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JMG Foundation

THE MARK LEONARD TRUST



The food issues census

A survey of UK civil society

The food issues census

Food and farming affect many issues of political and public concern, ranging from climate change to animal welfare to human health. The vital role that civil society plays addressing these is clear, whether in high-profile campaigns, setting nutritional standards or on the allotment. What we have not had, however, is a measure of this work: how much is being done, on what issues, and what are its strengths and vulnerabilities?

This report provides an overview of the work of civil society groups in the UK, based on a survey of over 300 organisations. It provides fresh insights on the size, shape and strategies of the sector. It shows that there is a rich diversity of approaches and activities, but also that food and farming is undervalued by civil society, and that the sector is particularly at risk from public spending cuts. The report sets out the challenges that these facts pose NGOs, government and grant-makers.

A survey of UK civil society

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Foreword

I came into the food business because I am greedy and I like to cook. And then I gradually realised that food is much more than a pleasure. What we eat makes a difference to our health, to the NHS budget, to the rural economy, to the sustainability of countryside and ocean, to jobs, to the way we socialise and interact, to our cultural identity, even to a child's behaviour, success or failure, happiness or unhappiness.

Charitable events highlighting the public's disquiet over food issues, or the programmes of high-profile TV chefs and others, take up plenty of media space and sometimes influence government policy. But until now nobody has mapped what is going on in civil society, what is being supported and by whom, how much overlap or duplication there is between organisations working in the same arena, what works and what doesn't.

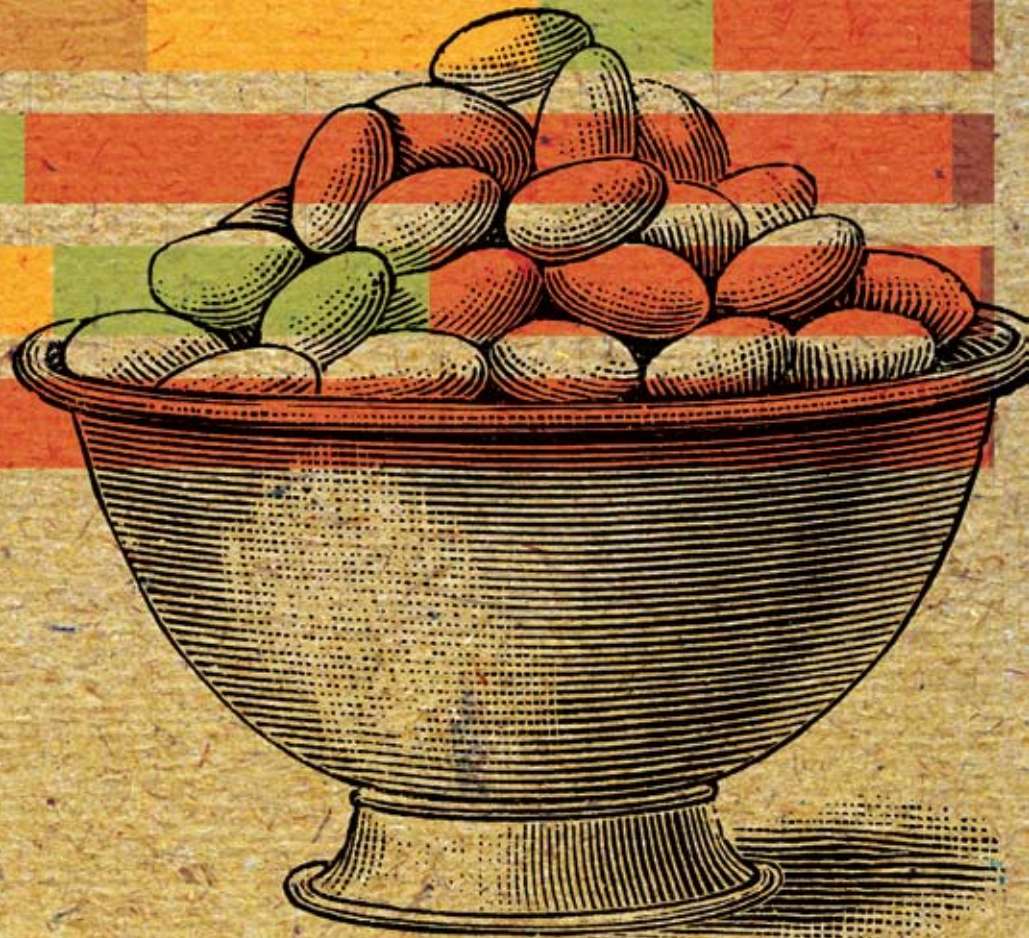
So this Food Issues Census, paid for by a group of charitable funders working in the food arena, is well-timed and, I believe, fills a big gaping hole. It will, I predict, become required reading for policy makers, funders, charity bosses, and anyone trying to change things in the food world.

Prue Leith

Cook, author, advisor to the Esmée Fairbairn Foundation



Summary



This report provides an overview of the work that civil society groups in the UK are doing on food and farming issues, based on a survey of over 300 organisations. It is intended to be a resource for those groups, to inform organisations funding in this sector and to stimulate discussion amongst all those who care about these issues.

A vital but undervalued sector

Based on the responses to the survey, we estimate that less than 1% of total voluntary sector and charity income is spent working on food or farming issues. Set against the share of social and environmental challenges attributable to food – including 10% of total UK mortality and at least a fifth of greenhouse gas emissions (Box 1.1, p.13) – this looks like a missed opportunity.

We come to this conclusion having noted that the UK-based organisations that responded to the survey spent a combined £178 million in their last financial year on activities relating to food or farming, accounting for an average 13% of their overall expenditure. They had 2,400 full-time equivalent (FTE) employees and 2,300 FTE volunteers working on food or farming issues.

Making estimates of the survey's coverage, we suggest that UK civil society in total spends at most £700 million per year on food or farming issues, employs 20,000 FTE staff and mobilises 80,000 FTE volunteers, through up to 25,000 mostly small organisations. We estimate that registered charities account for the majority of income (£450 million) but fewer than half of the staff and volunteers.

At risk from public spending cuts

Our survey found that 45% of civil society work on food or farming issues is funded by the public sector. This rises to 61% for organisations working at the national or regional scale. By comparison, statutory funds account for a third of average income for the voluntary sector as a whole. This suggests that work on food and farming is very vulnerable to public spending cuts, including the knock-on effects of the 30% budget cut at the Department for Environment, Food and Rural Affairs (Defra) announced in the 2010 Comprehensive Spending Review.

Addressing diverse issues

A large and diverse range of concerns and situations relating to food and farming are addressed by organisations working in this sector. We asked respondents to say how their time was distributed among 60 issues identified by the project steering group. The largest number of groups worked on local food, while animal husbandry issues attracted the greatest expenditure. Amongst our respondents environmental issues got more attention than issues relating to health. However, whereas organisations working on health tended to specialise, groups addressing environmental issues often did so alongside other themes, such as trade policy, farming or education.



Providing not protesting

More than a third of organisations responding to the survey spent most of their time on service provision. While education, co-ordination & capacity-building and service provision attracted the greatest staff time, education stood out as benefitting most from volunteer time. Spending was highest on research & expert advice and co-ordination & capacity-building. By all measures, activism was relatively neglected and lobbying received middling effort. The third sector, including charitable trusts and foundations, contributed least funding to activism and lobbying.

Working in partnership

The survey asked respondents to name up to ten other organisations with which they currently collaborated in work on food or farming issues through joint projects, co-branding or other relationships. The average number was six, with larger organisations and those primarily involved in activism, auditing & business advice, research & expert advice and lobbying listing the highest number of partners.

The organisations most commonly listed as partners were Sustain and the Soil Association. Sustain was a particularly important hub for groups working on farming/growing and health, while the Soil Association was most important for those working on local food, social inclusion and global policy issues. Both were separately named by respondents as key contributors to progress on food and farming issues. Other frequently named partners included the Big Lottery Fund, Friends of the Earth, the Federation of City Farms and Community Gardens, Garden Organic, the National Farmers' Union and Natural England.

Ambivalent towards big business

Civil society groups working on environmental and social issues are increasingly alert to the values and motivations underpinning their own activities and the behaviour of the people they are working with. Our survey explored the institutional values of organisations working on food or farming in relation to social justice, animals and the environment, expertise, the economy and big business.

Most respondents felt that big business had to be part of the solution to problems relating to food and farming. Yet food corporations, supermarkets and agribusiness were named as among the biggest obstacles to progress. One respondent explained, "of course they are part of the solution – in that they need to change their... practices – but this does not mean they should take a role in... policy setting".

Photos (clockwise from top left): Fairtrade Foundation (Annette Kay), Progressio (Marcus Perkins), Changeworks, Groundwork, Bankside Open Spaces Trust (Sam Roberts), Banana Link, Compassion in World Farming.

Demanding of government

A large majority of respondents supported a more interventionist role for the state, particularly in seizing the potential that public procurement holds to improve health and sustainability. Many were deeply concerned about the consequences of public spending cuts and of restructuring in the health sector. Withdrawal of funding from the Regional Development Agencies was seen to threaten valuable work by the regional food groups they had established.

Organisations highlighted that a 'big society' model, where volunteers manage community resources, would demand up-front investment in new skills and training. However, many organisations that currently work with volunteers rely on public funds and face an uncertain future.

Needing support from funders

Respondents to the survey considered campaigning, lobbying and practical research to be particularly important yet difficult to fund. Several organisations emphasised that it usually took longer to set up economically sustainable projects than grant-makers were prepared to fund. Groups were also concerned that the process of applying for funds acted as a barrier to entry for grassroots organisations.

Organisations needing relatively small amounts of ongoing funding felt they were caught in a treadmill, having to constantly repackage their work in order to match the changing fashions of philanthropy or pay lip-service to requirements to show 'innovation'. At the same time, funders were urged to take more risks in order to back genuinely innovative efforts to improve food and farming.

1 Introduction



“The importance of supporting sustainable and healthy food for all in the coming decades cannot be overstated, and this research will help us work together to invest wisely across civil society.”

Helen Crawley, Organix Foundation

1.1 Why a food issues census?

Food and farming are significant factors in some of the most serious environmental, social and economic problems we now face in the UK and internationally (Box 1.1). These problems cannot all be solved solely by changing how we eat or farm. Indeed, people working on food issues find it crucial to work with other sectors in order to achieve improvements in cross-cutting areas such as social welfare, environmental accounting and trade policy.¹ Yet food and farming occupy a pivotal place within these efforts, due both to their direct footprint on society, the economy and the environment, and because food is a revealing window onto wider concerns, and a powerful route through which to engage people in campaigns, social movements and changes in lifestyle.

The past few years have seen growing recognition of the importance of food and farming in the media, in politics and in public life. This has been marked by the rise of campaigning chefs like Jamie Oliver and Hugh Fearnley-Whittingstall, by government reports from bodies including the Cabinet Office² and Foresight,³ and mass public events such as The Big Lunch and Feeding the 5,000. The drive behind these developments has come in significant part from civil society activity, including research, standard-setting, campaigning and community organising. As Defra reels from heavy spending cuts, the Department of Health brokers 'responsibility deals' and government promotes 'the big society', the third sector is set to remain centre stage.

We know that civil society work on food is vibrant, diverse, and crucial in addressing many vital issues, both within the food sector and more widely. However, we also know that like other work across civil society it is vulnerable, depending on scarce and irregular funds, the goodwill of institutions and the personal commitment of many thousands of people. While there is no escape from these conditions, it is prudent to make the best of them by:

- Being aware of what others are doing across the sector, so that we learn from each other, avoid reinventing the wheel and focus our efforts where they can make the biggest difference.
- Using knowledge about the importance of food issues and priorities for action to make the case that more support should be given to work in this area.

This report has been commissioned by a group of charitable funders who already support work on food and farming issues. They consider that having a good knowledge of existing activity is a condition of responsible and intelligent grant-making (Box 1.2). Their own most immediate demand was for an overview of the sector. What range of issues is being addressed? Which are the focus of greatest activity and which appear relatively neglected? What are the aims and priorities of the organisations doing the work? What strategies are being pursued and where is the balance of effort?

Box 1.1: food issues in perspective

Food and farming are central to many current ecological, social and economic challenges. The way we eat and produce food not only contributes to these problems, but is also on the sharp end of their consequences.ⁱ

Climate change. Food accounts for a fifth of UK greenhouse gas emissions by consumption, rising to a third if you include indirect emissions from global land use changes such as deforestation.ⁱⁱ Climate change is expected to present profound challenges to farming, for example from changes to patterns of rainfall.ⁱⁱⁱ

Water scarcity. Irrigated agriculture is the world's biggest water user, accounting for about 70% of abstracted water.^{iv} The share is much lower in the UK but, of the 'virtual water' that we use here – the water it takes to grow what we consume – almost two-thirds is imported, much of it from water-stressed regions.^v

Biodiversity loss. Food production is also by far the biggest cause of land and marine species loss. Globally, over 4,000 assessed plant and animal species are threatened by agricultural expansion and intensification.^{vi} Of the thousand-plus threatened bird species worldwide, just short of 90% are threatened by agriculture.^{vii} Agricultural biodiversity is itself at risk, with 1,350 breeds of domesticated mammals and birds (20%) under immediate threat of extinction, reducing the genetic pool available to help cope with a changing environment.^{viii}

Animal welfare. The footprint of our food system in individual animal lives is as startling as its contribution to species loss. While there are 100 million chickens in the UK at any time, for instance, we eat 830 million over the year.^{ix} How we farm animals is relevant to human health, not only through food borne diseases such as salmonella and campylobacter, but also through the medicines we use to control disease: over half all antibiotics in the UK are given to animals,^x of which some 90% of go to farm animals.^{xi}

Livelihoods. Globally, more people depend on farming for a living than any other activity. While only 5% of people in high-income countries work in agriculture, in low-income countries the proportion exceeds two-thirds.^{xii} Spending on food is also proportionately higher, accounting for two-thirds of household expenditure in low-income countries compared with about an eighth across Europe.^{xiii} Agriculture and food security are therefore central to efforts to reduce global poverty.

Health inequalities. Poor diet accounts for an estimated 10% of total mortality in the UK, and following nutritional guidelines would save around 70,000 preventable deaths a year.^{xiv} Over 60% of this effect is down to fruit and vegetable intakes; if everyone ate 5-a-day it would save 42,000 lives a year, cutting total mortality by 6%.^{xv} As well as costing lives, poor diet compounds poverty, with people on low-incomes eating only a little over half the fruit and vegetables of the general population.^{xvi} In turn, employment in the food sector contributes to poverty because it is less secure than other parts of the economy, as over half the people who work in food are part-time compared with a third across the economy as a whole.^{xvii}



Box 1.2: tools for better grant-making

As well as supporting work within the food sector, we hope this report can contribute to wider efforts within philanthropy to take a strategic approach to grant-making. In the UK, relevant initiatives include the Environmental Funders Network (www.greenfunders.org), which has published a series of reports under the title *Where the Green Grants Went*, analysing the availability of funding for environmental work.^{xviii} Alongside such studies that take a strategic overview of funding, new web-based tools are being developed that enable large numbers of small-scale donors to sift through philanthropic opportunities and direct gifts towards activities they wish to support.^{xix}

The Food Issues Census owes something to both those approaches. We seek to provide an overview of civil society work in one sector, published as a report. However, groups working in this sector have provided us with much more data than we can cover here. We have therefore also provided an online toolkit that allows grant-makers and grant-seekers to mine the data for further information that is relevant to their own work. The toolkit, available at www.foodissuescensus.org, allows users to customise three types of chart and to download an anonymous version of the data.

The prospect of grant-makers taking a more strategic approach might raise concern that funders will be less flexible, more risk averse or more dominant in their relationships with grantees. However, research suggests that funders implementing a more strategic approach are in practice more likely to seek external input and to think innovatively.^{xx} The trusts and foundations supporting this work are committed to using it as a basis for dialogue between grant-makers and civil society organisations.

The objective of this report is to provide an overview of the work that UK civil society groups are doing on food and farming issues, based on a survey. It is intended to be a resource for those groups and for the organisations that support them, helping to identify priorities and make the case for funding, and providing a reference point for dialogue between grant-makers and grant-seekers.

1.2 Scope

This report is based on a survey of not-for-profit or public interest work relating to food or farming. It was a survey of organisations, rather than projects or individuals, and covered those working in the UK or supported by UK funders.

The focus of this report is on getting a measure of the sector. While the survey touches on the objectives, strategies and opportunities for change seen by groups working on food or farming, its main task has been to help map out the capacity that already exists to address food issues. This is only one of many questions that civil society groups and funders may seek to address in working out their priorities (Table 1.1).

Table 1.1: knowledge requirements for informed priority-setting

Requirement	Question
Capacity	What is already being done?
Objectives	What should we want to achieve?
Opportunities	Where are the levers of change?
Strategies	How can we use those levers?
Evaluation	What worked and what didn't?

As the first survey of its kind, it gathers basic information about what groups are doing and provides a base-line for tracking important changes, such as the effects of public spending cuts. As the survey covers a huge range of activity it can only skim the surface, but it should provide a useful reference point for more detailed conversations between grant-makers, grant-seekers and other stakeholders about specific opportunities to make a difference, how best to achieve change and the priorities for funding. The survey inevitably has some limitations and the findings reported in the subsequent sections should be treated as indicative rather than truly representative.⁴

1.3 Method

We did the work reported here in five steps:

- 1. Identify population and sample.** The organisations within the scope of this study were all those in the UK undertaking not-for-profit or public interest work relating to food or farming. This covers a wide spectrum of organisations, including businesses, schools and research institutions, as well as registered charities and community groups. Our core sample consisted of: organisations receiving food or farming-related funds from the grant-makers who commissioned this report; organisations listed as working on 'agriculture' in any of the four Where the Green Grants Went reports;⁵ recipients of funds under the Big Lottery Fund Local Food grants scheme; and members of Sustain, the alliance for better food and farming. In Section 2.2, we discuss the level of coverage that we achieved across different categories of organisation.
- 2. Design survey.** We created an online survey using Survey Gizmo (www.surveygizmo.com). The survey questions were designed to answer key research needs identified with a steering group comprising the commissioning funders and Sustain. In the interests of keeping the survey as short as possible, draft survey questions that were not deemed completely necessary to answering the main research needs were eliminated. The survey design was informed by the experience of the Environmental Funders Network in surveying other sectors. The draft survey was reviewed and tested twice by the steering group. The survey is reproduced at www.foodissuescensus.org and feedback from respondents can be found in Appendix 1.
- 3. Send survey.** We sent an invitation to participate in the online survey by email to 550 organisations included in our core sample, noting that they were welcome to forward the survey to additional organisations that might be interested. The invitation and mailing list were designed to direct the survey to appropriate individuals within the organisations contacted and to minimise the risk of duplication. A further 241 Big Lottery Fund grant recipients were contacted by the Royal Society of Wildlife Trusts, which administers the Local Food grants scheme. We sought to raise the response rate by sending reminders by email and following up with phone conversations to 250 organisations. Following the survey, respondents were invited to submit the photos that illustrate this report. A full photo gallery can be found at www.foodissuescensus.org.
- 4. Analyse results.** Of the 791 organisations that were emailed about the survey, 332 took part, with 244 answering all questions. The overall response rate to the survey invitations, excluding outliers (13) and those who replied to say that their work was outside the scope of the survey (44), was 45%.⁶ We cleaned the data by correcting typographical errors and removing duplicate responses. Based on an initial review of the data, outliers were identified and omitted from subsequent analysis (Section 2.1). We generated basic descriptive statistics and charts in Microsoft

Excel, undertook cluster analysis in SPSS, and coded the qualitative data in Weft QDA.

- 5. Create online tool.** We simplified and anonymised the data to create an online tool that organisations can use to explore the survey data in greater detail than is contained in this report, for example to inform strategic planning or support funding applications. Oxford Consultants for Social Inclusion developed the tool, which is available at www.foodissuescensus.org.

1.4 Overview

This report begins by sketching out a broad outline of the sector and then colours in the approaches, motivations and priorities of the organisations that make it up:

- Section 2 describes the size and structure of the sector, examining the types of organisation included in the survey, estimating the overall number of groups and people involved, and identifying their main funding sources.
- Section 3 explores the issues that organisations working on food or farming are seeking to address, comparing the overall amount of time and money devoted to different areas of concern.
- Section 4 considers how organisations seek to make a difference to those issues, discussing their strategies, activities, key audiences, and the factors they see helping or hindering progress.
- Section 5 describes how organisations work in partnership and identifies groups that act as hubs for work on particular issues.
- Section 6 unpacks the motivations and values that drive these organisations, including who they are seeking to benefit and where they stand in relevant ideological debates.
- Section 7 reports on the priority issues highlighted by respondents to the survey and their expectations of government and funders.
- Section 8 draws out conclusions for civil society, government, businesses and grant-makers.

2 Size and structure



“Little money is directed to food issues in spite of their social and economic importance. Charitable donors can play a vital part in putting this right.”

Sarah Ridley, the Tubney Charitable Trust

While many organisations working on food or farming issues have a broad sense of the range of relevant initiatives taking place around them, little has been known about the overall scale of activity. How many organisations and people are working on food and farming issues for the public benefit – is it thousands or hundreds of thousands? How does spending on these issues compare with spending across the voluntary sector as a whole? Do the large numbers of small-scale initiatives amount to more, in staff and volunteer time, than the work of the larger organisations that are best known? What about the balance between groups that focus only on food or farming, and those with a wider remit? The first task of this survey, therefore, was to get a measure of the size and structure of the sector.

2.1 Types of organisation

The organisations that responded to the survey were immensely diverse, ranging from very large, membership-based national charities to small community groups. They included food co-operatives, campaign groups, networks, commercial consultancies, social enterprises, wildlife trusts, youth groups, think tanks, school growing projects, professional associations and rare breed societies.

Figure 2.1: most respondents were registered charities

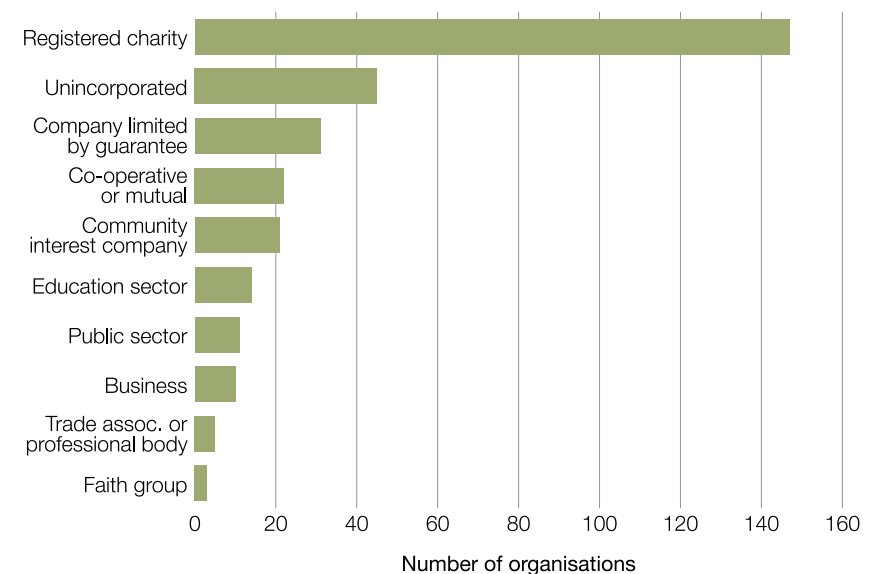


Chart: number of organisations completing the survey by type.
Note: the chart only shows organisations based in the UK (n=309).

Figure 2.1 summarises the types of UK-based organisations that responded to the survey. Almost half were registered charities (48%), with the next

largest share (15%) were unincorporated, meaning that they are not registered as a company, charity or public body.

Two of the responses represented large groups of organisations:

- 90 health and local authority delivery partners in a public health initiative. These organisations are likely also to undertake other food-related activities that might be eligible for inclusion in the survey but were not represented.
- 3,600 schools involved in a cooking and food growing initiative, of whom 180 flagship schools play a particularly active role and have access to funds through the project. For these organisations, the activities represented in the survey are likely to be their most significant relevant activities on food or farming issues.

Except where otherwise indicated, each of these responses is counted as a single organisation in the analysis that follows.

2.2 Scale and spending

The UK-based organisations that took part in the survey spent a combined £178 million in their last financial year on activities relating to food or farming. They spent an additional £7 million on funding other organisations to work on these issues. Organisations based outside the UK accounted for a further £15 million. Food and farming accounted for an average 13% of overall expenditure by all respondents, which amounted to £1.6 billion.

UK-based groups had 2,400 FTE employees and 2,300 FTE volunteers working on food or farming issues, out of a total workforce of 15,400 FTE staff and 72,900 FTE volunteers.⁷ The lower share of volunteer time spent on food or farming issues reflects that three organisations with much broader remits than food or farming accounted for over 90% of the volunteers. Since volunteers are defined differently by different organisations, and the volunteer workforce consists of large numbers of people often contributing a small number of hours per week, the estimates of total volunteer time should be treated with particular caution.

One basic difference among the organisations completing the survey was the geographical scale at which they worked – whether they worked exclusively at the local scale, on regional or national issues, or also internationally. Another difference is whether they focused mainly on food or farming work, or addressed food or farming within a broader set of concerns. We distinguished between groups that spent:

- **Little** of their time on food or farming issues, with less than 25% of both staff and volunteer time devoted to them.
- **Much** of their time on food or farming issues, with more than 25% of either staff or volunteer time devoted to them, but less than 100%.
- **All** of their staff time on food or farming issues.

Table 2.1: fewer than a third of respondents worked only on food or farming

Share of time on food or farming	Local only	Regional or national	International	Total
Little	Transition towns, schools, youth groups, health authorities 13%	Health groups, conservation groups, social enterprise support 10%	Environmental groups, animal welfare groups, sustainability think tanks, consumer groups 8%	31%
Much	Social inclusion projects, training initiatives, allotment associations, smallholder cooperatives 18%	Rural and landscape preservation groups, professional associations, diet-related patient support groups 12%	International development groups 10%	39%
All	Local food partnerships, community supported agriculture, food cooperatives 9%	Food or farming-focused campaign groups, education charities or networks 13%	Campaign groups focused on international food or farming issues, international public health programmes, food accreditation schemes 8%	30%
Total	39%	34%	27%	100%

Table: segmentation of respondents by scale and share of time spent on food or farming issues, including examples and percentage of all respondents. Note: the table only shows organisations based in the UK (n=238).

Table 2.1 shows how UK-based organisations were distributed according to these criteria. The largest proportion described themselves as working only at a local scale and, of those, the largest number spent much of their time on food or farming issues. If the 3,600 schools and 90 health authority initiatives covered in the two responses noted in Section 2.1 were counted individually then the balance would shift, as 95% of organisations would fall within the top-left cell of Table 2.1, working at the local scale only and spending less than a quarter of their time on food or farming issues.

Table 2.2 shows the relationship between the geographical scale at which organisations work and the amount of money they spend on food or farming issues. Groups working exclusively at the local scale tended, in general, to spend less than those working at regional, national or international scales. The largest number of organisations worked at the local level only and spent less than £20,000 on food or farming issues in their last financial year.



Table 2.2: a third of respondents, mostly local in scale, spent less than £20k per year on food or farming

Expenditure on food or farming	Local only (%)	Regional or national (%)	International (%)	Total (%)
0-£20k	20	11	4	35
>£20k-£150k	12	10	8	30
>£150k-£500k	5	9	5	19
>£500k-£2.5m	3	3	5	10
>£2.5m	-	1	5	6
Total	40	34	26	100

Table: segmentation of respondents by scale and expenditure (latest financial year) on food or farming issues, showing percentage of all respondents. Note: the table only shows organisations based in the UK (n=233).

2.3 How big is the sector?

Based on our assessment of the survey's coverage, we estimate that UK civil society as a whole, at most, spends £700 million per year on food or farming issues, employs 20,000 FTE staff and mobilises 80,000 FTE volunteers, through up to 25,000 mostly small organisations (Box 2.1). However, by our lowest estimate, civil society organisations spend only about half of this amount of time and money on food or farming issues. This compares with NCVO estimates of a total 870,000 civil society organisations in the UK with an annual income of £95 billion and a paid workforce of over a million people.⁸

More reliable national data exists for the UK's 160,000 registered charities, which last year had a total income of £54 billion.⁹ We estimate that up to 1,700 of those charities work on food or farming issues, spending at most £450 million on such work – roughly the amount that the UK's ten biggest supermarkets spend on advertising alone.¹⁰ The charities employ up to 7,500 FTE staff and mobilise 14,000 FTE volunteers. However, again, by our lowest estimate, charities spend only about half this amount of time and money on food or farming.

Based on these estimates, it seems safe to say that less than 1% of total UK civil society and charity income is spent working on food or farming issues. Yet, in Box 1.1, we saw that what we eat, and how food is produced, contributes a much larger share to many of the problems that civil society is trying to address: at least a fifth of UK greenhouse gas emissions, most of the world's water scarcity and biodiversity loss, and an estimated 10% of total mortality in the UK. Could the voluntary sector make a bigger difference to tackling these challenges by devoting additional resources to food and farming issues?

Box 2.1: how we estimated the size of the sector

To get a sense of the overall amount of money and time spent on food or farming issues across the voluntary sector as a whole, including organisations that were not surveyed or did not respond, we need to estimate what proportion of organisations working in this sector are represented within the survey.^{xxi} The survey is likely to represent the different types of organisation shown in Tables 2.1 and 2.2 at varying rates. Organisations that spend little of their time on food or farming issues were least likely to be contacted and would have least incentive to complete a survey on this topic, while those spending little money in absolute terms were likely to have the least capacity for such an exercise.

While the response rate to the survey invitations was 45%, we estimate the survey's coverage of the sector as a whole as follows:

- Voluntary sector organisations spending all staff time and over £20,000 on food or farming issues are well-known to those working within the sector and the large majority are likely to have been on our survey mailing list; for this group we estimate 50-75% coverage within the survey.
- For those spending much of their time (as defined in Section 2.2) and over £20,000 on food or farming issues, we estimate 20-50% coverage; this is informed by the knowledge that we had a relatively low response rate from some organisations falling within this category, such as international development charities.
- For those spending less than £20,000, we estimate 0.3-0.8% coverage. This takes into account the 3,600 schools represented by one initiative in the survey and is informed by the fact that allotment associations – another of the most prevalent forms of organisation within this category – are estimated to number around 6,000.^{xxii} Other types of small organisation that are poorly represented in the survey but large in number include Fairtrade town campaigns, buying groups and community gardens. As fewer of the organisations of these types are likely to be registered charities hence, we estimate coverage of 2-5% for charities in this bracket.

Combining these estimates of coverage with mean expenditure, staffing and volunteer numbers for each set of organisations provides the following rough low and high estimates of the total amount of work that is taking place to address food and farming issues within the UK voluntary sector.

	Civil society estimates		Registered charity estimates	
	Low	High	Low	High
Number of organisations	10,000	25,000	700	1,700
Expenditure (£ million)	300	700	200	450
Staff (FTEs)	8,000	20,000	3,500	7,500
Volunteers (FTEs)	32,000	80,000	6,000	14,000

Civil society puts less value on food and farming than UK households or the economy as a whole. In 2008, the food and farming sector accounted for 7% of national gross value added and 14% of national employment.¹¹ Food accounted for an average 11% of household spending, rising to 17% in the poorest households.¹² For every £2 that consumers spent on food, the voluntary sector spent one penny.

2.4 Sector concentration

If our estimates of the survey's coverage are correct, then only 2-3% of UK-based organisations working on food or farming issues spend more than £20,000 per year on such work. Is the large number of relatively small initiatives likely to contribute more spending, staff time and volunteer effort to work in this sector than the small number of large initiatives?

Within the survey, expenditure and staff time was heavily concentrated among organisations spending the most on food or farming issues (Figure 2.2). While the distribution of organisations is skewed towards the lowest spending bracket, the distributions of staff and volunteer time and total expenditure are heavily skewed the opposite way. The top 20% of organisations in this survey accounted for 92% of expenditure, 88% of staff FTEs and 93% of volunteer FTEs.¹³

Figure 2.2: total spending and staff time was concentrated in organisations spending the most on food or farming

Figure 2.2a

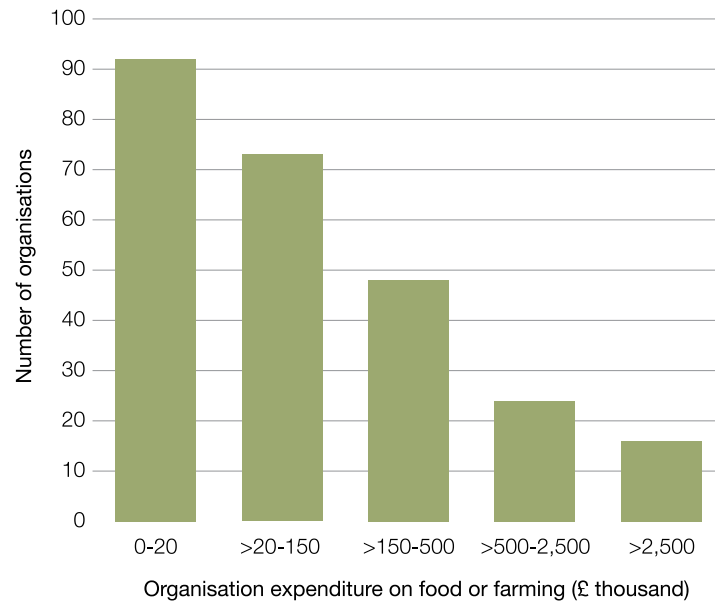


Chart: number of organisations by organisation expenditure in latest financial year. Note: the chart only shows organisations based in the UK (n=253).

Figure 2.2b

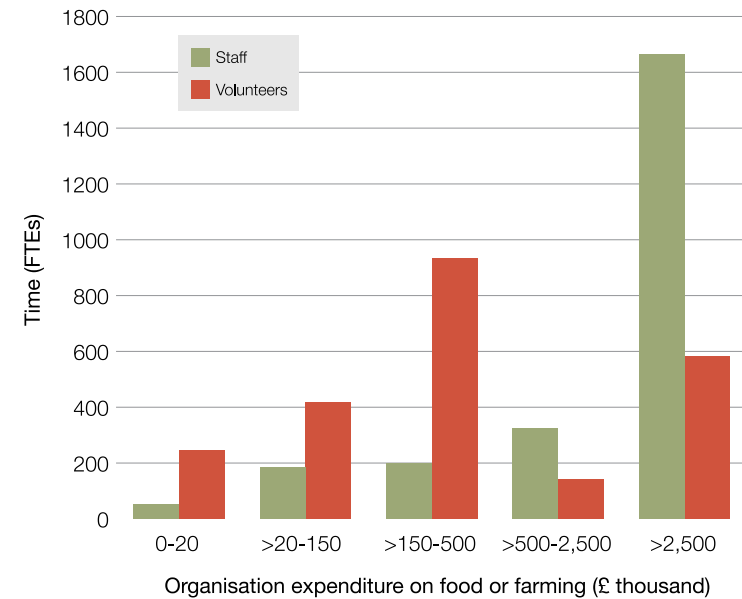


Chart: total staff and volunteer time spent on food or farming issues by organisation expenditure. Note: FTE = Full Time Equivalent hours; the chart only shows organisations based in the UK (n(staff)=250, n(volunteers)=247).

Figure 2.2c

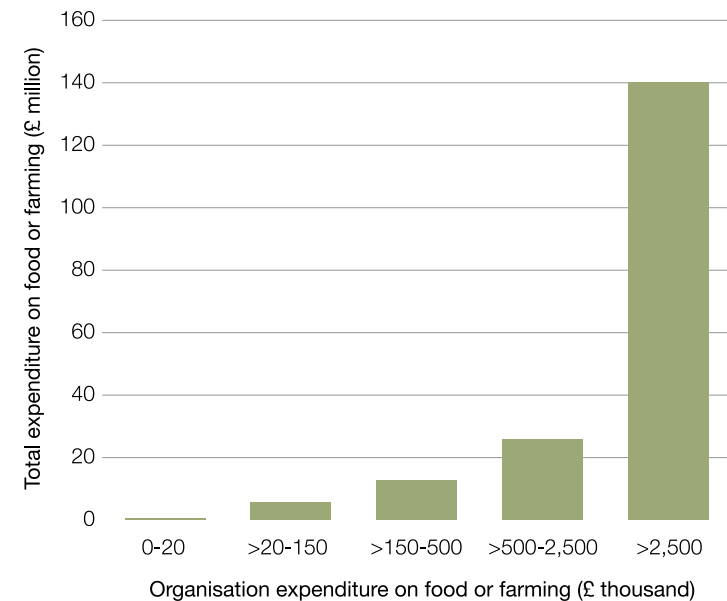


Chart: total expenditure on food or farming issues by organisation expenditure, for latest financial year. Note: the chart only shows organisations based in the UK (n=253).

However, as Section 2.3 described, smaller organisations are likely to be under-represented in the survey. Using estimates of the survey’s coverage, we can adjust the share of activity taken by the top 20% of organisations in the survey so that it represents the UK sector as a whole. This suggests that while the top 20% of organisations are likely to account for around 80% of expenditure, they would only be responsible for about 50% of staff time and 30% of volunteer time.¹⁴

Two points would follow from this. First, a small number of larger organisations dominate spending and paid staff activity on food or farming issues. These organisations are more likely to be on the radar of charitable funders and to engage in discussions among organisations about strategic priorities. However, second, there is a ‘long tail’ of volunteering.¹⁵ The majority of volunteers are involved through organisations spending relatively small amounts on food or farming, which are likely to be several steps removed from discussions that organisations specialising in these issues may have about strategic priorities. For example, they may have a relationship with one specific campaign or programme (e.g. Fairtrade towns or the Food for Life Partnership), or act fairly autonomously within their local context (e.g. an allotment association).

2.5 Funding sources

Our survey found that civil society work on food or farming issues is predominantly funded by the public sector (45%, Figure 2.3), and is therefore very vulnerable to public spending cuts.¹⁶ The risk is highest for organisations working at the national or regional scale, which were 61% publicly funded (Figure 2.4). By comparison, the public sector is estimated to account for one third of income for the voluntary sector as a whole.¹⁷ Organisations working on food or farming are likely to be exposed to the knock-on effects of a 30% budget cut at Defra over the next four years, and the average 28% cuts to local authority funding.¹⁸ Respondents highlighted public spending cuts as a major challenge facing their work (Section 7.3).

While the survey counted income from the Big Lottery Fund (BLF) as coming from the public sector, this provides little reassurance, as the BLF’s share of lottery ‘good cause’ money is set to reduce by 20%.¹⁹ Meanwhile, its Local Food grants scheme is no longer accepting new applicants and all projects funded under the scheme must be completed by March 2014.²⁰

After the public sector, the next largest source of income was individuals and members of the public (25%), mostly as donations, bequests and membership fees. Income from the private sector (17%) exceeded the level of funding from third sector organisations, including grants and donations from charitable foundations (10%). ‘Other’ income, for example from investments, accounted for 2% of the total.

While third sector funders such as charitable trusts and foundations contributed only a tenth of the total income that groups spent on food or farming issues, a quarter of organisations depended on them as their top source of income (Table 2.3). This reflects that they were the most important income stream for organisations spending less than £20,000 per year on food or farming, and suggests that the diversity of activity within the sector depends substantially on such funding (Figure 2.5).

Figure 2.3: almost half of the sector’s income came from the public sector

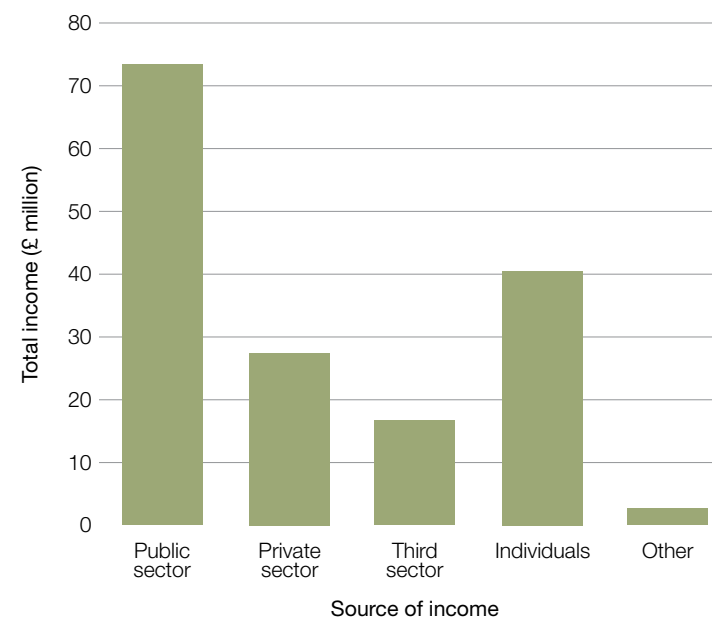


Chart: income for work on food or farming in latest financial year by source. Note: based on data for expenditure and income source; income is assumed to be equal to expenditure; the chart only shows organisations based in the UK (n=261).

Figure 2.4: national or regional scale organisations relied most on income from the public sector

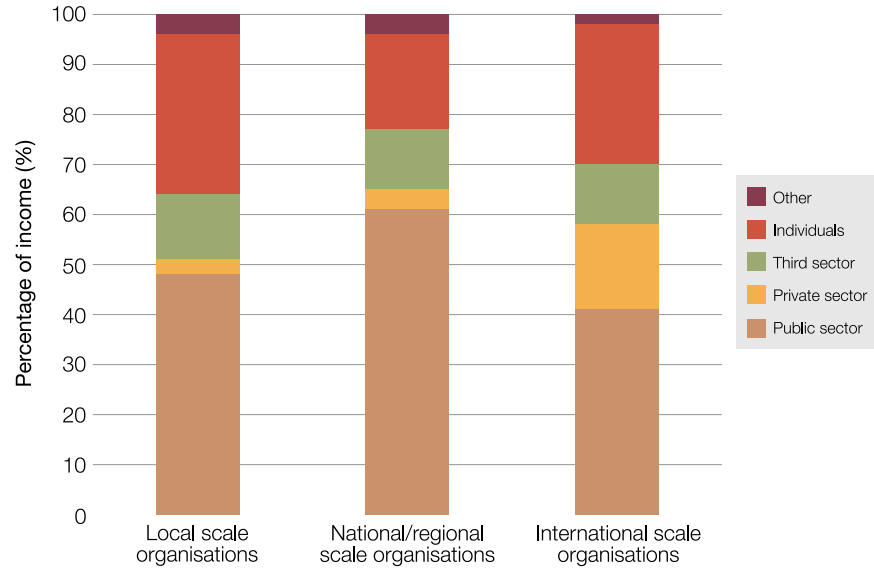


Chart: percentage of income for work on food or farming by source and scale of operation, for latest financial year. Note: based on data for expenditure and income source; income is assumed to be equal to expenditure; the chart only shows organisations based in the UK (n=242).

Table 2.3: a quarter of organisations got most of their income from the third sector

Source of income	Percentage of organisations rating income source top (%)
Public sector	36
Third sector	25
Individuals	23
Other	9
Private sector	7

Table: top-rated sources of income for work on food or farming issues. Note: based on data for expenditure and income source; income is assumed to be equal to expenditure; the table only shows organisations based in the UK (n=261).

Figure 2.5: the organisations spending least on food or farming depended most on income from the third sector

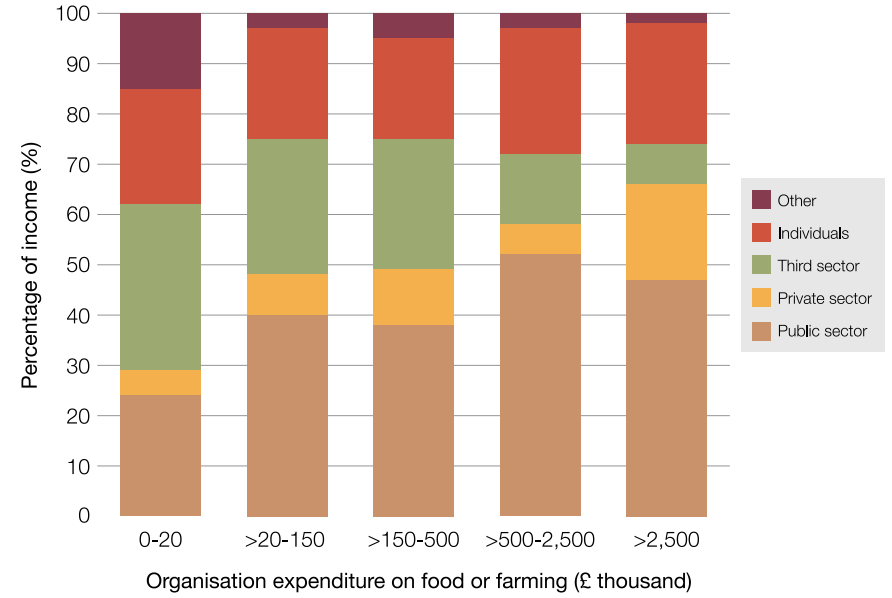


Chart: percentage of income for work on food or farming by source and organisation expenditure on food or farming, for the latest financial year. Note: based on data for expenditure and income source; income is assumed to be equal to expenditure; the chart only shows organisations based in the UK (n=260).

3 Issues



“With 45% of food and farming income coming from the public purse, it’s likely that private and third sector organisations will see even more applications as the cuts start to bite. Now is the time to start thinking strategically about how best to maximise our impact.”

Matthew O’Reilly, Mark Leonard Trust

Food is central to many broader environmental, social and economic issues, from biodiversity loss to health inequalities (Box 1.1). Their consequences, and the part food plays in causing them, vary from place to place and along the food chain from plough to plate. Moreover, the role food can play in addressing them also varies: a local growing project might help tackle social exclusion, while farm subsidy reform can play a pivotal part in international trade negotiations.

The diversity of concerns and situations touched by food and farming means that the range of issues addressed by organisations working in this sector is huge. Respondents to our survey included national organisations that owned large tracts of farmland, hospices that valued the therapeutic benefits of growing food, campaigns against global hunger, and healthy eating initiatives. It is nevertheless meaningful to describe it as a sector because some organisations work right across this range, and grapple with the specific challenges and opportunities arising from the link that food threads between such issues.

How are time and money currently distributed across this spectrum? How much work goes towards addressing the environmental aspects of food or farming, for example, compared with the health issues? What are the links between different issues? Can we detect clusters of work that might be useful in structuring funding programmes or networking among like-minded groups? It is to these questions that we now turn.

3.1 Which issues get most and least attention?

The organisations taking part in the survey most commonly worked on issues relating to local food, community and sustainable production. These themes are prominent in Figure 3.1, which shows the words respondents used most frequently in describing the issues that they work on, with larger words occurring more often. Less frequently used keywords included health, nutrition, welfare, livelihood and farmers.

To gain some quantitative insights into the distribution of effort across this range of concerns, the survey asked respondents to state how their staff and volunteer time was spread across 60 named issues. The list of issues offered by the survey was designed to cover a wide array of food system inputs (e.g. pesticides), activities (e.g. retail), outputs (e.g. waste) and outcomes (e.g. food security). Since the issues were not all mutually exclusive, we asked respondents to choose the more relevant issue wherever two or more overlapped. Inevitably, while the list covered a very broad range of issues, it was not comprehensive.²¹

Figure 3.2 shows how many organisations worked on each of the 60 issues. The top issues by this measure were local food, education, community development, sustainability issues (including biodiversity and climate change), and adult health & nutrition. Issues that only small numbers of respondents worked on included fishing (fish stocks, aquaculture

Figure 3.2: how many organisations worked on each issue?

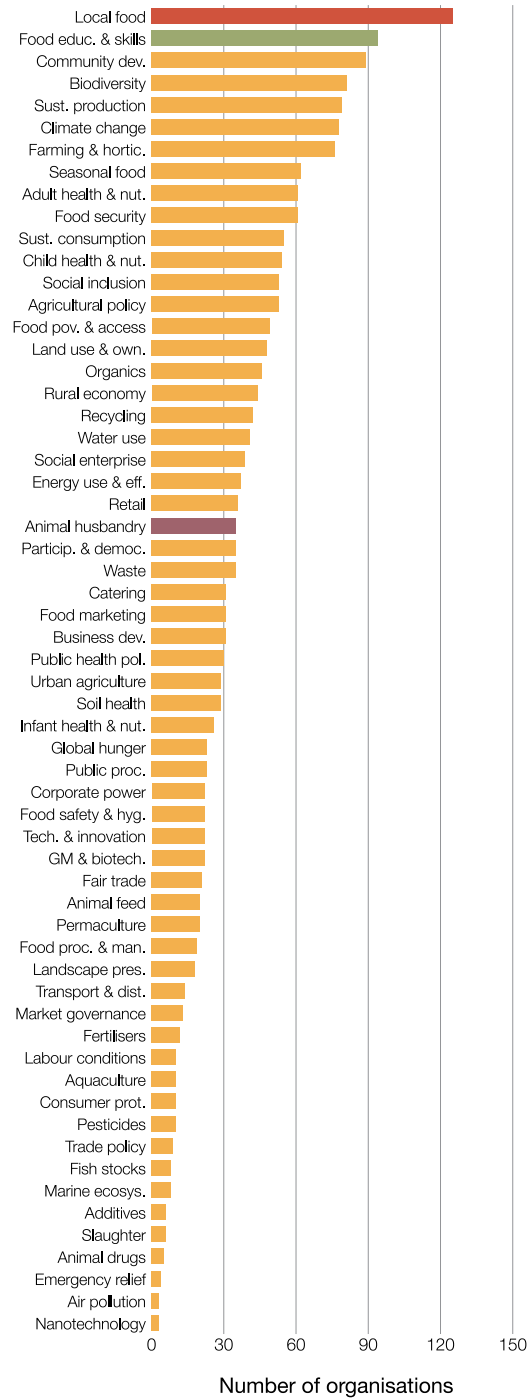


Chart: number of organisations working on each issue.

Note: top-ranked issues by staff time (green, Figure 3.3) and expenditure (purple, Figure 3.4) are highlighted; the total number of organisations shown in the chart exceeds the survey population, as organisations worked on multiple issues (n=250).

Figure 3.3: how much staff time was spent on each issue?

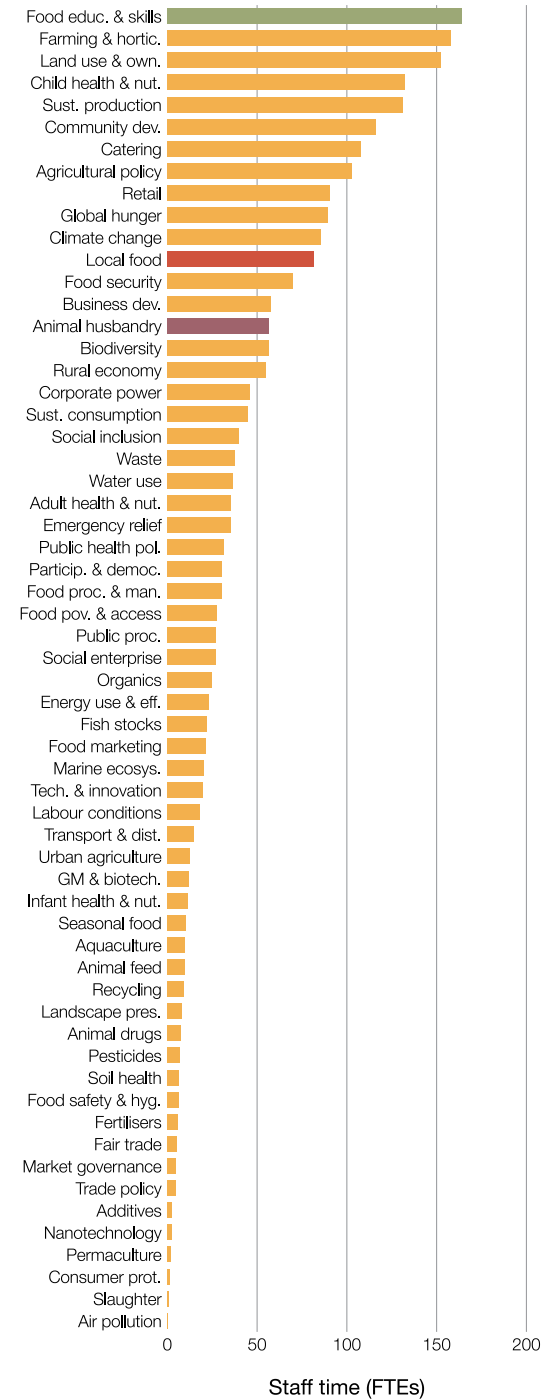


Chart: staff time by issue.

Note: top-ranked issues by number of organisations (red, Figure 3.2) and expenditure (purple, Figure 3.4) are highlighted; staff time is assumed to be distributed in the same proportions as total staff and volunteer time (n=250).

Figure 3.4: how much money was spent on each issue?

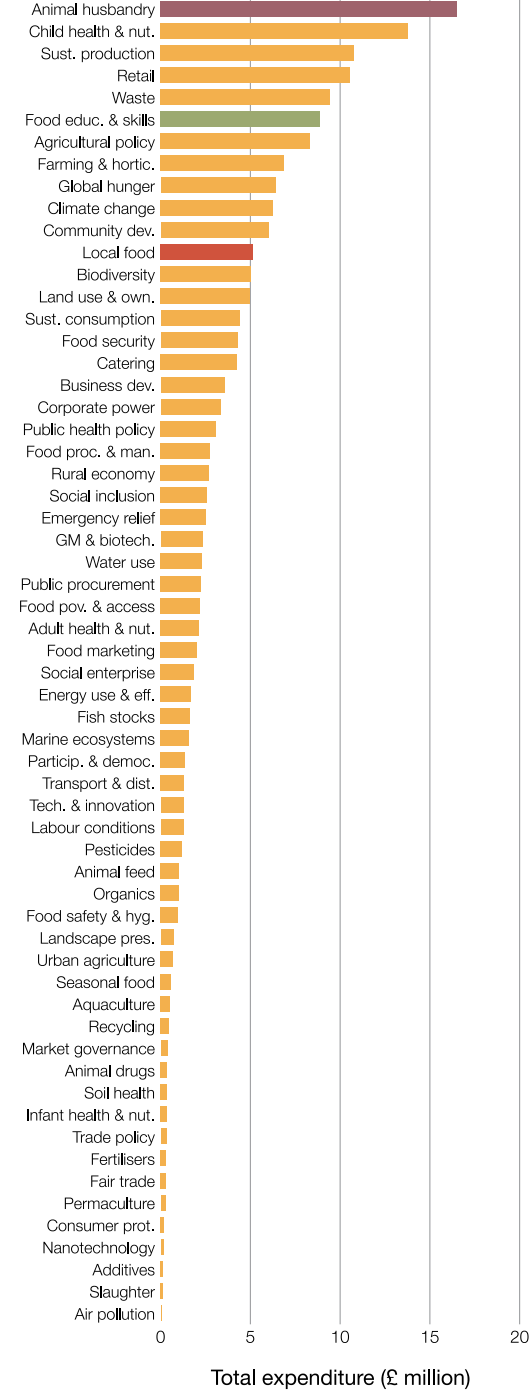


Chart: expenditure by issue for latest financial year.

Note: top-ranked issues by number of organisations (red, Figure 3.2) and staff time (green, Figure 3.3) are highlighted; expenditure is assumed to be distributed in the same proportions as total staff and volunteer time (n=250).

Key to abbreviations

Adult health and nut.	Adult health and nutrition
Business dev.	Business development
Child health and nut.	Child health and nutrition
Community dev.	Community development
Consumer prot.	Consumer protection
Energy use & eff.	Energy use & efficiency
Farming and hortic.	Farming and horticulture
Food educ. and access	Food education and access
Food pov. and access	Food poverty and access
Food proc. & man.	Food processing & manufacture
Food safety and hyg.	Food safety and hygiene
GM & biotech.	GM & biotechnology
Infant health & nut.	Infant health & nutrition
Land use & own.	Land use and ownership
Marine ecosys.	Marine ecosystems
Particip. & democ.	Participation & democracy
Public health pol.	Public health policy
Public proc.	Public procurement
Sust. consumption	Sustainable consumption
Sust. production	Sustainable production
Tech. & innovation	Technology & innovation
Transport & dist.	Transport & distribution

Figure 3.5: the most popular issues didn't attract the most funds

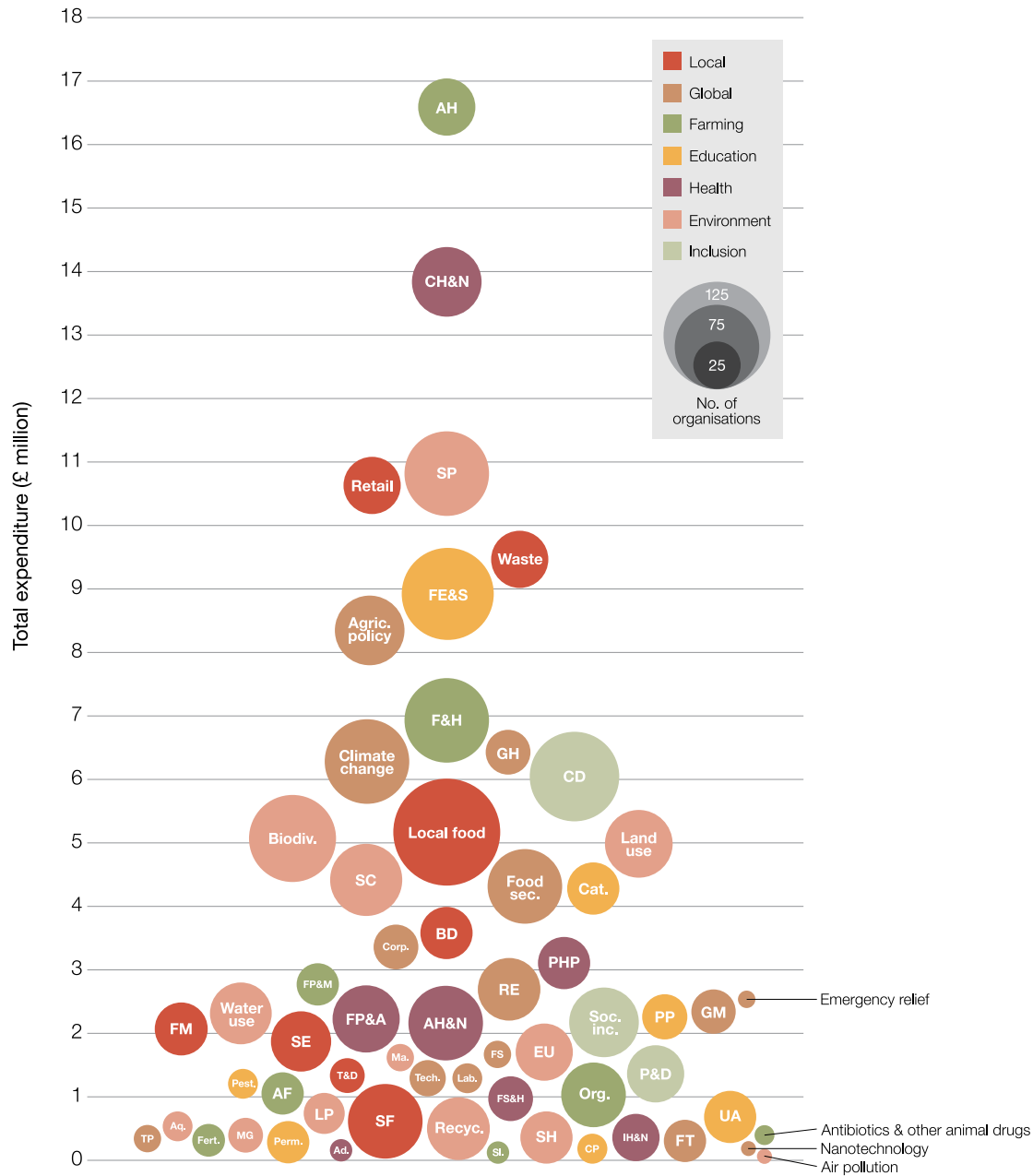
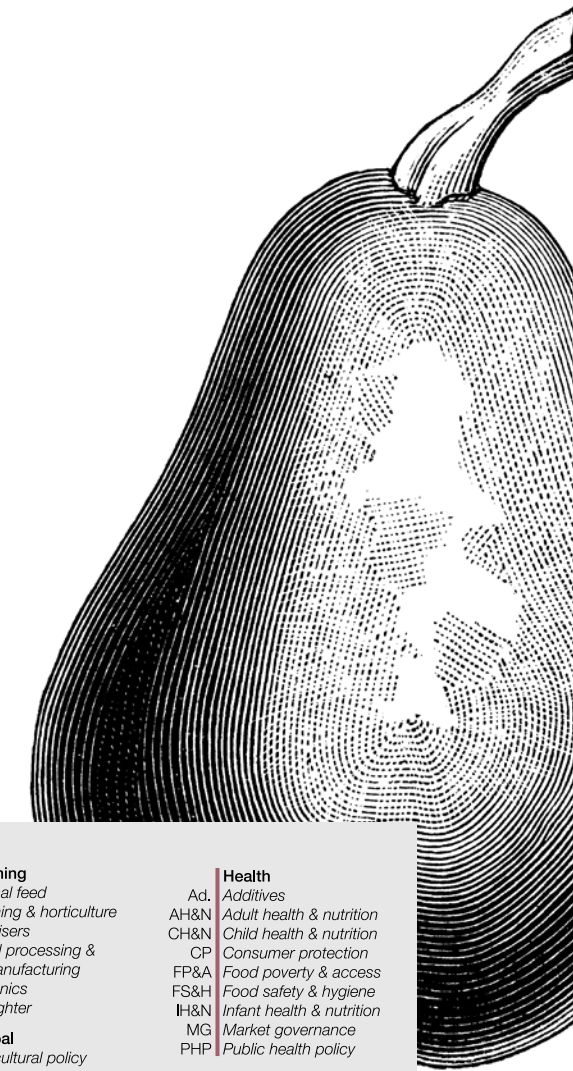


Chart: number of organisations and expenditure by issue for latest financial year. Note: n=250.



Key to abbreviations		
Education	Farming	Health
Cat. Catering	AF Animal feed	Ad. Additives
FE&S Food education & skills	F&H Farming & horticulture	AH&N Adult health & nutrition
Perm. Permaculture	Fert. Fertilisers	CH&N Child health & nutrition
Pest. Pesticides	FP&M Food processing & manufacturing	CP Consumer protection
PP Public procurement	Org. Organics	FP&A Food poverty & access
UA Urban agriculture	Sl. Slaughter	FS&H Food safety & hygiene
Environment	Global	IH&N Infant health & nutrition
Aq. Aquaculture	Agric. policy Agricultural policy	MG Market governance
Biodiv. Biodiversity	Corp. Corporate power	PHP Public health policy
EU Energy use & efficiency	ER Emergency relief	Inclusion
FS Fish stocks	FT Fair trade	CD Community development
Land use Land use & ownership	Food sec. Food security	P&D Participation & democracy
LP Landscape preservation	GH Global hunger	Soc. inc. Social inclusion
Mar. Marine ecosystems	GM GM & biotechnology	
Recyc. Recycling	Lab. Labour conditions	Local
SH Soil health	RE Rural economy	BD Business development
SC Sustainable consumption	Tech. Technology & innovation	FM Food marketing
SP Sustainable production	TP Trade policy	SF Seasonal food
		SE Social enterprise
		T&D Transport & distribution



Photo: Climate Friendly Food (Jenny Hall)

3.2 The big themes

While each organisation represented in the survey selected a unique mix of issues to describe their work, it is possible to group the organisations into distinct clusters according to the similarities and differences in issues that they chose. Using these clusters as a starting point, we were then able to analyse which issues were most closely related to one another, and so pick out some of the overarching themes that emerged from the data (Table 3.1).²²

This reveals that, whereas health is a fairly specialist area of work, groups tended to work on sustainability and environmental issues alongside other themes. The main exception among environmental issues was work on climate change, which most often went hand-in-hand with work on global economic and social issues.

Of the seven themes listed in Table 3.1, the greatest expenditure and staff time went to issues within the global theme, while the least resources went to inclusion work (Figure 3.6). However, inclusion attracted the most volunteers. Environment received more attention than health on all measures.²³

Figure 3.7 shows how the organisations in each cluster are funded. Those working on local food, education and health depend very heavily on public sector funding, and therefore appear particularly vulnerable to public spending cuts. The large contributions from individuals and members of the public to work on farming and global issues is likely to reflect large animal welfare and environmental charities, respectively, included within those clusters. Although the third sector was not the largest overall source of income for any cluster, it was the most common top income stream for groups working on global issues (Figure 3.8).

Table 3.1: themes and organisation clusters

Theme	Issues included under this theme	Profile of organisations in this cluster
Global	Agricultural policy, Food security, Global hunger, GM & biotechnology, Nanotechnology, Trade policy, Climate change, Emergency relief, Fair trade, Labour conditions, Technology & innovation, Corporate power, Rural economy	67 organisations including research think tanks, international development groups and internationally focused environmental groups, most often working at an international scale
Local	Waste, Local food, Seasonal food, Social enterprise, Transport & distribution, Business development, Food marketing, Retail	59 organisations including food co-ops and retailers, campaigns on waste and behaviour change, and many allotment associations, most often working at a local scale
Inclusion	Community development, Democracy & participation, Social inclusion	22 organisations including community-based healthy eating, environmental and growing initiatives, most often working at a local scale
Education	Food education, Public procurement, Catering, Urban agriculture, Permaculture, Pesticides	34 organisations, particularly diverse in character, but including several that work primarily with schools, most often working at a local scale
Farming	Animal husbandry, Farming & horticulture, Slaughter, Organics, Fertilisers, Antibiotics & other animal drugs, Food processing & manufacturing, Animal feed	47 organisations including groups focused on promoting and educating people about farming, initiatives to improve farm management and husbandry, animal welfare charities and city farms, most often working at a local scale
Health	Additives, Adult health & nutrition, Child health & nutrition, Food safety & hygiene, Infant health & nutrition, Public health policy, Consumer protection, Market governance, Food poverty & access	27 organisations including public health campaigners, groups delivering health services and consumer protection groups, most often working at regional or national scales
Environment	Recycling, Air pollution, Land use & ownership, Landscape preservation, Soil health, Water use, Biodiversity, Energy use & efficiency, Sustainable consumption, Sustainable production, Aquaculture, Fish stocks, Marine ecosystems	A cross-cutting theme, addressed by organisations within all the other six clusters

Figure 3.6: which themes got the most attention?

Figure 3.6a

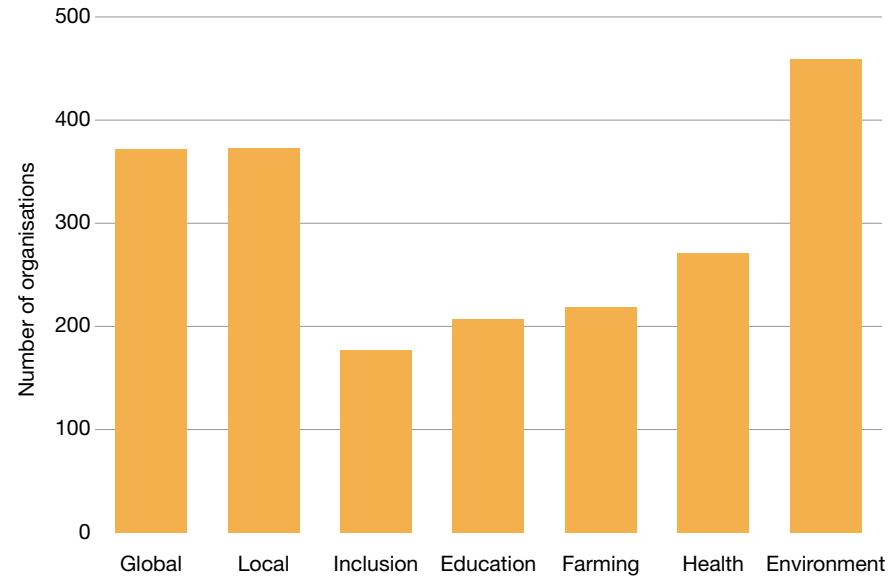


Chart: number of organisations by theme. Note: the total number of organisations shown in the chart exceeds the survey population, as organisations worked on multiple issues (n=250).

Figure 3.6b

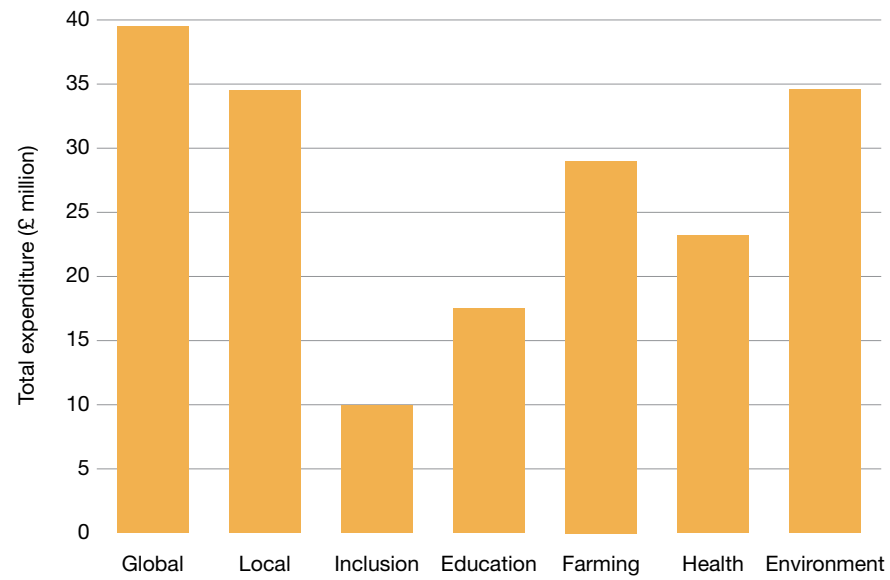


Chart: total expenditure by theme for the latest financial year. Note: n=250.

Figure 3.6c

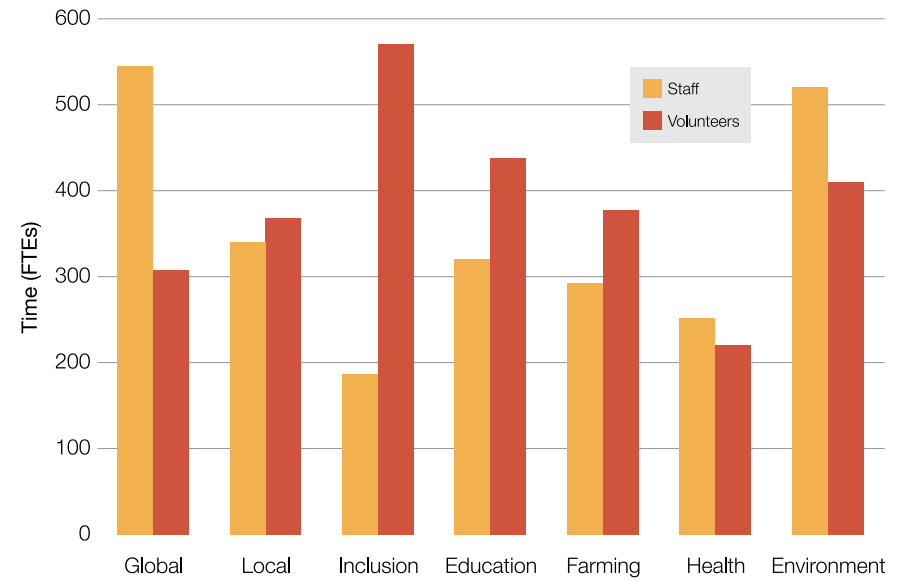


Chart: staff and volunteer time by theme. Note: n=250.

Figure 3.7: organisations in the health cluster rely most on public sector funding

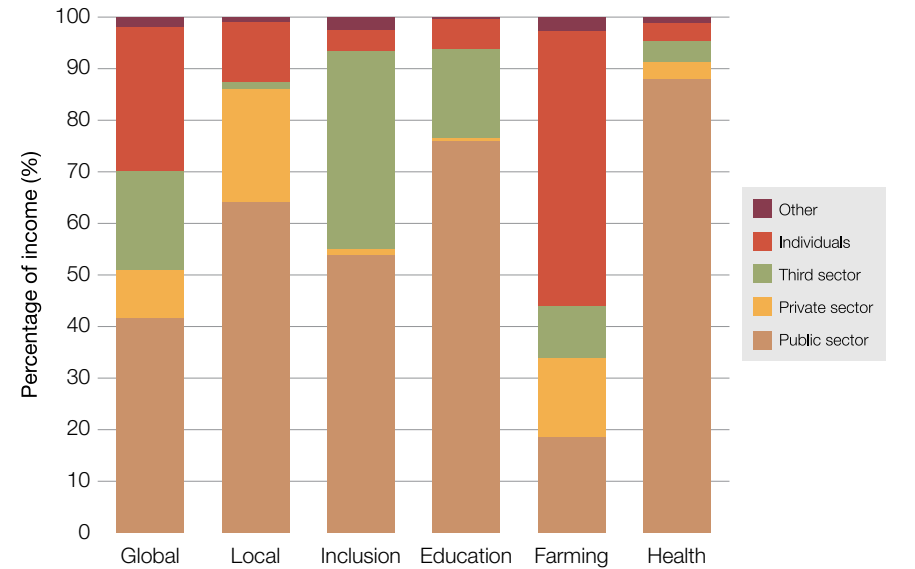


Chart: percentage of income by source and organisation cluster. Note: based on data for expenditure and income source; income is assumed to be equal to expenditure (n=249).

Figure 3.8: organisations in the global cluster were most commonly funded by the third sector

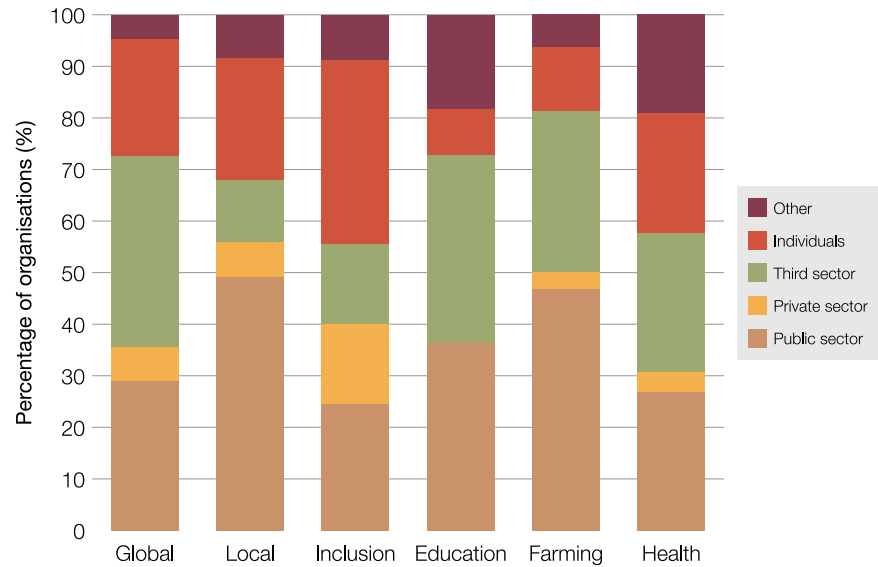


Chart: percentage of organisations by top income source and organisation cluster. Note: based on data for expenditure and income source (n=246).

4 Strategies



“As we rush towards a ‘full world’ of 9.5 billion people the urgent need for changes to our food and farming systems grows ever clearer. Yet this innovative survey shows that in general both civil society groups and their funders have a conservative and incremental approach. Going forwards, a stronger focus on power is essential if the many impacts resulting from our current food system are to be addressed.”

Jon Cracknell, JMG Foundation

The approaches that civil society organisations take to addressing the issues that they work on vary considerably. Some focus on activities that make an immediate difference on the ground, such as community gardening or cookery classes. Some work to change the rules of the game, for example through campaigns or lobbying. Some co-ordinate and facilitate the activities of other groups.

These different strategies face distinctive challenges and opportunities, have different funding requirements and may appeal to different grant-makers. NGOs, funders and policy makers debate the appropriate balance of effort between different approaches, for example between those that aim for gradual versus radical changes, between service provision and lobbying, and between insider and outsider strategies.²⁴ This section provides a basis for such debates, discussing the activities of organisations working on food or farming issues, their key audiences, and the factors that they see helping or hindering progress.

4.1 Activities

The survey asked respondents to say how their staff and volunteer time was distributed across the following nine areas of activity:

- Activism (e.g. direct action, organising demonstrations or promoting boycotts)
- Auditing & business advice (e.g. providing accreditation, certification, labelling, monitoring or business consultancy)
- Awareness-raising (e.g. advertising campaigns to highlight an issue or influence public behaviour)
- Co-ordination & capacity-building (e.g. mediation, running networks, conferences or roundtables, providing training)
- Education (e.g. teaching children or adults, training professionals)
- Funding (e.g. awarding grants to other organisations)
- Lobbying (e.g. engaging with decision-makers to influence public policy)
- Research & expert advice (e.g. impact assessment, developing or analysing policy, developing standards or providing independent advice)
- Service provision (e.g. catering, running a community shop, growing food, managing land, delivering public health services)

Figures 4.1-4.3 provide an overview of the responses. Lots of organisations did some education, awareness-raising and co-ordination & capacity building, but service provision was by far the most common top activity (Figure 4.1). While education, co-ordination & capacity-building and service provision attracted the greatest staff time, education stood out as benefitting most from volunteer time (Figure 4.2). Spending was highest on research & expert advice and co-ordination & capacity-building (Figure 4.3). By all measures, activism was relatively neglected.

Figure 4.1: service provision was the most frequent top activity

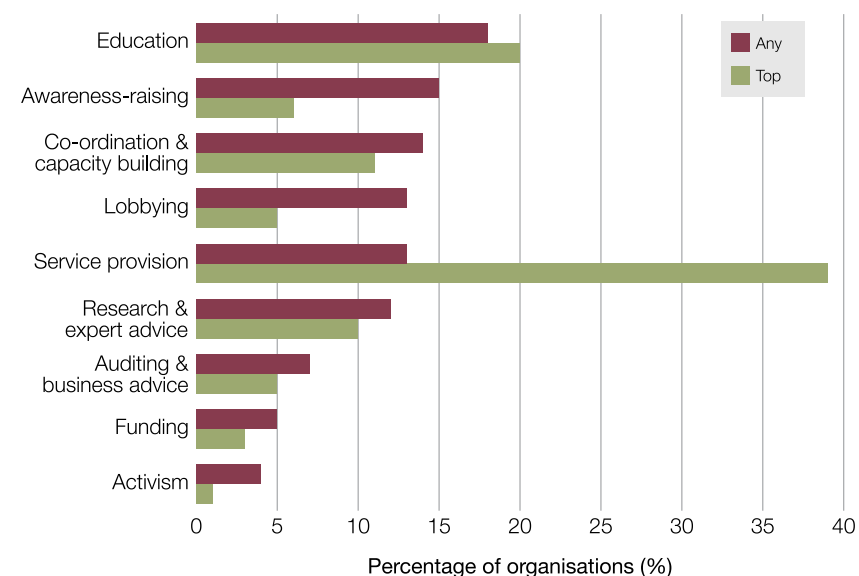


Chart: percentage of organisations spending (a) any and (b) most time on each activity. Note: n=256.

Figure 4.2: education attracted the most staff and volunteer time

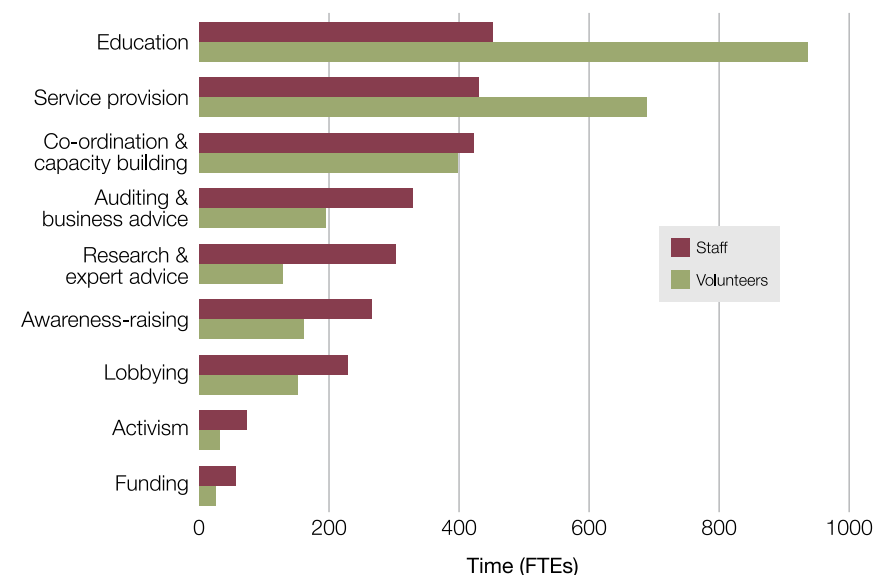


Chart: total staff and volunteer time by activity. Note: sorted by staff time (n=256).

Figure 4.3: spending was highest on research & expert advice

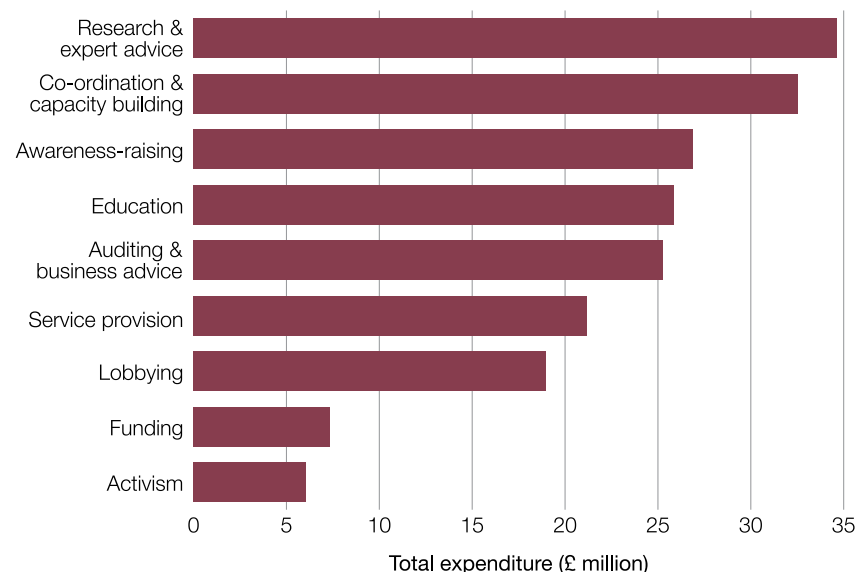


Chart: total expenditure by activity for the latest financial year. Note: n=257.

Table 4.1: what kinds of organisation prioritised each activity?

Profile	Activities	Number of organisations, scale and spending on food and farming
Large international	Co-ordination & capacity building, Auditing & business advice, Research & expert advice	67 organisations, generally spending a large amount (median annual expenditure = £160k), working at an international scale
Medium international	Activism	3 organisations, generally spending a medium amount (median annual expenditure = £100k), working at an international scale
Medium national	Education, Lobbying	64 organisations, generally spending a medium amount (median annual expenditure = £70k), working at a national or regional scale
Small local	Service provision, Awareness-raising	115 organisations, generally spending a small amount (median annual expenditure = £30k), working at a local scale

Table: profiles of organisations spending most time on each activity. Note: funders are excluded, as funding supports other activities (n=257).

Figure 4.4: education, awareness-raising and capacity-building relied most on public sector funds

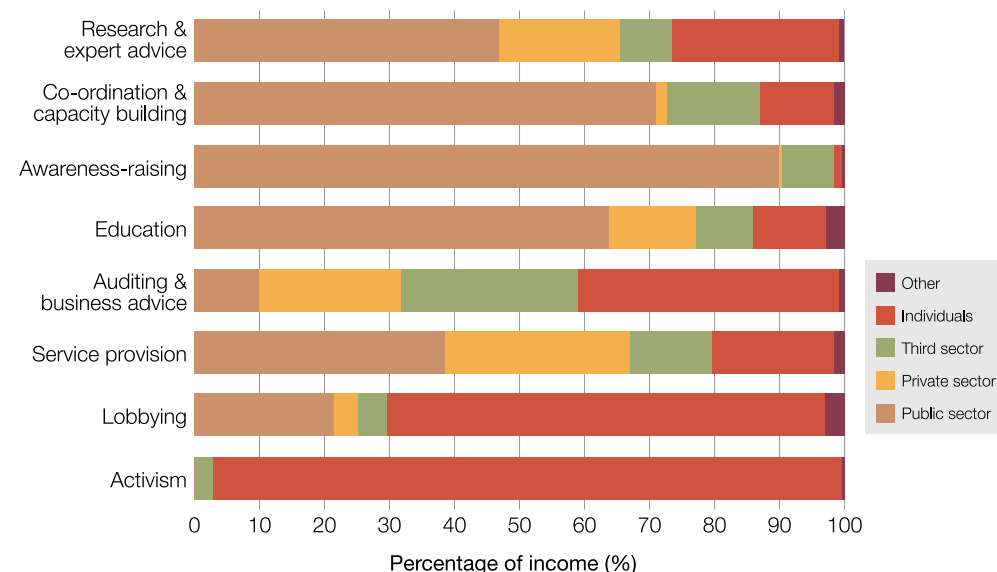


Chart: percentage of income by source and activity. Note: based on data for expenditure and income source; income is assumed to be equal to expenditure; sorted by total expenditure (n=247).

Table 4.1 profiles the organisations working on different activities according to their spending on food or farming issues, and the scale at which they most commonly operate. Activities such as co-ordination & capacity building tend to be undertaken by larger or more food-focused organisations working on an international scale, whereas service provision appears to be a more piecemeal activity.

Figure 4.4 shows that awareness-raising, education and co-ordination & capacity-building depend heavily on public sector income and are especially vulnerable to public spending cuts. Service provision also relies on substantial public sector funding, but obtains a higher proportion of income from other sources, including the private sector. Auditing & business advice activities appear to be supported by the most balanced mix of income sources – public, private, charitable and individual. Civil society lobbying and activism rely most on donations from individuals and members of the public, overwhelmingly so in the case of activism. It is striking that third sector funders, including charitable trusts and foundations, contribute proportionately least (3% and 4% respectively) to activism and lobbying than any other category of activity.

4.2 Audiences

Communication is an important aspect of many of the activities that organisations are undertaking. Who are they trying to communicate with in order to effect change?

Almost across the board, the most frequently cited top audience was the general public. The clearest exception was research & expert advice, where larger organisations focused on audiences in national government (e.g. in Westminster, devolved administrations and the NHS).

We asked respondents to score different audiences according to the priority that they placed on them. Taking these scores and the size of each organisation into account gives a clearer picture of the overall priority that organisations placed on different audiences (Figure 4.5). The general public was the highest priority audience, followed by workers & small enterprises, national government and large businesses. Public interest groups and local & regional government scored substantially lower, followed by EU institutions and international agencies. The lowest ranking audience was academia.²⁵

Figure 4.5: high and low priority audiences

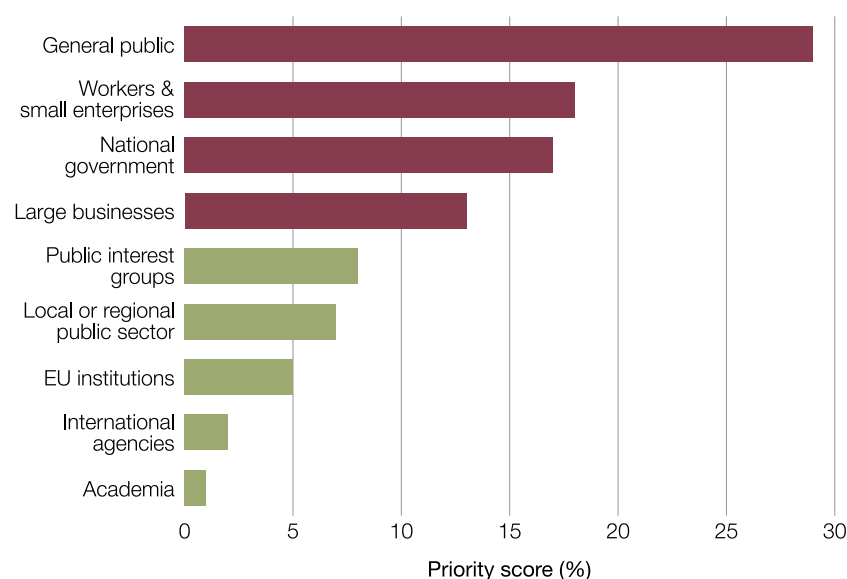


Chart: priority scores for each audience. Note: scores were calculated by weighting audience rankings by organisation staff FTEs, then calculating the percentage of the overall total; audiences scoring below 10% are highlighted in green (n=243).

Given that 90% of legal food standards affecting the UK are set by EU institutions, the relatively low priority that the sector placed on communicating with them may seem to signal a missed opportunity. However, it is also worth considering that national government influences EU institutions and implements EU legislation, that much of the regulatory activity that affects the UK food sector falls outside the scope of food standards (e.g. employment law, planning policy, the budget), and that some UK NGOs will be members of European umbrella groups that have specialist expertise in EU audiences and are based in Brussels.

Table 4.2 compares groups that placed any priority on EU institutions as an audience with those that did not. Groups seeking to communicate with the EU tended to be larger in terms of expenditure and staff time, but to have fewer volunteers. They relied relatively more on individual donations and tended to focus more on global issues, whereas other organisations were more likely to be publicly funded and focus on environment or local food issues. Organisations prioritising EU institutions as an audience were also distinctive for focusing their work less on education and service provision, and more on awareness raising, lobbying, co-ordination & capacity building and research & expert advice.

Table 4.2: a small number of larger organisations worked at an EU level

	Prioritised EU	Did not prioritise EU
Number of organisations	25	224
Median expenditure on food or farming (£ thousands)	240	65
Median staff time on food or farming (FTEs)	3	1.5
Median volunteer time on food or farming (FTEs)	1	1
Top source of income	Individual donations	Public sector
Top theme	Global	Environment
Top activity	Co-ordination & capacity-building	Education

Table: comparison of organisations rating EU institutions as an audience versus those not rating EU institutions. Note: top source income, theme and activity are rated by staff time (n=259).

4.3 Helpers and hindrances

The survey asked respondents “Thinking about the sector as a whole, who or what is currently doing most to help efforts to address food and farming issues?” We also asked who or what was doing most to hinder such efforts. Figure 4.6 shows the keywords that came up most often in response to these questions, displaying the perceived ‘helpers’ in green and the ‘hindrances’ in red.

Respondents saw like-minded organisations making the most positive difference: NGOs, community groups and named organisations such as the Soil Association, Sustain and the Big Lottery Fund Local Food grants scheme. Celebrity chefs and parts of industry, in the shape of the Food & Drink Federation, also featured. Food corporations more generally, supermarkets and agribusiness were seen to be among the big hindrances, topped only by government, alongside wider practices or problems such as short-termist economics, intensive farming and lack of education. Defra and

the National Farmers' Union divided opinion, identified by some as helpers and by others as hindrances.

Does the fact that groups saw civil society as the most progressive force and the state as the biggest barrier endorse the coalition government's 'big society' agenda? Later sections of this report, which look in more detail at respondents' expectations of government, suggest not: Section 6.3 finds that organisations working in the sector overwhelmingly take the position that government should generally intervene more in the market, while Section 7.3 reports that many are deeply concerned about the effects of public spending cuts on their work.

Figure 4.6: who or what is doing most to help (green) and hinder (red)?



Graphic: responses to the questions 'Thinking about the sector as a whole, who or what is currently doing most to help efforts to address food and farming issues?' (green) and 'Thinking about the sector as a whole, who or what is currently doing most to hinder efforts to address food and farming issues?' (red). Those in brown were said by some to help and by others to hinder. Note: excludes common words such as 'and', 'the' and 'food'. xxiv

5 Partnerships



The survey asked respondents to name up to ten other organisations with which they collaborated in work on food and farming issues through joint projects, co-branding or other relationships. Our aim was to explore how far groups were working together, and how this varied across the sector. Working in appropriate partnerships can result in a better use of resources, as partners play to their strengths in pursuing a common objective.

The question was also helpful in identifying organisations that act as hubs through relationships with large numbers of other groups. Identifying these hubs can help in knowing which organisations are well-placed to co-ordinate collaborative initiatives on particular themes.

5.1 Number of partnerships

The average number of partnerships that organisations listed varied according to their size. Among the 226 that listed any partnerships, the average number was six. For organisations spending under £20,000 last year, the average was five, while for those spending over £2.5 million, the average was nine (Table 5.1).

Table 5.1: groups spending less worked with fewer partners

Expenditure (£ thousand)	Number of partners (mean)
<20	5.1
>20-150	5.9
>150-500	6.0
>500-2,500	6.8
>2,500	9.2

Table: number of partners (mean) by expenditure on food or farming in last financial year. Note: n=226.

The number of partnerships also varied according to the types of approach that organisations took. Organisations primarily involved in activism, auditing & business advice, research & expert advice and lobbying listed the highest number of partners. Those mainly working on service provision, awareness-raising and, surprisingly, co-ordination & capacity-building, seemed less well-linked to other organisations.

5.2 Key partners

The organisation most commonly listed as a partner was Sustain, the alliance for better food and farming, which acts as an umbrella group for over 100 civil society organisations working on food and farming issues.²⁶

It was named as a partner by 39 respondents. Following Sustain closely was the Soil Association, which campaigns for organic food and farming, named by 36 respondents. The Soil Association-led Food for Life Partnership was additionally named by five organisations. Other frequently named partners included the Big Lottery Fund, Friends of the Earth, the Federation of City Farms and Community Gardens, Garden Organic, the National Farmers' Union and Natural England (Figure 5.1).

The top-listed partners varied according to the activities and issues that organisations mainly worked on. While the Big Lottery Fund and the National Society of Allotment & Leisure Gardeners were hubs for organisations focusing on service provision, Friends of the Earth, Sustain and the Soil Association were more prominent hubs for other activities. Friends of the Earth and the Soil Association were both key hubs for organisations in the global cluster, with the Soil Association also topping the lists for local food and inclusion clusters. Garden Organic was a hub for organisations in the education cluster. Sustain was a key hub for organisations working on farming and, with the Big Lottery Fund, on health. Given that the Local Food grants scheme is in its final phase, the Big Lottery Fund could be advised to encourage groups that see it as a hub to strengthen their contacts with other organisations.

Funders and other organisations seeking to encourage a more strategic and co-ordinated approach to food and farming issues should note that there already appears to be a fairly well-developed infrastructure, with several organisations currently acting as hubs for groups working in this sector. These hubs may also be useful contact points for organisations starting work on food or farming issues for the first time.

Figure 5.1: hub organisations



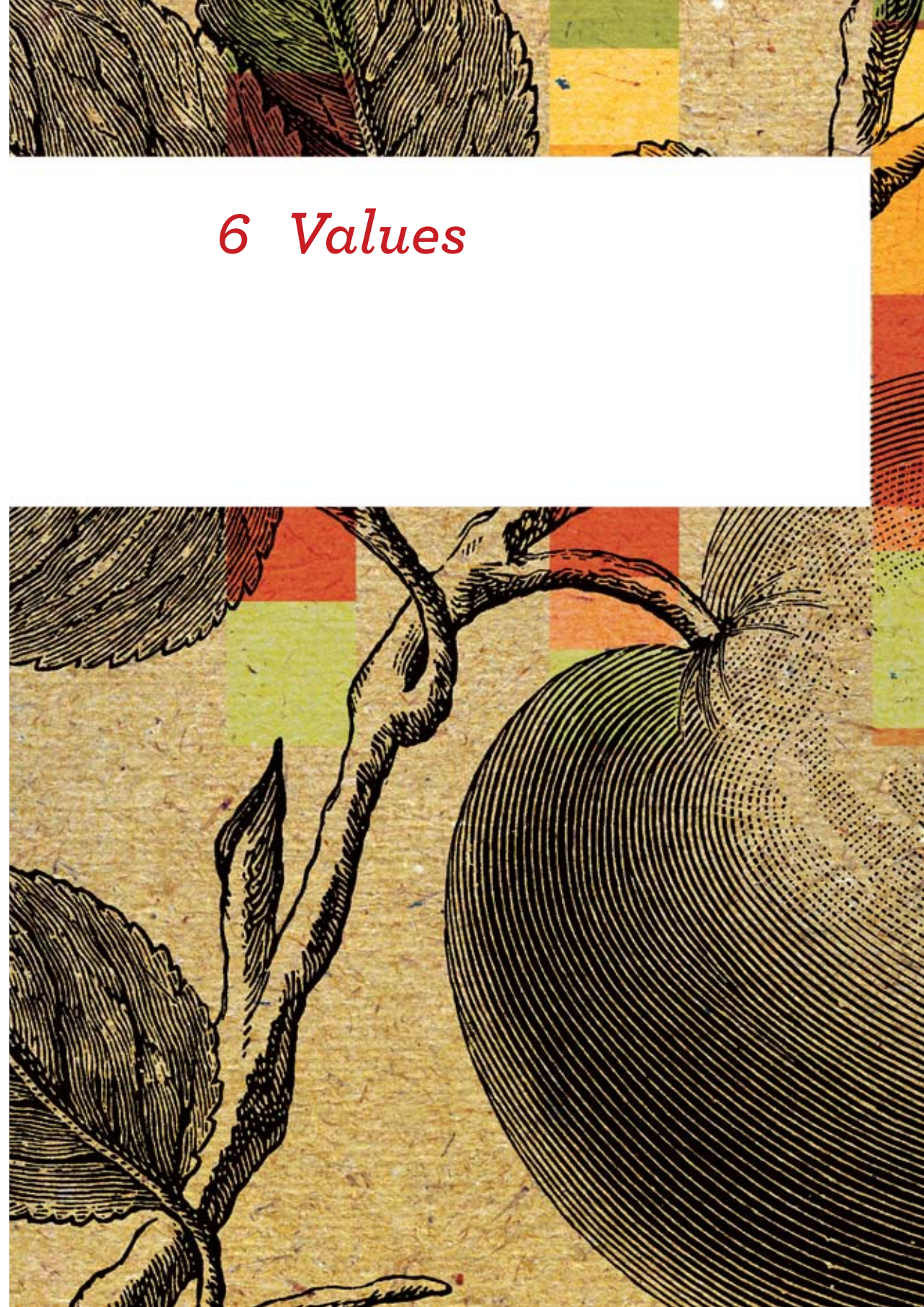
Chart: organisations listed as partners by five or more respondents. Note: colours indicate which themes the respondents that named these hubs most commonly worked on; size represents number of partnerships.

Key to abbreviations	
Co-op	Co-operative Group
Co-ops UK	Co-operatives UK
DEFRA	Department for Environment, Food and Rural Affairs
FACE	Farming And Countryside Education
FCFCG	Federation of City Farms and Community Gardens
F4L	Food for Life Partnership
LEAF	Linking Environment And Farming
LAAs	Local Authorities
NHS	National Health Service
NSALG	National Society of Allotment & Leisure Gardeners
ORC	Organic Research Centre
PA	Permaculture Association
Plunkett	Plunkett Foundation
RAC	Royal Agricultural College
RHS	Royal Horticultural Society
RHS	Royal Horticultural Society
UKFG	UK Food Group
WSPA	World Society for the Protection of Animals
WWF	World Wildlife Fund

Local	Global	Farming	Education	Health
Local	Global	Farming	Education	Health

No. of partnerships
20
10
5

6 Values



Civil society groups working on environmental and social issues are increasingly alert to the values and motivations underpinning their own activities and the behaviour of the people they are working with.²⁷ This awareness builds on insights from social psychology into the relevance of values to behaviour, and reflects concern that issue-specific campaigns, particularly those that play to individuals' self-interest, are reinforcing unsustainable attitudes and lifestyles.

Against this background, the survey explored the motivations of organisations working on food or farming issues. Why are they working on these issues? Who is the work intended to benefit? Where does the organisation stand in relevant ideological debates?

Understanding these motivations is relevant to funders on two counts. First, it highlights the relationships between organisations' values, and the issues and activities that they work on. The work of NGOs, funders, government departments and other institutions is value-laden, and it is only by making this explicit that they can engage transparently in public and policy debate. Second, it allows grant-makers to explore whether organisations working in the areas they seek to fund exhibit values that chime with their own thinking. Wherever this is not the case, it is important to consider why organisations working in a particular area tend to have a particular perspective: it is likely that their experience and knowledge of the issues they seek to address informs their perspectives. An apparent divergence of values might therefore be a useful basis for dialogue between grant-makers and grant-seekers.

6.1 Motivations

The survey asked respondents 'How would you summarise the main motivation for your organisation's current work on food and farming issues?' Box 6.1 gives some examples of the responses, illustrating the diversity of concerns and ambitions that drive civil society work in this sector.

Figure 6.1 highlights the words that organisations used most frequently in describing their motivations.²⁸ The words that respondents used most often included sustainable, community, local and health. Some of the words that were used less commonly, but still occurred several times, refer to concerns such as livelihoods, welfare, food culture, poverty and affordability, skills and education, and mental health.

Box 6.1: sample responses to the question 'How would you summarise the main motivation for your organisation's current work on food and farming issues?'^{xxxv}

- "To change the food system through implementation of a more biodiverse and ecological model of production in the framework of food sovereignty"
- "To combat climate change and to increase our community resilience"
- "To build community and encourage local/seasonal food production by bringing allotments to our parish"
- "To bring about a renaissance in agriculture"
- "To provide local communities with easy access to fresh fruit and vegetables"
- "We believe climate change is the major driver in the world today, but needs to be addressed with food and health at the heart of it"
- "Solidarity with those who do not have equitable access to food and land"
- "To provide a viable retail alternative with food ethics at its heart"
- "To support local communities looking to grow food in finding suitable land and developing the necessary skills"
- "To protect animals, human health, the environment and rural communities from the adverse impact of factory farming"
- "To reconnect people with their food, farming, farmers, and natural environment"
- "To improve public health through good food for all"
- "To reverse the ongoing increases in developmental and mental health problems afflicting the UK and other developed countries"
- "To spread passion for growing and eating good food by sharing the basic skills for growing, nurturing, harvesting and preparing food with school children"
- "To reduce inequalities and ensure equal access to a healthy lifestyle for residents in our area"
- "To improve the health of inner city children and families and provide affordable supplies of fresh, nutritious food for our catering service"
- "A transition to a resilient community as a response to peak oil and climate change"
- "Supporting young people to identify issues that concern them and to take action – a small proportion choose food-related issues such as healthy eating, fairtrade, world hunger or animal welfare"

Figure 6.1: motivations



Graphic: the 100 most frequently used words in phrases relating to respondents' motivations for their work on food or farming. Note: excludes common words such as 'and', 'the' and 'food'. xxxvi

6.2 Beneficiaries

The organisations that completed the survey sought to help a wide diversity of beneficiaries (Table 6.1). The survey asked respondents to prioritise a range of potential beneficiaries of their work, from specific groups of people through to ecosystems. The vast majority of organisations worked foremost to benefit people, ahead of animals or the environment. While the most general group of people – consumers/citizens – was the most frequent top-rated beneficiary, children & young people received considerably more attention than older people (Figure 6.2).

Table 6.1: intended beneficiaries

Allergy sufferers	People with developmental and mental health problems
Asylum seekers	People with learning disabilities
Children & young people	Refugees
Elderly people	Religious groups
Families on low income	Smallholder farmers
Parents	Teachers
People living in poverty abroad	Women

Table: examples of beneficiary groups that respondents mentioned in their answers to free text questions within the survey.

Figure 6.2: children were a priority for 25 times as many groups as older people

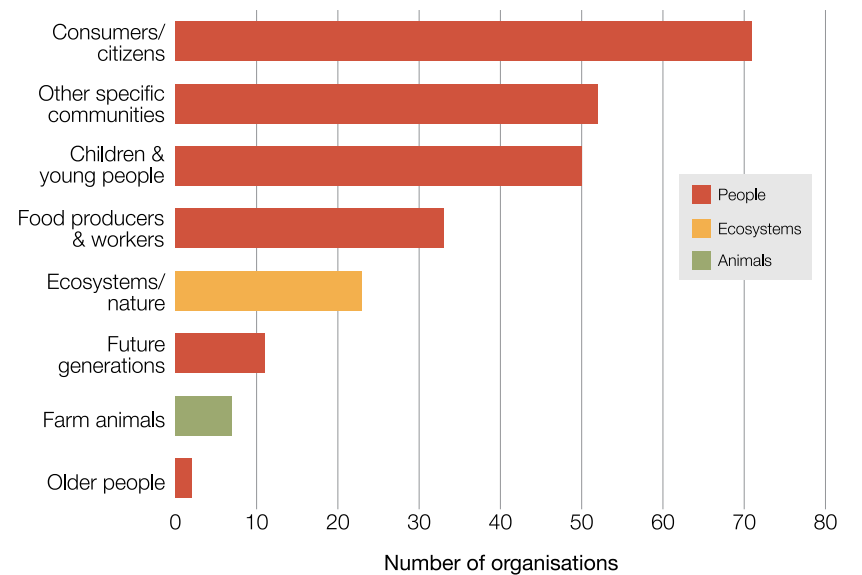


Chart: number of organisations by top priority beneficiary. Note: n=249.

Figure 6.3: how did the main intended beneficiaries of organisations working on different issues compare?

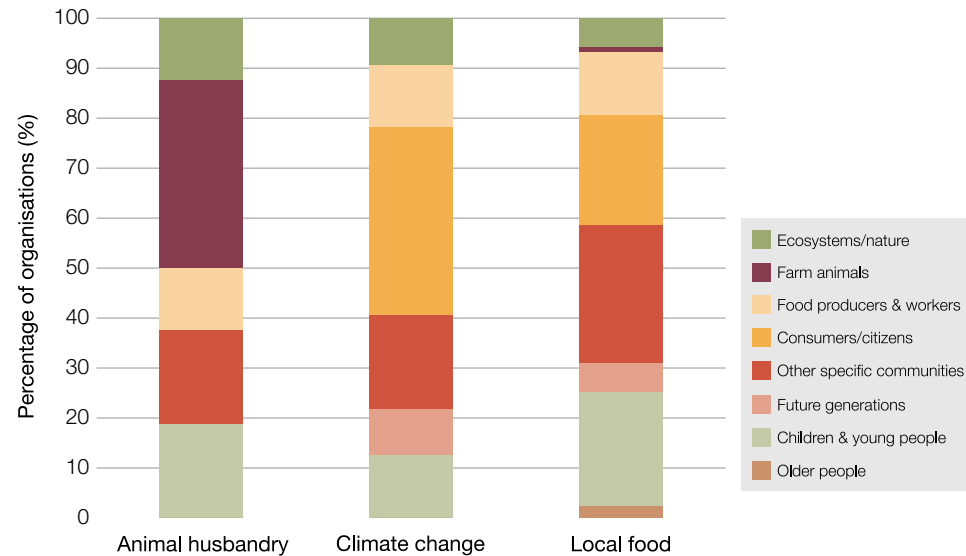


Chart: for all organisations selecting the issue (e.g. climate change), the chart shows the percentage of organisations by top beneficiary and issue. Note: showing organisations spending more than one tenth of staff and volunteer time on animal husbandry (n=16), climate change (n=32) and local food (n=87).

Figure 6.3 illustrates the differences between groups working on three issues. Farm animals were the most popular beneficiary for groups working on animal husbandry which, while not surprising, suggests that the data is meaningful. More interestingly, ecosystems or future generations were not a major focus for groups working on climate change; rather, they appeared more interested in the shorter-term impact on people. Organisations working on local food issues focused mainly on specific (e.g. disadvantaged or local) communities, on children & young people and on consumers/citizens. Food producers and ecosystems were not a high priority for these groups.

Where groups get their income from is related to what they are trying to achieve. Figure 6.4 compares organisations' top beneficiaries and sources of income. For nearly all sources of income, the focus was on consumers/citizens, children & young people, or other specific groups. However, for organisations relying primarily on contracts or sales to businesses, the most frequent beneficiaries were ecosystems and food producers (including workers).

Figure 6.4: different types of funder prioritised different beneficiaries

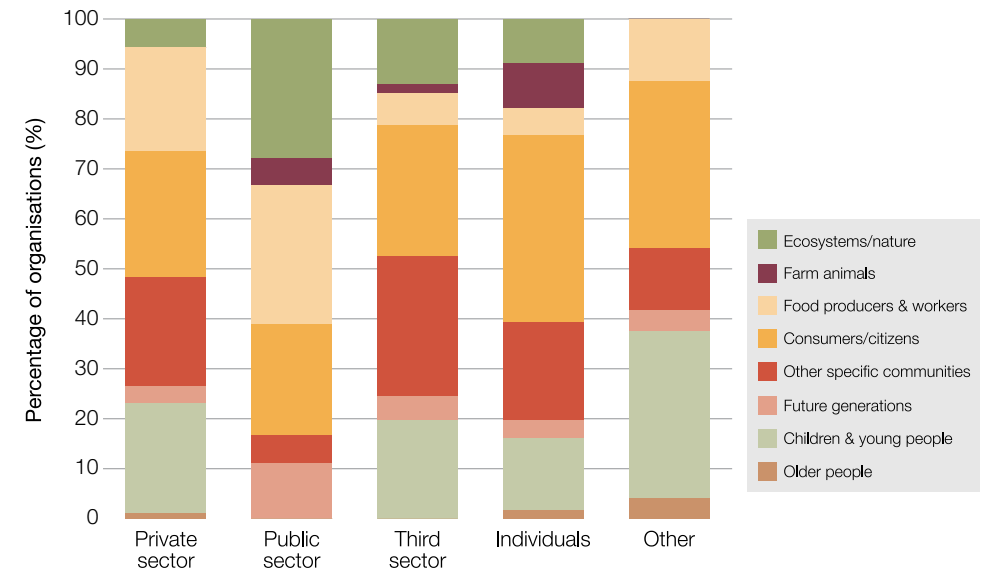


Chart: percentage of organisations by top beneficiary and source of income. Note: n=246.

6.3 Institutional values

In seeking to understand organisations' values, we asked respondents to identify which statements out of a series of contrasting pairs more closely represented their organisation's approach to food and farming issues. The wording invited respondents to treat this as an empirical question about their organisation's actual position on relevant issues, rather than a question about their own personal values.²⁹

The statements were formulated to touch on questions of values and ideology that have been central to public and policy debates about food and farming, which can be summed up as series of 'isms' (Table 6.2). Figure 6.5 shows how many organisations selected each option: overall, the organisations that took part in the survey were strongly interventionist and very strongly egalitarian, yet also strongly supportive of working with big business to find solutions. Those that felt more strongly that the public should listen more to the experts had a narrow majority over those that felt the experts should listen more to the public. Perhaps surprisingly, given how few organisations focused on animals or ecosystems as their top beneficiary (Section 6.2), there was a fairly even divide between those that prioritised the intrinsic value of animals and nature, and those that prioritised their utility to humans.

Table 6.2: statements on institutional values in the survey

Ideological debate	Statement	Survey options
Economic liberalism	The market would work better if government generally	intervened more
		intervened less
Scientism	When it comes to public health or environmental issues	the public should listen more to the experts
		the experts should listen more to the public
Accommodationism	Big business	must be part of the solution
		cannot be part of the solution
Anthropocentrism	It is important to treat animals and nature well because	people depend on them
		people should respect them for what they are
Egalitarianism	We can best beat poverty by	sharing wealth more
		creating more wealth

Note: for each option, respondents could agree or strongly agree; there was no neutral option.

Figure 6.5: interventionist, egalitarian and accommodationist

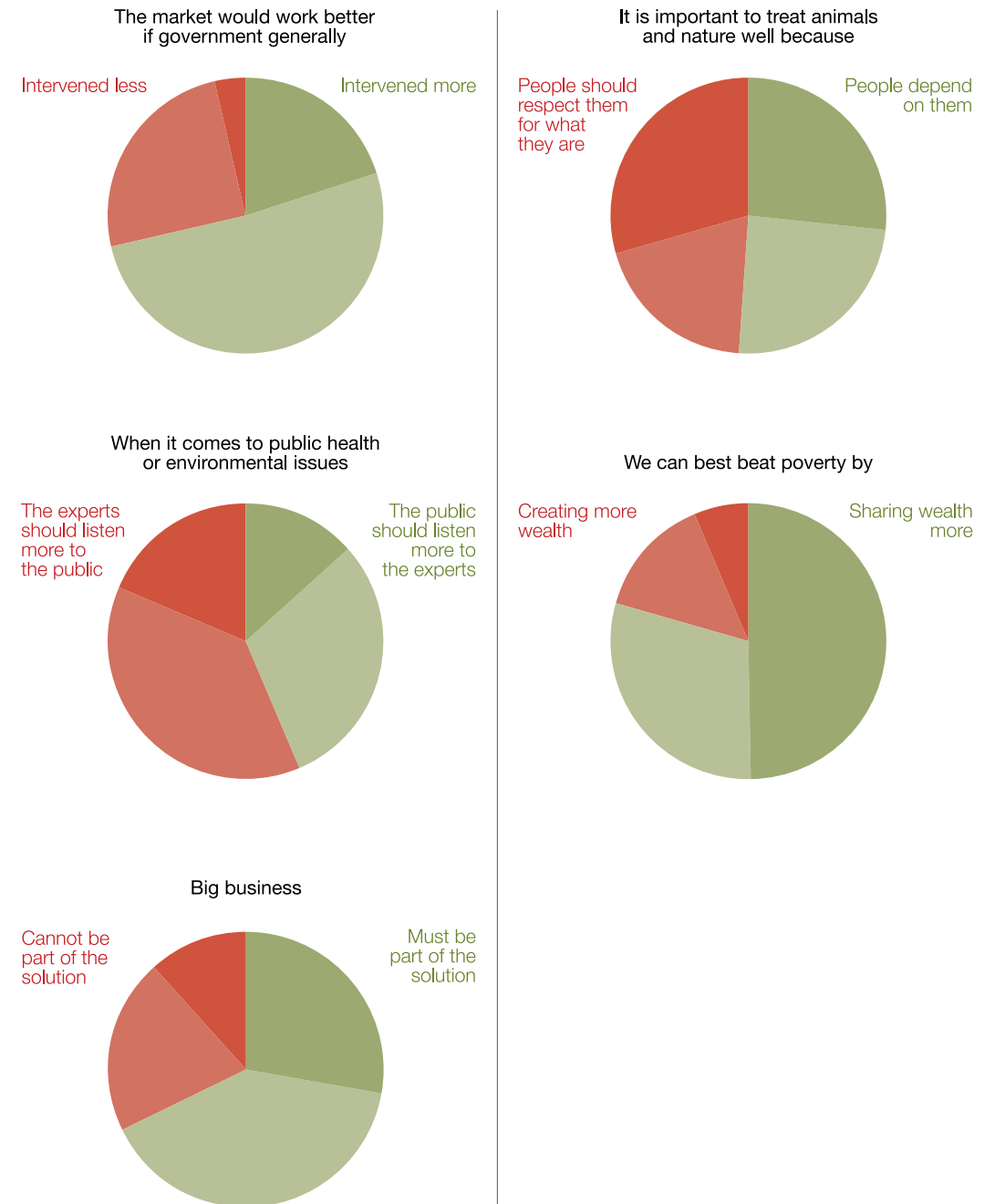


Chart: answers to questions about institutional values by percentage of organisations. Note: paler shading is 'agree', darker shading is 'strongly agree'; showing results for all organisations (n=236 to 242 depending on statement).

Figure 6.6: bigger organisations were more accommodationist

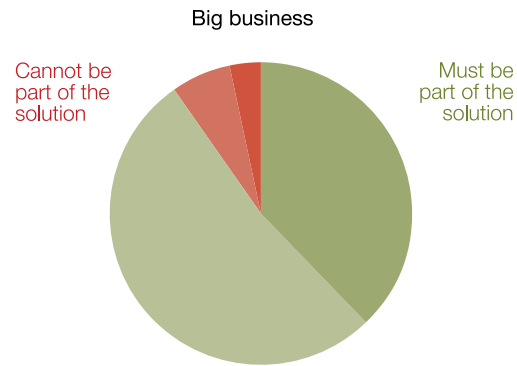


Chart: answers to a question about institutional values relating to big business, by percentage of organisations, weighted by staff and volunteer time. Note: paler shading is 'agree', darker shading is 'strongly agree'; showing results for all organisations, weighted by staff and volunteer time on food or farming (n=236).

Weighting the results according to the size of each organisation only marginally changes this picture for four out of the five statements. The main difference is that the balance swings even further in favour of working with big businesses to find solutions (Figure 6.6). However, it is important to interpret these findings with caution. As one respondent explained:

“I am not comfortable about the answer regarding the role of the food industry – of course they are part of the solution – in that they need to change their marketing practices – but this does not mean that they should take a role in health policy setting. When industry are involved (more than just consulted) they invariably ‘lower the bar’ because they can tolerate only small incremental changes. Their input invariably undermines rather than empowers those urging speedier and more effective action to protect health such as the banning of the promotion of junk foods and baby foods or taxes on unhealthy foods. The legislation to curb marketing and protect child health, now in effect as law in over 60 countries, would simply not exist if the World Health Assembly had been forced to compromise its Resolutions to meet the requirements of industry.” [health cluster, international scale]

While there are some values that are widely shared among organisations working on food or farming, the sector is not all of one mind. What factors explain the differences that exist? Is it the issues or activities that organisations work on, for example?

Examining these responses in more detail suggests that the overall picture of the sector’s values presented above is broadly reflected across the clusters described in Section 3.2 and across different activities. The most striking differences concerned perspectives on expertise and big business:

- Groups working in the education and health clusters were more inclined to say that the public should listen more to the experts (Figure 6.7). By contrast organisations working on inclusion and global issues overwhelmingly felt that the experts should listen more to the public.
- While activist organisations considered that big business cannot be part of the solution, those working primarily on auditing & accounting considered that big business must be part of the solution (Figure 6.8), though this comparison is based on a very small number of organisations and so may not be representative.

These contrasts point to cultural differences across the sector. Organisations working on health appear more likely to favour a didactic approach, while those working on global issues such as trade and agricultural policy share a more participatory tradition with groups that work on inclusion. The apparently stark contrast between the activists and the auditors hints at a tension that runs throughout the sector, and a key strategic choice facing NGOs and funders.

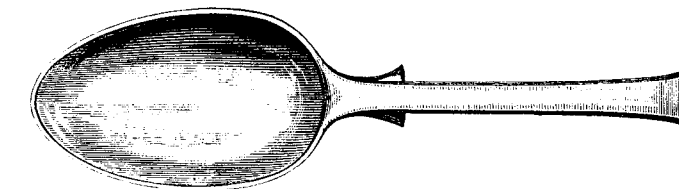
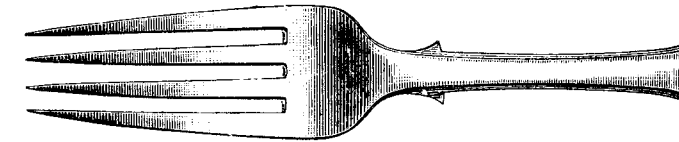


Figure 6.7: who should listen to whom?



Chart: answers to a question about institutional values relating to expertise, by percentage of organisations and cluster. Note: paler shading is 'agree', darker shading is 'strongly agree' (n=236).

Figure 6.8: activists and auditors

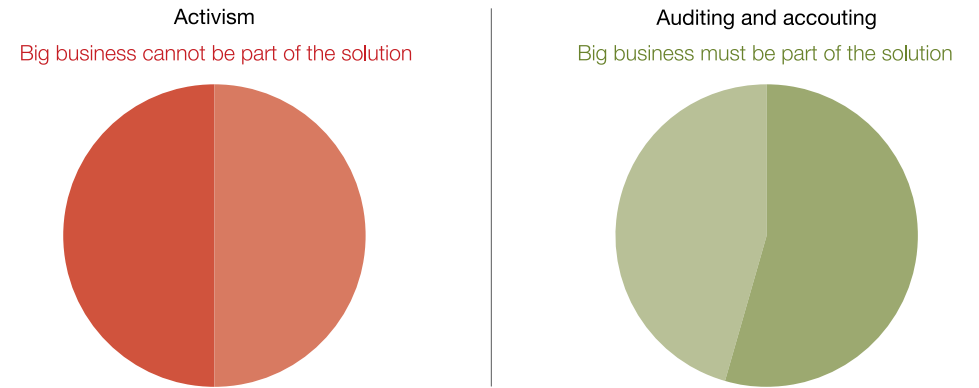


Chart: answers to a question about institutional values relating to big business, by percentage of organisations and activity. Note: paler shading is 'agree', darker shading is 'strongly agree'; no organisations working mainly on activism agreed with the statement that 'Big business must be part of the solution', and no organisations working mainly on auditing & accounting agreed with the statement that 'Big business cannot be part of the solution'; activism (n=2), auditing & accounting (n=11).



Photo: Camel Community Supported Agriculture

7 Funding needs and priorities



“This report highlights the fact that many food and farming organisations are currently plugging gaps left by the public sector. It’s easy to see how such organisations could be taken for granted and miss out on funding opportunities.”

Jo Temple, Mark Leonard Trust

Box 7.1: agriculture and horticulture research and development priorities

“Research and development of new technologies (irrigation products for smallholder farmers). Research and development in new countries / project areas / feasibility studies. Pilot projects where risks of failure may be higher (e.g. unproven approaches, countries or crops or technologies). Monitoring and evaluation systems development.” [global issues cluster, international scale]

“We rely heavily on unrestricted donations/core funding for... pilot studies leading to statutory bids... fundraising and project bidding... Evidence reviews relating to the impact of organic farming on biodiversity, climate change, food security...” [farming cluster, international scale]

“Exploring soil health and links to human nutrition because many assume this work is either already done or is being covered by larger organisations and establishments.” [education cluster, national/regional scale]

“Farm-scale trials of permaculture design application, holistic management, grazing trials.” [education cluster, national/regional scale]

“Research and development of organic farming and local food systems, including activities and initiatives to support the strategic development of these sectors. Activities to measure the impact of sustainable food and farming initiatives, e.g. organic farming, local food systems, public engagement in growing (impact on environment, sustainability, health, food security, social cohesion).” [farming cluster, international scale]

“Infrastructure and skilled staff resource to support expansion on a truly international basis – understanding of international local markets etc. Research expertise to inform food business consultancy. Economic analysis to support the argument for humane and sustainable food production.” [farming cluster, international scale]

Box 7.2: neglected issues in sustainable agriculture

“Integrated crop/pest management. There is a serious lack of skills, and of research and development in this area.” [global issues cluster, international scale]

“[We work] on all aspects of food and agriculture through the lens of pesticide use. Over the years, pesticides have slipped down policy-makers’ agendas, but problems persist. In particular, the use of systemic pesticides like neonicotinoids threaten pollinators and the very future of agriculture. Yet, hardly any of the big environmental organisations have woken up to this problem.” [education cluster, international scale]

“Our work, transition farming, seeks to bridge the gap between commercial farming and the objectives of local and regional food networks. Because our work is often deemed to be at the commercial side of food production, it appears to be a relatively low priority for funding. However, our work is necessary because of market failure and therefore most of the initiatives that we are seeking to develop fall in the void between commercial funding and the typical models of local food grants.” [global issues cluster, national/regional scale]

One aim of the survey was to help funders understand the needs and priorities of civil society organisations working on food or farming issues. We asked four questions relating to this:

- ‘Are there any areas of work related to food and farming that your organisation has in the past particularly had to support through unrestricted or core funds?’
- ‘Within your organisation’s main area of work on food and farming, which single issue or activity would benefit most from more funding?’
- ‘Thinking about the food and farming sector as a whole, which single issue or activity besides your own work would benefit most from more funding?’
- ‘What do you see as the most pressing gaps or unmet needs that your organisation currently faces in your work on food and farming issues?’

In this section we summarise the responses to these questions, considering in turn the activities and objectives that organisations prioritised, and their expectations of government and funders.

7.1 Priority activities

The activities that respondents highlighted as important yet difficult to fund ranged from central functions such as core staff, administration, maintenance and fundraising costs, to broader delivery work, including education, training and community engagement. While respondents’ priorities in part reflected their approaches, two themes were particularly prominent.

The first theme was that it is important, yet difficult, to fund research, trials and evaluation. The focus was particularly on practical studies and experimentation. In relation to diet and behaviour, for instance, one group called for “Pilot research studies, especially those involving ‘pragmatic’ research in community settings” [health cluster, national/regional scale], while another for “Research and modelling on health and economic outcomes of more sustainable food systems” [global issues cluster, international scale]. However, as the examples in Box 7.1 illustrate, the demand for more support for research and development work came particularly from organisations involved in agriculture and horticulture.

The second area that was considered by several respondents to be important yet difficult to fund was campaigning and lobbying, for instance “time spent briefing MPs, informing members of the public” [global issues cluster, international scale]. One group considered that campaigning is difficult to fund “as many funders find this approach too radical” [education cluster, national/regional scale]. Another remarked that “Because of the nature of campaigning much of our resource requirements are to fund staff salaries while operational budgets are relatively small” [global issues cluster, international scale]. These comments validate this report’s earlier finding that activism and, to lesser degree, lobbying were neglected activities.

7.2 Priority objectives

The objectives that respondents prioritised broadly reflected their own areas of work and concerns. Nevertheless, five themes stood out. The first theme was sustainable consumption and production, with groups highlighting the importance of consumer campaigns to promote sustainable diets [global issues cluster, international scale], reducing food waste [local issues cluster, national/regional scale], and work “that supports pricing in the externalities of food e.g. the health or environmental costs of food into the retail price” [local issues cluster, national/regional scale] and protecting “natural capital at the landscape scale” [local issues cluster, national/regional scale]. Several respondents highlighted what they saw as neglected issues in sustainable agriculture (Box 7.2). There was a particular concern to address broader sustainability issues in addition to climate change:

“Biodiversity and water management – these need to be brought up the agenda so they do not get lost in the current focus on carbon.” [global issues cluster, national/regional scale]

“Sustainability assessment tools that cover multiple issues, not only climate change/carbon footprinting issues.” [farming cluster, international scale]

Second, sometimes supporting the first theme and sometimes challenging it, several groups saw a need to develop and build momentum around positive visions for food systems that were radically fairer and more sustainable than the solutions proffered by policy-makers and big business. These calls focused particularly on agriculture and international development, with calls for “Research and development in agroecological approaches” [farming cluster, international scale] and “Cross-sector collaboration to set farming policy towards ecological and social goals rather than corporate profitability” [education cluster, national/regional scale]. According to others:

“We need to pull together a coalition on food sovereignty, that will actively promote the positive solutions and policy options for food and farming. Unfortunately, most of our organisations get constantly pulled into challenging the negative developments, and we fail to put the same effort and clarity into articulating and lobbying for the real, viable solutions and policy for agriculture and food sovereignty.” [global issues cluster, international scale]

“We do not yet have a ‘treasury model’ of a more resilient food system which joins up action at different scales (allotments to global) so tend to get stuck within the current economic paradigm where local food is seen as a visitor attraction in between trips to the supermarket.” [global issues cluster, national/regional scale]

A third theme was the need to empower communities by increasing their access to land and other resources:

“A land trust [is needed] to rescue county farms before counties sell them off. The farms could then be made available to new entrants in small/

medium sized plots. Land exchanges at a very low rate. Tenancies of a decent period are difficult to find. It’s absolutely essential to keep county farms for the public good.” [global issues cluster, international scale]

“To build food security we also need to extend our focus beyond vegetables, and particularly to the resilient storage and processing of staple foods such as cereals, pulses, and also root vegetables. We need to invest in actual equipment for these things, especially in urban areas, and create a body of knowledge about how this can be done on a medium scale (as opposed to the very large scale that now dominates the sector).” [farming cluster, national/regional scale]

“[A priority is f]lood mapping and community engagement processes, to empower communities to have the option to take food out of the hands of big business and take some control of their food...” [local issues cluster, national/regional scale]

Fourth, several respondents highlighted the importance of developing skills in farming and the food sector as a whole, and among their own volunteers (Box 7.3). Others, however, emphasised that they had the skills but lacked the opportunity to use them:

“There is no shortage of skills – we are lacking in capacity to reach a wider audience through a lack of funds.” [global issues cluster, national/regional scale]

“I’m not sure we lack capacity – probably just money! ... We have excellent people who between them have all the necessary skills. But we lack money to pay them to do this work – so those skilled people are under-employed.” [farming cluster, national/regional scale]

The fifth and final theme is improving public health. Although food security and sustainability appear to be higher up the agenda than obesity and healthy eating for groups with a cross-cutting remit, improving public health is still the priority for many organisations. This was reflected in the motivations that some respondents gave for their work, for example:

“We hope to enable a significant, measurable and sustained reduction in overweight and obesity levels.” [health cluster, international scale]

“Healthy eating and better understanding of links of healthy diet to mental health.” [local issues cluster, local scale]

7.3 Expectations of government

Pursuing many of the priorities set out in the previous section will demand action from government in specific areas. In addition, respondents highlighted three aspects of cross-cutting policy that were central to the success or failure of their own work: public procurement, local bureaucracy and planning, and spending cuts.

Public procurement was considered a crucial opportunity to make progress on healthy eating and sustainable diets, which remained to be fully exploited. Two groups working with schools and universities called for:



Photo: Kench Hill Education Centre

“Mandatory food standards across the public sector [that] would put sustainable food at the heart of procurement. A designated officer at each local authority would ensure that school food gets the attention and funding it requires to build on the successes of the last six years. In the current climate this is unlikely to be funded by local government so perhaps regional/borough leads on sustainable procurement or training for those officers tasked with managing school food contracts.” [education cluster, national/regional scale]

“Promotion of low-carbon diets and reduction of meat and dairy products in public procurement and public catering.” [global issues cluster, national/regional scale]

Local bureaucracy and planning practices were a major concern for some community groups (Box 7.4). In their experience, obtaining access to available land for growing was unnecessarily difficult, and the available space was being eroded by thoughtless housing development.

However, by far the most frequent policy concern for organisations responding to the survey was the likely effect of public spending cuts and restructuring (Box 7.5). The withdrawal of funding from the Regional Development Agencies was seen to threaten valuable work by the regional food groups they had established. There was also concern about the future of local food initiatives in the aftermath of the Big Lottery Fund’s Local Food grants scheme, ending at a time when few local authorities were likely to take up the baton of funding effective projects that were not self-supporting. One group working on public health welcomed the shift in responsibility from the NHS to local authorities, but was deeply concerned about how this change was being managed, noting that “there is no coherent transition plan and many talented staff are leaving – a waste of years of investment” [health cluster, international scale]. A ‘big society’ model, where volunteers would be expected to manage the community resources they were using, was seen to demand up-front investment in new skills and training.

7.4 *Expectations of funders*

Respondents also commented on the practices and requirements of grant-makers. Several organisations emphasised that it usually took longer to set up economically sustainable projects than grant-makers were prepared to fund:

“[It is difficult to fund s]et up costs over a long enough period until sustainable. This is especially true to cover time for community workers to build trust in a new concept/way of working for farmers before they will commit to joining/taking part. This typically takes 2-3 years where there is some track record elsewhere to build on – 5 years where none.” [farming cluster, national/regional scale]

“I think that most charities would agree that the hand-to-mouth nature of funding limits the amount of serious long-term projects that can be undertaken. Very few of our funders will commit to three or five year

Box 7.3: developing skills and knowledge

“If we are to change trends in food and farming, we must change attitudes towards labour on the land, often seen as demeaning and something to be escaped from as soon as possible – this is a global problem, that increases with urbanization and the marginalization of farming. Only if you are a big farmer with big computerized equipment are you respected by many policy-makers! Yet diverse food production, adapted to local conditions and climate fluctuations, is crucial. There are many opportunities for new research into agro-ecosystems, soil, interactions between plants and micro-organisms etc. Many jobs could be created by providing opportunities for small-scale agricultural production, using appropriate technology and organic/agroecological methods. It need not be backbreaking if we develop or recover appropriate technology to assist us! A major issue worldwide is HOW do we attract young people into farming and WHO should we try to attract? We must change attitudes to farming and instead of thinking of it as an activity connected with ‘dirt’, honour the knowledge of the truly knowledgeable and put them at the centre of policy-making and implementation.” [global issues cluster, international scale]

“Overall present skills should be better recognised and rewarded, in order to attract new entrants. Some sort of Continuing Professional Development and recognition through competence. The abolition of the Agricultural Wages Board is a disaster for this. The AWB, for 80% of workers, meant enabling them to improve their wages by improving their skills. They have no incentive now. There will be an appalling lack of skills – in dairy, sheep and general farm management in a few years’ time, as all the old timers depart. And there is virtually no development of future ‘sustainability’ skills.” [global issues cluster, international scale]

“The key issue is the mismatch between the high labour input necessary for organic horticulture and the low financial returns – we are heavily reliant on volunteer labour to meet our day-to-day labour needs, which is unsustainable. In addition, there is a lack of traditional farming skills e.g. scything, hedge-laying, ditching, animal husbandry, so labour inputs are often inefficient. More broadly within society, the weak links between producers and consumers leads to unrealistic assumptions over the real cost of food – environmental, welfare as well as economic – which leads to a reluctance to source and buy local food.” [farming cluster, local scale]

“Our most pressing gap is the lack of volunteers from within the farming community who have a good knowledge of funding streams and understand the application process sufficiently well to present both our work and its relevance in its proper context.” [global issues cluster, national/regional scale]

“We have found there is a shortage of people with mixed skills including public face, education and training, business/commercial attitude and ability to work with people in a social setting... Massive and rapid drop in funds means losing specifically trained staff who have experience and in-house training to meet the needs of the organisation. Inability to take up new opportunities because staff do not have required teaching qualifications.” [farming cluster, local scale]

“We need people technically well versed and good at doing research, understanding what to look out for. We could also use editorial skills to help with production of materials (maybe editorial resource people could be shared amongst smaller organisations).” [global issues cluster, international scale]

Box 7.4: local bureaucracy and planning practices

“We are the first group in [our area] being granted the right to grow in a local nature reserve/national park. This has meant that we have had to go through a lengthy process applying for the change of land use. In our opinion the council who promised us land two years ago should have carried out this application themselves. New issues have kept popping up in this process because of the inexperience of the local government in dealing with a project of this nature. Something needs to be done to make this process easier for people.” [education cluster, local scale]

“We would like to see better guidance and enforcement of space being left for people to grow food. Developers are being allowed to dictate the use of space based on their bottom line and not based on what is best for the people who will live in these places. Gardens are the size of postage stamps and no land is being left in developments for allotments and community gardens. If funding was made available for allotment initiatives to move forward, perhaps getting them started would be less daunting for the average person. Our group is composed of people who feel passionately about growing, but who have families and day jobs. The red tape that we have run into is unbelievable. We have been working away for a year and a half and still don't have confirmation on our site. Although old laws say that local authorities must help provide space for allotments, it's nearly impossible when no land has been left over after development.” [inclusion cluster, local scale]

Box 7.5: concern over public spending cuts and restructuring

“The Sustainable Development Commission has had its funding withdrawn by government and will close at the end of March 2011. This will create a gap in independent expert advice to government (and available to all).” [global issues cluster, national/regional scale]

“Here there is a shortage of supply – ‘local food’ is a fashionable phrase... but supply is much more of a problem. The demise of SEEDA will not help. Farms need more investment – as a retailer of local food I have no problem with demand but a huge problem getting reliable, consistent supply from small producers.” [local issues cluster, local scale]

“Our project... is in danger of going under due to cuts from our main funder the NHS. We meet the needs of the local community and access hard to reach people from disadvantaged communities in [our area]. These people do not access more traditional services. We are in particular need of funding from grant-giving trusts during this period of flux. It would be a great shame and a total waste of time, effort and resources for an organisation such as ours to have to close due to a change in government policy.” [education cluster, local scale]

“There is insufficient cross-sector working. The Department of Health shows no leadership and fails to understand both the reality on the

ground or how to implement policy. The end-destination of public health in Local Authorities is good as LAs control many of the channels to impact public health e.g. schools, leisure centres, transport and planning etc. However, there is no coherent transition plan and many talented staff are leaving – a waste of years of investment. In the meantime PCT-led efforts are highly fragmented and variable, meaning that tax-payers do not benefit from the significant potential economies of scale. PCT-led commissioning in this area is highly variable and mostly inefficient. Many organisations pay lip service to following the evidence-base and cost-effectiveness whilst not understanding it in reality.” [health cluster, international scale]

“Working in a deprived area and in the voluntary sector we are very aware of the impact that government cuts and rising food and energy prices will have on already poor households. There is an awareness that growing ‘your own food’ is a possible solution but the gap between the idea and the huge amount of work needed for practical implementation is huge and a large amount of resource is needed to bridge this gap (e.g. novice gardeners take on an allotment but need a lot of support to bring it to a productive state and often give up because we cannot provide the support needed). With the depletion of the Local Food fund and local authority cutbacks it will be difficult to go forward in this area. As an organisation we manage the 75 acre site, which under the current funding regime combines a heritage project with managing tenants and an orchard education community project. We are constantly working to bring in the required match funding.” [local issues cluster, local scale]

“Farms offer excellent opportunities for educational work about food, health, wellbeing and the environment etc. Government cuts are stopping educational access work to new higher level stewardship entrants and existing schemes will not be renewed. The government has scrapped its target of one million children to visit farms. All this is taking place when child obesity levels are rising and people are becoming more removed from where their food comes from and the natural world around them.” [global issues cluster, national/regional scale]

“Uncertainty of the future of agrienvironment schemes makes it difficult to plan ahead and to offer advice to others.” [global issues cluster, national/regional scale]

“In the present economic climate, self management of allotments is becoming more likely. Associations like ours have a need for training in this. We would prefer to learn about this before it is forced upon us by cutbacks in local services.” [farming cluster, national/regional scale]

funding, with 90% funding only for one year.” [inclusion cluster, national/regional scale]

Another respondent suggested that the balance between funding capital and operating costs was out of kilter and in need of review:

“The major frustration of recent years... is the willingness of trusts and foundations, local government and lottery funding to fund the purchase of assets and capital works but not the ongoing costs of operating them. It has not been difficult to fund a new building in which to educate children and fill it with capital equipment. Unfortunately, this country is littered with unused buildings and equipment for want of revenue funding. Some have used full cost recovery where possible but this is disappearing, short-termism prevails.” [education cluster, local scale]

Groups were also concerned that the processes of applying for funds acted as a barrier to entry for grass roots organisations:

“Too much funding is wasted in office blocks, not enough gets through to the grass roots where it is most needed. Getting funding is too much about knowing the right words and not enough about the long-term sustainability of the project.” [local issues cluster, local scale]

“Bringing projects to birth takes a substantial amount of time. The Local Food fund application process, for example, probably required more than one month full-time equivalent work and was extended over a period of more than a year. There is no way in the current system that such preparatory work can be sustained by a small organisation, meaning that only large charities can realistically apply. This is wrong in principle and in practice.” [farming cluster, national/regional scale]

“It is very important that funding can be accessed in advance for small organisations with limited cash flow.” [farming cluster, local scale]

Furthermore, organisations needing relatively small amounts of ongoing funding felt they were caught in a treadmill, having constantly to repackage their work in order to match the changing fashions of philanthropy or demonstrate ‘innovation’:

“All we need is £5-10k per annum – what we get is having to consistently re-invent the wheel for ‘innovative’ funding. There is no reward for success... What we have is a slow deterioration of what’s already achieved, due to volunteer fatigue – we are trying to keep our own businesses afloat at the same time as developing the greater community good. All we need is admin support, so that we can do what we are best at – developmental work and rollout of best practice developed over 10 years with public funds. What a travesty!” [local issues cluster, national/regional scale]

While some respondents complained at having constantly to repackage their core activities, others encouraged funders to take more risks in order to back genuine innovation:

“We feel that funders need to scratch below the surface of funding applications more – too often in [our area] we have seen great projects rejected whilst groups new to the issue of food have been supported because they have ticked all the right boxes. In a few years we will see a large number of struggling food projects in the region, because they have not addressed the fundamental challenges within the food system. We need to act collectively and boldly if sustainable food projects are going to compete against the existing market system. We need to combine advocacy with enterprise if we are going to deliver a sustainable food system... and so we would urge funders to take more risks.” [local food issues, national/regional scale]

8 Conclusions and next steps



“The Environmental Funders Network aims to support foundations and philanthropists to fund effectively. Good data about the size, shape, and strategies of civil society is a vital component of this. This report should inform the work of anyone funding, or thinking of funding, work on food issues”.

Nick Perks, Environmental Funders Network.

This report is a first attempt to provide an empirical overview of civil society work on food and farming issues. We have reported on the amount of work that is taking place, the issues that groups are addressing, their strategies, and their expectations of funders and government. While it is in the nature of a survey of this kind that the findings are tentative, some strong messages emerge. This closing section highlights key points for the report's main readers, and sets out our own next steps.

8.1 Civil society

This survey holds up a mirror to civil society organisations working on food or farming. We can see a diverse sector, addressing a huge array of important issues with few resources, often in partnership. Some organisations, notably Sustain and the Soil Association, are shown to act as hubs and to be widely valued by others.

Yet the sector also, by and large, looks quite conservative. Education and service provision account for the most staff time, while activism and lobbying are relatively neglected. EU institutions, where many of the rules affecting UK food and farming are made, are not treated as key audiences. The focus seems to be on filling holes left in a food system dominated by the private and public sectors, ahead of working to influence and change that system.

As government looks increasingly to ‘the big society’ to step in where the state once was, the need for voluntary organisations to provide services will grow. Yet, as the public spending purse snaps shut, the opportunity costs of doing so will also increase. This survey cannot tell us which activities are most important, but it can prompt us to reflect on whether, collectively, we have got the balance right.

8.2 Government

To the UK government, the report shows that work on food and farming is very vulnerable to public spending cuts. The organisations at greatest risk are those working at a national or regional scale, which rely on the public sector for almost two-thirds of their incomes – approximately twice the average for the voluntary sector as a whole. Work on the local food theme and health depends most on public funding, and those organisations engaged in awareness-raising, education and co-ordination & capacity-building are the most vulnerable.

Respondents highlighted that a ‘big society’ model, where volunteers managed community resources, would demand up-front investment in new skills and training. However, many organisations that currently work with volunteers rely on public funds and face an uncertain future.

The sector has mixed feelings towards government. It has been seen by many as a hindrance to their work, yet the majority support a more

interventionist role for the state. Respondents to the survey suggested that where government has sometimes got in the way is at a local scale, with some community groups frustrated by bureaucracy and planning practices. In general, however, the call was for government to play a stronger role locally and nationally, particularly in seizing the potential that public procurement holds to improve public health and sustainability.

8.3 *Businesses*

Most of the respondents to our survey felt that big business had to be part of the solution to the problems we face in this sector. Yet food corporations, supermarkets and agribusiness were seen to be among the biggest obstacles to progress. Does this reflect an optimism that the big businesses will change their behaviour, or is it a fatalism that they are here to stay, in spite of presenting barriers? The challenge to businesses is to make good on that ambiguity, working with NGOs to tackle the structural barriers that have meant civil society and the private sector have so often pushed in opposite directions.

8.4 *Grant-makers*

We estimate that less than 1% of UK charity and voluntary sector income is spent working on food or farming issues. Set against the share of social and environmental challenges attributable to food – including 10% of total UK mortality and at least a fifth of greenhouse gas emissions – this looks like a missed opportunity. Charitable grant-makers are in a position to help correct that.

As more than two-thirds of organisations working on food and farming also work on other issues, there may be opportunities for grant-makers who have not previously supported this area to fund such work through existing grantees. The hub organisations identified in Section 5.2 provide opportunities for contact with wider networks of relevant organisations.

However the third sector, including trusts and foundations, contributes just 10% to the overall income of voluntary organisations working on food and farming issues, so grant-makers need to fund strategically in order to maximise the impact of their support. By highlighting the activities and issues that depend most on different income streams, this report can inform that strategic thinking.

8.5 *Next steps*

This report was commissioned by a consortium of charitable grant-makers that already support work on food or farming issues. They see this survey and the online tool available at www.foodissuescensus.org as first steps in encouraging more supportive funding in this sector, and are committed to using this report as a basis for dialogue between funders and NGOs. If you would like to be involved in any ongoing activity, or you have feedback on this report, please email info@foodissuescensus.org.

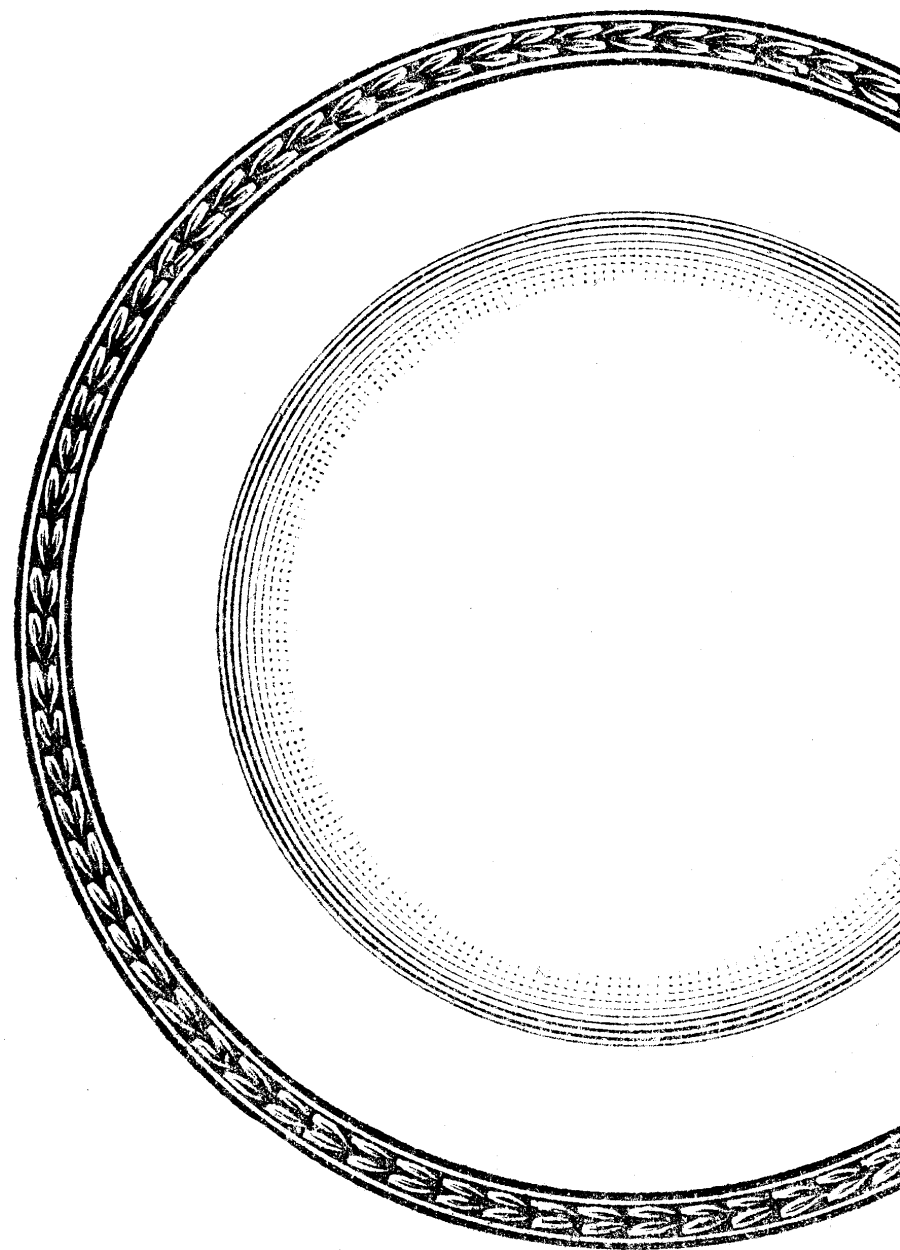




Photo: The Organic Research Centre

Appendix 1: survey feedback

Respondents to the survey offered the following feedback on the survey.

Coverage of important issues:

“This survey does not give enough space to describe some of the fundamental issues, actors and processes.”

“Give more space for important answers.”

“There were no questions on how the organisations you are surveying get their legitimacy. How do they check they are representing the interests and opinions of their members/subscribers/funders? Yet in my experience there is a wide gulf between the internal policy consultation in organisations representing interest groups like farmers or land owners – who must and do consult their members constantly, and organisations representing ‘causes’ (birds, animal welfare, the environment generally) who do little or no formal consultation of members/supporters.”

Fit with respondents’ circumstances:

“The questions and the way they’re structured don’t really correspond with how we work. We don’t divide up our work or time or staff in the ways suggested.”

“It was very difficult to select from a list of our main areas of activity and specify % for each. Our main area of activity... overlaps with most of the other areas such as sustainable production and consumption, farm animals, etc.”

“This was an excellent survey, however our work and funds are mostly focused on our international partners, and there were times when the options did not allow for this (e.g. lobbying national governments or media in Africa).”

“At various points, a “don’t know” option, or option to leave a field blank would have been extremely helpful. The estimates of funding and time devoted to food issues are extremely rough due to organisational complexity and the diverse range of activities we carry out, where food is just one of our areas of interest. I would caution against taking this numerical information as reliable. ”

“Have done my best to answer your questions, which in some cases were compulsory, even though they don’t all suit a non-political, non-campaigning organisation like ours. So please interpret with caution, especially the questions about organisational opinions because we don’t take a fixed view on matters like these. Much of our work is about tracking and assessing consumer opinion and this wasn’t offered as an option. Economic analysis is another important area for us.”

“The questions on the role of big business and the state and the intrinsic value of nature are difficult. As a large organisation of diverse individuals, it is difficult for us to take a stance.”

“We are only a small gardening organisation but our vision is large. The earlier questions seemed very relevant but when it came to the final page I found these a little more challenging and possibly more suitable for larger organisations. However, I tried to answer them as best I could. I enjoyed completing the survey and thank you very much.”

“Smaller projects like ours could give more accurate answers if the survey was more specific to what we do.”

“This was not an easy survey to complete as a Parish Council doesn’t operate in the same way as businesses.”

Time required to complete survey (stated in invitation to be 20 minutes):

“In all, the survey took us well over an hour – not 20 minutes!”

“Sorry this is fragmented but this took more than 20 minutes!”

“Did take me 20 minutes to complete – think it works well – well done!”

Utility and purpose:

“The survey is not precisely enough specified. Food and farming and the social and environmental impacts of farming cover such a wide range of issues and issues on which there is a wide range of legitimate views, that I am left perplexed by the purpose of this survey and how my answers will be of any value.”

“We appreciate the initiative behind this survey and are... willing to support further inquires that might help the donors understand the issues and their interconnectedness better, plus share the challenges the NGOs face when campaigning on food and farming. We also are interested in discussing strategies for influence and change, either with other grantees or with the donor networks.”

“Joined up research by multiple donors such as this is very positive.”

“The survey was useful.”

“This is a great initiative...”

“Thank you for giving our organisation the chance to say these things. I hope it helps to change direction of our food and farming funding.”

“We are very pleased to be a part of this survey and would like to thank the funders for commissioning this survey.”

“Thank you. Filling in this survey has helped me clarify a few issues. I look forward to seeing the results.”

Appendix 2: participating organisations

We are grateful to the following organisations for taking part in the survey that generated the data used in this report:

A Rocha UK; Abbey Hill School & Technology College; ACE Africa; ActionAid; Adelaide Street Allotment Association; Agriculture and Theology Project; Allen Lane Foundation; Allergy Action; Ards Allotments; Ashiana Network; Baby Milk Action; Banana Link; Bankside Open Spaces Trust; Barracks Lane Community Garden; Barrow and Spade Brigade (Great Chart and Singleton Community Allotments); Bedfordshire Rural Communities Charity; Behaviour Change; Bellburn Lane Allotment Association; Bevendean Community Garden; Bill Quay Farm Local Food Connection; Biodynamic Agricultural Association; BioRegional; Biotechnology and Biological Sciences Research Council; Birdham C E Primary School; BirdLife Europe; Bradford YMCA; Bridewell Organic Gardens; Brighton & Hove Food Partnership; British Dietetic Association; British Heart Foundation Health Promotion Research Group; BTCV, Skelton Grange Environment Centre; Calverley Horticultural Society; Camel Community Supported Agriculture; Campaign for Real Farming; Campaign to Protect Rural England; Canalside Community Food; Carnegie UK Trust; Caroline Walker Trust; Castle Community Network; Catholic Concern for Animals; Centre for Alternative Technology Charity Ltd; Centre for Global Awareness; CGIAR Research Program on Climate Change, Agriculture and Food Security; Change Works; Chapter 7; Chester Road Allotment Association; Chineham Parish Council; Christ Church CEP School; Church Farm; Church of England Ethical Investment Advisory Group (EIAG); Circle 33 Housing Trust; Climate Friendly Food CIC; Cockermonth Allotment Association; Colne Valley Food CIC; Colne Valley Partnership; Common Cause Co-operative Limited; Community Food and Health (Scotland); Community Food Initiatives North East; Community Mobilization Against Poverty (CMAP); Community Sustainable Development Empowerment Programme (COSDEP); Compassion in World Farming; Consensus Action on Salt and Health; Consumer Focus; Co-operatives UK; Corby Business Academy; Corner House Research; Cornwall Gardens Trust; Corporate Watch; Council for Scientific and Industrial Research; Country Land and Business Association Ltd; Country Markets Ltd; Court Lane Allotment Gardeners Association; Coxhoe Allotment Association; Cracking Good Food Manchester Ltd; Craven Arms Community Food; Cumbria Fells and Dales RDPE Local Action Group; Cumbria Wildlife Trust; Dartington Hall Trust; De Moray Association; Debdale and Woodland Community Association; Deen City Farm Ltd; Dig-In Community Allotment (Stapleford); Do the Green Thing; East Anglia Foods Link; Eat England; EcoNexus; Environmental Justice Foundation; Environmental Practice @ Work Ltd; Environmental Vision (Envision); Escape: Community Art in Action; Ethical Trading Initiative; European Public Health and Agriculture Consortium; Exeter Community Initiatives; f3 Consultants Co-operative CIC; Fairtrade Foundation; Falkland Stewardship Trust; Falmouth Friends of the Earth (FalFoE); Family Farmers’ Association; FARM; Farm Animal Welfare Trust; Farm Crisis Network;

FARM-Africa; Farming & Countryside Education (FACE); Farms for City Children; Feedback Madagascar; Fern Avenue Allotment Association; Ferndale Allotment Association; Field Studies Council; Find Your Feet; Food and Behaviour Research; Food Ethics Council; Food for Life Partnership; Food for Thought; Food Matters; Foodcycle; FoodsMatter; Fordhall Community Land Initiative; Fork and Dig It; Forum for the Future; Freightliners City Farm; Friends of Queens Road Allotments.; Friends of the Earth; Friends of the Earth Europe; Future of Farming; Garden Organic; Gateshead Food Co-op CIC; GeneWatch UK; Get Set Grow; Gloucestershire Land for People; GM Freeze; GMWatch; Gorgie City Farm; Grace & Flavour CIC; Great Yarmouth & Gorleston Allotments Association Ltd; Green Peas UK at Grow Mayow Community Garden; Greengrow Ltd; Greig City Academy; Groundwork Greater Nottingham; Groundwork Leicester & Leicestershire; Groundwork Thames Valley; Growing Food Together group; Growing Well; Haemolytic Uraemic Syndrome Help (HUSH); Hammersmith Community Gardens Association; Harper Adams University College; Hart Voluntary Action Ltd; Health Education Trust; Healthy Food for All; Heeley City Farm; Hereford Allotment & Leisure Gardeners Society Ltd; Herstmonceux Allotment Association; Highbury South Allotment Association; Hillside TRA; Horwich Harvest (Lever Park School); Houghall Allotment Club; Hyperactive Children's Support Group; IGD; Incredible Edible; Insitute for Food, Brain and Behaviour; International Development Enterprises UK; Jacob Sheep Society; Joliba Trust; Kent Farmers' Market Association; Kentish Town City Farm Ltd; Kinross Potager garden; LEAF (Linking Environment and Farming); Leg of Mutton Allotment Association; Leicestershire Food Links Ltd; Lidgett Lane Allotment Association; Linthouse, Elderpark, Govan, Urban Planters (LEGUP); Live Well, Eat Well Community Allotment (Pendle); Livestockwise; Lorton After School Club; Low Luckens Organic Resource Centre; Lower Whitehill Farm Ltd (Pepper Pot Farm); Luton Federation of Allotments and Leisure Gardens; Made in Stroud Ltd/Fresh-n-Local Farmers Markets; Made-Well CIC; Making Local Food Work; Manchester International Festival; Manna House; Manor Gardens Welfare Trust; Marine Stewardship Council; MEND Central Ltd; Middlesbrough Environment City; Moelyci Environmental Centre; Molson Coors Brewing Company; Moray Market Garden Company; Moss Brook Growers; Mother and Child Foundation; Moulsecomb Forest Garden and Wildlife Project; Museums Sheffield; Nab Cottage/English Language in the Lakes; National Heart Forum; National Justice and Peace Network; National Trust; Natural Beekeeping Trust; Natural England; New Agrarian Alliance Ltd; New Economics Foundation; New Life Church – OASIS Community Centre and Gardens; Newbottle Primary School; Norfolk & Suffolk Local Food Ltd; Norris Bank Primary School; Northumberland Toy Library and Childrens Resource Centre; Nourish; Nourish Enterprises CIC; Nuffield Council on Bioethics; NVA (Europe) Ltd; Old Trafford Amateur Gardeners' Society; Organic Centre Wales; Organiclea Community Growers; Our Life; Overseas Development Institute; Oxford Brookes University

– Department of Hospitality, Leisure and Tourism Management; Peasant Evolution Producers Cooperative; Pendle Leisure Trust; People & Planet; Permaculture Association; Pesticide Action Network UK; Plantlife; Plunkett Foundation; Policy Studies Institute; Preston Lane Allotments; Progressio; Progressive Farming Trust t/a Organic Research Centre; Project Agora; Prosiect B3; Quorn Community Gardens; Reading University; Red Machine Allotment Association; Resource Futures; Rotters Community Composting; Royal Highland Education Trust; Royal Society for the Prevention of Cruelty to Animals; Royal Society of Wildlife Trusts; Ruislip-Northwood Co-operative Smallholding & Allotment Society Ltd; Rural Outreach Programme (ROP); RuSource; Saffron Walden County High School Farm Club; Sandwell Primary Care Trust; School Food Matters; School Food Trust; School of the Built and Natural Environment, Northumbria University; Science Museum; Scottish Churches (ACTS) Rural Group; Seeds for Africa; Seedy Sunday; Shepherd Way Allotment Society; Sheringham Community Smallholding Project; Skye & Lochalsh Food Link; Slow Food UK; SMCF Ethiopia; SOAS Food Studies; Social Enterprise East Midlands (SEEM); Social Issues Research Centre; Socialist Health Association; Soil Association; Somerset Community Food; SOS Sahel UK; South East Area Lifestyle (SEAL) Community Health Project; South East Food Group Partnership Ltd; South View Allotments Association; South West Food & Drink Ltd; St Bartholomew's Cooking with the Community; St Elizabeth's Centre; St Mary's RC Primary School; STAA Ltd; Stoke Town Growers; Stroud Valleys Project; Sussex Cattle Society; Sustain; SustainAbility; Sustainable Development Commission; Sustainable Restaurant Association; Swansea Community Farm; Tees Valley Wildlife Trust; Tescopoly; The Country Trust; The Countryside Foundation for Education; The Ecologist; The Farmer Network Ltd; The Friends of HOPE; The Gaia Foundation; The Game & Wildlife Conservation Trust; The Good Gardeners Association; The Guild of Food Writers; The Kelmars Trust; The Kench Hill Charity; The Kindling Trust; The London Orchard Project; The National Lobster Hatchery; The Orchard Trust; The People's Supermarket; The Refugee Council; The Sobriety Project; The Southern Uplands Partnership; The Springhead Trust; The University of Bedfordshire; The Vegan Society; The World Development Movement ; Thorpe Edge Community Project; Transition Network; Transition Town Totnes; Tree Aid; True Food Community Co-op; Tweedgreen; UK Food Group; UK Public Health Association; Unicorn Grocery; University of Plymouth; University of Warwick – Warwick Crop Centre; Victoria Allotments Association; VISION Culture CIC; Voluntary and Community Action East Cambs; Vredeseilanden vzw; War on Want; Waste Watch; Watford Community Garden; Wellgate Community Farm; West Jesmond Allotment Association; Which? (Consumers' Association); Whirlow Hall Farm Trust; Willowbrook Hospice; Woodbine Terrace Allotment, Newcastle upon Tyne; Woodland Trust; Worcestershire Wildlife Trust; WRAP; WWF-UK; WWOOF (World Wide Opportunities on Organic Farms); and YUMI.

Endnotes

Notes to the main text

- 1 Food Ethics Council (2010) Food justice: the report of the Food & Fairness Inquiry. FEC, Brighton.
- 2 Strategy Unit (2008) Food matters: towards a strategy for the 21st century. The Stationery Office, London.
- 3 Foresight. The Future of Food and Farming (2011) Final project report. The Government Office for Science, London.
- 4 The reasons for this include: (1) While the total number of organisations that completed the survey is sufficient to allow credible inferences, the diversity of the sector means the number giving any specific answer was often small. This means that the more one zooms in on the detail, the less representative the findings are likely to be. (2) Many of the survey questions were complex, and respondents may have interpreted them in different ways. (3) Two questions asked respondents to say what proportions of combined staff and volunteer time were allocated to specific activities or issues. When reporting some results, we have assumed that organisations allocated staff time, volunteer time and expenditure in the same proportions. (4) Not all respondents answered all questions.
- 5 The four editions to date of Where the Green Grants Went are available at www.greenfund.org/resources.
- 6 Businesses and trade associations without a known public interest remit were not included in the original invitation list. A small number of university departments, public sector research organisations, and non-departmental public bodies were included in the initial invitation list and responded to the survey. However, these organisations reported particular difficulties in completing some aspects of the survey, were known to be patchily represented compared with the overall population of such organisations, were not the primary focus of a survey of civil society activity, and yet were in some cases very large, with a heavy influence on the overall results. On this basis, 13 such organisations were excluded from the analysis as outliers.
- 7 Including organisations based outside the UK, the combined total workforce was 17,100 employees and 73,400 volunteers, of whom 2,600 (13%) and 2,700 (4%) worked on food or farming issues.
- 8 NCVO (2009) The UK civil society almanac 2009: executive summary. NCVO. <http://bit.ly/fUwrCa> NCVO estimates that total civil society income was £116 billion in 2006/7. The estimate given here has been adjusted to exclude income to universities. figures have been adjusted to exclude universities, which are included in the overall NCVO estimates.
- 9 Charity Commission (2010) Facts and figures: 31st December 2010. <http://bit.ly/gSFBiO>
- 10 Gray, R. (2011) The top 100 advertisers 2011. The Grocer, 19 March. <http://bit.ly/fKbGRW>
- 11 Defra (2010) Food statistics pocketbook. Defra, London. <http://bit.ly/ge0Pxt>
- 12 Defra (2010) Food statistics pocketbook. Defra, London. <http://bit.ly/ge0Pxt>
- 13 Based on the top 20% for each indicator.
- 14 These estimates are very sensitive to the assumptions we make about the average spending, staff and volunteering among organisations spending under £20,000 last year on food or farming. They are less sensitive to our estimates of the survey's coverage – the percentages for expenditure, staff and volunteer time were similar for our high and low estimates of the survey's coverage.
- 15 The concept of 'long tail' distributions, in which the least frequently occurring majority of occurrences accounts for a majority of items, was popularised by Anderson, C. (2006) The long tail: why the future of business is selling less of more. Random House, London.
- 16 We asked respondents to state what share of their income came from each of the following sources: grants or donations from trusts, foundations or charities, grants or donations from public bodies, individual donations, bequests or membership fees, sales to members of the public (e.g. of food, publications), contracts or sales to businesses, grants or donations from businesses, contracts or sales to the public sector, contracts or sales to trusts, foundations or charities or other.
- 17 Clark, K., Dobbs, J., Kane, D. & Wilding, K. (2009) The state and the voluntary sector: recent trends in government funding and public service delivery. NCVO, London. <http://bit.ly/gP1kA5> Cf. Clifford, D., Geyne Rajme, F. & Mohan, J. (2010) How dependent is the third sector on public funding? Evidence from the National Survey of Third Sector Organisations. Third Sector Research Centre.
- 18 Jowit, J. (2010) 'Greenest government ever' reserves worst cuts for Defra. Guardian, 20 October. <http://bit.ly/9NMn1i>. BBC (2010) Councils facing 9.9% core funding cut. BBC News Politics. <http://bbc.in/gf2uRy>
- 19 Wiggins, K. (2010) Big Lottery Fund share of good cause money will be reduced to 40 per cent in September. Third Sector Online, 15 July. <http://bit.ly/f2csHu>
- 20 <http://www.localfoodgrants.org/about>
- 21 Some issues (e.g. cooking skills) are not well addressed by our list. Some of the keywords used in the list are contested concepts. For example, proponents of 'food sovereignty' (not in the list) question the political and economic assumptions underpinning the more widely used but different concept of 'food security' (in the list).
- 22 A short paper outlining the clustering technique we used is available on request.

23 In using this analysis as a basis for discussing the balance of effort across different areas of concern, it is important to consider the specific issues included within each theme rather than relying only on the headline. In particular, the themes contain different numbers of issues, implying that some (e.g. global and environment) are defined broadly while others (e.g. inclusion) are narrower. The number of issues within each theme appears to have a considerable influence on the distribution of organisations, expenditure and staff FTEs among the clusters.

24 E.g. Shuman, M. (2005) Why do progressive foundations give too little to too many? *The Nation*, 12 July. <http://bit.ly/h3a19Z>

25 Funding was not a major focus for the organisations included in the survey; while a handful of grant-makers took part, they were not targeted in our invitations and the funders commissioning the survey did not take part.

26 The survey did not treat the media as audiences in their own right.

27 In reporting these results we list the organisations that were most frequently named as partners but, in line with our commitment to keep survey respondents anonymous, we do not name the respondent organisations that they partnered.

28 Crompton, T. (2010) *Common cause: the case for working with our cultural values*. WWF, COIN, CPRE, FoE, Oxfam. <http://bit.ly/aRTuZe>

29 As some respondents also described their activities in their answers to the question about motivations, we only included in this graphic phrases that related directly to motivations.

30 While a small number of respondents told us that they found this question difficult to answer from an institutional perspective, the number of responses to the different statements (excluding outliers) ranged from 236 to 242.

Notes to tables, figures and boxes

i Foresight. *The Future of Food and Farming (2011) Final project report*. The Government Office for Science, London.

ii Garnett, T. (2008) *Cooking up a storm: food, greenhouse gas emissions and our changing climate*. Food Climate Research Network, Guildford.

iii Foresight. *The Future of Food and Farming (2011) Final project report*. The Government Office for Science, London.

iv Sustainable Development Commission (2008) *Green, healthy and fair*. SDC, London.

v Chapagain, A. & Orr, S. (2008) *UK water footprint: the impact of the UK's food and fibre consumption on global water resources*. WWF-UK, Godalming.

vi UNEP (2009) *The environmental food crisis: the environment's role in averting future food crises*. A UNEP Rapid Response Assessment. UNEP, Nairobi.

vii UNEP (2009) *The environmental food crisis: the environment's role in averting future food crises*. A UNEP Rapid Response Assessment. UNEP, Nairobi.

viii FAO (2000) *Domestic animal diversity at risk*. Spotlight 2000. <http://bit.ly/hk3n24>

ix The Poultry Site (2006) *RSPCA dismayed by poultry conditions*. The Poultry Site, 26 September. <http://bit.ly/f7y1GO>

x Veterinary Medicines Directorate (2007) *Overview of antimicrobial usage and bacterial resistance in selected human and animal pathogens in the UK 2004 report*. VMD, New Haw. Cited in Soil Association (2009) *Government must act over escalating farm antibiotic resistance problem*.

xi Veterinary Medicines Directorate (2009) *Report on antimicrobial sales in veterinary medicine in 2008*. VMD, New Haw. Cited in Soil Association (2009) *Government must act over escalating farm antibiotic resistance problem*.

xii DFID (2001) *Agricultural and fisheries trade, developing countries and the WTO*. Briefing Note.

xiii Strategy Unit (2008) *Food: an analysis of the issues*. Cabinet Office, London.

xiv Strategy Unit (2008) *Food: an analysis of the issues*. Cabinet Office, London.

xv Strategy Unit (2008) *Food: an analysis of the issues*. Cabinet Office, London.

xvi Strategy Unit (2008) *Food: an analysis of the issues*. Cabinet Office, London.

xvii Defra (2010) Food statistics pocketbook. Defra, London. <http://bit.ly/ge0Pxt>

xviii The latest in the series is Cracknell, J., Godwin, H. & Williams, H. (2009) Where the green grants went 4: patterns of UK funding for environmental and conservation work. Environmental Funders Network. <http://bit.ly/94wdAk>

xix Bernholz, L., Skloot, E. & Varela, B. (2010) Disrupting philanthropy. Center for Strategic Philanthropy and Civil Society, Sanford School of Public Policy, Duke University. <http://bit.ly/hM97bS>

xx Bernholz, L., Skloot, E. & Varela, B. (2010) Disrupting philanthropy. Center for Strategic Philanthropy and Civil Society, Sanford School of Public Policy, Duke University. <http://bit.ly/hM97bS>

xxi The coverage within the survey of public sector bodies (e.g. Primary Care Trusts and local authorities) businesses and organisations based outside the UK was so low that it is more meaningful to try and estimate the size of UK voluntary sector activity on food or farming, rather than all not-for-profit work on these issues.

xxii McDaid, D. (2011) Personal communication from the National Society of Allotment & Leisure Gardeners (NASLG). 2,551 allotment associations are members of NASLG, covering 125,000 plots. As around 330,000 plots are known to exist in the UK, the total number of allotment societies is estimated to be 6,000.

xxiii This graphic was created using www.tagxedo.com.

xxiv This graphic was created using www.tagxedo.com.

xxv Responses have been lightly edited to ensure they fit in this box and to maintain anonymity.

xxvi This graphic was created using www.tagxedo.com.

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