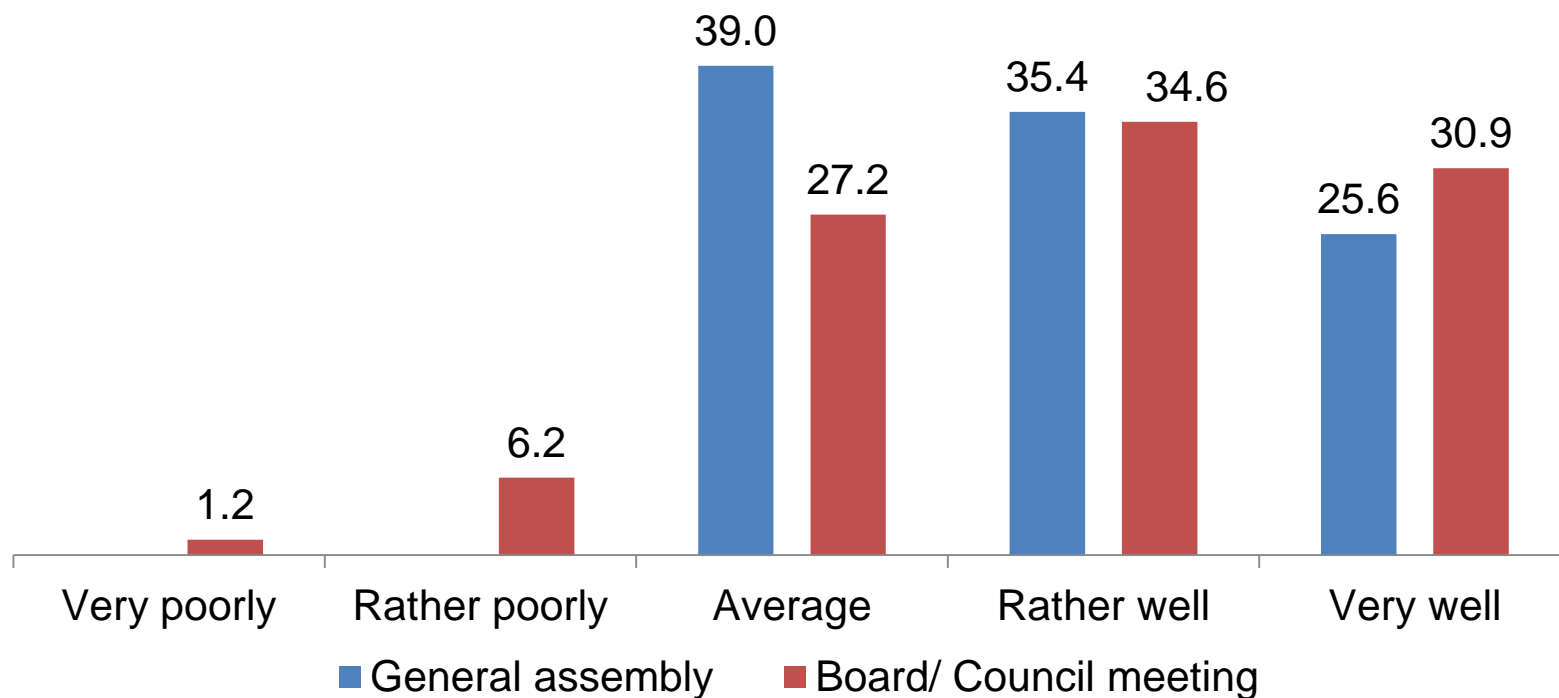
Membership Paradoxes:

- 5 NGOs told that they have no members (though at least founders are to be counted as members),
- 5 foundations indicated that they have members (though there is no membership in foundations by law).

Reporting and accountability: Q16. What tools do you use to ensure the accountability and transparency of your organization? (multiple responses possible, % of cases)



Reporting and accountability: Q29. How well are the meetings of the highest governing bodies documented? (% of cases)



Foundations report more accurate documentation of board meetings (rather well or very well - 67% of foundations vs. 49% NGOs), which can be explained by legal requirements.

Internal Procedures

- 68% have internal rules of procedures, 32% do not have.
- Out of those who have internal procedures, 62% claim that they always adhere to these rules, 29% frequently, and 8.7% rarely adhere.

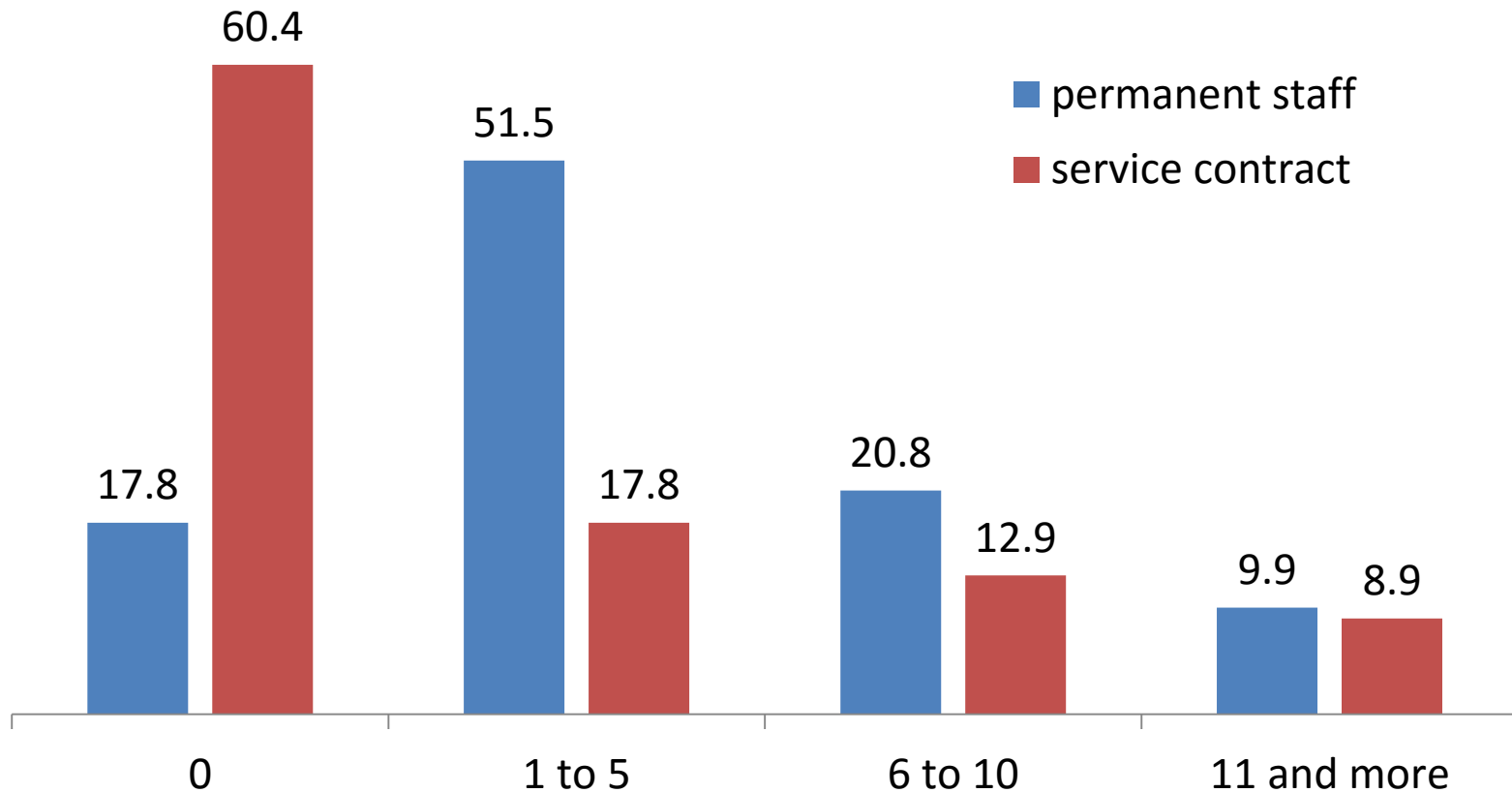
Resources

Human: staffing and HR Management
Financial and other resources

Resources

Human: staffing and HR Management

Staffing: Q4. How many employees do you currently have: permanent staff and service contracts (% of cases)



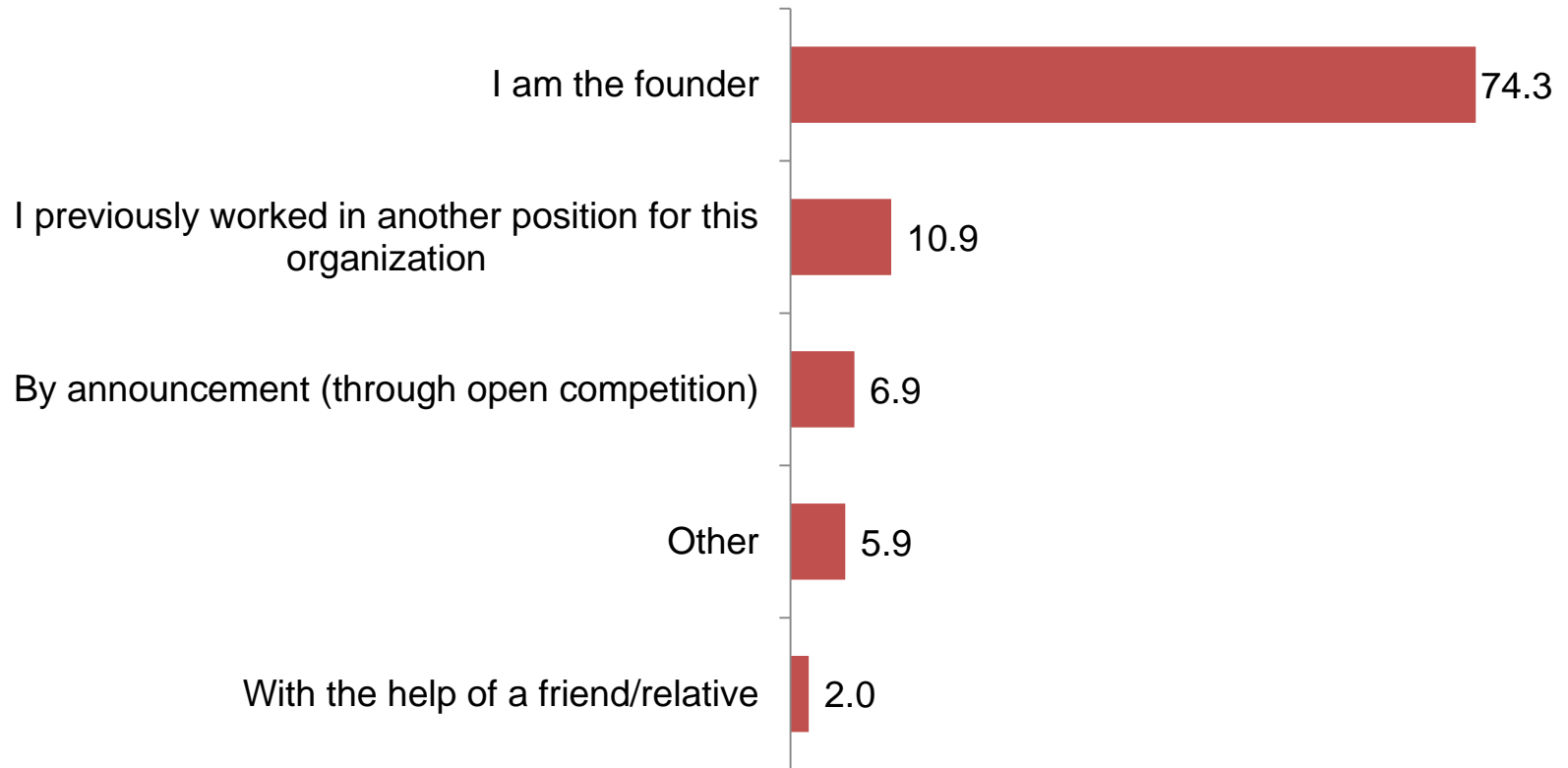
Permanent staff: 5.3 in average per CSO
Service contracts: 3.4 in average per CSO

HR Management: Conflict of Interest

- In 77.5% of cases, there are no employees related to each other. Among foundations, there are no cases of relationship.
- 15.8% of CSOs have an explicit written policy on conflict of interest, 84.2% do not have (no significant difference among NGOs and foundations)

HR Management: recruitment

Q27. How were you recruited for this job? (% of cases)



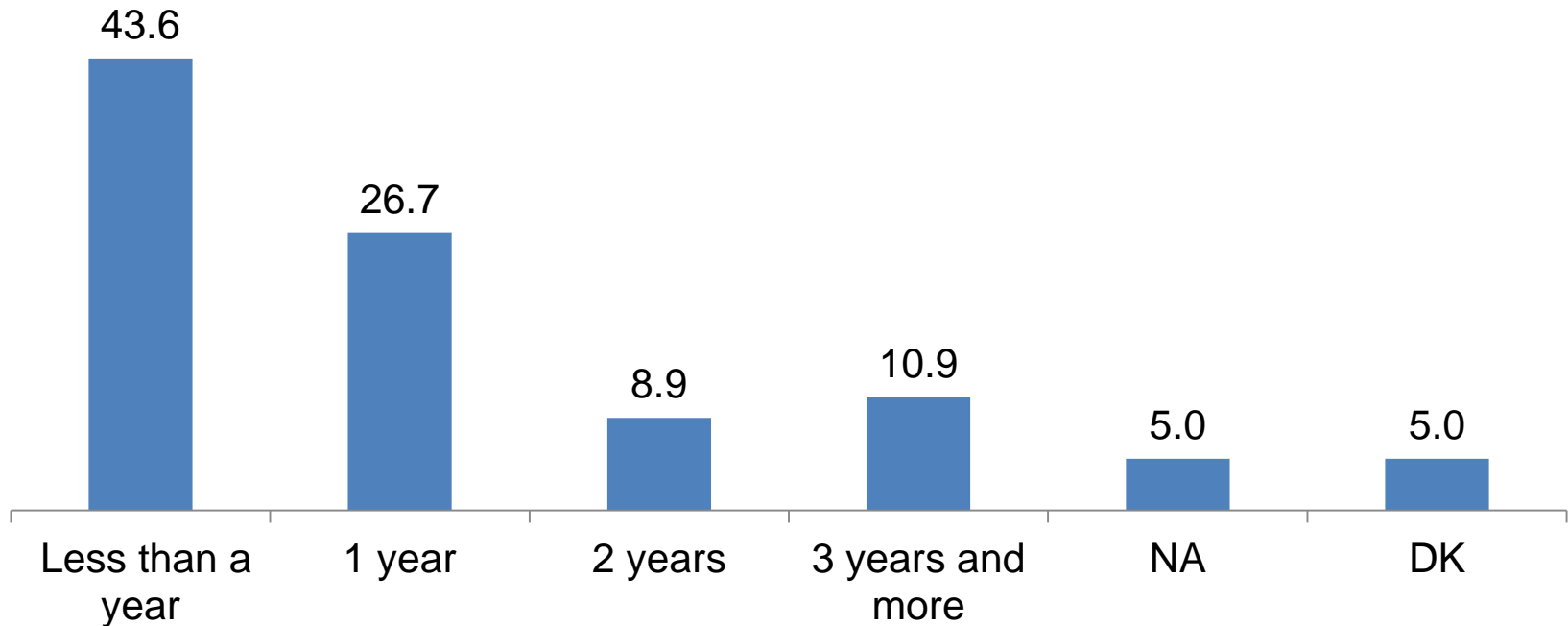
- Though only 6.9% were employed through competition, 42.9% declare that the new leader will be selected through competition.

HR Management: volunteers

- 82% have volunteers
- Those few CSOs that have neither permanent staff nor service contractors report that they have volunteers.
- More than third of the organizations have up to 10 volunteers, and another third have up to 50 volunteers.
- In total, CSOs reported having about 4600 volunteers, with 56% of female volunteers. However, it should be noted that one CSO mentioned having 2000 volunteers which significantly influenced the total number. In any case, the number of volunteers overweighs the number of permanent staff in multiple times.

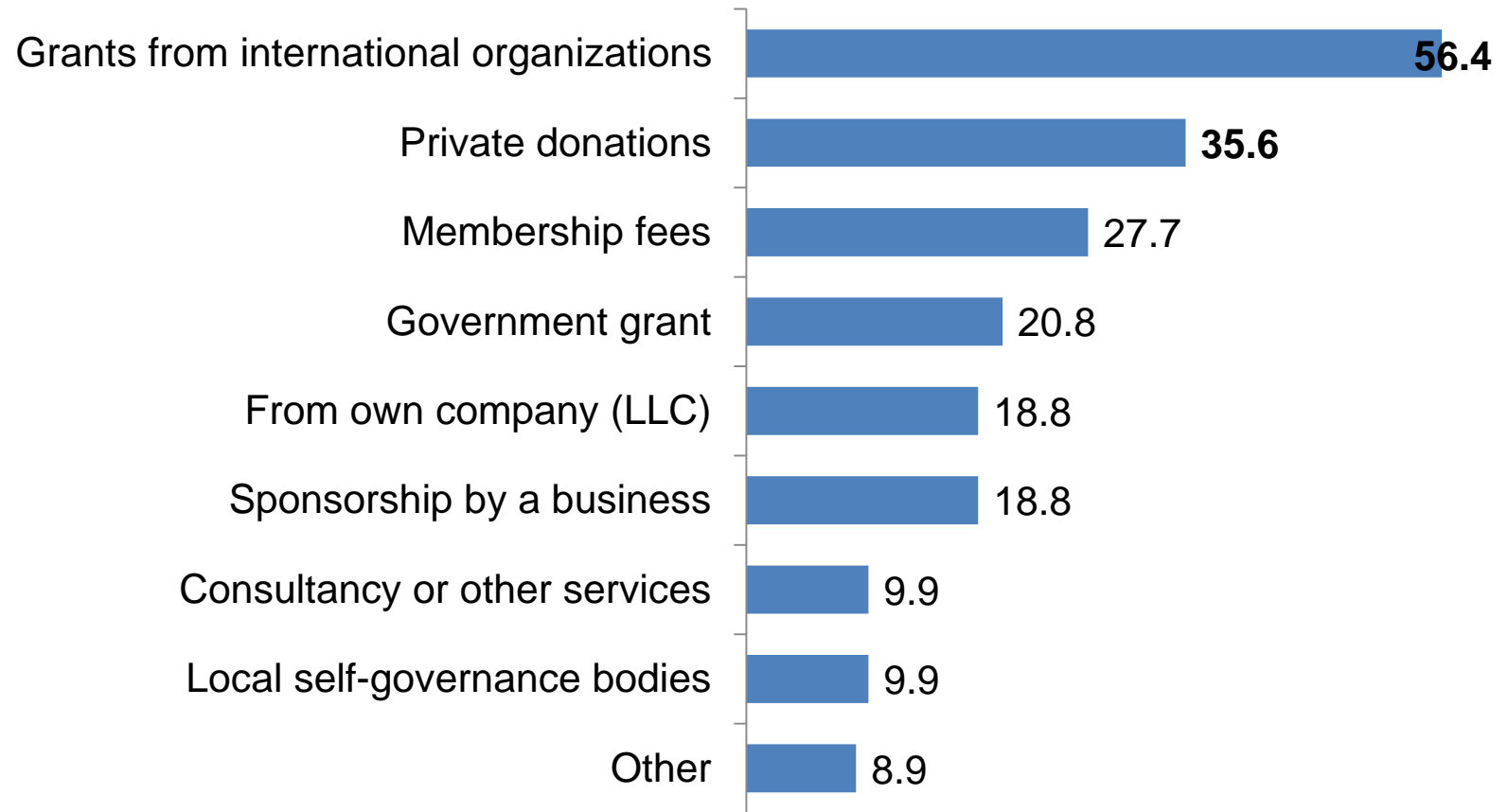
Resources: Financial and other

Q31. For what duration does your organization have financial resources (or real prospects of financial resources) to conduct activities? (% of cases)

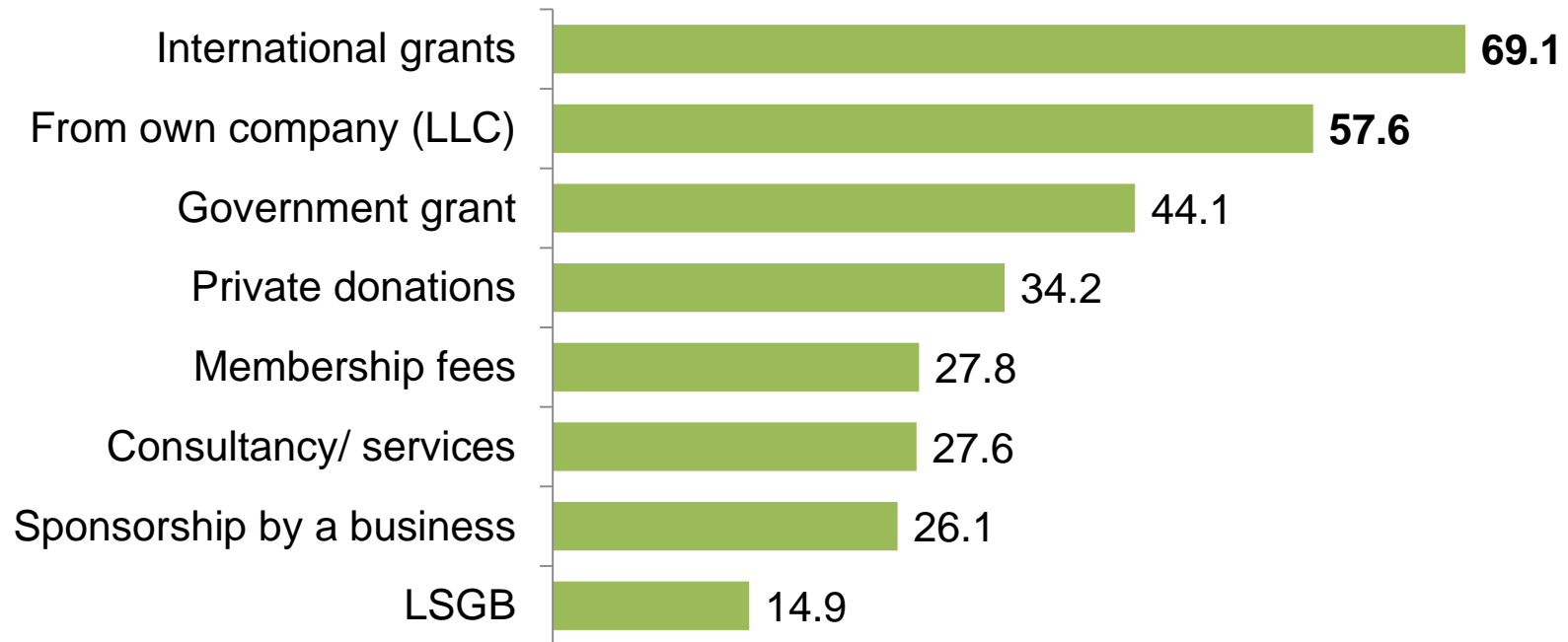


Most organizations that have prospects of financial resources for 2-3 years are currently funded by international organizations.

Q33. What are your organization's sources of funding this year? (multiple responses possible, % of cases)



Q34. What is the (approximate) share of amount received from each source compared to the total? (average % among CSOs that have income from that source)



- Those few who have income from own company (19 CSOs) heavily rely on this income.

- Compared to the last three years, the organizations' annual budget has in average stayed the same: 36.6% of CSOs stated that their budget has decreased, while another 38.6% said that it has increased, with the rest keeping the same level of the budget.
- Four CSOs have no funding source. Most of organizations - 38 CSOs - have only one type of funding source, 27 CSO have two sources, the rest – three or more sources.
- Project application to donors is the most widespread fundraising experience (75.2%), followed by volunteer management (28.7%), local fundraising (24%), provision of services (20.8%), etc.

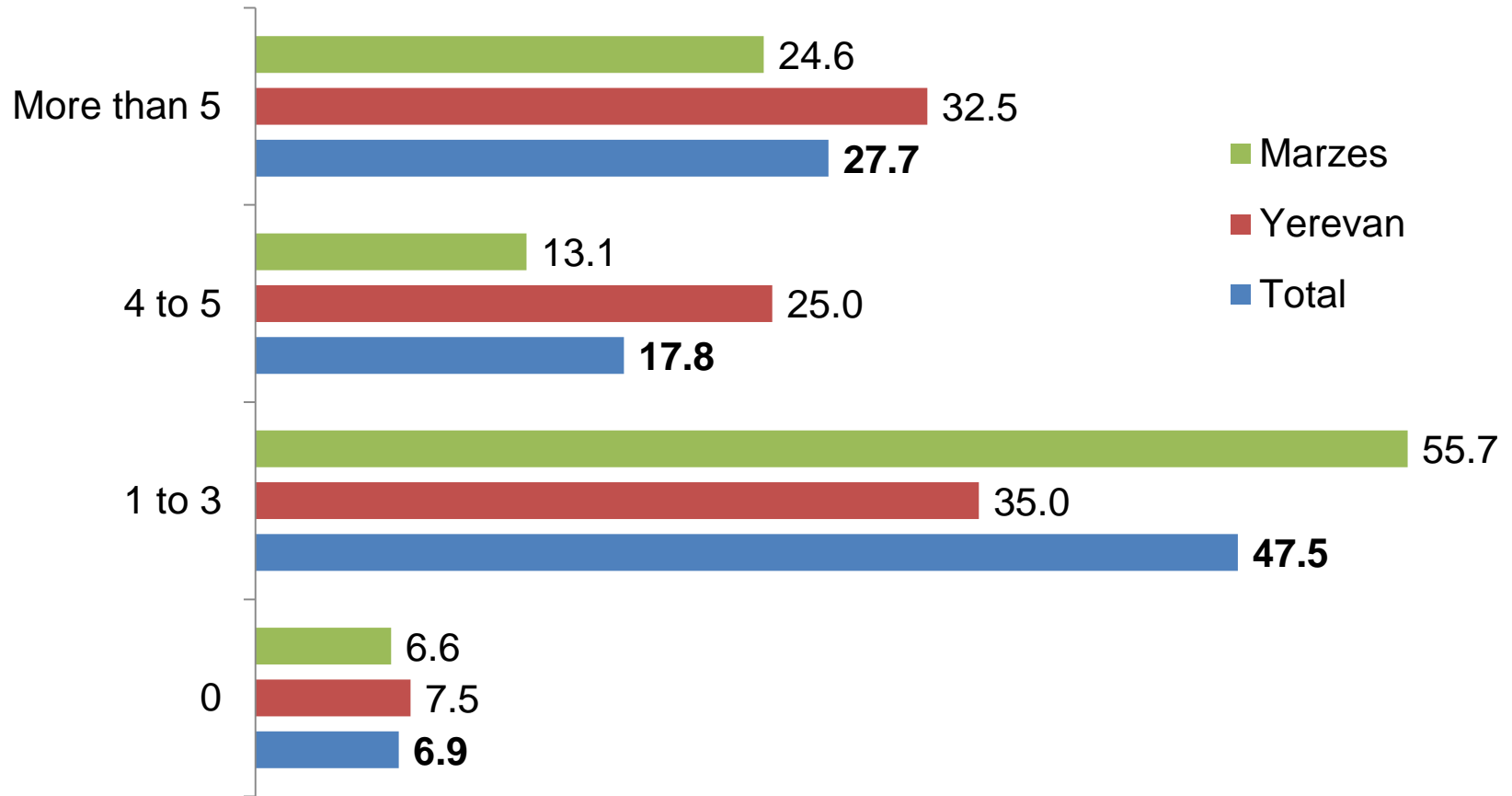
Q44. If international donors terminate their funding, which of the following could serve as a future source of funding for your organization? (% of cases; multiple responses)



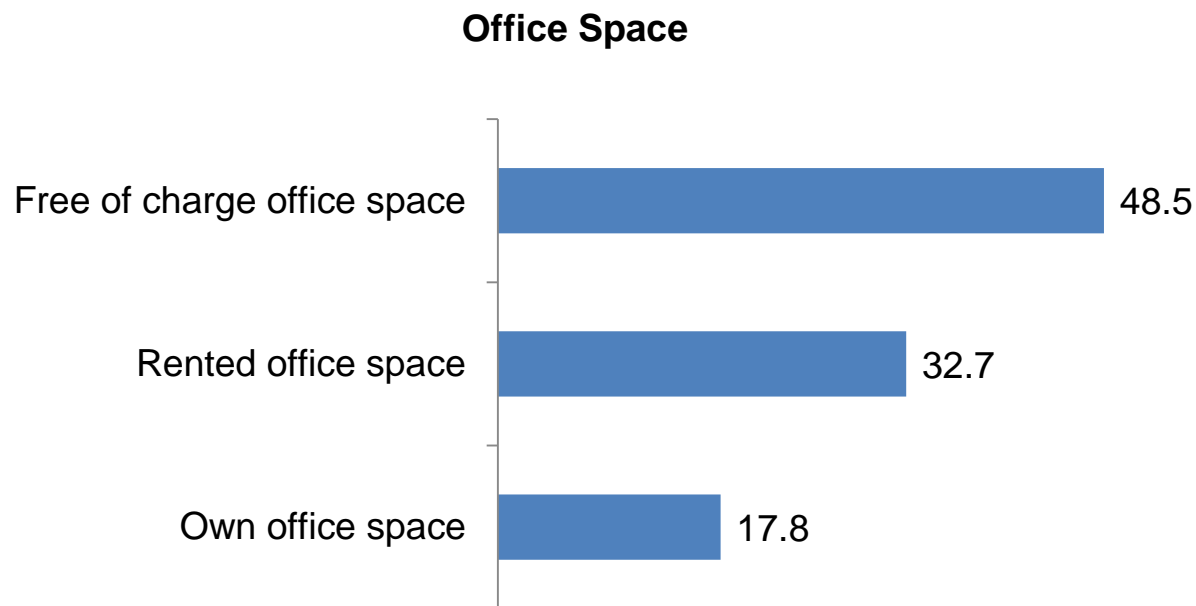
Funding: some more concerns

- Fundraising strategy is available in about half of the organizations; more foundations have it as compared to NGOs.
- 85% of CSOs apply to grant competitions and about the same share are invited to present a project.
- 9 CSOs did not indicate any alternative way of funding except donors.
- 57.4% do not have an internal financial system that allows to plan, implement, and analyze financial activities.

Q43. How many projects did your organization implement last year? (% of cases)



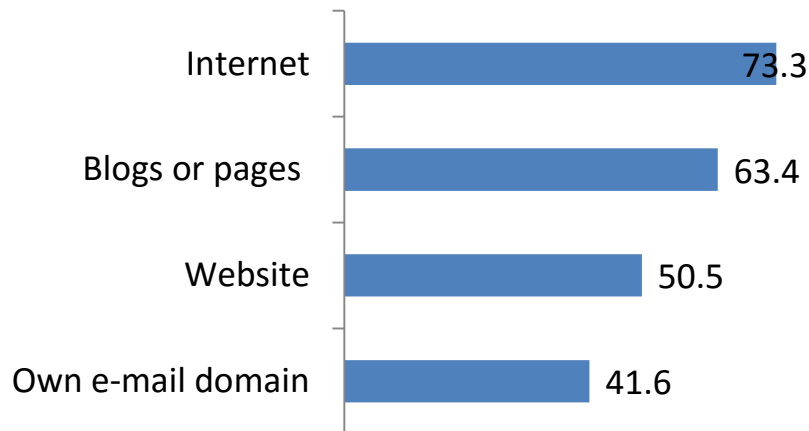
Q42. Please indicate all the material resources that your organization currently has (% of cases)



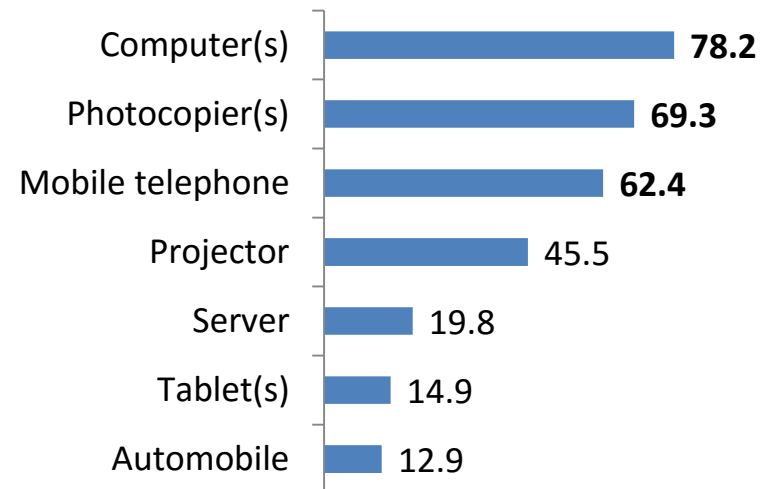
Regional CSOs have more possibilities for using free space for their office: 57.4% of regional CSOs indicated they have free office space as compared to 35% of Yerevan-based organizations, where renting is more widespread (45% vs 24.5% of regional CSOs).

Q42. Please indicate all the material resources that your organization currently has (% of cases)

Electronic Resources



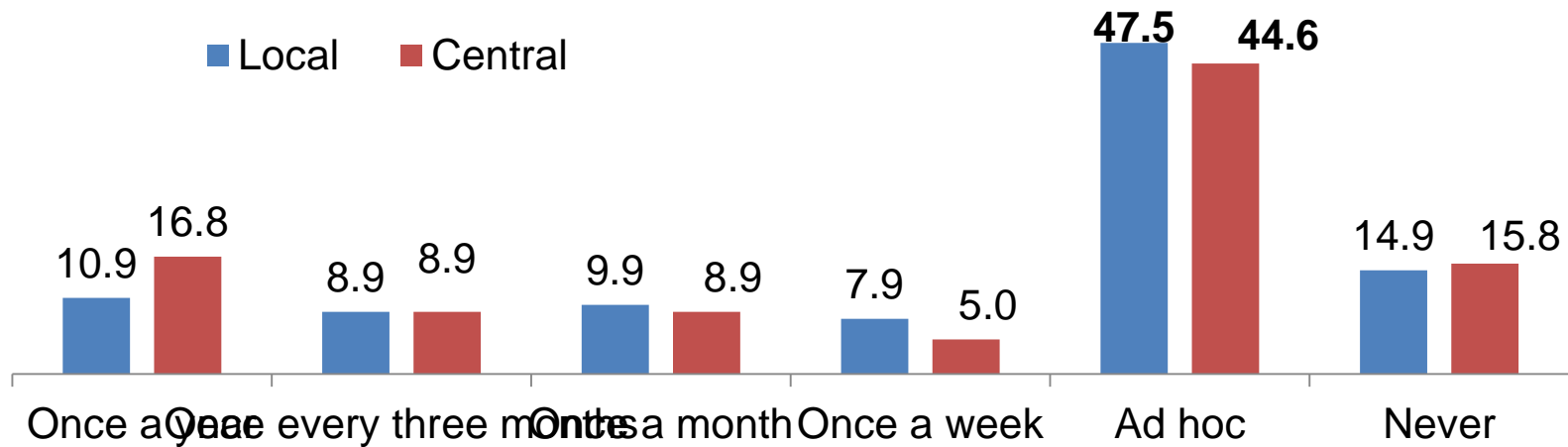
Equipment



Yerevan-based organizations are better-off as compared with their regional colleagues in terms of electronic resources and equipment (for example, 82.5% of Yerevan-based CSOs have their website, while only 29.5% of regional organizations own it, with most of them indicating that improvement is needed).

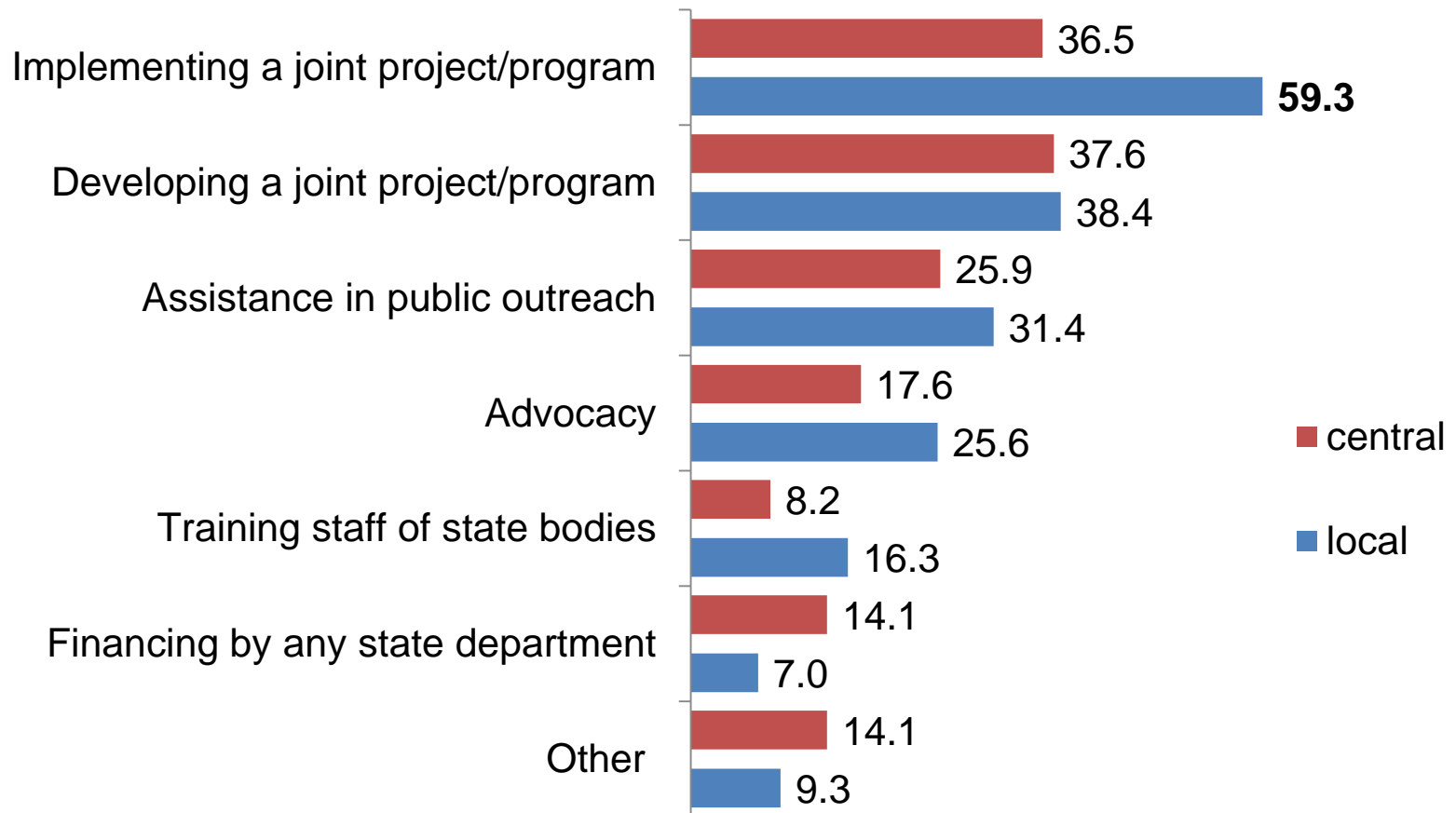
Collaboration

Collaboration with state: Q45. How often does the organization cooperate with Armenian state authorities? (% of cases)

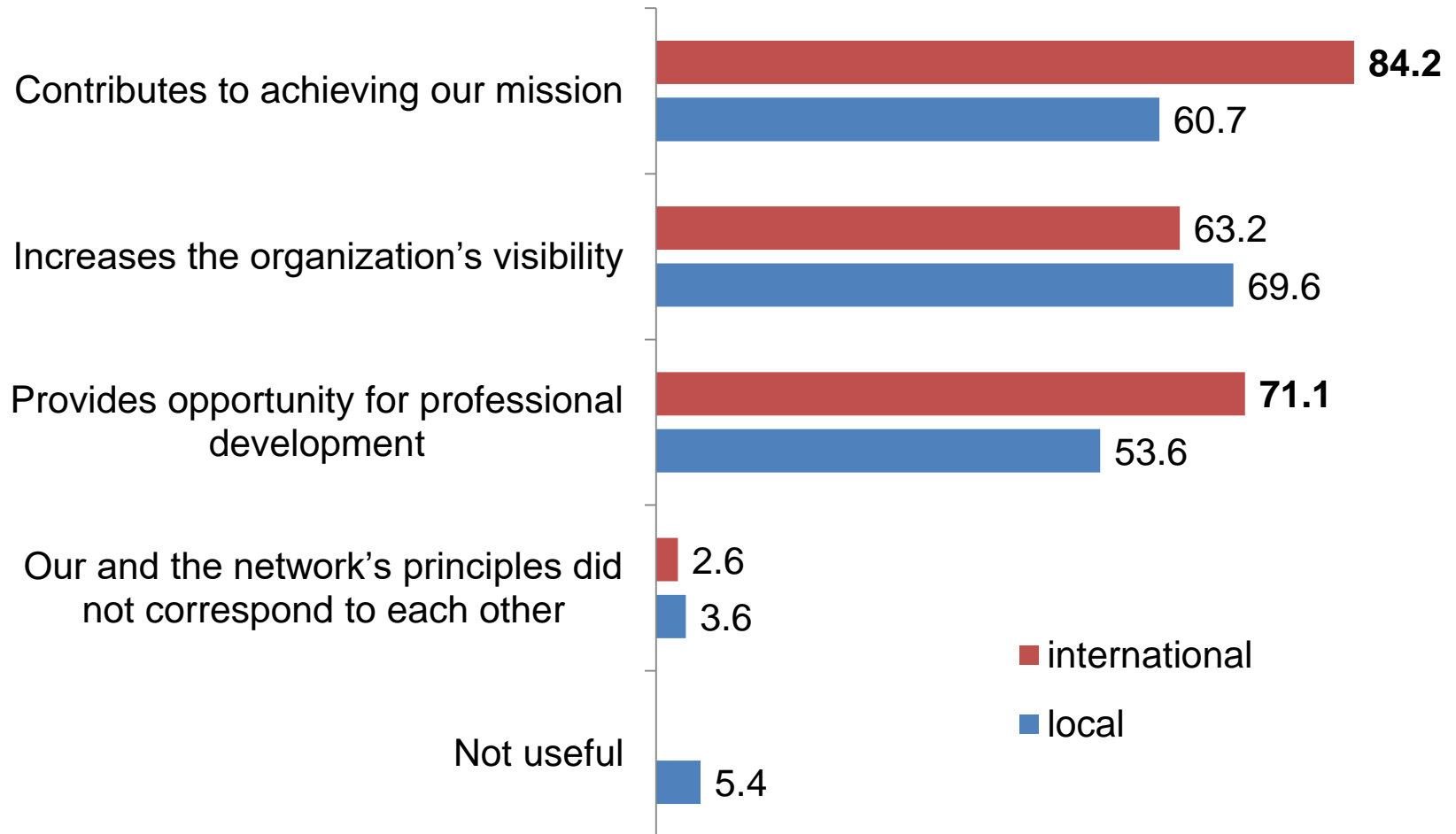


- More Yerevan-based organizations indicated that they never collaborated with local government (25% as compared to 8.2% of regional CSOs),
- Slightly more regional organizations had never collaborated with central government
- The respondents that stated absence of collaboration with either local or central government most of all justified their answer with the strategy of organization as well as lack of interest of authorities.

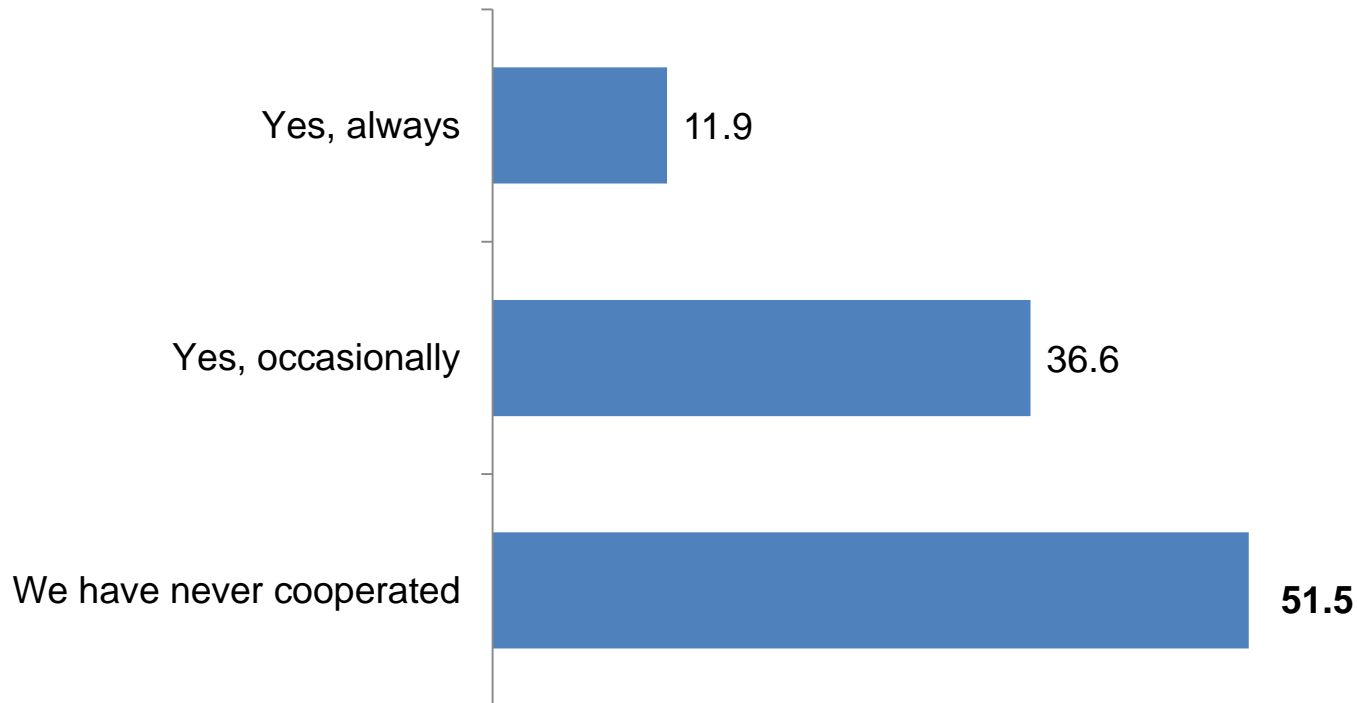
Collaboration with state: Q46. What is the nature of cooperation with governing authorities? (% of cases, multiple responses possible)



Collaboration with CSOs: Q51. How would you describe the experience of membership in networks/ coalitions overall? (% of cases, multiple answers)



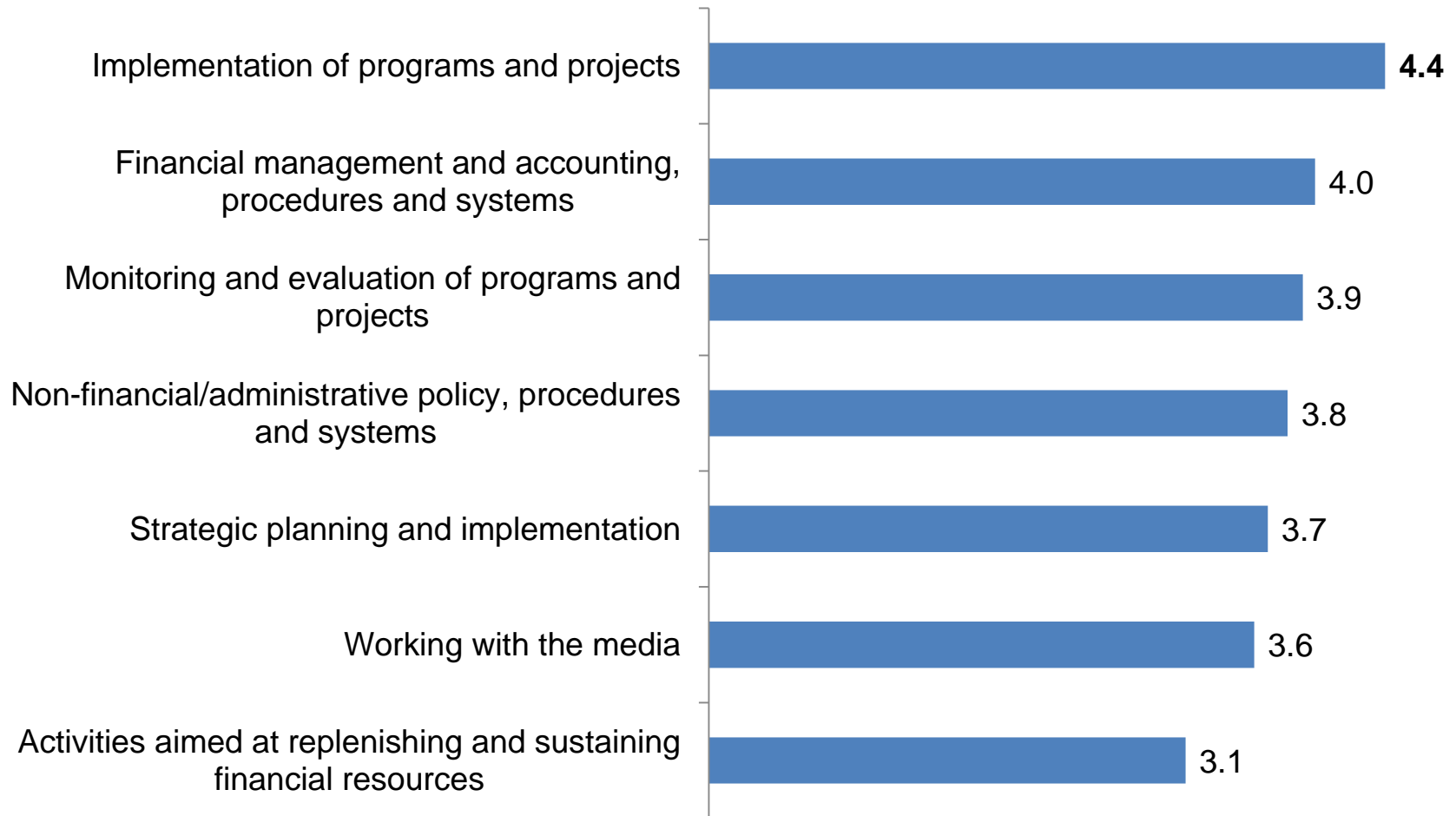
Collaboration with business: Q53. Do you cooperate with businesses to implement projects? (% of cases)



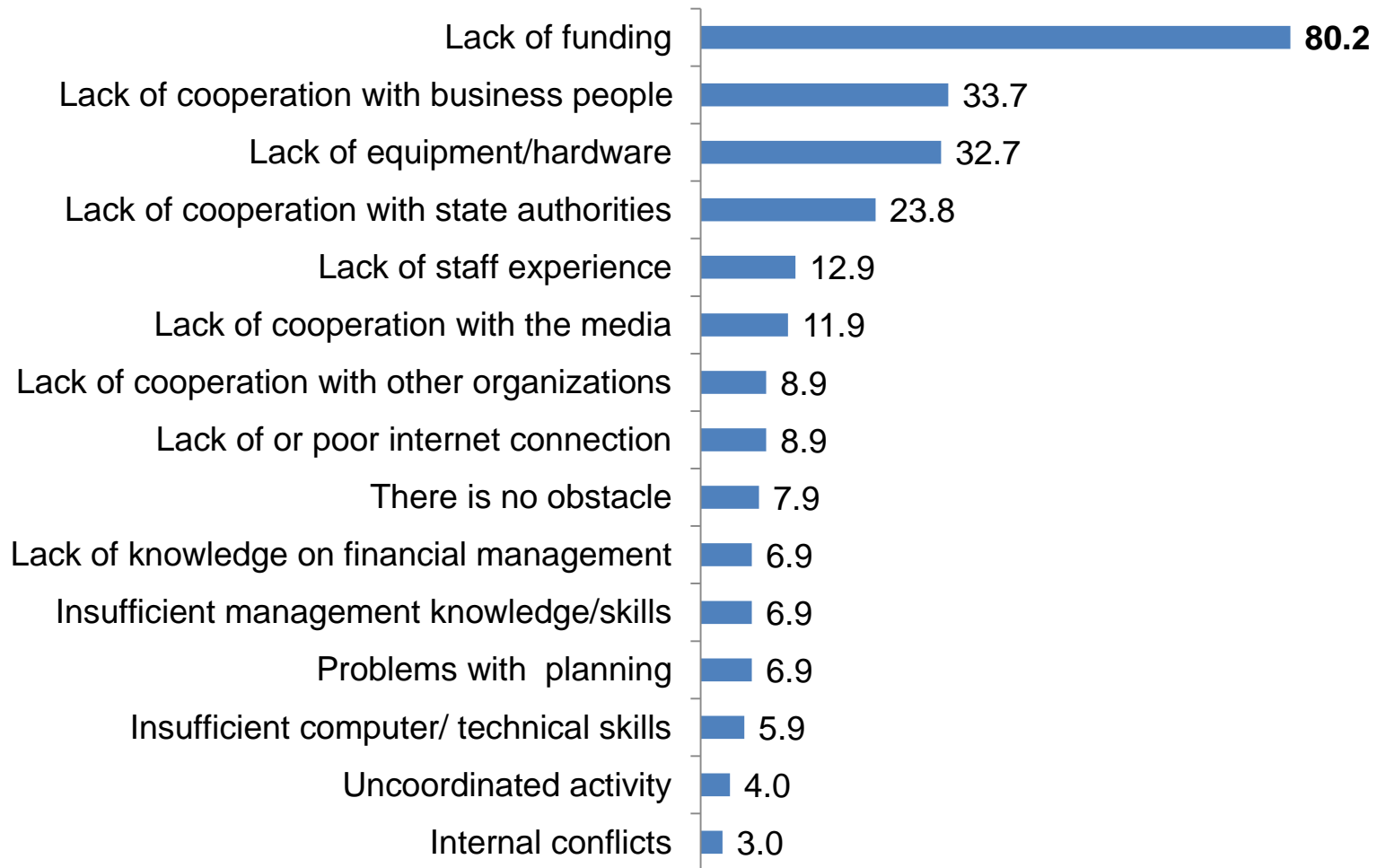
CSOs collaborated with business mainly through exchange of experience (53.1% among CSOs mentioning collaboration), receiving financial support (51%), and providing trainings to business (24.5%).

Organizational development needs

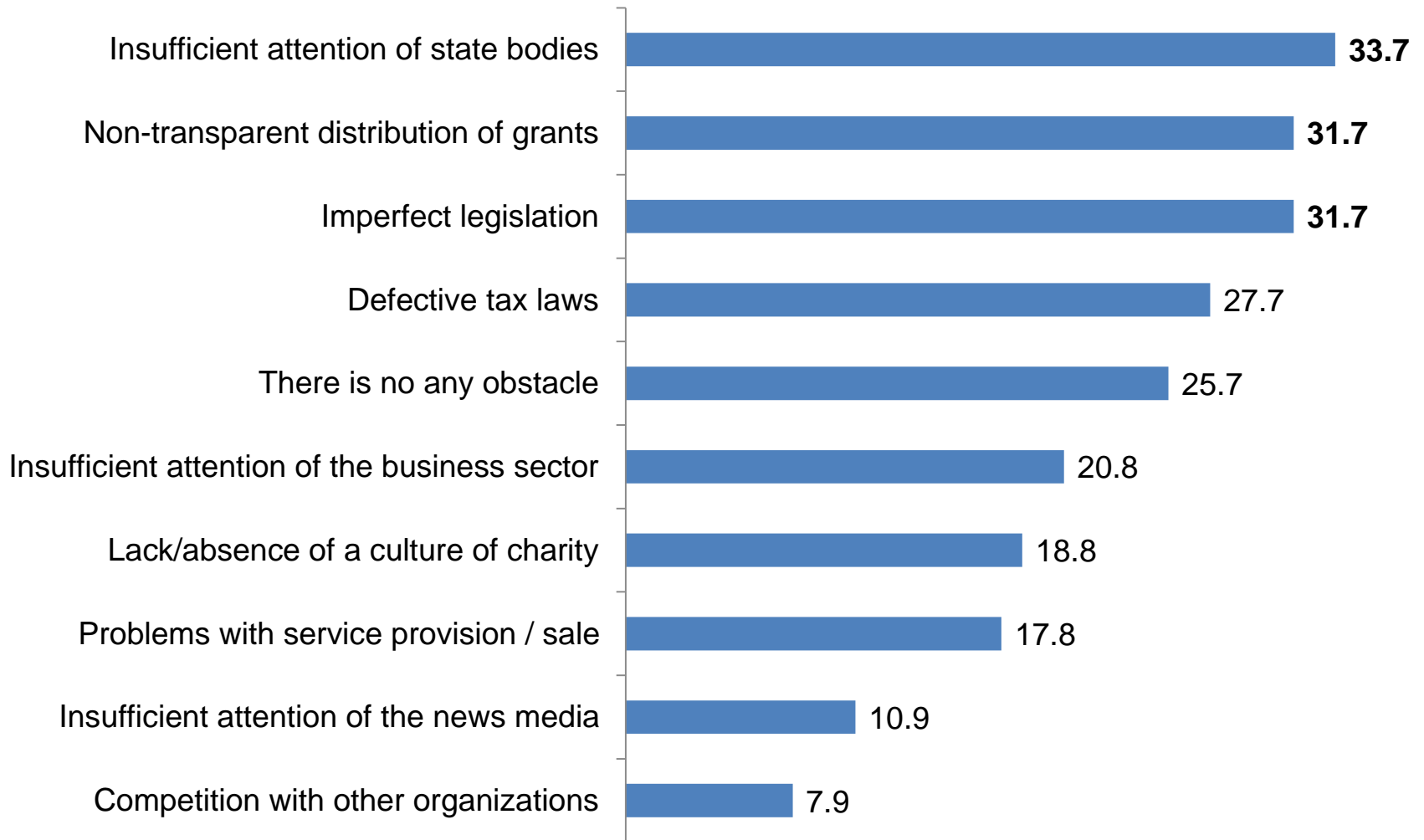
Q58. How well are the following functions implemented in your organization? (average, 1-5 scale, 1=poor, 5=very well)



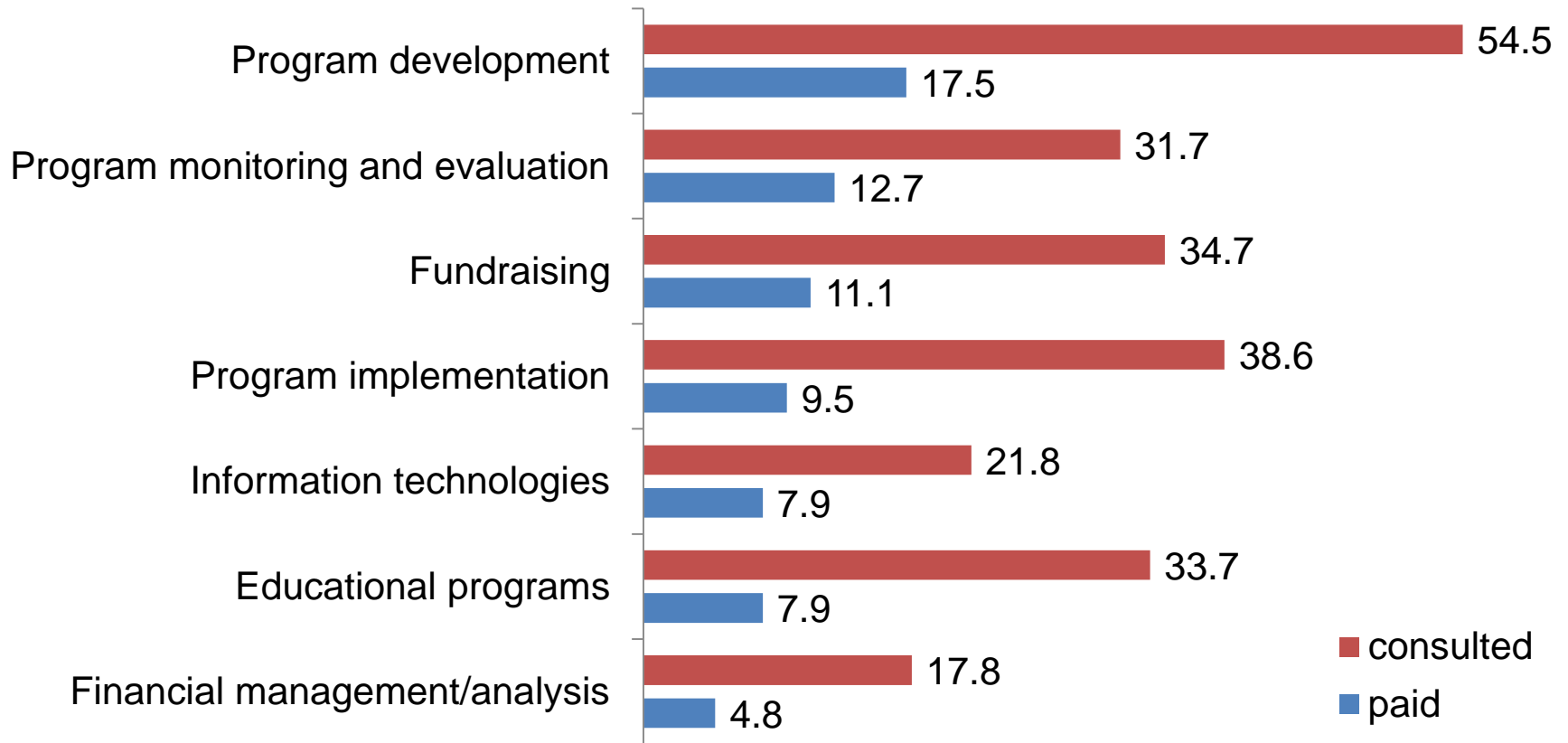
Q61. What are the internal obstacles to your organization's development? (% of cases, multiple answers)



Q62. What are the external obstacles to your organization's development? (% of cases, multiple answers possible)



Q59. Has your organization received external consultation in the following areas? (% of cases)/Q60. Has your organization paid for those services? (% of CSOs that received consulting, N=63)

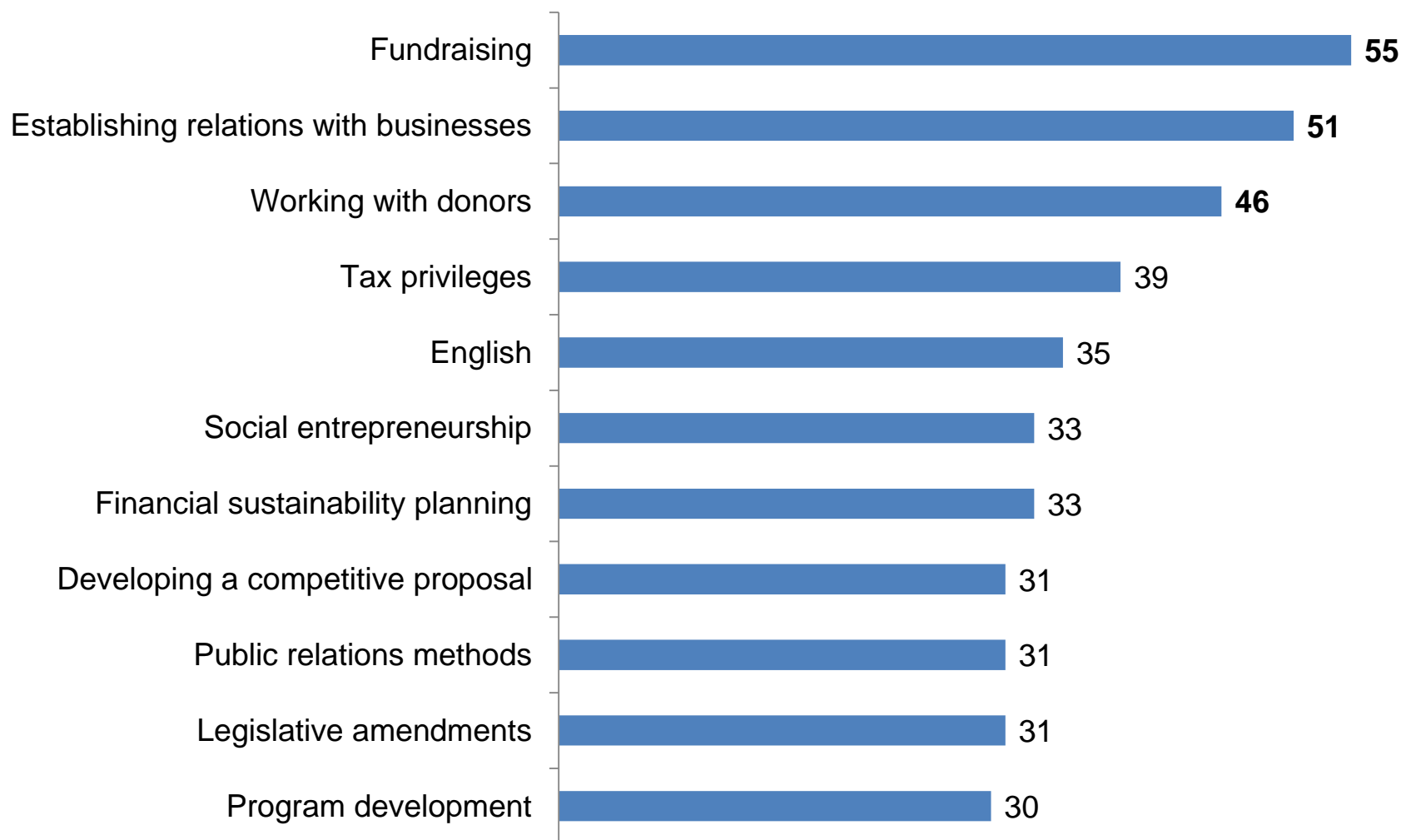


- 38 CSOs haven't got any external consulting assistance.

Organizational development: some more facts

- 90% enable employees to participate in conferences, training programs and other educational activities during work hours, and 37% pays for their participation.
- 67% organize training programs for its employees.
- 33% have undergone organizational capacity assessment.
- 77% would like to undergo assessment/ re-assessment.
- 39% made use of capacity building opportunities provided by donor.

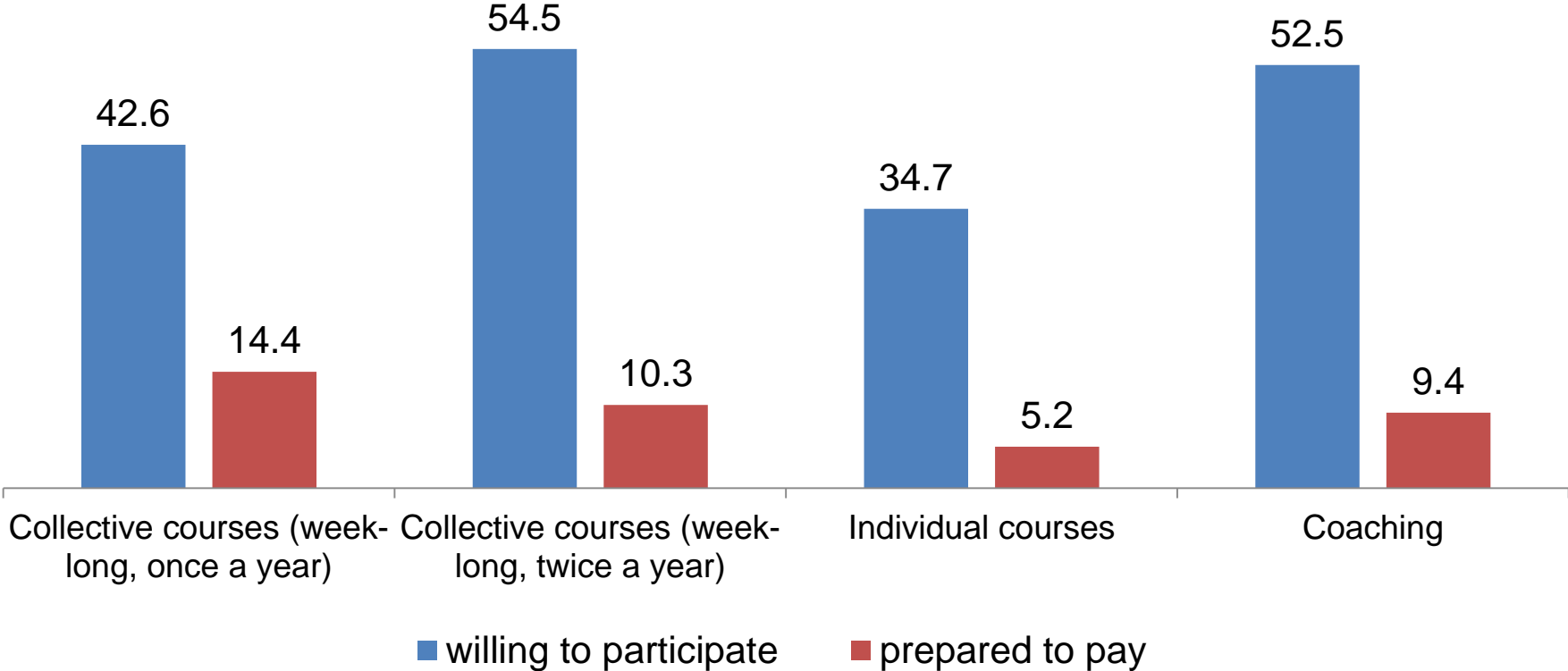
Organizational development: Top training preferences (cases)



Organizational development: Trainings that organizations are ready to pay (cases)

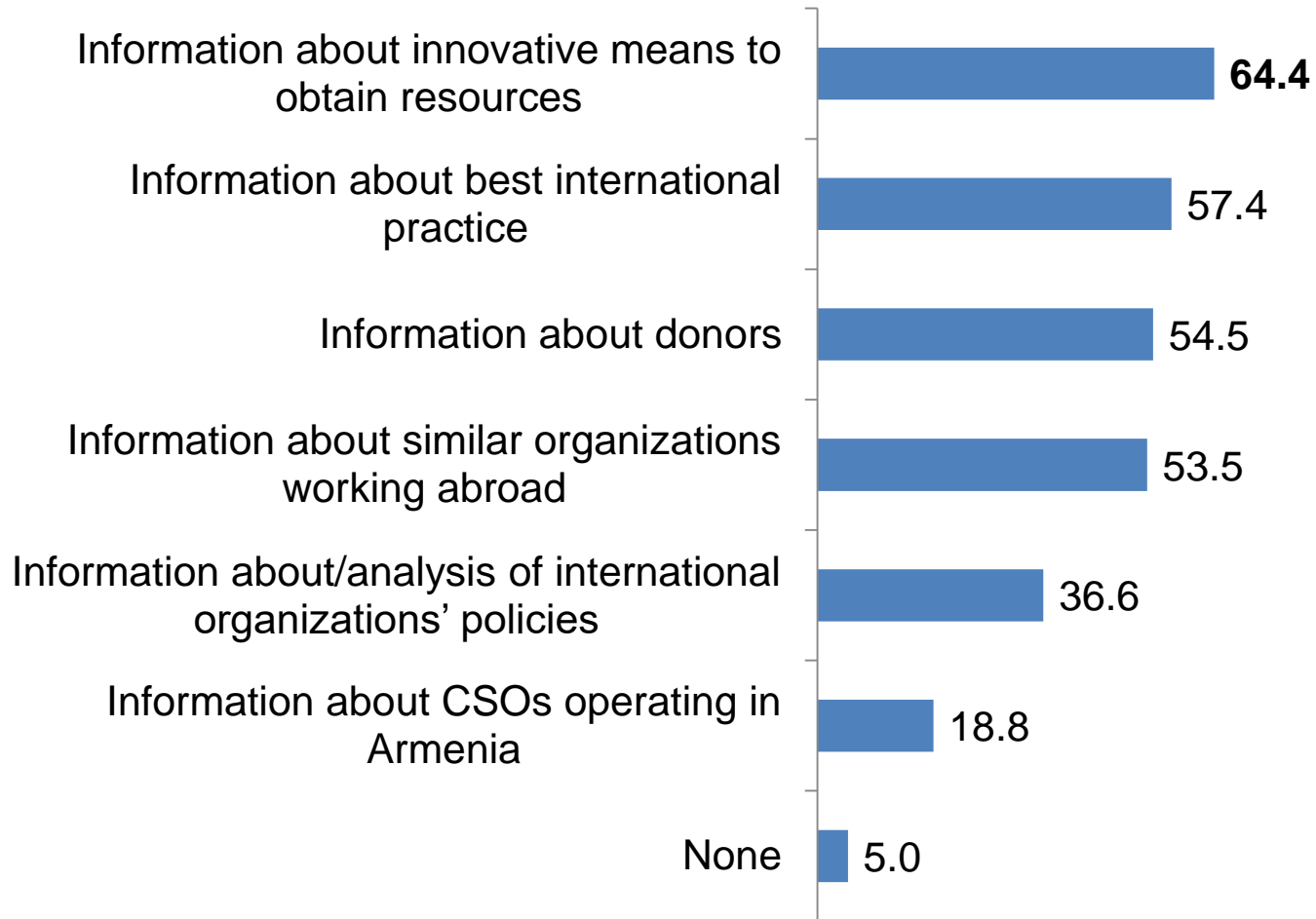
Topics	Cases
English	10
Developing a competitive proposal	8
Public relations methods	8
Establishing relations/cooperating with businesses	7
Financial sustainability planning	7
Translation from English to Armenian and vice versa	7
Social entrepreneurship	6
Tax privileges	5
Program development	5
Fundraising	4
Effective management of financial resources	4
Preparing reports	4
Rights protection	4

Organizational development: Q67. In what format would you like to participate in the CSO organizational capacity-building school?/Q68. Are you prepared to pay for these services? (% of cases, multiple responses possible)

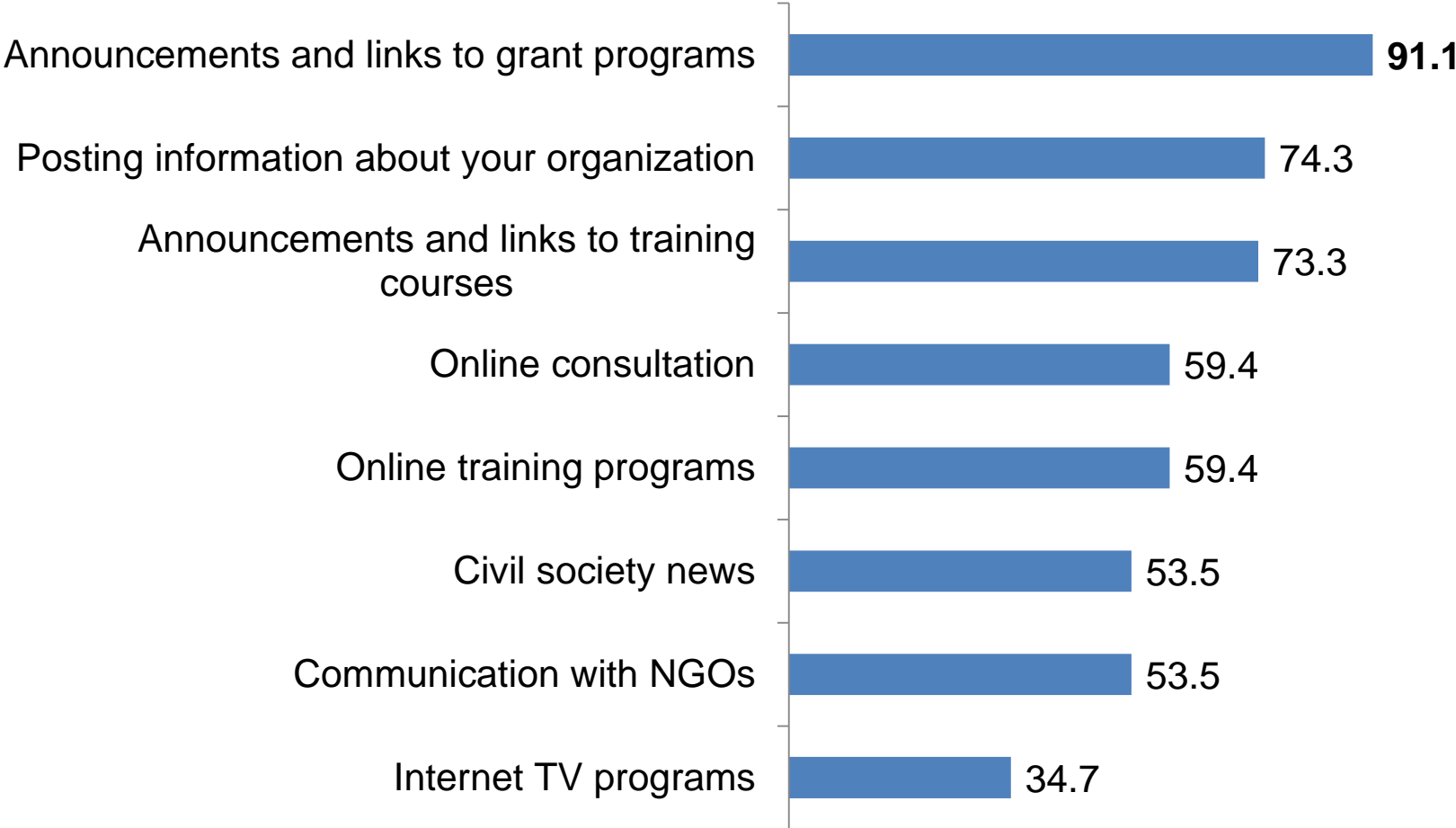


4% indicated they do not need these services

Organizational development: Q69. What lack of information do you notice in the CSO sector? (% of cases, multiple responses possible)



Organizational development: Q70. What would you like the portal to provide? (% of cases, multiple responses possible)



THANK YOU!
Questions?