

Acknowledgments

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Background

The Australians Living on the Edge Community Sector Confidence Survey is a unique survey of community service organisations which assist low income and disadvantaged Australians. By providing a deeper understanding of the size, shape and experiences of this sector over time, the survey is an important tool for the development of social policy and strategies to support the ongoing work of the sector.

This is the sixth *Australians Living on the Edge* survey of the community services sector conducted by ACOSS and the state and territory Councils of Social Service. The survey examines key changes in the operating environment of community organisations, major issues of concern to organisations, and how the community services sector is responding. Indirectly, the survey also aims to provide a sense of how the primary users of community services – low-income and disadvantaged Australians – are faring.

Together, the 818 respondents to the survey delivered services to nearly 2.3 million low income and disadvantaged clients in the 12 months to June 2003.

To provide a context to the scope of this Survey, information is provided below from the Australian Bureau of Statistics (ABS) survey on community services in 1999-2000¹ and *Australia's Welfare 2003*² on the shape and size of the community services sector in Australia.

Community Service Organisations

The ABS has estimated that as at the end of June 2000 there were 9,287 employing businesses and organisations involved in the provision of community services. The 9,287 'businesses' and organisations comprised 2,800 'for profit' organisations, 5,938 'not for profit' organisations and 548 government organisations. While the number of government organisations has remained virtually the same since June 1996, the number of 'for profit' and 'not for profit' organisations have increased by 32% and 10% respectively.

According to the ABS, direct community services expenditure by these organisations has increased by 28% since 1995-96. Increases were different by sector, with expenditure by 'for-profit' organisations increasing by 16%, 'not for profit' organisations by 47% and government organisations by 6%.

In comparing the results of the Australians Living on the Edge survey with the ABS survey, it is important to note that the type of community service organisation captured in each survey is quite different.

For example, in the ABS survey child care services accounted for 38% of the total number of organisations while children's services accounted for only 6% in the Australians Living on the Edge survey. Similarly, the ABS survey found that nursing homes and accommodation for the aged

¹ Australian Bureau of Statistics (ABS) (2001), *Community Services Australia*, ABS Catalogue No. 8696.0

² Australian Institute of Health and Welfare, *Australia's Welfare 2003*, Canberra, 2003

accounted for 16% of the total number of organisations, while aged care (which is broader than just residential care) accounted for just 6% of organisations represented in the Australians Living on the Edge survey.

However, there are also some interesting parallels. For example, 18% of respondents to the Australians Living on the Edge survey were involved in individual and family support services, a level of activity which closely reflects the ABS finding that personal and social support services account for 20% of all direct community service expenditure.

One explanation for these differences lies in the structure of the community services sector and the relative importance of 'for profit', 'not for profit' and government organisations. Child care services, for example, are dominated by 'for profit' organisations while personal and social support services are dominated by 'not for profit' organisations. Given that the Australians Living on the Edge survey draws on the membership base of the state and territory Councils of Social Service which is primarily comprised of 'not for profit' organisations, it is more likely that correlations will be found between the two surveys where 'not for profit' service provision dominates.

Community Service Workforce

The 2001 Population Census shows 237,000 people employed in community service occupations in Australia (including but not restricted to community service industries), an increase of 27% over the number in 1996. This growth was substantially higher than the total growth in all occupations over the period (8.7%).

Of the total, 87% were females. Of the broad occupational groups, the largest was child and youth services workers, with 101,696 employees, followed by aged or disabled care (51,784). The fastest growing broad category between 1996 and 2001 was disability workers, up 58%.

There were 1,228 community service workers per 100,000 population in Australia in 2001. The Australian Capital Territory had the highest rate of persons working in community services occupations, with 1,694 per 100,000 population, followed by the Northern Territory (1,589). New South Wales had the lowest rate, with 1,077 per 100,000 population.

There were slightly more volunteers in community service *industries* in 1999-2000 than employees (276,334 and 269,022, respectively). Volunteers are much more likely to provide indirect services (37.4%) than employees (18.0%). The distribution of volunteers and workers across industries varies. For example, over three quarters (76.6%) of all volunteers provided services to non-residential care services compared with 29.3% of employees. Almost one third of employees (31.4%) worked in nursing homes compared with just 5.7% of volunteers.

Because many workers in community services occupations are employed part-time, the Australian Institute of Health and Welfare has converted this contribution into the equivalent full time workforce and has estimated that there were 195,313 full time equivalent (FTE) paid workers employed in occupations that provided, or supported the provision of, community services in Australia in 2000-01.³

³ Australia's Welfare, p. 143

By comparison, it was estimated that 985,366 FTE household members delivered welfare services at almost no charge in 2000-01, or about five times the FTE of paid workers.⁴ Only a small fraction of this workforce (equivalent to about 100,000 full time workers) can be attributed to volunteers in community and welfare organisations, with the vast majority comprising those caring directly for relatives and friends.

The imputed value of household members' contribution has been estimated at \$28.8 billion, or double the amount of the monetary welfare services expenditure (\$13.7 billion).

Household members also contribute around \$2.5 billion in client fees to community service organisations compared to \$1.6 billion from non-government community service organisations and \$9.6 billion from government sources⁵.

⁴ Australia's Welfare, p. 153

⁵ Australia's Welfare, p. 123

Key findings

The sixth *Australians Living on the Edge* Community Sector Confidence Survey, conducted by ACOSS and State/Territory Councils of Social Service, received responses from 818 local services across the country.

Services estimated that 2,378,407 client contacts were had in 2003-02, compared to 2,131,695 in 2001-02. This represents an increase of 246,712 or 12% over the past year.

Over the past year agencies report that they are a bit larger financially. However, the trends for different sources of income are of concern.

Between 2001-02 and 2002-03 government grants fell from 74.2% to 72.8% of total average income for agencies.

Contributions from business have remained static and, at 2% of income, this remains a minor source of income for most agencies.

In a worrying trend, the results show that fees imposed on clients, as a proportion of agency income, jumped from 9.6% to 11.3% from 2002 to 2003. In 2003, twenty seven per cent of agencies relied on client fees for 10% or more of income compared with 2002 when twenty five per cent of agencies relied on client fees for 10% or more of their total income.

More specifically, many agencies reported problems with:

- large waiting lists and levels of unmet demand
- the overall lack of housing options including emergency and long term accommodation and levels of homelessness
- the increasing burden of contract administration and onerous reporting requirements
- increasing insurance and legal costs
- increasing client problems including frailty, violence and domestic violence
- recruiting and retaining qualified staff and volunteers and staff shortages
- uncertainty and short term nature of government funding
- inadequate premises and facilities due to the need to find the cheapest rent.

Some agencies referred to problems of constant government restructuring and narrow contractual arrangements. Related to this are reports of difficulties in finding recurrent funding for successful pilot projects – service innovations are being developed but support for follow through is not available.

Some notable developments include agencies raising public awareness of their services, achieving accreditation, developing community advocacy and empowerment capacity, raising awareness of mental health in the corporate sector and mental health education among young Australians.

Between 2002 and 2003 there has been a 23% increase in the estimated numbers of client contacts that did not result in service support – a rise from 140,659 to 172,427 rejected client contacts.

The areas experiencing the greatest mismatch between capacity and demand are housing, where the number of people turned away represent 33% of the current client base, followed by crisis services, where the number of people turned away represents 17% of the current client base.

Increased operating costs have again been identified as a major contributor to pressure on agencies. In 2001 about 16% of all agencies reported this as a concern but this increased to 18% in 2002 and again to 19% in 2003.

Eighteen per cent of agencies said that the rising number of clients seeking their service was a source of increased pressure (up from 16% in 2002), while 17% of agencies reported that the increasingly complex needs of their clients was an important factor (up from 15% in 2002).

These agencies under pressure were asked to indicate what strategies they used to cope with this.

While increased (unfunded) effort by staff and volunteers remains a key coping strategy (15%) this has declined from 17% in 2002 and 2001 and from 21% in 2000. This suggests that an increasing proportion of agencies are beginning to reach the limits of staff and volunteer capacity.

The creation and extension of waiting lists, increased referrals and closer targeting of services were used by 21% of organisations as ways of dealing with the pressures they faced.

A significant proportion of agencies report that they have met increased demand within existing capacity, up from 4% in 2002 to 11% in 2003. This suggests that agencies have found ways of working more efficiently. However, it is not possible to determine from this survey whether these efficiencies have been at the cost of the quality of services or not.

Asked to look ahead, one in four agencies (23%) expect, over the coming year, to be able to meet an increase in demand within their existing capacity. This compares with 18% in 2002.

These trends suggest that while demand continues to grow, a greater proportion of agencies are working within their capacities. The downside of these trends is that while more people have been assisted:

- the number of people being turned away has risen;
- there has been an increased use of client fees; and
- it is possible that access to good quality services, particularly for the most disadvantaged, has diminished.

Methodology and number of responses

The survey was distributed by mail and email to the community services sector through the state and territory Councils of Social Service organisational membership and selected national member organisations of ACOSS. It is estimated that about 3,000 surveys were distributed.

818 organisations completed the survey, and of these about 150 were completed online via the ACOSS website.

The number of responses from NSW and Victoria are well down on historical highs of 175 and 177 respectively and do not reflect the size of the sector in each of these states. This national report is therefore more reflective of trends across the other states and territories than some previous reports.

Table 1: Survey returns by State/Territory

State/Territory	Number of responses	Percentage of total	Number of responses for previous survey	Percentage of total
QLD	250	31	168	24
SA	125	15	44	6
WA	124	15	112	16
NT	83	10	67	10
VIC	83	10	52	8
TAS	59	7	70	10
NSW	58	7	141	21
ACT	36	5	31	5
Total	818	100	685	100

There was a 19% increase in the number of responses to the survey compared to last year.

Survey results

I. Types of work performed by participating agencies

Most agencies engaged in more than one type of service delivery (1,361 responses were provided by 818 agencies). Eighteen per cent of these responses fell into the category of individual and/or family support services. The next most common response was community development and/or support work (15%).

The percentage of responses in each category are very similar to last year's survey, which suggests that there has been no significant change in the set of sector agencies being surveyed between 2002 and 2003.

Table 2: Type of work done

Types of work / focus	No. of responses⁶	%
Aged Care	73	5
Disability Services	137	10
Individual and/or Family Support	240	18
Children's Services	81	6
Employment	45	3
Advocacy	123	9
Crisis Assistance	145	11
Housing Assistance	110	8
Multi Service	131	10
Health Services	66	5
Community Development and/or Support	210	15
Total	1,361	100

⁶ Multiple responses were invited for this question.

2. Size of agency by income

The largest proportion of organisations have an annual turnover within the \$100,000 to \$500,000 band (37%). However, the number of organisations in this income range have continued to fall and are likely to be superceded by the number of organisations in the \$250,000 to \$1 million range within the next year if the upward trend in income levels over the past five surveys continues.

Table 3: Size of agency by income

Income	No. of responses	%	% change from 2001-02
Zero	9	1	n/a
\$1 - \$25,000	52	6	- 1
\$25,000 - \$100,000	113	14	- 1
\$100,000 - \$250,000	157	19	- 2
\$250,000 - \$500,000	146	18	- 3
\$500,000 - \$1m	142	17	+ 1
\$1m - \$5m	111	14	+ 2
Over \$5m	56	7	+ 2
No answer	32	4	n/a
Total	818	100	

3. Source of agency income

Between 2002 and 2003, there has been a decline in the proportion of income derived from government sources which has been offset by an increase in client fees. Contributions from business has remained static and continues to be a minor source of income for most community sector organisations. However many business contributions are provided in kind (see discussion below).

Table 4: Source of agency income

Income	2003 (%)	2002 (%)
Government grants	72.8	74.2
Client fees	11.3	9.6
Contributions from business	2.1	2
Donations	5.3	4.9
Other	8.5	9.3
Total	100	100

Business contributions

The survey asked agencies to briefly describe any contributions made by business.

The 249 agencies that answered this question (30%) had generally received some form of support from business organisations, although a small proportion indicated that they had received no support or minimal support.

The major type of support provided by businesses were in-kind donations of goods and services such as legal work, IT support, vehicle maintenance, use of premises, food and clothing. Sponsorship of community organisation products and events was another common form of business support as was voluntary work on boards and management committees.

4. Labour force structure

The average number of paid staff employed by respondent agencies is 25 while the average number of volunteers (including board, clerical and service delivery volunteers) is 37.

The following table gives a more detailed picture of the overall labour force structure of respondent agencies. Of the 761 organisations that answered this question:

- most organisations (68%) employ between zero and 10 paid staff
- most organisations (83%) utilise between zero and 10 board and management committee volunteers
- most organisations (88%) utilise between zero and 4 clerical volunteers
- most organisations (64%) utilise between zero and 4 service delivery volunteers, although about 10% utilise in excess of 50 such volunteers.

Table 5: Paid and unpaid labour by category and number

Number of persons	0-4	5-10	11-20	21-50	51-100	101 – 200	201+
	Number of organisations utilising labour by the above categories						
Paid staff	334 (44%)	179 (24%)	108 (14%)	73 (10%)	24 (3%)	17 (2%)	26 (3%)
Board/Mgt C'tee	186 (24%)	448 (59%)	117 (15%)	7 (1%)	1 (<1%)	-	-
Volunteers (clerical)	667 (88%)	57 (7%)	24 (3%)	8 (1%)	3 (<1%)	1 (<1%)	1 (<1%)
Volunteers (service)	483 (64%)	58 (8%)	68 (9%)	77 (10%)	39 (5%)	18 (2%)	18 (2%)

5. Important issues facing services

When asked to describe the three most important issues facing their service the overwhelming majority talked of the gap between resources and growing demands for services and contract accountability.

More specifically, many agencies reported problems with:

- large waiting lists and levels of unmet demand
- the overall lack of housing options including emergency and long term accommodation and levels of homelessness
- the increasing burden of contract administration and onerous reporting requirements
- increasing insurance and legal costs
- increasing client problems including frailty, violence and domestic violence
- recruiting and retaining qualified staff and volunteers and staff shortages
- uncertainty and short term nature of government funding
- inadequate premises and facilities due to the need to find the cheapest rent.

Some agencies referred to problems of constant government restructuring and narrow contractual arrangements. Related to this are reports of difficulties in finding recurrent funding for successful pilot projects – service innovations are being developed but support for follow through is not available.

Notable developments include agencies raising public awareness of their services, achieving accreditation, developing community advocacy and empowerment capacity, raising awareness of mental health in the corporate sector and mental health education among young Australians.

6. Number of people who received a service from participating agencies in the 2001-02 and 2002-03 financial years

The 818 participating agencies delivered services to 2,378,407 people in the twelve months from July 2002 to June 2003, compared to 2,131,695 in the 12 months from July 2001 to June 2002.⁷ This represents an increase of 246,712 people or 12% in the past year.

Table 6: Number of people who received a service from participating agencies in 2002-03 and 2001-02

Type of Service	No. of clients (July 02 to June 03)	%	No. of clients (July 01 to June 02)	% change
Aged Care	58,232	3	59,820	-3
Disability	126,842	5	105,951	+20
Individual and/or family support	376,033	16	290,485	+29
Children's services	91,229	4	85,896	+6
Employment	33,771	1	34,493	-2
Advocacy	197,136	8	217,074	-9
Crisis	182,643	8	149,852	+22
Housing	96,645	4	84,119	+15
Multi-Service	515,562	22	443,557	+16
Health	361,447	15	357,655	+1
Community Development and/or Support	338,867	14	302,791	+12
Total	2,378,407	100	2,131,695	Avg: 12

⁷ These totals should be viewed with some caution and do not necessarily reflect the total numbers of people actually receiving a service. The same person may be recorded as seeking a service on several different occasions over the period and possibly from a number of different providers.

7. Number of people who sought but did not receive a service in the 2001-02 and 2002-03 financial years

The results below show that there has been a 23% increase in the estimated number of people who did not receive the service they sought between the 2001-02 and 2002-03 financial years (from 140,659 to 172,427 people).

Table 7: Number of people who sought but did not receive a service from participating agencies in 2002-03 and 2001-02

Type of Service	No. of people (July 02 to June 03)	% of total	No. of people (July 01 to June 02)	% change
Aged Care	3,132	2	2,654	+18
Disability	4,721	3	3,586	+31
Individual and/or family support	34,337	20	27,145	+26
Children's services	5,065	3	3,927	+29
Employment	2,828	2	2,464	+15
Advocacy	22,548	13	16,711	+35
Crisis	31,638	18	28,772	+10
Housing	32,227	18	27,448	+17
Multi-Service	19,148	11	13,839	+38
Health	3,334	2	2,237	+49
Community Development and/or Support	13,449	8	11,876	+13
Total	172,427	100	140,659	Avg: 23

Table 8 compares the number of people who received a service with the number of people who sought but did not receive a service. The purpose of this calculation is to illustrate which areas experienced the greatest mismatch between existing capacity and unmet demand. As the final column of Table 8 shows, the worst affected areas are housing (where one person is turned away for every three people who receive a service) and crisis services (where one person is turned away for every six people who receive a service).

Table 8: Number of people who sought but did not receive a service in 2002-03 as a percentage of the number of people who received a service

Type of Service	Persons receiving a service (2002-03)	Persons not receiving a service (2002-03)	Persons not receiving a service as a percentage of persons receiving a service
Aged Care	58,232	3,132	5
Disability	126,842	4,721	4
Individual and/or family support	376,033	34,337	9
Children's services	91,229	5,065	6
Employment	33,771	2,828	8
Advocacy	197,136	22,548	11
Crisis	182,643	31,638	17
Housing	96,645	32,227	33
Multi-Service	515,562	19,148	4
Health	361,447	3,334	1
Community Development and/or Support	338,867	13,449	4
Total	2,378,407	172,427	7

8. What are the sources of increased pressure on the capacity of agencies to deliver services?

Agencies were asked to identify the sources of any increased pressure on their capacity to deliver services. Increased operating costs has again been identified as a major contributor and its relative importance has continued to climb. In 2001 about 16% of all agencies reported this as a concern but this increased to 18% in 2002 and again to 19% in 2003.

Eighteen per cent of agencies said that the increased number of clients seeking their service was a source of increased pressure (up from 16% in 2002) while 17% of agencies reported that the increasingly complex needs of their clients was an important factor (up from 15% in 2002).

Table 9: Sources of any increased pressure on agencies

Source of any increased pressure	No. of responses	% 2003	% 2002
No increase	34	2	2
Increase in referrals from another agency	359	13	12
Another agency has closed down/reduced its services	114	4	4
Existing clients have more complex needs	469	17	15
More people are seeking service	494	18	16
Increased operating costs	524	19	18
Decrease in income	179	7	4
Difficulty in retaining skilled/experienced staff	279	10	7
A state govt. policy change affected clients	124	5	9
A federal govt. policy change affected clients	128	5	10
Total	2,704	100	100

A particular government policy change

A smaller percentage of agencies identified either state or federal government policy changes which impacted on their clients as a source of increased pressure in this survey compared to the last survey (5% each of all responses).

Federal Government policies

While a wide range of responses were given to the question asking agencies to identify new federal policies affecting their clients, two areas of policy change dominated:

- Social security policies and the administration of the social security system, particularly in relation to welfare reform and changes to Centrelink payments and conditions

- Decreased level of funding under the Commonwealth/State Housing Agreement and the failure of housing policy to deliver low cost and crisis housing (which is a joint Commonwealth and State/Territory responsibility).

In relation to ongoing policy issues, a number of responses referred to:

- Immigration policies which restrict access to services for Temporary Protection Visa holders
- Centrelink penalties for breach of payment conditions
- Lack of funding for legal aid
- The demise of Medicare and bulk billing.

9. What are the sources of any increase in agency costs.

Agencies overwhelmingly reported that wages and employment on-costs was the major source of increased agency costs. It should be noted that the 2001 Census of Population and Housing showed that in general, people employed in community services occupations had relatively low incomes, with only 15.9% overall receiving \$41,600 or more per year, compared, for example, with 39.6% of people employed in health occupations.⁸

The other areas that scored highly were:

- The cost of insurance
- The cost of accommodation
- The cost of utilities
- The cost of compliance with Occupational Health and Safety legislation
- The cost of workers compensation.

Other significant sources of agency costs were the cost of fuel and information technology.

10. What impact is the increased pressure having on service delivery and management

Agencies which indicated increased operating pressures were asked to indicate the strategies they used to cope with this. While the responses show that increased (unfunded) effort by staff and volunteers was again the primary way that agencies coped with increased pressure (15%) there has been a steady decline in this percentage over each survey (17% in 2002, 17% in 2001 and 21% in 2000). This suggests that an increasing number of organisations are realising that the limits of staff and volunteer endurance have been reached or that placing people under sustained and increasing pressure undermines both the quality of services provided and the sustainability of the sector.

⁸ Australia's Welfare 2003, p144.

The creation and extension of waiting lists, increased referrals and closer targeting of services were used by 21% of organisations as ways of dealing with the pressures they faced. This also represents a significant decline in the relative importance of these strategies for organisations in the last financial year when compared with earlier surveys (28% in 2002, 27% in 2001, 38% in 2000).

These changes correspond to the significant increase in the percentage of organisations reporting that they have met increased demand within existing capacity, up from 4% in 2002 to 11% in 2003.

Table 10: Impact of any increased pressure on service delivery and coping strategies

Impact on service delivery and coping strategies	No. of responses	% 2003	% 2002
Met increased demand within existing capacity	344	11	4
Greater targeting of services	231	7	9
Increased referrals to other agencies	206	7	10
Creation/extension of waiting lists	210	7	9
Using up financial reserves	361	12	12
Rationalising assets	119	4	3
Increased (unfunded) effort by staff/volunteers	465	15	17
Sought additional resources from government	437	14	16
Sought additional resources from business	183	6	8
Sought additional resources from philanthropic organisations	231	7	n/a
Advocacy for systemic change	224	7	9
Other	87	3	3
Total	3,098	100	100

11. Where are costs being cut

Given that staffing costs are the major source of cost pressure for organisations, it is not surprising that cutting staff hours and conditions is the major way in which organisations trim their budgets. Of course, these strategies translate into the closer targeting of services or a reduction in the hours that services operate, and these were commonly reported responses too. Other strategies include reducing the level of material aid to clients, not undertaking building maintenance and repair, ceasing outreach services to remote areas and ever stricter controls on overheads.

12. Where agencies have experienced a decrease in pressure, what are the causal factors?

Nearly three quarters of all respondents to this question indicated that there had been no decrease in pressure and 12% of respondents did not answer this question.

Cyclical and seasonal factors played a bigger part in contributing to decreased pressure this year compared to last year (6%) as did the use of targeting (7%).

Table 11: Sources of any decreased pressure on agencies

Source of decreased pressure	No. of responses	% 2003	% 2002
Not applicable (no easing of pressure)	513	72	74
Cyclical/seasonal factors	42	6	2
Less demand for services due to increase in well-being of clients	8	1	1
Fee increases have led to a drop in demand	17	2	2
More agencies have opened to share workload	19	3	3
Increased targeting of services	51	7	4
Decrease in referral from other agencies	10	1	2
Lower operating costs	14	2	2
Increased funding	43	6	6
Total	717	100	100

13. Expectations about organisations' capacity to deal with changes in demand, costs or other significant changes over the next 12 months

A greater proportion of agencies expect to meet an increase in demand in the next twelve months (23%) compared with the previous survey (18%). Furthermore, 11% of agencies expect increased capacity due to an increase in income or other resources. There has been a corresponding decrease in the numbers expecting not to meet demand (dropping from 25% to 20%) and those expecting not to meet an increase in costs (dropping from 17% to 13%). This suggests that more agencies expect a more stable environment in terms of both demand and cost pressures. Nevertheless about a third of organisations (33%) expect **not** to meet an increase in demand or an increase in costs over the next 12 months.

Table 12: Expectations over the next twelve months

Expectation	No. of responses	% 2003	% 2002
No change expected	73	6	9
Expect increased capacity due to decreased demand	72	6	8
Expect increased capacity due to decrease in costs	17	1	2
Expect increased capacity due to increase in income or other resources	130	11	n/a
Expect to meet increase in demand	273	23	18
Expect not to meet increase in demand	243	20	25
Expect to absorb increase in costs	173	15	16
Expect not to meet increase in costs	160	13	17
Other	54	5	5
Total	1,195	100	100

Insurance

Access to affordable insurance continues to be reported as a major concern for sector organisations and was identified above as a significant cost pressure for many organisations.

The results below show that while sector organisations made very few claims for most types of insurance, organisations report an average increase of 19% in the cost of cover between 2002-03 and 2003-04 and continuing difficulties in both affording cover and finding an insurer.

14. Type of claim made by service type

Table 13: Insurance claims made by community sector organisations in the last two years, by service type

Service type ⁹	Director Ind	Vol. Ins	Prof. Ind	Public Liabt'y	Bld & Cont's	Work. Comp	Total claims	Average no. claims per agency
Aged Care	0	2	0	1	76	145	224	8
Disability	1	2	1	3	71	682	760	28
Ind./Family	0	3	0	5	102	223	333	12
Children	0	0	0	1	46	101	148	53
Empl.	0	0	0	0	19	71	90	3
Advocacy	0	3	2	3	31	102	141	5
Crisis	0	1	0	1	32	30	64	2
Housing	1	0	0	2	62	41	106	4
Multi-service	0	3	1	82	137	471	694	25
Health	1	0	20	2	14	24	61	2
Community	1	3	18	1	43	66	132	5
Total	4	17	42	101	633	1,956	2,753	Avg: 2

⁹ Note that many agencies deliver more than one type of service and the one insurance claim is counted against each of the service categories across which these agencies work.

15. Difficulties in obtaining insurance

Over a quarter of respondent agencies (218 agencies) indicated that they had experienced difficulties in obtaining insurance cover in the 2002-03 financial year.¹⁰ Of these:

- 119 indicated that the difficulty was due to the increased cost of cover (53%)
- 99 indicated that the difficulty was due to being refused cover by an insurer (42%)
- 8 indicated that the difficulty was due to both the increased cost of cover and refusal of cover by an insurer (4%).

16. Costs of insurance

The data received from respondent agencies shows that the collective cost of insurance cover for these agencies was \$21.4 million in 2002-03, while the cost of cover in 2003/04 was \$25.6 million. This represents a \$4.2 million (or 19%) increase between 2002/03 and 2003/04.

Of the 566 agencies that completed this part of the survey:

- 77% are paying more for insurance in 2003/04 than they did in 2002/03
- 14% are paying the same
- 9% are paying less.

Of the 438 agencies that are paying more for insurance:

- 34% are paying between \$1 and \$999 more
- 40% are paying between \$1000 and \$4,999 more
- 12% are paying between \$5,000 and \$9999 more
- 11% are paying between \$10,000 and \$49,999 more; and
- 3% are paying between \$50,000 and \$90,000 more.

Of the 49 agencies that are paying less for insurance:

- 27% are paying between \$1 and \$999 less;
- 57% are paying between \$1,000 and \$9,999 less; and
- 16% are paying between more than \$10,000 less.

¹⁰ 114 organisations did not answer this question.

Information Technology

17. Access to Information Technology

This year's survey asked a number of questions about the capacity of the sector to invest in, and take advantage of, information technology.

While half of all organisations have a website and seventy per cent have networked computer systems, it is clear that many organisations suffer barriers to the take up of IT and fail to invest in it.

A large proportion of respondents (85%) reported barriers to the take up of IT with major problems in affording the technology itself and support services (50%) and the low level of IT skills in organisations (28%).

In terms of investment, almost half of respondent organisations reported zero investment or did not provide an estimate of expenses in 2003-04.

The following table shows the number and percentage of organisations with desktop computers, email addresses and internet connections, grouped according to the number of units of each of these resources. For example, 345 organisations (or 48% of the 713 organisations which completed this question) have access to between zero and five desktop computers.

Table 14: Access to IT

Access to IT	0-5 (units)	6-10	11-20	20+
Desktop computers	345 (48%)	175 (25%)	91 (13%)	102 (14%)
Individual email addresses	457 (64%)	93 (13%)	67 (9%)	96 (14%)
Individual Internet connections	609 (85%)	41 (6%)	28 (4%)	35 (5%)

18. Networked desktop computers

Agencies were asked whether their desktop computers were networked to show the extent to which data and communication systems are efficiently centralised and access to office tools like printers are available from each computer terminal.

Of the 716 agencies that answered this question, 70% had networked computer systems.

19. Organisations with a website

Of the 722 agencies that answered this question, 361 (50%) had a website.

20. The cost of Information Technology

Agencies were asked how much they had provided for information technology expenses in 2003-04.

The total spend for all respondent agencies was just over \$12 million, but almost half of all agencies either spent nothing or did not answer this question.

- 357 agencies (44%) did not answer this question or spent nothing on IT
- 68 agencies (8%) spent less than \$1000
- 186 agencies (23%) spent between \$1001 and \$5000
- 74 agencies (9%) spent between \$5001 and \$10,000
- 133 agencies (16%) spent more than \$10,001.

21. Barriers to IT

Agencies were asked to identify any barriers to the take up of information technology in their organisation. Of the 970 responses to this question:

- 144 said that there were no barriers (15%)
 - 271 said that low level IT skills in the organisation was a barrier (28%)
 - 490 said that the cost of technology and support was a barrier (51%)
 - 65 gave other reasons (6%).
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