Australian Community Sector Survey 2012

National Report

ACOSS Paper 191

acoss
Australian Council of Social Service

The Australian Council of Social Service is the peak body of the community services and welfare sector and the national voice for the needs of people affected by poverty and inequality.

ACOSS' vision is for a fair, inclusive and sustainable Australia where all individuals and communities can participate in and benefit from social and economic life.

Established in 1956, ACOSS aims to reduce poverty and inequality by:

- Developing and promoting socially, economically and environmentally responsible public policy and action by government, community and private sectors; and
- Supporting the role of non-government organisations in providing assistance to vulnerable Australians and contributing to national policy making.

ACOSS members comprise community service providers, professional associations, advocacy organisations and individual supporters. ACOSS provides independent and informed policy development, advice, advocacy and representation about issues facing people in Australia affected by poverty and inequality and the community services sector. We also provide a key coordinating and leadership role for non-profit social services across the country. We work with our members, clients and service users, the non-profit sector, governments, departments and other relevant agencies on current, emerging and ongoing social, systemic and operational issues.

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Executive Summary

The Australian Community Sector Survey (ACSS) is the only annual national survey collecting data about the non-government, non-profit community services and welfare sector. This sector is a major provider of the community services that most of us rely on at some point in our lives, but which are particularly important to people on low incomes.

The 2012 ACSS was conducted between April and June 2012 and covers the period from 1 July 2010 – 30 June 2011.

A total of 665 agencies completed the survey, responding on issues relating to service provision, income and expenditure, and operational, policy, and workforce issues for the community services sector.

Key Findings

For people experiencing poverty and disadvantage in Australia, the availability of secure and affordable housing, and care and treatment for mental illness were reported as the greatest areas of need. The services that were least able to meet demand were housing and homelessness services, followed by legal services.

Organisations were asked to report on areas of unmet need among their clients, beyond those services they delivered themselves. Here, unmet need was highest for housing and homelessness services, followed by mental health services. Unemployment featured strongly among clients with unmet needs.

Underfunding and uncertainty about the funding of services stood out strongly as the most significant future pressure on the sector. Ongoing unmet demand by clients followed closely behind. These concerns indicate clearly the impact of inadequate and inconsistent funding on service effectiveness and sustainability.

Summary of key findings

Housing the highest need

While investment in areas such as the social housing initiative made a positive impact on homelessness and housing services, the survey shows clear areas of unmet demand and a need for sustained investment over time to address homelessness adequately.

- Nearly 3 in 5 respondents listed housing among 'high need' services of clients.
- 81% said they could not meet demand for their services.
- 63% of respondents said waiting times for this service have increased.
- There were 303,713 instances of service provision but 20,496 instances (8%) of clients turned away from services responding to this survey.

Legal services also in strife

Legal service providers were the second highest service type to report difficulties in meeting demand.

- 73% could not meet demand for services.
- Most community legal services reported unmet demand, underfunding, restricted services to clients, and increasing waiting lists.
- There were 119,886 instances of service provision, but 11,693 (or 14%) were turned away.

Mental health

Mental health was second only to homelessness/housing as the area of highest need, nominated by 57% of services.

Emergency relief services were in high need

- 499,743 people received emergency relief services, but 3,747 people (6%) were turned away.
- 45% of services reported emergency relief services as an area of high need.
- Over 80% of emergency relief services had to target services more tightly to meet demand.
- Three-quarters of respondents said costs exceeded revenue for emergency relief.

Youth services in trouble

- 46% could not meet demand.
- 78,100 persons received services but 2,834 people (or 5%) were turned away by respondents.
- 60% of services reported that costs of this service exceeded revenue.
- 70% reported requiring staff/volunteers to work longer hours to meet demand.

Domestic violence and sexual assault support services feel the strain

- 68% of respondents reported that costs of this service exceeded revenue.
- 66% required staff/ volunteers to work longer hours.
- 52% reported they could not keep up with demand.
- 52% said waiting times for this service had increased.
- 139,179 people received services from survey respondents but 4,322 people (or 3%) were turned away.

Underfunding, funding uncertainty, and unmet demand lead the list of future stresses on the sector.

NOTE**:** Turnaway percentages exclude outlier numbers, for example reports of 0 or 50,000 turnaways

1. Survey methods

About this survey

The Australian Community Sector Survey (ACSS) is an annual online survey of community services in Australia. The survey gauges the opinions of those who deliver vital social and community services. It is also a barometer of the health of the sector, identifying pressure points, funding and resource shortfalls and most importantly the needs of the sector's huge and growing number of clients.

The ACSS is the only annual national survey collecting data about the non-government, not for profit community services and welfare sector in Australia. This sector is a major provider of the community services that many of us rely on at some point in our lives, but which are particularly important to people on low incomes.

Changes this year

In 2012 the Survey was modified to address a number of objectives:

- Additional modules were developed seeking opinions on sector-wide changes;
- Reporting of service delivery was streamlined; and
- Additional questions were included on organisational demographics.

The internal organisation of the questionnaire was adjusted to reduce the reporting burden on respondents, and communication to the sector and survey respondents was revised.

Sampling and sample limits

The sampling frame was members and sector networks of ACOSS and the state and territory Councils of Social Service. This covers approximately 3,000 community organisations nationally and a further number of individual members who may be associated with additional organisations. A large, stratified random sample of the sector using a high quality sampling frame would provide the best survey evidence base to collect data, but such a sampling frame is not currently available due to incomplete census-like records of the entire community and social services sector. The sampling method adopted here was non-probability availability sampling: respondent organisations from ACOSS/COSS databases were emailed a cover letter from ACOSS and a link to the survey inviting participation and providing instructions and assurances about data confidentiality. Additional measures to gain a sample were undertaken. Information about the survey was made available through Australian Policy Online, the ACOSS website, and through ACOSS email distribution lists. Past respondents to ACSS were also contacted by email.

Since the sample is non-probability derived, there are potential sources of response bias that go beyond sampling error. However, with over 600 responses, the survey cross-section represents a large sample from community services overall. Efforts to improve the quality and representativeness of the sample in future years are ongoing.

Responses mainly came from Chief Executive Officers, Executive Officers and managers (with various responsibilities) within the sector. As expected, most responses came from the sector's smaller organisations. The overwhelming majority of respondents were involved in direct service provision.

Responses

A total of 665 valid responses were obtained. Measures to protect the quality of the sample were undertaken. Multiple responses from the same (usually small) organisation were deleted, with the more complete response kept in the sample. Multiple responses from large organisations were allowed where these organisations have many sites, state-level offices etc. Where multiple responses were submitted, responses were checked to reduce the likelihood of accounting for the same jurisdiction multiple times.

A screening question eliminated responses from for-profits and governments.

Fieldwork

The survey was in the field between April and June 2012. Respondents were asked to provide information relating to the period 1 July 2010 to 30 June 2011, and the previous (financial) year. Results were analysed using SPSS survey software. Reminder emails were sent to prompt responses.

Report

This report highlights major trends from the survey. In addition, some basic information from a number of profiled services is included in this report.

A PDF version of the survey is available on the ACOSS website at **www.acoss.org.au**

Data reporting

Client service and financial data in ACSS 2012 is for either 2010-11 or 2009-10.

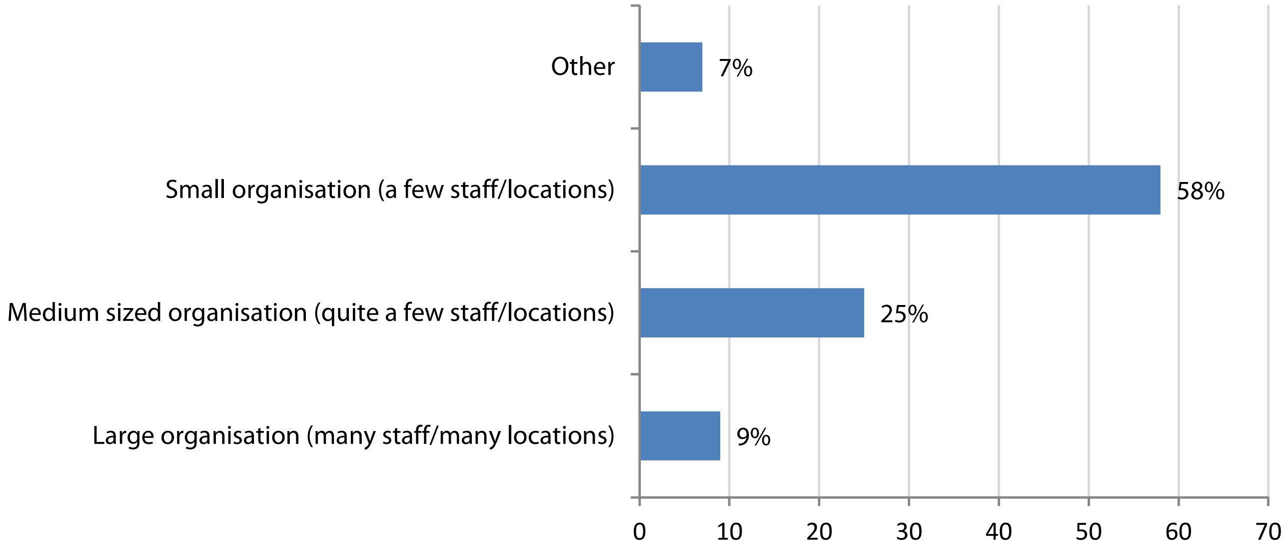
Acknowledgements

This survey benefitted greatly from the work of a dedicated research team comprising Ms Lisa Fowkes (ACOSS member), Dr Shaun Wilson (Social Sciences, UNSW) and Dr Adam Stebbing (Sociology, Macquarie University). ACOSS gratefully acknowledges their contribution.

Our thanks go also to COSS members and sector colleagues who provided valuable advice and feedback on the development of the new survey instrument and to all those organisations who continue to support the importance of the ACSS through their efforts to complete the survey.

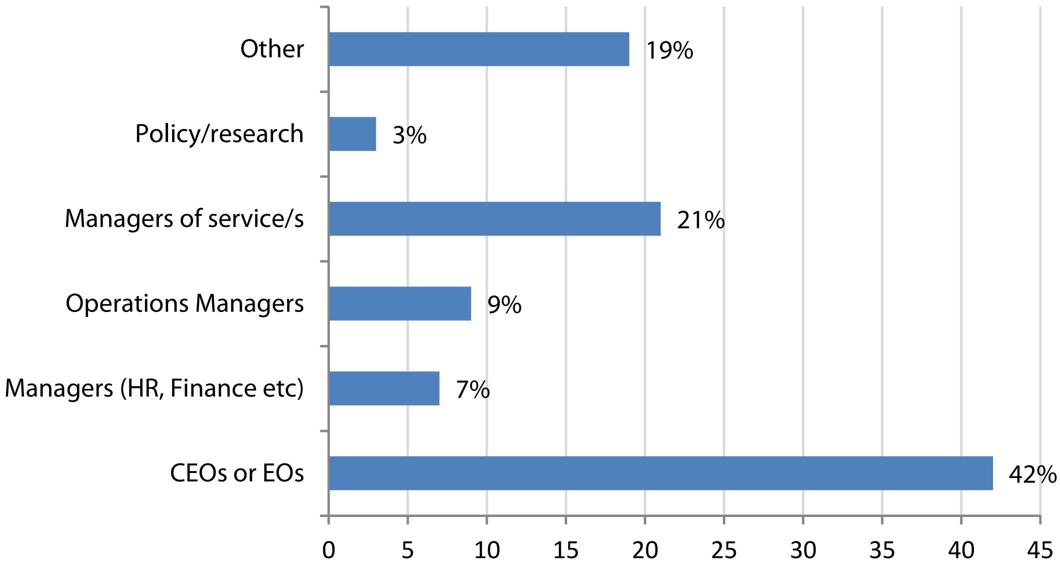
2. Who answered the survey?

Small organisations (self-classified) dominated responses (n=649)



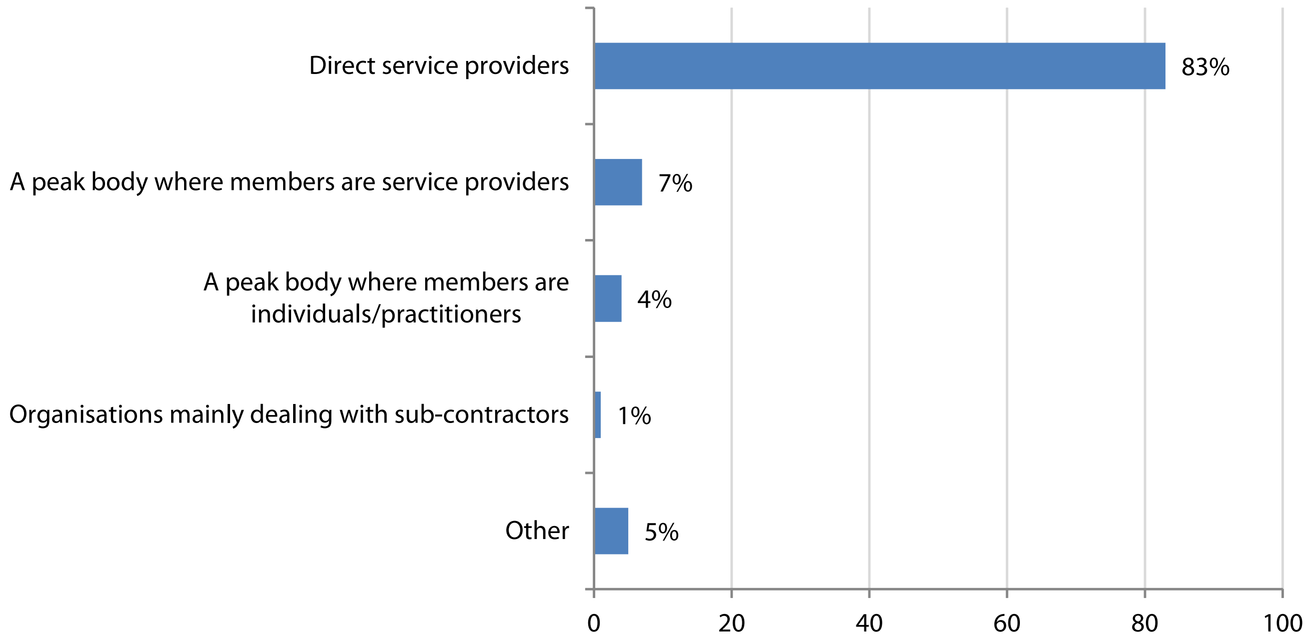
Within the not-for-profit sector, organisational size has emerged as a policy issue of increasing prominence and debate. While small organisations are often established by and to meet the needs of a particular community, concerns about their sustainability include the capacity of smaller organisations to compete with larger organisations in securing funding; and the likelihood of smaller organisations being able to engage effectively in advocacy. Small organisations, self-classified according to staff size and service location, dominated response to this survey (58%).

Respondents were mostly CEOs, EOs and managers (n=649)



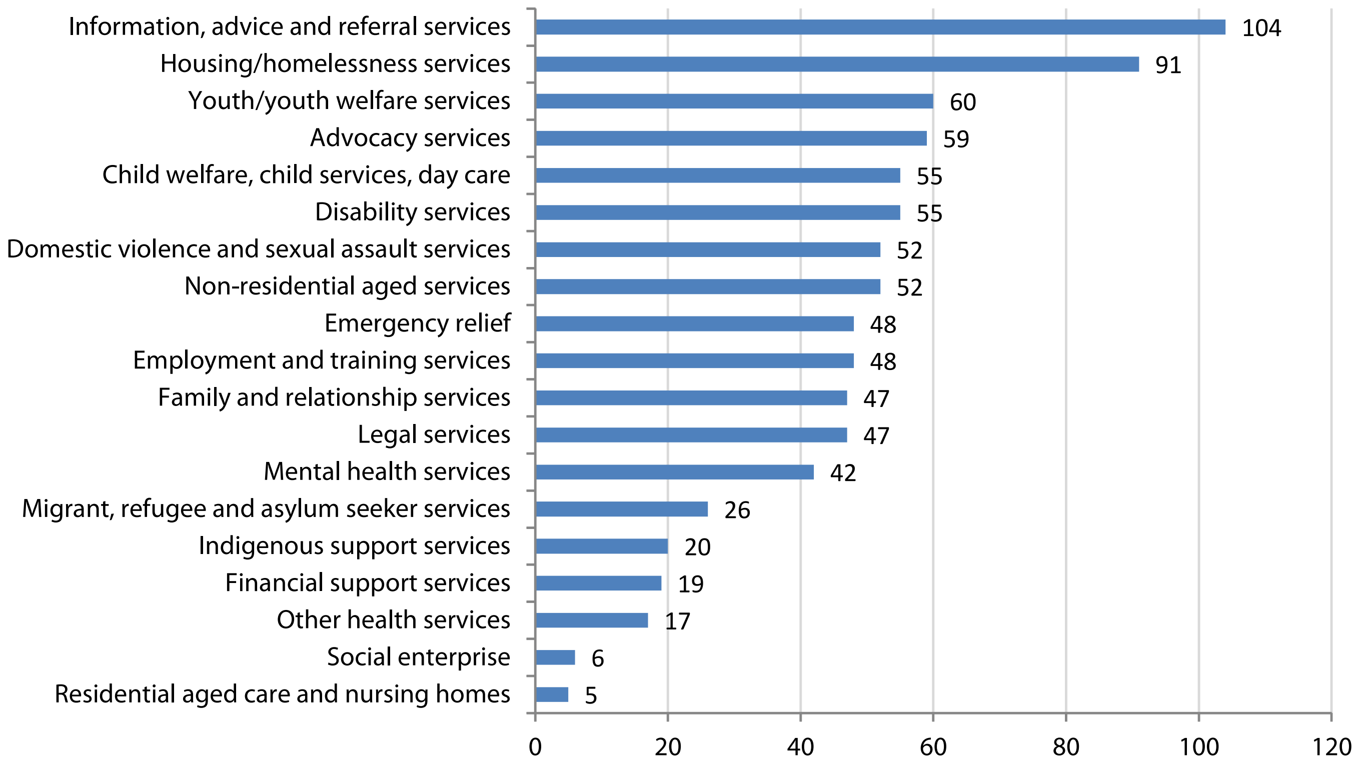
Those who responded to the survey were mostly in management positions, including CEOs, EOs, and various other types of managers (79%).

Most respondents were direct service providers (n=648)



The majority of survey responses (83%) were from organisations providing services directly to clients. Peak bodies comprised 11%, and organisations dealing with sub-contractors made up only 1%.

Information, housing/homelessness and youth services were the most commonly reported-on services (figures are total numbers)

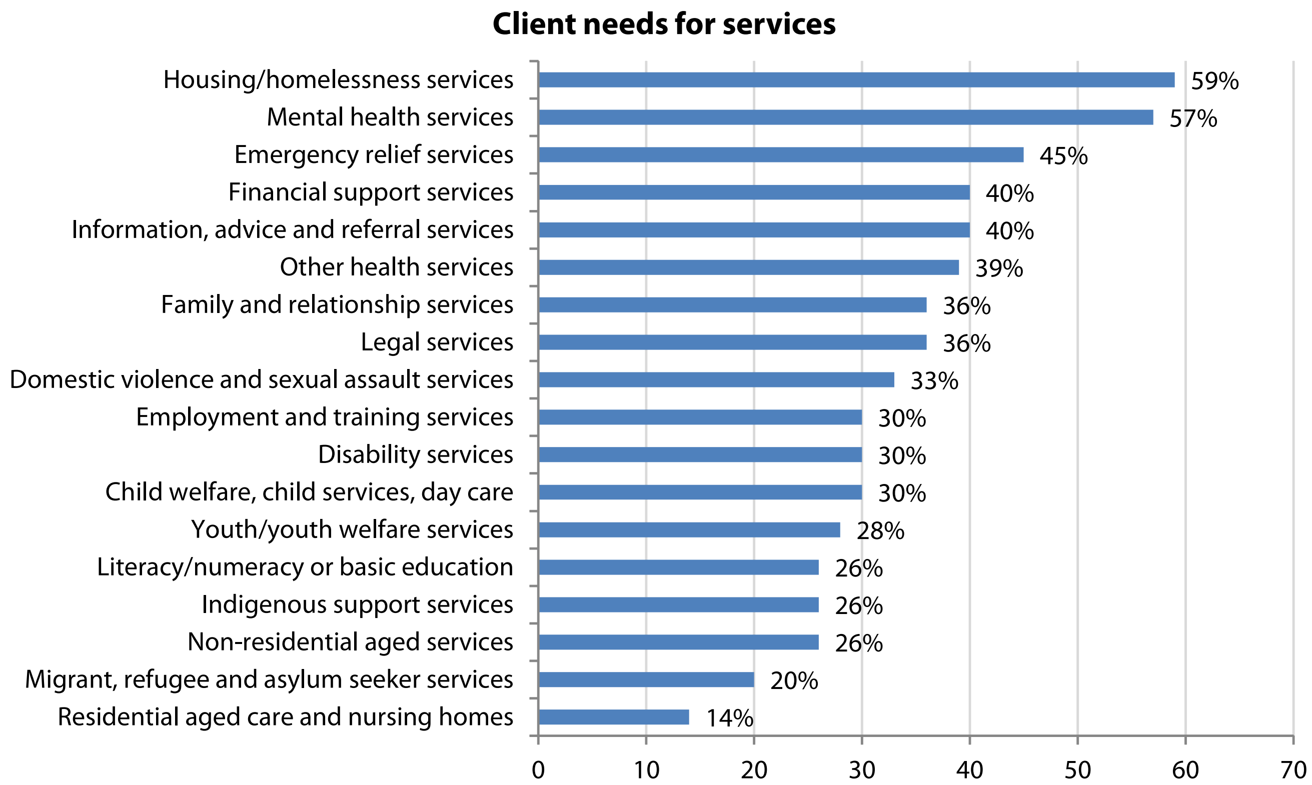


Note: questionnaire allowed up to four reported services

Respondent organisations were asked to report on the main activities of their organisations. Most respondent organisations delivered several services simultaneously, with the services most commonly reported being information, advice and referral (104 responses), housing/homelessness services (91 responses) and youth/youth welfare services (60 responses).

3. What do the sector's clients need that they're not getting?

Housing/homelessness services and mental health services top the list of 'high need' services that clients are missing out on



N=>482. Question: Thinking about the people that access your services, what services do they need but can't currently get? Please tell us the level of need that people accessing your service have for each of the following. Response categories: High need, medium need; low need. Coded: 'High need' responses only.

Housing the highest need

Nearly 3 in 5 respondents listed housing among 'high need' services of clients, at 59% of services.

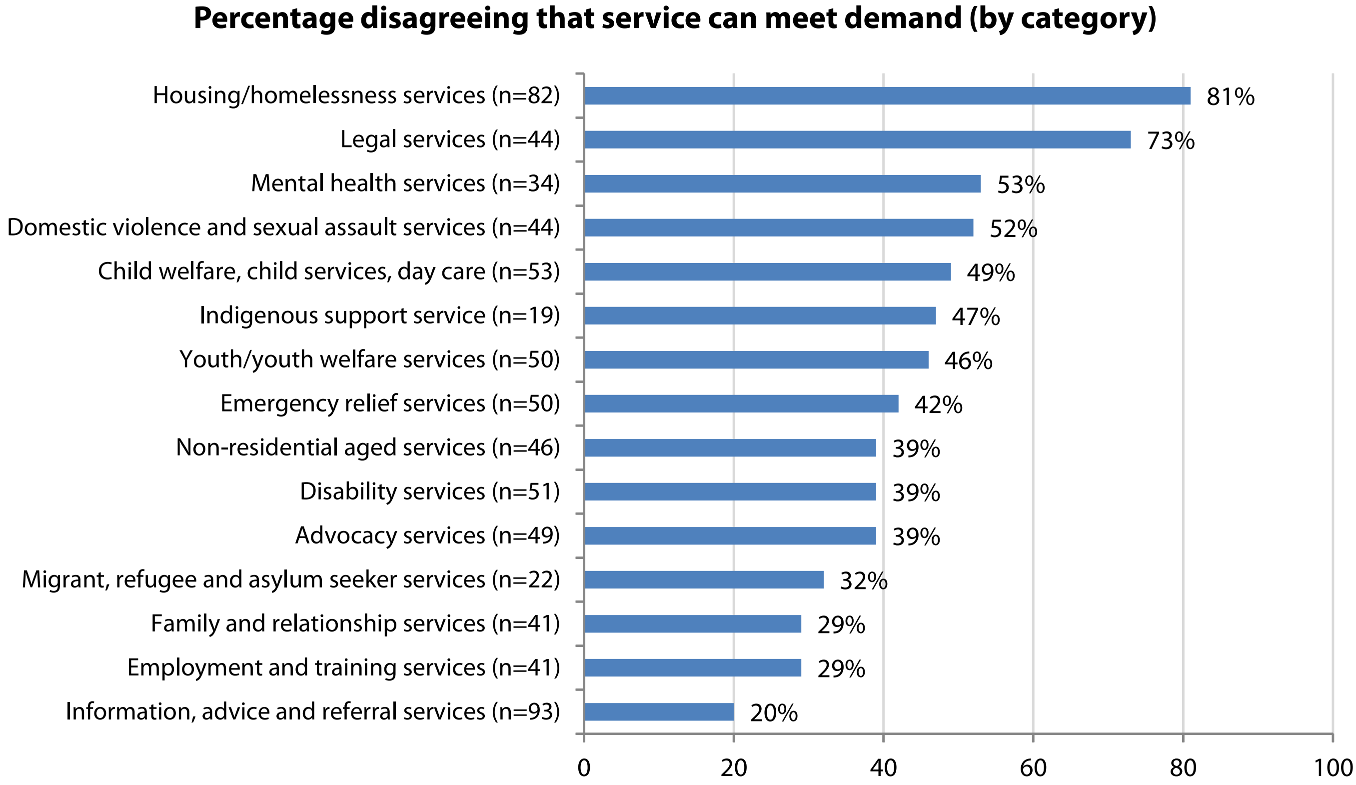
Mental health, emergency relief services also in high need

57% mentioned mental health services as 'high need' followed by 45% for emergency relief services.

Note: Lower ranked services are often targeted at smaller client groups (for example, indigenous Australians and refugees).

4. Which services can't meet demand?

Housing/homelessness and legal services cannot cope with demand



Question: 5 point agree-disagree responses to the statement 'Our organisation was able to meet the demand for this service'. Responses above are coded as 'disagree' and 'strongly disagree' combined to provide a measure of demand pressures across the sector. Only service organisation categories with n>20 (for main service) are reported here.

81% of housing services cannot meet demand

The housing crisis in Australia features throughout this report. Most service providers (81%) say they cannot meet demand for their services.

Legal services also in strife

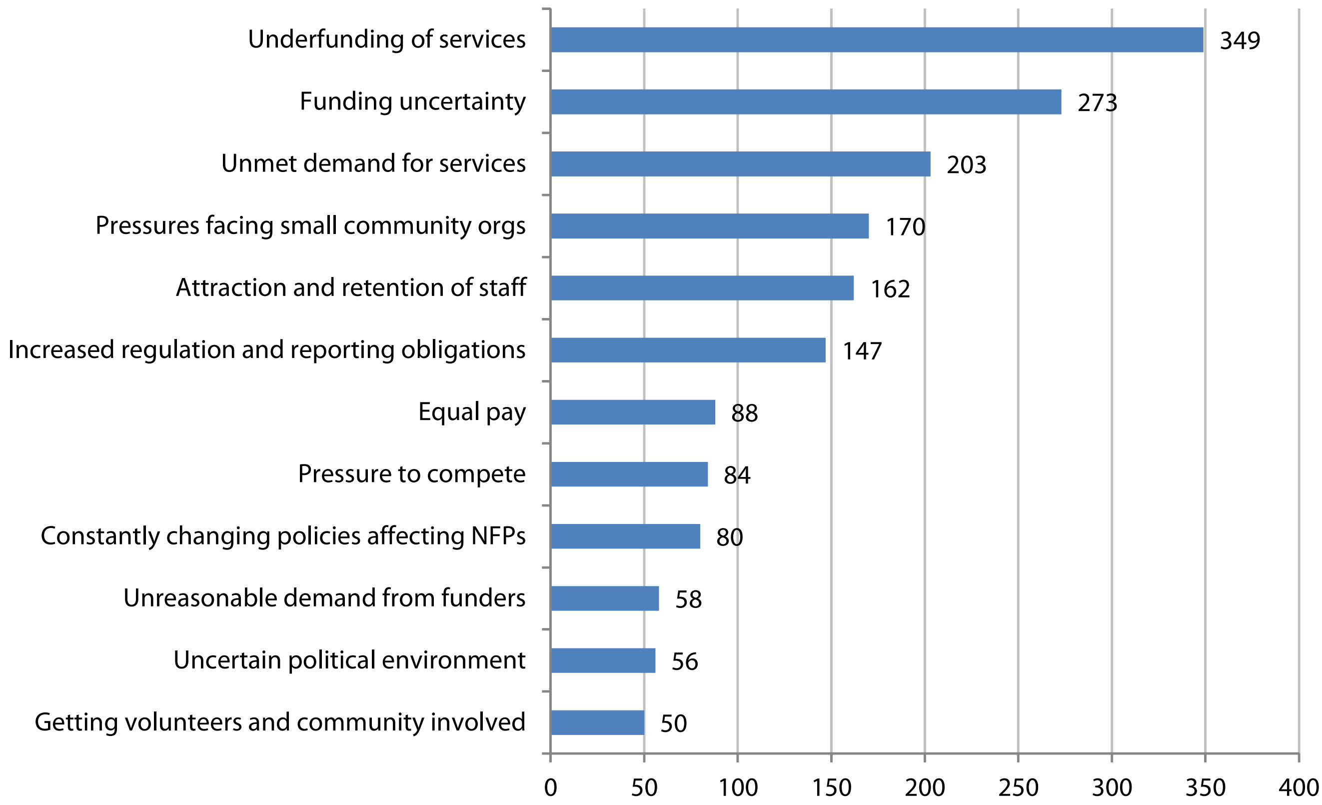
Legal service providers were also highly likely to report difficulties in meeting demand (73%). This finding corroborates recent reports on the funding crisis for legal assistance services across Australia. For example, Commonwealth funding has been cut by 22% in real terms since 1997 according to a report by Community Law Australia[1]. The National Association of Community Legal Centres has called for an immediate increase in investment in community legal centres of around $48 million a year to bring existing centres up to a basic minimum funding level, followed by increases targeted towards high needs areas.

1 Community Law Australia (2012): Unaffordable and out of reach: the problem of access to the Australian legal system. Available: **http://www.communitylawaustralia.org.au/wp-content/uploads/2012/07/CLA_Report_Final.pdf**

5. What are the future pressures on the sector?

Underfunding, funding uncertainty, and unmet demand lead the list of future stresses on the sector

Total mentions (respondents chose 3 responses from this list)



Question: Here is a list of issues facing the sector. Please tell us which of the following you think is the top issue facing the sector as a whole. And the second? And the third?

Funding was the most mentioned issue...

Funding – too little and too uncertain – tops the mentions of future issues facing the sector.

...followed by unmet demand

Closely related, unmet demand for services and pressures on small service providers are ranked 3rd and 4th as significant future pressures on the sector.

6. Opinions about sector-wide reforms

The 2012 decision by Fair Work Australia on equal pay for social and community sector and disability workers has near-universal support in the sector but 81% respondents think the 8-year implementation is too slow

Statement	Strongly agree	Agree	Neither	Disagree	Strongly disagree	No.
Overall, equal pay is a good thing for the sector	**65**	**27**	6	1	1	587
Implementing equal pay over 8 years is too slow	**52**	**29**	15	4	1	589
Implementing equal pay will cost jobs and cut services in the sector	10	27	33	24	6	583
It is a better idea to fund clients directly than to fund services	4	10	25	**37**	**24**	584
Good service providers have nothing to fear from direct client funding	12	25	28	24	12	583
Rules and laws governing charities need to be simple and consistent	**53**	**42**	5	0	0	585
A national 'non-profit' regulator is a good thing for the sector	**28**	**43**	28	1	0	584
I feel confident that the Commonwealth government will increase funding to cover the cost of the equal pay decision to my organisation	5	21	20	**36**	**12**	574

Question: Please tell us how much you agree or disagree with the following statements. Columns summing < 100 % due to non-response (figures are total numbers).

Charities are a high priority

95% of respondents supported simple and consistent laws and rules for charities and **61%** thought a national non-profit regulator would be good for the sector.

Equal pay could be costly

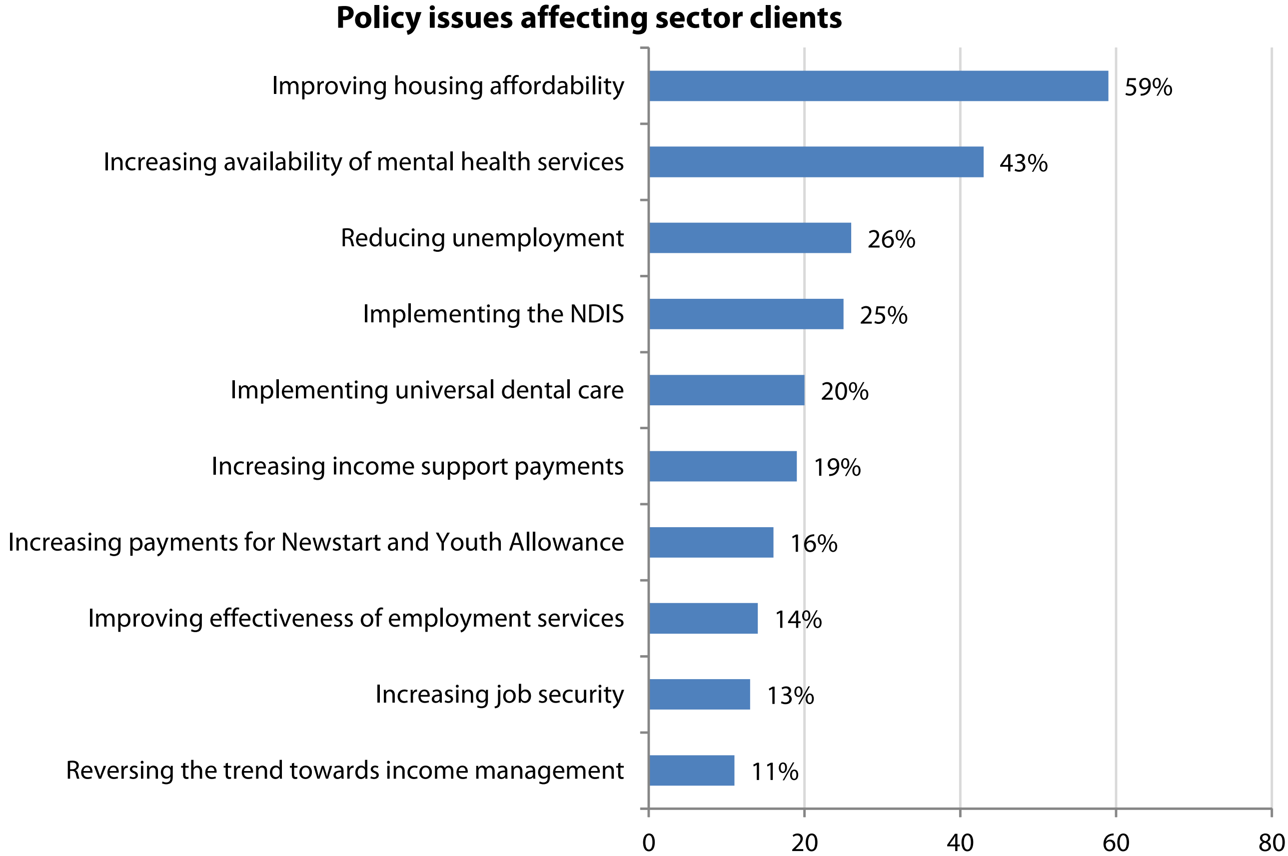
37% thought equal pay would cause cuts to services and job losses and **48%** were **not** confident the Federal government would meet the costs of equal pay for their organisation.

Funding for clients or services?

There was opposition to some policy direction on funding. **61%** of respondents **disagreed** that it was better to fund clients instead of services – a prospect raised by Productivity Commission proposals for disability reform. Opinions were mixed about whether 'good' providers have something to fear from direct client-funding.

7. What should policy makers prioritise for people experiencing poverty and disadvantage?

Improving housing, unemployment and mental health stand out as top priorities for **clients** of the sector



Question: Here is a list of policy issues that affect the clients of community sector organisations. Please tell us which of the following should be the top priority for government action. And the second? And the third? (responses are total mentions expressed as percentage of respondents)

Housing affordability a high priority

59% of respondents identified improving housing affordability – the stand-out item on the list. Mental health was identified by **43%** of respondents. Job security and reducing unemployment mentioned (either or both) by **36%** of respondents.

25% mention the NDIS

Policy was mentioned too, especially the National Disability Insurance Scheme (25%).

35% mention increasing income support payments

Combined mentions of **increasing** income support payments totalled 35% of respondents.

8. Service Profiles

Client profiles were developed from respondents who were asked to nominate the groups of people making up a majority of their clients. Profile data on service clients reports only on those characteristics perceived of a **majority** of clients. These data, therefore, do not identify smaller high-need groups who are over-represented in the client population.

Turnaway rates are included in the following profiles. Turnaway measures when organisations decline to provide a service that they would ordinarily provide to a client. A simple formula for calculation of turnaway rates is adopted in this report: the number of turnaways divided by total number of persons serviced in a year, expressed as a percentage. Caution is required in interpreting these figures. Not all services 'turn away' clients. For instance, some services ration availability, thus depressing the effective turnaway rate. Many services provide quality information about their overall service provision, but do not provide the same data on turnaways. These cases were excluded from calculations in this report.

Other services provide turnaway numbers that express something other than what is intended by a turnaway, for example, the total number of calls to a service that did not result in actual service delivery. This is evident in areas such as specialist homelessness services, where data from the Australian Institute of Health and Welfare indicate that 56% of adults and accompanied children making new requests for accommodation were turned away and 64% of accompanying children were turned away.[2]

Where particular data were influential outliers, they were investigated further, and generally excluded from the calculations.

2 AIHW 2011. People turned away from government funded specialist homelessness accommodation 2010-11: appendix. Cat. no. HOU 261. Canberra: AIHW. Viewed 18 January 2012. **http://www.aihw.gov.au/publication-detail/?id=10737420784** P.4 &10AIHW 2011.

Domestic violence and sexual assault services

Domestic violence and sexual assault support services report **underfunding** and unmet demand.

Statement	Strongly agree	Agree	Neither	Disagree	Strongly disagree	N/A
Our organisation was able to meet demand for this service	9	34	5	27	25	0
To meet demand, we required staff and/or volunteers to work more hours	**16**	**50**	11	11	9	2
In order to meet demand, our organisation reallocated resources to this area	9	46	23	14	5	5
Revenue for this service more than covered its costs	2	9	16	**32**	**36**	5
To meet demand, we targeted our services more tightly or limited service levels	23	50	11	11	5	0
Waiting times have increased for this service	25	27	18	23	2	5

N=44 Question: Please tell us how much you agree or disagree with the following statements.

Response highlights

68% did not agree that revenue for this service more than covered its costs.

66% of services required staff/ volunteers to work longer hours.

52% of domestic violence and sexual assault services did not agree that their organisations could keep up with demand.

52% of respondents said waiting times for this service have increased.

Clients are commonly...

Women

Insecurely housed

Unemployed

Provision and turnaway rates

Services reported total provision of services in 2010-11 as:

139,179 persons

Turnaways 2010-11:

4,322

Turnaway rate:

2010-11 3%

2009-10 4%

Emergency relief services

Most emergency relief services report more tightly targeting services and required staff and volunteers to work longer hours

Statement	Strongly agree	Agree	Neither	Disagree	Strongly disagree	N/A
Our organisation was able to meet demand for this service	9	43	7	21	21	0
To meet demand, we required staff and/or volunteers to work more hours	**18**	**46**	11	18	5	2
In order to meet demand, our organisation reallocated resources to this area	11	41	14	27	5	2
Revenue for this service more than covered its costs	2	9	14	**43**	**32**	0
To meet demand, we targeted our services more tightly or limited service levels	**39**	**43**	5	14	0	0
Waiting times have increased for this service	14	30	14	32	7	4

N=44 Question: Please tell us how much you agree or disagree with the following statements

Response highlights

Over **80%** of emergency relief services had to target services more tightly to meet demand. **Three-quarters** did not agree that revenue for emergency relief exceeded costs.

To meet demand, almost two-thirds (**64%**) of these services reported requiring staff/volunteers to work longer hours.

Clients are commonly...

Unemployed

Provision and turnaway rates

Services reported total provision of services in 2010-11 as:

499,773 persons

Turnaways 2010-11:

3,747

Turnaway rate:

2010-11 6%

2009-10 6%

Housing and homelessness services

Housing and homelessness services are characterised by a high level of unmet demand and rising waiting times for service

Statement	Strongly agree	Agree	Neither	Disagree	Strongly disagree	N/A
Our organisation was able to meet demand for this service	1	13	4	**33**	**48**	1
To meet demand, we required staff and/or volunteers to work more hours	17	31	13	24	6	9
In order to meet demand, our organisation reallocated resources to this area	10	41	14	22	4	10
Revenue for this service more than covered its costs	1	15	15	**29**	**35**	5
To meet demand, we targeted our services more tightly or limited service levels	15	47	20	15	1	3
Waiting times have increased for this service	**32**	**31**	18	9	0	11

N=>69 Question: Please tell us how much you agree or disagree with the following statements

Response highlights

81% of homelessness/housing services did not agree that their organisations could keep up with demand.

63% of respondents said waiting times for this service have increased.

54% of organisations did not agree that revenue for their service more than covered costs.

Clients are commonly...

Unemployed

Insecurely housed

Provision and turnaway rates

Services reported total provision of services in 2010-11 as:

303,713 persons

Turnaways 2010-11:

20,496

Turnaway rate:

2010-11 8%

2009-10 13%

Legal services

Most community legal services reported unmet demand, underfunding, restricted services to clients, and increasing waiting lists

Statement	Strongly agree	Agree	Neither	Disagree	Strongly disagree	N/A
Our organisation was able to meet demand for this service	2	18	7	**41**	**32**	0
To meet demand, we required staff and/or volunteers to work more hours	**16**	**46**	11	16	2	9
In order to meet demand, our organisation reallocated resources to this area	7	21	24	31	0	17
Revenue for this service more than covered its costs	0	12	14	**30**	**26**	19
To meet demand, we targeted our services more tightly or limited service levels	**30**	**52**	11	5	0	2
Waiting times have increased for this service	**23**	**46**	18	9	0	5

N=>42 Question: Please tell us how much you agree or disagree with the following statements

Response highlights

Results suggested a range of serious stresses on legal services. **73%** of respondents reported unmet demand and **62%** required staff/volunteers to work longer hours.

At **82%**, a very high number of respondents reported rationing services and almost **7 in 10** reported increasing waiting times.

Clients are commonly...

Unemployed

Provision and turnaway rates

Services reported total provision of services in 2010-11 as:

119,886 persons

Turnaways 2010-11:

11,693

Turnaway rate:

2010-11 14%

2009-10 13%

Youth services

Many of these services reported underfunding and required staff/volunteers to work longer hours

Statement	Strongly agree	Agree	Neither	Disagree	Strongly disagree	N/A
Our organisation was able to meet demand for this service	8	30	16	32	14	0
To meet demand, we required staff and/or volunteers to work more hours	**22**	**48**	6	20	0	4
In order to meet demand, our organisation reallocated resources to this area	13	44	15	25	0	4
Revenue for this service more than covered its costs	4	10	22	**36**	**24**	4
To meet demand, we targeted our services more tightly or limited service levels	16	44	18	12	6	4
Waiting times have increased for this service	6	28	20	30	2	14

N=>48 Question: Please tell us how much you agree or disagree with the following statements

Response highlights

A majority of organisations (**60%**) reported that costs of this service exceeded revenue.

70% of youth services reported requiring staff/volunteers to work longer hours to meet demand.

Clients are commonly...

Unemployed

Provision and turnaway rates

Services reported total provision of services in 2010-11 as:

78,100 persons

Turnaways 2010-11:

2,834

Turnaway rate:

2010-11 5%

2009-10 3%

9. Analysis

This survey covered over 600 organisations delivering community services in Australia. Small organisations constituted the most significant proportion of respondents; with responses coming predominantly from people at CEO level, followed by service managers. The majority of organisations responding delivered primary services.

For people experiencing poverty and disadvantage in Australia, housing affordability and care and treatment for mental illness were reported as the greatest areas of need. However a wide range of issues beyond those two received fairly equal prioritisation by respondents, ranging from increasing social security payments to improving employment and implementing the National Disability Insurance Scheme.

The services that were least able to meet demand among their own client group were housing and homelessness services, followed by legal services. Areas of unmet need that were identified beyond those offered by services themselves were highest for housing and homelessness services, followed by mental health services. Across all services most in demand, unemployment featured strongly in each client group.

In terms of the effectiveness and sustainability of community services in Australia, underfunding and uncertainty about the funding of services stood out strongly as the greatest areas of future pressure on the sector. Ongoing unmet demand by clients followed closely on these concerns. There was strong support for equal pay for social and community sector and disability workers, but concern about the 8-year implementation of the equal pay case recently determined by Fair Work Australia.

Turnaway rates

This Report shows a reduction in turn-away rates from 2009-10 to 2010-11 for some services. However it also reflects that services have undergone even further rationing of services, and have required additional hours from their workers, both paid and unpaid to meet demand. In this context, turn-away rates may be only a qualified measure of levels of demand and how services are meeting them.

Headline findings

Housing and homelessness

The need and effectiveness of key strategies towards secure housing has been demonstrated in this report. Services have been able to deliver services to more people because of funding increases. When the social housing initiative was introduced, around 52% of properties went to people who were homeless or experiencing domestic violence. This resulted in services being able to exit more people from crisis services into ongoing (12 months) accommodation. But this is also evidence that funding for services and investment in secure, affordable housing stock need to be sustained over time if they are to be effective.

Lower turnaway rates can also be linked to the establishment of 'central access gateways' in a number of states and territories, which became a central process for fielding clients to services - if a gateway is aware of a lack of available accommodation in a particular area, then services may not be receiving as many requests as previously.

Legal services

Community legal centres work with partners in legal aid commissions and Indigenous legal services to help Australians who cannot afford a lawyer. Community legal centres focus on helping people who do not qualify for legal aid and mainly help people with civil and family law issues such as tenancy, debt, family violence, employment issues and relationship breakdown. Due to funding shortages, community legal centres focus on assisting disadvantaged Australians. Over 80% of the people helped by community legal centres receive under $26,000 a year in income. Community legal centres focus on early advice, problem solving and working with other community agencies to address connected legal, financial, social and health problems. Repeated Parliamentary and government inquiries have recognised the problems faced by Australians in accessing legal help. For example, the Australian Government Attorney-General's Department has noted that "98 per cent of legal aid recipients [receive] an income that could be considered below the poverty line. This leaves much of Australia unable to afford legal representation but nevertheless ineligible for legal aid." [3]

In 2009, Price Waterhouse Coopers analysed legal aid funding in Australia and identified that, based on budgeted 2010 figures, Australian Government legal aid funding per capita in real terms had fallen 22 per cent since 1997. Budget figures indicate that Australian Government spending per capita on legal assistance funding will continue to fall in real terms across the next three years.

Community Law Australia, a coalition of community legal centres from across the nation, has called on the Federal government to inject an extra $330 million a year into the system to ensure all Australians can access a basic level of legal assistance – essentially a doubling of the budget for this area.[4]

3 Attorney-General's Department, Strategic Framework for Access to Justice in the Federal Civil Justice System, 2009, 52
4 Community Law Australia (2012) *Op. cit.*