

The food issues census

A second survey of UK civil society

2017

Acknowledgements

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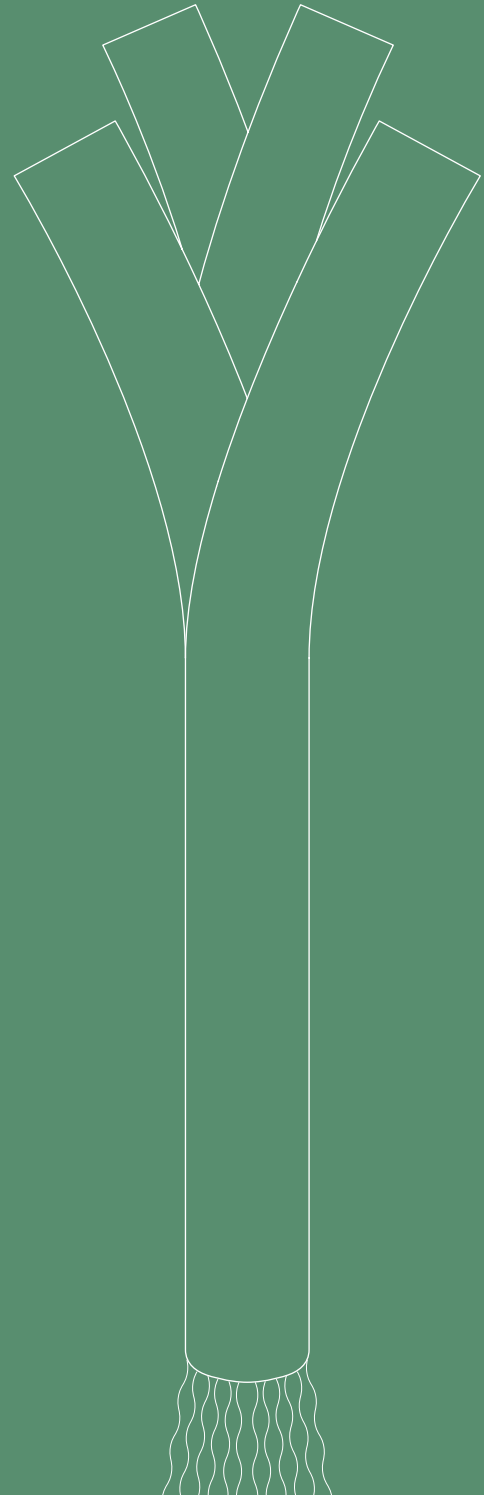
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Foreword



It has become abundantly clear in recent years that the food we eat has the capacity to be good or bad for us, and for our planet (in fact, very good, or extremely bad!). The outcomes depend on the food choices we make, and are connected to the way the foods we choose are produced, transported and consumed.

The work of ensuring that those choices are ethical, responsible ones falls to many people – campaigners like me, individual producers, the food buying public, and also the civil society organisations (CSOs) that have taken part in this survey.

These bodies are working in a host of different ways to develop and support sustainable food systems: systems that prioritise high animal welfare, low environmental impact, increased biodiversity and decreased waste. It's vital work: if the way we produce our food isn't sustainable, then ultimately neither is our society.

That's why this census is so important. It provides an insight into the fantastic work CSOs are already doing in the areas of food and farming, but is also a crucial way-marker for funders, showing where their support and backing is most needed, and can do most good in the future. It should be required reading for grant funders, government policy-makers and for charities themselves. Where can they make the most difference? Which areas are desperately important but still underfunded? Who can help, and who throws the biggest spanner in the works?

With Brexit likely to affect the rules governing how we grow food, treat animals and husband the environment, it's never been more critical to take a hard look at the efficacy of, and the resources available to, our food and farming CSOs. Our goal must be a completely sustainable food system. In order to reach that goal, let's target our resources in the most effective and intelligent way we can.

Hugh Fearnley-Whittingstall

Writer, broadcaster,
sustainable food campaigner

Executive summary

Food matters: how we produce, trade and consume it touches many issues from climate change to human health and wellbeing, from the state of our environment to the plight of animals. The food sector is both responsible for many of these issues, and deeply affected by them.

Because of its position at the heart of so many issues, food provides unique opportunities to develop joined up solutions to the problems faced by society, from urban growing projects to national campaigns on, for instance, the use of pesticides or antibiotics in farming.

And food matters to every one of us. It's close to people's hearts as citizens, growers, decision-makers and investors. This means that civil society organisations (CSOs) can engage them in debate, and encourage and promote social change.

But how much of the CSO sector focuses on food? How effective are their interventions? What are the challenges and opportunities that need more resources? This food issues census is an attempt to answer those questions, to get the measure of the sector and its capacity to address food issues.

It follows on from the original food issues census, published by the Food Ethics Council in 2011, which was the first ever effort to develop a picture of the voluntary sector on food, farming and fishing – covering everything from small-scale, local initiatives to well-known, large, national (or even global) organisations.

Taking the 'temperature' of food and farming related CSOs in 2016 has given us the opportunity to assess how the landscape has changed in the past five to six years (note: although this report has a publication date of 2017, the data was collected in 2016, hence references to 2016 throughout the report).

We can get a view of how many organisations, and people within them, work on food and farming – and how much time and money they spend. We can see how the new economic landscape has affected the sector, and where organisations get their funding. Crucially, we can see how dependent the sector is on EU funding.

Inevitably, the census has some limitations, and the findings in this report should be treated as indicative rather than wholly representative. Nevertheless, we are confident that the census will help existing funders (and potential new ones) target their funding strategies and activities in relation to food.

It provides an invaluable resource for CSOs in planning their work and pitching proposals to grant-makers. It is an advocacy tool that can be used to secure further vital funding for work on sustainable food and farming.

Of the 573 organisations we contacted, 138 responded, with 112 answering all the questions: a response rate of 24%. This was lower than 2011, when 332 organisations took part, with 244 responding to all the questions. Forty-eight organisations participated both in 2011 and 2016. The data was cleaned by correcting typographical errors and removing duplicate responses. Following an initial review of the data, some outliers were identified and omitted from subsequent analysis.

A vital – but vulnerable – sector

We found that civil society work on food remains vital, vibrant and varied in addressing a host of major food and food-related issues. However, such work is also vulnerable, relying on limited and irregular funding, and on the individual passion, commitment and goodwill of thousands of people.

The organisations working on food and farming are very diverse and include community groups, food co-operatives, campaign groups, large scale membership charities, networks, schools and educational institutions, and many more.

But by most indicators, the challenges faced by the food system are getting worse, not better. Despite the best efforts of CSOs, the sector's response is not commensurate with the scale and urgency of the challenges. This is partly because the lack of funding that we found in 2011 to support CSO work on food issues does not look to have significantly improved.

The census found that civil society work on food or farming issues remains predominantly funded by the public sector, which has reduced slightly (from 45% in 2011 to 41% in 2016). This is most likely due to public spending cuts and the fact that the Big Lottery Fund (which the survey counted as 'public sector') has closed its Local Food grants scheme in the period since the original census.

In monetary terms, the public sector is the biggest source of funding for respondent organisations. However, in terms of the number of grants, the most popular source is UK third sector grants, followed by individual donations, bequests or membership fees. This suggests that public sector sources tend to be larger in size.

Funding from the private sector accounted for 25% of total funding (£38 million) from respondents in this census, significantly higher than the 2011 census, where it was only 17% of total funding (less than £30m).

Third sector grants are clearly the funding lifeblood for many civil society organisations. The challenge of an increasingly competitive funding landscape is that CSOs spend a lot of time and effort on fundraising, which may not always pay back if it is mostly smaller third sector grants that they are chasing.

Small to medium organisations (<£500k) received most of their income from the third sector (predominantly grants or contracts from trusts and foundations). In contrast, large organisations (>£500k) relied more on private funding. For very large organisations (>£2.5m), 45% of funds came from public funding.

Almost one in five of respondents received EU funding for the previous financial year. For these organisations, an average of 21% of their funding came from the EU. This means there will be an important shift in the funding landscape for food and farming CSOs during the coming months and years as the UK leaves the EU. This potential loss of funding will have an impact on the sector. The question is whether (and where) CSOs will be able to make up the shortfall.

Put in the context of a challenging economic climate, budget cuts and uncertainty over the UK's future role in the EU (and the rest of the world), this is challenging. Public sector funding is likely to continue to be squeezed. Many trusts and foundations that fund food and farming work are experiencing an upsurge in applications, while UK CSOs relying on EU grants are likely to have to find alternative sources of funding. Multi-year funding might offer organisations some respite from the never-ending funding quest, give them greater security and allow them to plan more effectively.

Priority issues

Our survey analysed which of 57 issues in six clusters were the most and least worked on by organisations. The most represented cluster was environment (20%), followed by global (19%), local (18%), health (17%), farming (16%), and finally inclusion (1%). The organisations taking part in the census most commonly worked on issues relating to local food, food poverty & access, farming & horticulture, community development, sustainable production, and climate change.

Food poverty and access has made a big move from 15th place in 2011 to 2nd in 2016 in terms of number of organisations working on the issue. Expenditure on food poverty & access has also gone up, equalling £6.3m in 2016, an almost threefold increase from the equivalent figure in 2011 (£2.2m). This is despite the number of survey respondents being lower in 2016.

At the other end of the scale, work on animal husbandry fell steeply. This was the issue on which most was spent by respondents in 2011 (albeit concentrated in relatively few organisations). In 2016 it dropped outside the top 10 issues by expenditure. This may imply that animal husbandry – and farm animal welfare issues – are regarded as less of a concern in 2016 than they were previously, or possibly that this has become an underfunded area.

CSOs take a wide range of different approaches to address food and farming issues. Some work on activities that make an immediate difference on the ground, such as providing food to people in need or community gardening. Others focus on campaigning or lobbying to change the rules of the game.

Across organisations, 29% of expenditure went on providing services, while 10% went on activism (an increase from 3% in 2011). Although lobbying (4% of expenditure in 2016) and fundraising (2%) were highlighted as areas that needed more expenditure in 2011, organisations have not been able to allocate more funds to them. Only 4% was spent on education.

Helpers and hindrances

The actors most commonly cited as helping food and farming were progressive NGOs (Sustain and Soil Association were most frequently mentioned), funders (particularly Esmée Fairbairn Foundation), forward-looking businesses, celebrity chefs (Jamie Oliver and Hugh Fearnley-Whittingstall were mentioned) and ‘grassroots’ groups and networks.

As in 2011, the major hindrance identified was the (UK) Government, which (if you include specific government departments) was mentioned almost four times more than the next most commonly cited response, namely farm unions. In all, 41% of respondents identified the current UK Government as a hindrance in 2016, up from 34% in 2011.

Several CSOs expressed concern that Brexit could be a hindrance to their activities. The food industry – and particularly major supermarkets – were also held up by multiple respondents as hindering progress.

Collaboration was the answer when we asked CSOs what the sector needs to do to create the biggest positive impact on the food system. Collaboration would help to build a unified response and a louder voice, which was particularly important in the light of the upcoming challenges posed, for example, by the UK’s negotiated exit from the EU.

Funding sources and priorities

There appears to be greater diversification of funding sources in 2016, but funding is becoming increasingly competitive and, for smaller CSOs in particular, there is still reliance on a handful of trusts and foundations to provide the bulk of support on food issues. However, economic uncertainty can breed volatility in the financial markets, and trusts and foundations may face challenges in delivering sufficient investment returns to enable them to increase – or even maintain – levels of expenditure on grants.

CSOs report that they have been able to deliver a great deal with core or unrestricted funding in the last three years, including training, advocacy (including at EU level) and coalition/partnership building, particularly amongst national charities. However, many CSOs have found it difficult to secure unrestricted core funding, especially when it comes to continued funding for tried and tested work rather than new and ‘innovative’ programmes.

There was also a disparity between the issues that got the most funding and those that were most popular among civil society organisations. This may result in some CSOs feeling compelled to work on (seemingly) ‘sexier’ issues, rather than on what may be perceived as ‘less fashionable’ ones such as pesticides or air pollution, that arguably need increased funding and CSO work.

All the beneficiaries in our census (apart from ecosystems and nature) depend mostly on third sector funding. Ecosystems and nature had most support from the public sector. Children and young people were top beneficiaries for 13% of organisations, whose funding came primarily from the third sector (43%), and individuals (21%). Issues affecting general consumers and citizens depended mostly on funding from the third (44%) and private sectors (25%).

Our findings in this census suggest that – perhaps unsurprisingly – core, unrestricted funding is something many civil society organisations would prefer over restricted project funding.

Motivations and partnerships

The top motivation for CSOs was the environment. This was closely followed by a broad ambition for fair, sustainable food and farming. Third on the list was health and nutrition, and sustainable diets. Hunger, food poverty and access, was fourth. Other commonly cited motivations included supporting local food communities and tackling food waste.

We asked respondents about partnership working, and which organisations represented collaboration 'hubs'. We found that on average, respondents operate in seven partnerships. The most listed partner organisations were the Soil Association and Sustain: the alliance for better food and farming, which remain the same as 2011.

Several new partnership organisations have appeared on the list, such as the Eating Better alliance and the Food Foundation, neither of which existed in 2011. Other organisations have risen to prominence alongside the issues they represent, notably WRAP on food waste and FareShare on surplus food redistribution.

Funding, capacity and collaboration needs

Despite being one of the most worked on issues in 2016, the largest number of respondents felt that food poverty and household insecurity were the most underfunded areas. Food waste, sustainable diets and soil health were also high on the list.

In terms of activities that respondents felt needed more funding, there was a diversity of responses, but three broad themes emerged. The first was training of employees and key stakeholders. The second was campaigning, advocacy and policy. The third was awareness raising, communications, research and outreach. Other skills or areas of expertise needed included marketing, monitoring and evaluation, campaign building, finance, behaviour change, lobbying and policy.

Overall, we found that it is difficult for civil society organisations to carve out the time and space to do internal 'foundational activities' to ensure their organisations can deliver a positive, sustained impact in the future. The increasingly competitive funding environment may have forced some CSOs into taking a short-term approach, without the 'luxury' of core, organisational development funding to enable them to survive (or flourish) in the years ahead.

The census suggests that CSOs working on food and farming are partnering more, but more funding is needed to nurture these collaborations. We found a healthy appetite for more (and more effective) collaboration. Allowing CSOs to collaborate and build partnerships appears to be a key funding need.

The road ahead

The need for civil society organisations to work on food and farming is still strong, and many would argue it has grown in the past five years. The sector has seen consolidation amongst larger organisations. Many middle sized CSOs are partnering effectively, and some of the very smallest have lost their struggle to survive in a cut-throat funding environment.

We urge those working in CSOs on food and farming issues to use the food issues census to inform grant proposals, to aid dialogue with grant-makers and to highlight the importance of funding work on food and farming. We also urge them to continue to collaborate more where it makes sense to do so, particularly those in campaigning, policy and advocacy in light of Brexit.

Our estimate is that at best 2% of charity and voluntary sector income is spent on food and farming issues, but it might be closer to the less than 1% estimated in the 2011 census. Put in context against the scale of environmental, health, social justice and animal welfare issues that food is responsible for, £1-£2 in every £100 spent by the sector going towards tackling food or farming-related ills seems wholly inadequate.

We urge grant-makers – both existing food sector funders and prospective food sector funders – to increase overall funding for food and farming, so it is commensurate with the scale of the challenges. We also urge them to use this census to guide their strategic planning around fundraising, to maximise the impact of their support.

This second edition of the census contains a renewed call from civil society for Government (and Devolved Administrations) to step up to the plate, with 41% of responses citing the Government as a hindrance to progress on food and farming, up from 34% in 2011. This clearly needs to change – government and devolved administrations need to listen more to the expertise in CSOs, and engage them in working out the solutions to the problems with our food system.

As our politicians begin to negotiate the country's exit from the EU, we are at the beginning of a political and cultural journey that we have not experienced for many years, and one that will significantly affect the UK's food system. Now is the time for CSOs to come together and make a unified case for sustainable food and farming that places equal value on human health and wellbeing, the environment and animal welfare.

Only a significant step-up in funding will allow this opportunity to be seized. Grant makers have a crucial role to play in supporting CSOs to work in partnership to share best practice and to advocate to government with a loud and unified voice. Instead of asking “why fund food and farming,” the challenge to grant makers is “how can you not fund it?” This is a once in a lifetime opportunity: let's not let it slip away.

1. Introduction

.....
“It is much more powerful to make an informed strategic decision using data ... than to take a ‘best guess’ approach.”
.....



1.1 Why a food issues census?

Why food matters

Food matters: how we produce, trade and consume it touches many other issues from climate change to human health and wellbeing. Everyone – regardless of culture, occupation or religion – has a personal relationship with food, which provides civil society organisations with a powerful opportunity to talk to people about the serious issues that society faces.

The food sector:

- Includes activities directly implicated in causing a substantial share of many problems faced by the world, by the UK and by local communities, including climate change, biodiversity loss, ill health, deprivation and animal suffering.
- Is deeply affected by environmental and social problems – for example biodiversity loss, water scarcity and poverty all hit food production harder than any other economic activity world-wide.
- Provides opportunities to develop joined-up solutions to such problems, ranging from urban growing projects to large-scale campaigns.
- Is close to people's hearts – as citizens, growers, decision-makers and investors – and so can engage them in social change. And of course, everybody eats.

Even where analysis traces the causes of food-related problems to cross-cutting issues – such as linking hunger to social welfare shortfalls¹ – a strong case can be made for food-focused work as an accessible 'way in' to tackling broader issues.

The value of this census

The objectives of this census are to get a measure of the sector, its capacity to address food issues and the collective views from within the sector on particular challenges and opportunities that need more resources. It follows on the work of the original food issues census published in 2011, and aims to provide an updated view of the sector, as well as highlighting significant changes in 2016 compared to 2011.ⁱ The census inevitably has some limitations and the findings reported in the subsequent sections should be treated as indicative rather than truly representative.

There is ever growing interest in food across all media platforms, traditional and new, but at the same time many hundreds of thousands of people are struggling to afford to eat. Pressure on Government departmental budgets is even more intense as austerity bites deeper. The UK's decision in June 2016 to leave the EU means that food and farming policy will be in the spotlight as rarely before. This food issues census provides us with an overview of civil society's capacity in the UK to tackle food issues. Based on primary data, it provides a trusted reference point for dialogue between grant-makers and grant-seekers, complementing other work by funders to improve grant-making (such as the Where the Green Grants Went series). Having good knowledge of existing activity is a basic condition of strategic action, as well as responsible and intelligent grant-making. It helps existing funders (and potential new ones) target their funding strategies and activities in relation to food, and provides an invaluable resource for civil society organisations (CSOs) in planning their work and pitching proposals to grant-makers. It is also an advocacy tool that can be used to secure further vital funding for work on sustainable food and farming.

i. Although the census was published in 2017, the data collection took place in 2016, hence data throughout the report refers to 2016, unless otherwise specified.

It highlights the breadth and importance of food, farming and fishing activities, and their relevance to the objectives of charitable trusts and foundations. Those working in the sector and grant-makers will have views on where and how effort should be spent, such as the balance between, for example, campaigning and service delivery. However, it is much more powerful to make an informed strategic decision using data on civil society capacity and collective viewpoints on where resources are most needed than to take a 'best guess' approach.

'Big Society' is a much less widely used term than in 2011, but civil society remains a hugely important sector – particularly in relation to food and farming. Civil society work on food remains vital, vibrant and varied in addressing a host of major food and food-related issues. However, such work is also vulnerable, relying on limited and irregular funding, and on the individual passion, commitment and goodwill of thousands of people. Anecdotally many people have told us that funding is becoming increasingly competitive. As we said in 2011:

"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."²

Food issues should be an important target of action and philanthropy. Yet our 2011 food issues census indicated that "less than 1% of total UK civil society and charity income is spent working on food or farming issues." Surely this is an insufficient level of investment in such a vital sector?

1.2 Scope, objectives and audiences

In 2011 the Food Ethics Council published the original food issues census. One of its aims was to "provide a base-line for tracking important changes ..." – this second food issues census builds on the success of the original survey, tracing the marked changes in the external environment since 2011.

The 2016 survey covered civil society organisations working in the UK or supported by UK funders, and was commissioned by the Big Lottery Fund, Esmée Fairbairn Foundation, JMG Foundation and The A Team Foundation. The Steering Group comprised the organisations that commissioned the work, as well as representatives from the Environmental Funders Network and Sustain: the alliance for better food and farming. This report seeks to address some key questions about the sector. What range of issues is being addressed? Which issues are the focus of greatest activity and which perhaps require greater activity and investment? What are the aims and priorities of the organisations doing the work? What strategies are being pursued and where is the balance of effort?

This report is based on the results of a census of civil society organisations whose work relates to food and farming. The data was collected mostly during summer 2016, with financial data collected referring to organisations' previous full financial year.

This work has two primary audiences. First, UK charitable trusts and foundations, particularly grant-makers with an explicit or potential interest in funding activity relating to food. Secondly, CSOs working on food issues. The findings and approach will also be relevant to public and private sector bodies funding work to address food issues in the public interest and to international grant-makers and NGOs, while the methods may be relevant to grant-makers with a wider interest in building civil society capacity.

Box 1: Food issues in perspective

Climate change

Food and farming account for at least 20% of global greenhouse gas (GHG) emissions.³ One of the most climate-dependent activities,⁴ agriculture affects climate change, and is affected by it, as its outputs become vulnerable to the increasing frequency and intensity of extreme weather conditions.

Food and poverty

Indicators suggest that the numbers of people in the UK living in food poverty are increasing. Figures published by The Trussell Trust in April 2016 show that foodbank use remains at record levels, rising 2% on the previous year. Over 1.1 million three-day emergency food supplies were provided to people in crisis by the charity's 424 foodbanks in the 2015/16 financial year, compared to just 61,000 in 2011.⁵ Many other organisations are food aid providers too, so the full extent of food poverty in the UK is unknown.

Environmental impact

Food production has a huge impact on the environment. About 47% of the EU's land is used for agriculture,⁶ and roughly 33% of total household environmental impact is related to food and drink consumption.⁷ Of the species currently listed as threatened or near-threatened with extinction, 62% were endangered due to expansion and intensification of agricultural activity.⁸ The issue of food waste has become higher profile, but still around 10 million tonnes of food and drink are wasted in the food chain in the UK each year.⁹

Water scarcity

Irrigated agriculture remains the largest user of water globally, including about 70% of global freshwater.¹⁰ This figure drops for OECD countries, which includes the UK, to 40%. It takes about 2,400 litres of water a day to feed one person in the UK.¹¹

Livelihoods

Globally, more people depend on farming for a living than any other activity.¹² Employment in the food sector can contribute to poverty, with over half of employees being part time. Poor diet also relates to poverty, with people on low incomes eating only a little over half the fruit and vegetables of the general population.

Health inequalities

Health problems associated with being overweight or obese are estimated to cost the NHS at least £5 billion per year. In 2014, 26% of adults were obese and a further 36% were overweight.¹⁰ In 2015, 71.3% of deaths were caused globally by non-infectious diseases, which include heart disease, stroke, cancer and diabetes, all which are considered to be affected by diet and lifestyle.¹³

Animal welfare

Every year in the UK, one billion terrestrial animals are farmed for food.¹⁴ Whether they are treated humanely or inhumanely remains a fundamental ethical concern. How we farm animals is also important to human health, including through the medicine we use to control disease. Around 45% of antibiotics in the UK are given to animals,^{15,16} of which almost all go to farm animals.

1.3 Methodology

The work we did followed a very similar process to that of the original census, in order to ensure consistency and comparability to the 2011 results.

- 1. Population and sample.** The types of organisations within scope in this study were the same as those in 2011, meaning all those that undertake not-for-profit or public interest work relating to food and farming. This consists of a wide range of organisations from businesses, schools and research institutions to registered charities and community groups. We started with the list of organisations contacted during the 2011 census,ⁱⁱ and scanned for new organisations that have emerged since, with help from the organisations funding this work.
- 2. Design.** We created an online census using Survey Gizmo (www.surveygizmo.com). The census questions were adapted from the 2011 census, which was first developed by the 2011 Steering Group. The census is available online at www.foodissuescensus.org.
- 3. Data collection.** We sent invitations to participate in the online census by email to 573 organisations in July 2016. We targeted specific individuals when possible, to ensure they had the required organisational knowledge to complete the census, but also to minimise the risk of duplication. The census was shared among the networks of the commissioning funders and Sustain.

- 4. Result analysis.**ⁱⁱⁱ Of the 573 organisations that were contacted, 138 responded, with 112 answering all the questions. The response rate was 24%. This is lower than it was in 2011, when 332 organisations took part, with 244 responding all the questions. Forty-eight organisations participated both in 2011 and 2016. The data was cleaned by correcting typographical errors and removing duplicate responses. Following an initial review of the data, some outliers were identified and omitted from subsequent analysis.
- 5. Online tool.** We simplified and anonymised the data to create an online tool that organisations can use to explore the data in greater detail than the report allows. The tool was developed using TABLEAU by Oxford Consultants for Social Inclusion, and is available at www.foodissuescensus.org.
- 6. Case studies.** From the 69 organisations that responded to the question about what they were most proud of, nine case studies were selected. Six of these are represented in this report to illustrate examples that were inspiring and showcased the broad range in size, geographical location, issues and activities undertaken by CSOs in the sector. All nine case studies (the six in this report plus Brighton & Hove Food Partnership, the Soil Association's Food for Life initiative and Footprint Women's Centre) are available to read at www.foodissuescensus.org.

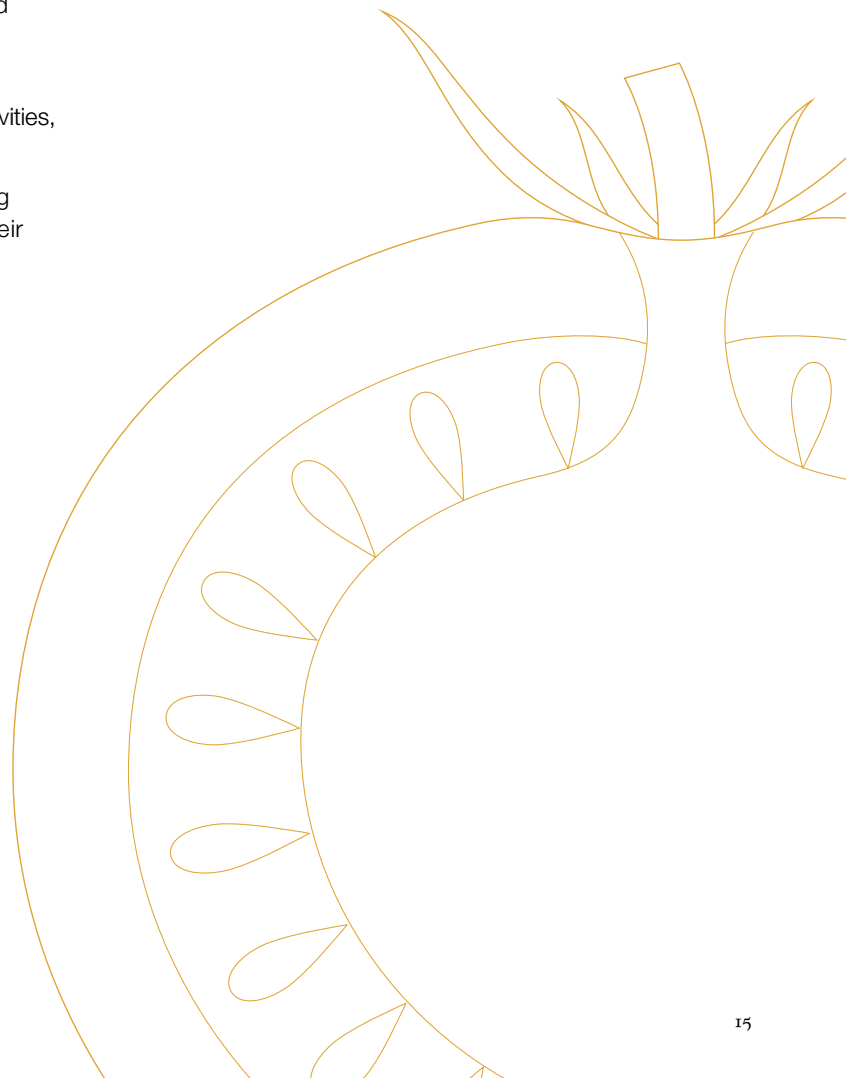
ii. The core invitation list for the original census consisted of organisations receiving food or farming-related funds from the grant-makers who commissioned the 2011 census; organisations listed as working on 'agriculture' in any of the first four 'Where the Green Grants Went' reports; recipients of funds under the Big Lottery Fund Local Food grants scheme; and members of Sustain: the alliance for better food and farming.

iii. Note: figures are approximate, and many organisations emphasised that their responses (in particularly estimates) should be treated with caution. The number of respondents to different questions varies. As there was only one Trade Union and one business, these were excluded from some analyses.

1.4 How the report is set out

- Chapter 2 describes the ‘landscape’, estimating the size and structure of the civil society sector working on food and farming, and looking at funding sources.
- Chapter 3 explores which issues are being worked on, comparing overall amount of time and money devoted to different areas.
- Chapter 4 explains how organisations seek to make a difference to those issues, looking at their strategies, activities, and the factors they see helping or hindering progress.
- Chapter 5 describes who organisations are partnering with, who they see as the principal beneficiaries of their work, and what the motivations of the participating organisations are.
- Chapter 6 sets out funding, capacity and collaboration needs.
- Chapter 7 considers the road ahead and implications for civil society, grant-makers and government (including policy solution ideas from respondents).

“We need to relearn food. [We need to] re-educate, especially around the notion that food should be cheap.”



Growing Together



Growing Together is a partnership initiative funded by the Big Lottery Fund that works with community growing groups across the UK. The project acts as a 'hot-house' for sustainable funding ideas, providing tailored support to community growing initiatives giving them the confidence, skills, and knowledge they need to move away from reliance on grants.

The programme helps to up-skill communities; kick-starts a cultural shift in income generation in the UK's community growing sector; and works together to influence policy. Advisors and a country-wide network of specialist consultants give help and support to community-managed growing projects. Growing Together showcases successful projects and provides tailored training to meet each community group's specific development needs. Training can include business planning, successful marketing, effective communications, selling to restaurants, cider making and aquaculture to name a few.

Growing Together's Local Heroes campaign inspires people to become a 'Local Hero' by taking action to support community growing groups in their neighbourhoods, many of which face a struggle to make ends meet. These include city farms, community gardens, community orchards, therapeutic and children's gardens together with many other sites. Most rely on voluntary support and need more help to thrive, particularly as less local authority grant funding is now available.

As the campaign develops, the project will emphasise how the public and business sector can support food growing activities, for example subscribing to a veg box scheme, visiting a group to buy produce, helping expand growing activities as a volunteer, or through the donation of skills or food growing equipment as a business.

The project has already had a positive impact. A recent external evaluation report found that groups receiving support from the project are very happy with the way they are receiving that support.

There are real opportunities to realise a permanent local food / community growing infrastructure across the UK that delivers multiple long-term benefits for local people and their communities. Working across the UK provides an amazing opportunity to share best practice with a wide variety of community growing sites in rural and urban areas. Growing Together staff have collated a number of insights that the project has highlighted.

For instance, running events and visits is a very effective way to give support to groups. Community growing groups like to see other projects and meet the people that run them so the majority of the training events we have run are either on or near a community growing site. Working with the corporate sector takes time and perseverance, but it is worth the effort, as the corporate sector can provide an array of resources to local groups. This can be through corporate challenge days, professional support with HR or legal issues, or providing tools and materials to projects.

Social media is a good way to share knowledge and gives extra support and profile-raising for Growing Together events. It can be used for highlighting inspirational and innovative ways in which groups are using food growing activities to raise income for their work, often in deprived areas or with vulnerable people.

www.growingtogether.community

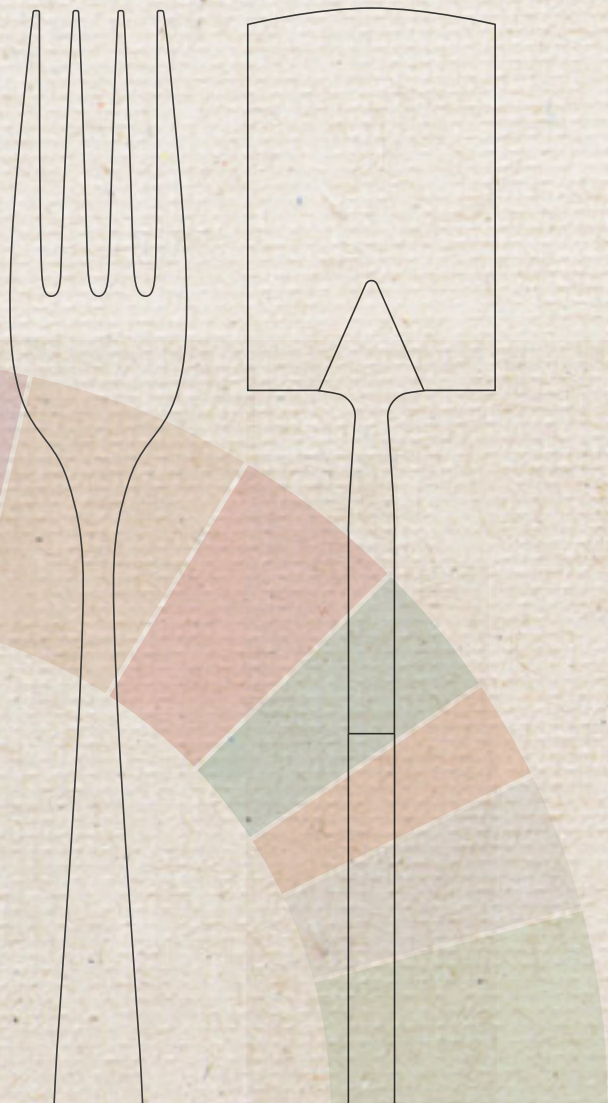
Find them on Facebook:

[growingtogether.community](https://www.facebook.com/growingtogether.community)

Follow them on twitter:

[@gtcommunities](https://twitter.com/gtcommunities)

2. Landscape



Top findings

Respondents had a combined total annual expenditure of £1.03 billion, of which £151 million was on food and farming. So, expenditure on food and farming related issues represented 15% of total expenditure.

Civil society work on food or farming issues remains predominantly funded by the public sector, down 4% from 2011.

However, in terms of the *number* of grants, UK third sector funding sources are more popular.

Almost one in five (19%) of respondents received EU funding for the previous financial year. For these organisations, an average of 21% of their funding came from the EU.

42% of respondents said they had received the same level of funding as three years ago and over 40% said their income levels had gone up (either higher or significantly higher).

Our 2011 census was the first ever effort to develop a picture of the voluntary sector on food and farming – covering everything from small-scale, local initiatives to well-known, large, national (or even global) organisations. How has the landscape changed in the past five to six years? How many organisations, and people within them, work on food and farming – and how much time and money do they spend? How has the new economic landscape affected the sector? Where do organisations get their funding and how dependent is the sector on EU funding?

2.1 Overview: a best estimate of the sector

Based on our assessment of the survey's coverage, we estimate that UK civil society as a whole, at most, spends £900 million per year on food and farming issues, employs 14,000 FTE staff and mobilises many more thousands of FTE volunteers,^{iv} for up to 17,000 (mostly small) organisations¹⁷ (see table 2.1). Our lowest estimates for 2016 indicate that CSOs could be spending under half that amount of time and money on food and farming.^v

This implies a contraction since 2011 in the number of organisations (2011: 10,000-25,000) and staff (2011: 8,000-20,000). However, it is not possible to confirm if such a contraction has indeed taken place, given that both the 2011 baseline and 2016 figures are best estimates only.

iv. It is not possible to give an accurate estimate of volunteers, as different organisations appear to have interpreted the term 'volunteers' in very different ways. By way of indicative figures, the original Census estimated there were between 32,000 and 80,000 volunteers (FTE) working in civil society organisations on food or farming issues in 2011, four times as many as best estimates for number of staff (FTE).

v. 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 (i.e. including organisations not surveyed or that did not respond) we have estimated the proportion of organisations working in this sector that are represented in this survey. This is on the assumption that for organisations with expenditures under £20k, we have an extremely low coverage rate (0.05 to 0.1%), and for those between £20k and £150k, and over £150k per year, a medium coverage of 15-40% and 20-50% respectively. We have assumed the ratio of staff (FTEs) to organisation has remained the same as in 2011 for the purposes of calculating estimates here.

The National Council for Voluntary Organisations (NCVO) estimates that the UK has 163,000 voluntary organisations, with 827,000 employees, with a total estimated income of £44 billion in 2015.¹⁸ The Charity Commission estimates 164,000 charities in England and Wales in 2014,¹⁹ while the Scottish Council for Voluntary Organisations estimates an additional 23,700 charities in Scotland, out of a total of 45,000 voluntary organisations.²⁰ In relation to the voluntary sector as a whole, NCVO reports that there was a sharp increase in the number of 'super-major' charities (with an income of over £100 million) in the period 2008/09-2013/14²¹ – perhaps at the expense of some of the smaller civil society organisations.

Table 2.1: Civil society estimates for food and farming

| | Low | High |
|--------------------------------|-------|--------|
| Number of organisations | 8,000 | 17,000 |
| Expenditure (£ million) | 350 | 900 |
| Staff (FTEs) | 6,500 | 14,000 |

Figure 2.1: Types of participating organisations

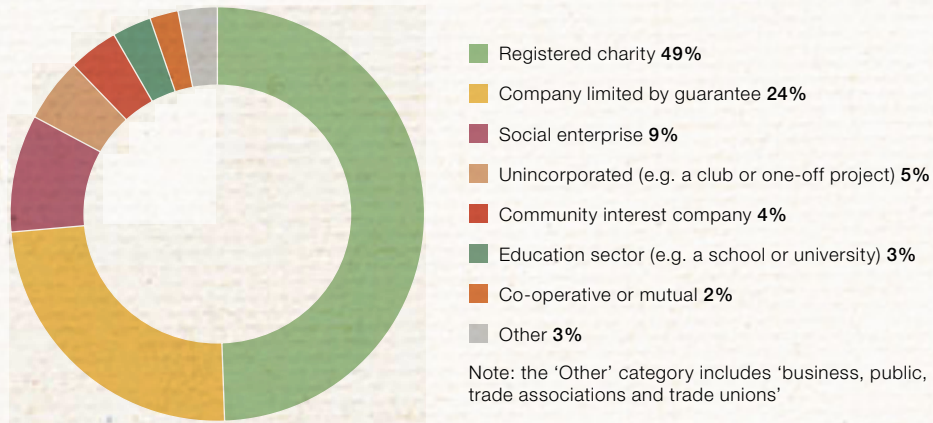
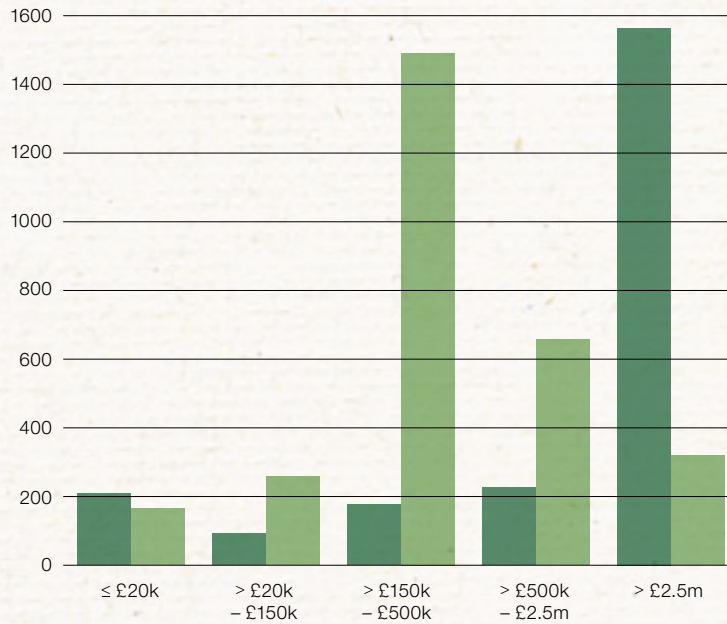
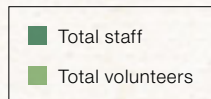


Figure 2.2: Staff and volunteer distribution split by organisational size of respondents

Number of staff and volunteers (FTE) spent on food and farming split by size of CSO



2.2 What and where?

The organisations that completed the census are very diverse and included community groups, food co-operatives, campaign groups, large scale membership charities, networks, schools and educational institutions, and many more, working from farm to fork (figure 2.1). The majority (63%) of organisations were registered charities (slightly higher than 2011's 48%), closely followed by Companies limited by guarantee (34%), and Social Enterprises (12%).^{vi} To the best of our knowledge, the 'network' organisations that filled in the census completed it with information for their 'umbrella' organisation, rather than for all their members, to avoid the risk of duplication.

2.3 Scale

Of the organisations participating in the census, the largest proportion worked both at an international and national scale (44%; up from 27% in 2011), with only four organisations exclusively working outside the UK (but receiving UK funding). A further 29% worked exclusively in the UK (across all regions, England, Scotland, Northern Ireland and Wales), and 26% worked locally or regionally (table 2.2). For those working within the UK, 46% worked in England, 16% in Northern Ireland, 16%, 19% in Scotland, and 19% in Wales.

Table 2.2: Civil society estimates for food and farming

| Share of time on food and farming | Inter-national | National | Regional or Local | Total |
|-----------------------------------|----------------|------------|-------------------|-------------|
| All (100%) | 18% | 13% | 8% | 39% |
| Much (>25%) | 18% | 6% | 8% | 32% |
| Little (<25%) | 8% | 10% | 10% | 28% |
| Total | 44% | 29% | 26% | 100% |

Note: Totals may not equal 100% because of rounding.

“It takes time to build a successful campaign and the kind of change most of us want for the food system does not come [...] over the course of a ‘grant year’. So few funders offer [more than 1 year], yet without it small innovative groups like ours are in danger of serious burn out and/or eventual demise.”

vi. Note: respondents could classify their organisation under more than one heading (e.g. as a registered charity and a company limited by guarantee), hence totals do not add up to 100%.

Figure 2.3: Proportion of respondent organisations split by organisational size

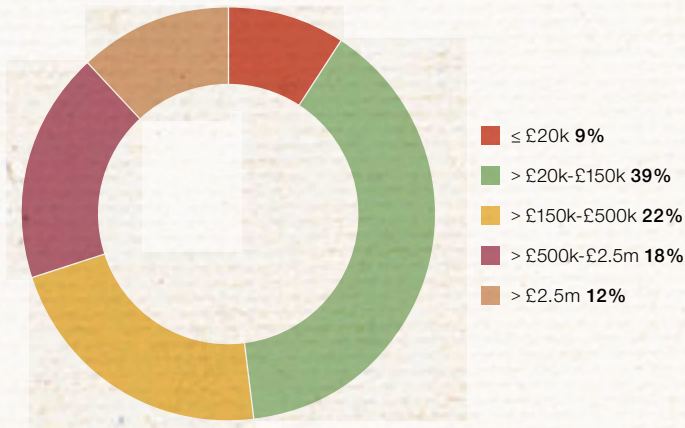
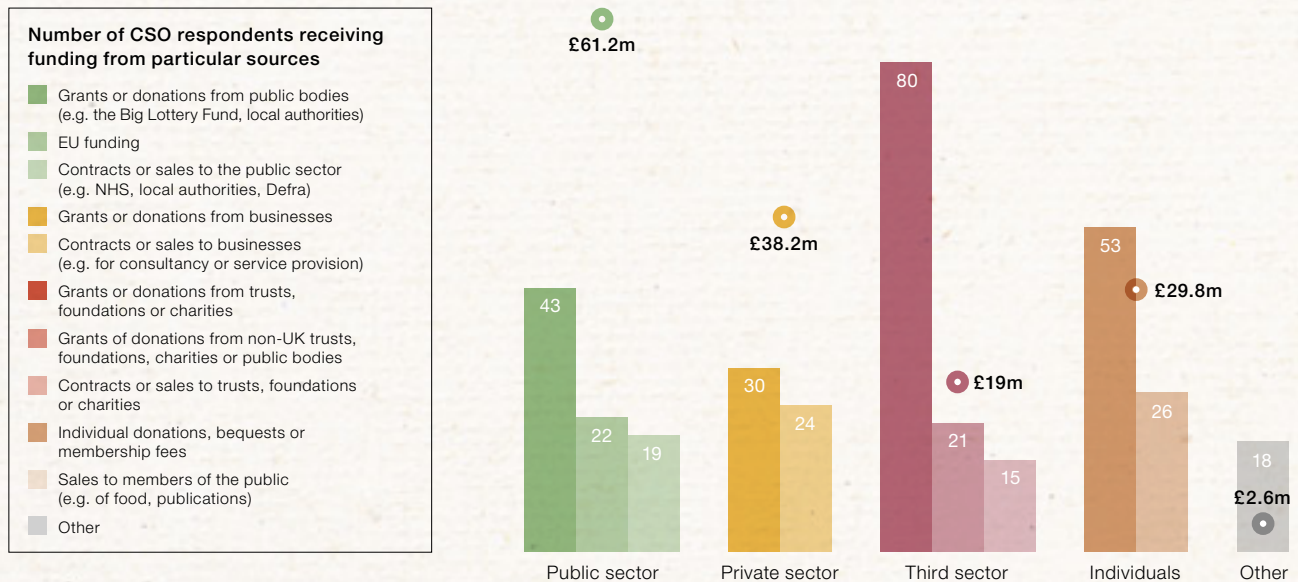


Figure 2.4: Total funding per source and number of CSO respondents receiving funding from particular sources



2.4 Workforce

In total, UK-based organisations that completed the survey employed 2,095 FTE (Full Time Equivalent) staff and had a total of 1,639 FTE volunteers working on food or farming issues, out of a total workforce for respondent organisations of 41,153^{vii} FTE staff and 87,360 volunteers (figure 2.2). This means that only 5% of the CSO workforce works on food and farming issues. Note that volunteer estimates in particular should be treated with caution as ‘volunteers’ are defined differently by different organisations.

The proportion of staff working on food and farming issues also saw a significant reduction, going from 15% of CSOs’ workforce in 2011 to only 5% in 2016. However, this figure should be treated with caution, given that results here are skewed heavily if one or two larger organisations complete the census in one year and not the other. Larger organisations that responded had more employees than all smaller organisation respondents put together. Mid-size organisations that completed the census had the highest proportion of volunteers.

These changes since 2011 may be a real shift or may simply be a change in the mix and size of respondents skewing the figures. Hence, the results should be treated with an element of caution.

vii. Note that one organisation completing the census in 2016 had 22,000 employees in total (of which only a very small proportion worked on food or farming), explaining the significant increase since 2011.

2.5 Expenditure

The UK-based organisations that completed the census had a combined total annual expenditure of £1.03 billion, of which £151 million was specifically on food and farming. So, expenditure on food and farming related issues represented 15% of total expenditure for respondent organisations, little change from the figure of 13% in 2011.

“The narrow-minded economic focus of public health, agricultural, environmental and social policy... [is] failing to take into proper account fairness, climate change, health impacts and future generations.”

The highest proportion of organisations’ expenditure on food and farming ranged between £20k and £150k (39%; see figure 2.3). Organisations with food and farming expenditure under £20k represented only 9% of total participating organisations, which is considerably lower than in 2011 (35%). This could be because these organisations have reduced capacity and did not have the time to complete the census, or it could be because funding pressures have caused some smaller CSOs to close.

In relation to this, the National Council for Voluntary Organisations (NCVO) highlights the rise of super-major organisations and the fact that smaller charities are more financially volatile: “The three smaller income bands experienced decreases in overall income and were less financially secure.”¹⁸

2.6 Funding

We asked participants what proportion of their funding came from public or private funding, the third sector, individuals or other sources. We categorised the different sectors as follows:

- Public sector: grants or donations from public bodies (e.g. the Big Lottery Fund or local authorities), contracts or sales to the public sector (e.g. NHS, local authorities, Defra), and EU funding
- Private sector: grants or donations from businesses, and contracts or sales to businesses (e.g. for consultancy or service provision)
- Third sector: grants or donations from trusts, foundations or charities, grants of donations from non-UK trusts, foundations, charities or public bodies, and contracts or sales to trusts, foundations or charities
- Individuals: Individual donations, bequests or membership fees, and sales to members of the public (e.g. of food, publications)
- Others (with an option to specify)

The relative proportion of funding from these different sources has not changed significantly in comparison to 2011, except for the rise in total funding from the private sector, which accounted for 25% of total funding (£38 million) from respondents in this census. This is significantly higher than in 2011, where it was only 17% of total funding (less than £30 million). This census found that civil society work on food or farming issues remains predominantly funded by the public sector, but that this proportion has reduced slightly (from 45% in 2011 to 41% in 2016). This is likely to be due to public spending cuts and the fact that the Big Lottery Fund (which the survey counted as 'public sector') has closed its Local Food grants scheme in the period since the original census.

Organisation type did not affect how dependent organisations were on public funding, but Companies limited by guarantee, education organisations and co-operative or mutual organisations were more dependent on third sector funding than other organisations (47%, 49% and 73% respectively).

Funding was fairly evenly distributed across geographical regions, although international organisations relied more on private funding than national or local ones.

In monetary terms, the public sector is the biggest source of funding for respondent organisations (figure 2.4). However, in terms of the number of grants, the most popular source is UK third sector grants, followed by individual donations, bequests or membership fees. This suggests that public sector sources tend to be larger in size.

Third sector grants are clearly the funding lifeblood for lots of civil society organisations. The challenge of an increasingly competitive funding landscape is that CSOs spend a lot of time and effort on fundraising, which may not always pay back if it is mostly smaller third sector grants that they are chasing.

Different organisation types relied, on average, on different types of funding sources (figure 2.5). Sources of income classified as 'other' by participants primarily included funding from investments and reserves.

Figure 2.5: Funding sources for different CSO types

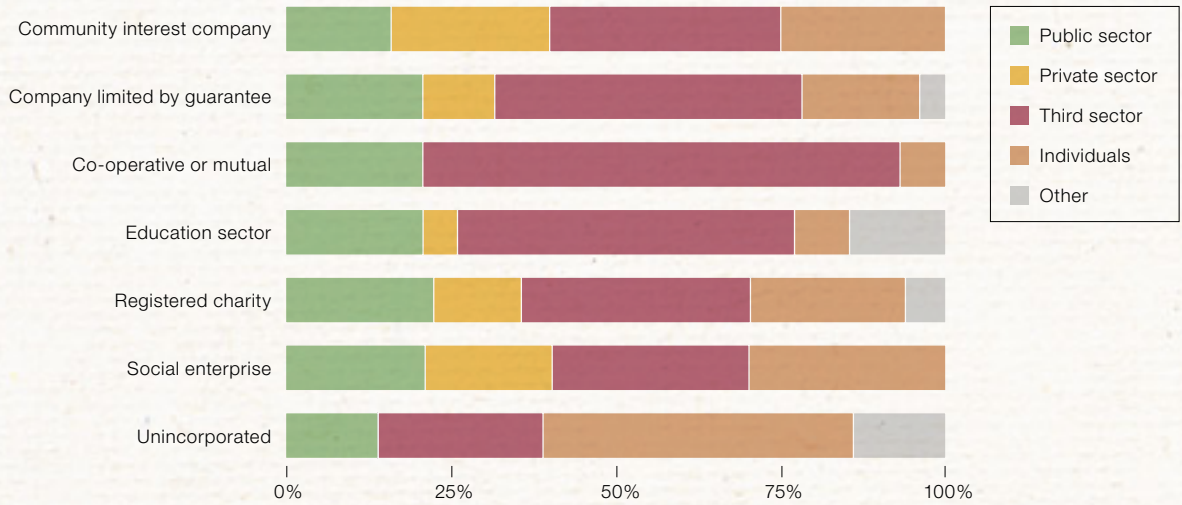
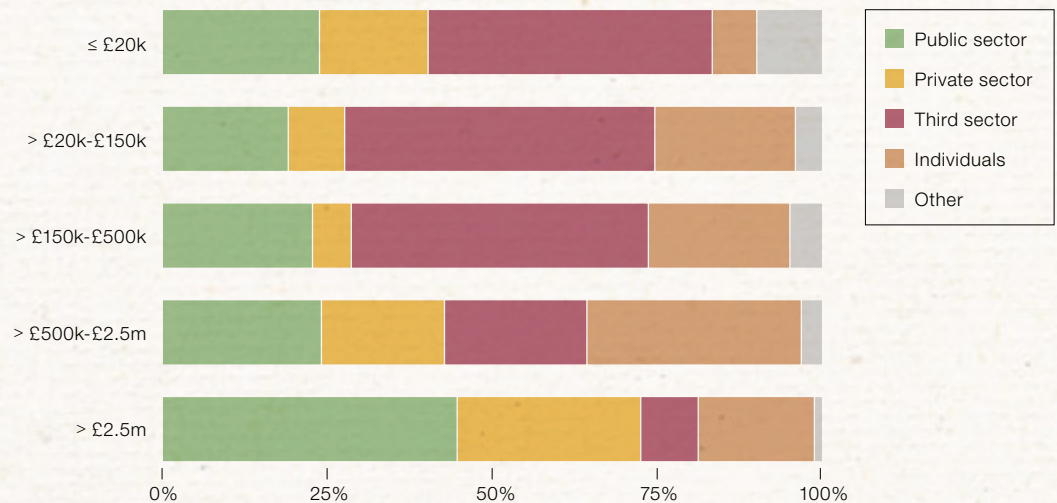


Figure 2.6: Sources of funding for different sizes of CSO respondents



Income source per expenditure bracket

Whilst 41% of funds in total came from the public sector across expenditure brackets, the picture changes when looking at the distribution of funding among different-sized organisations (figure 2.6). Small to medium organisations (<£500k) received most of their income from the third sector (predominantly grants or contracts from trusts and foundations, amounting to between 45% and 47% of income). Trusts and foundations remained the most important income stream for many smaller organisations. As noted in 2011, this “suggests that the diversity of activity within the sector depends substantially on such funding.”²²

In contrast, large organisations (>£500k) relied more on private funding (up to 28% of their income). For very large organisations (>£2.5m), 45% of funds came from public funding.

The importance of EU funding to civil society work on food and farming

One critical question relates to the reliance that organisations have on EU funding, given that, as currently expected, EU funds are likely to be closed off (or at the very least much harder to reach) in the future.

Almost one in five (19%) of respondents received EU funding for the previous financial year. For these organisations, an average of 21% of their funding came from the EU, although this varied greatly (from 1% to 60%). Most of these organisations worked on an international scale (86%), and had an income ranging from £150k and £500k (32%).

A total of £13.6 million was given to respondents directly from EU funding sources for food and farming activities (1.3% of total expenditure). It is important to note that other sources of funding may rely on EU funding themselves, therefore the total reliance on EU funding – direct and indirect – may be higher than this.

This represents an important shift in the funding landscape for food and farming CSOs, and one that is, undoubtedly, already being addressed at a strategic level by both CSO funders and fundees. It remains to be seen what impact this potential loss of funding will have on the sector, and whether (and where) CSOs will be able to make up the shortfall.

New funding sources and income changes in the past three years

Of the 112 respondents that fully completed the census, 48% (53) have had new sources of funding in the past three years (figure 2.7). Of those who received funding via new sources since 2011, 26% had that funding from grants or donations from trusts, and 17% had funding from grants or donations from public bodies (e.g. the Big Lottery Fund or local authorities). This would suggest that there is an increased demand for grants and donations from trusts and public bodies. There do not appear to be significantly more third sector funders operating in the food and farming field than there were in 2011, but the census does not quantify this.

Respondents were asked how their organisation's income for their work on food and farming issues has changed compared to three years ago. Forty-two percent of respondents said they had received the same level of funding and over 40% said their income levels had gone up (either higher or significantly higher). The caveat to this is that some organisations who received lower or significantly lower income will have gone out of business in the period since the 2011 census, which may distort the findings. Nevertheless, the apparent increase in income for a large proportion of CSOs that still exist and are still working on food and farming is an encouraging sign (figure 2.8).

Figure 2.7: Where new sources of funding have come from in the last three years (2013 to 2016)

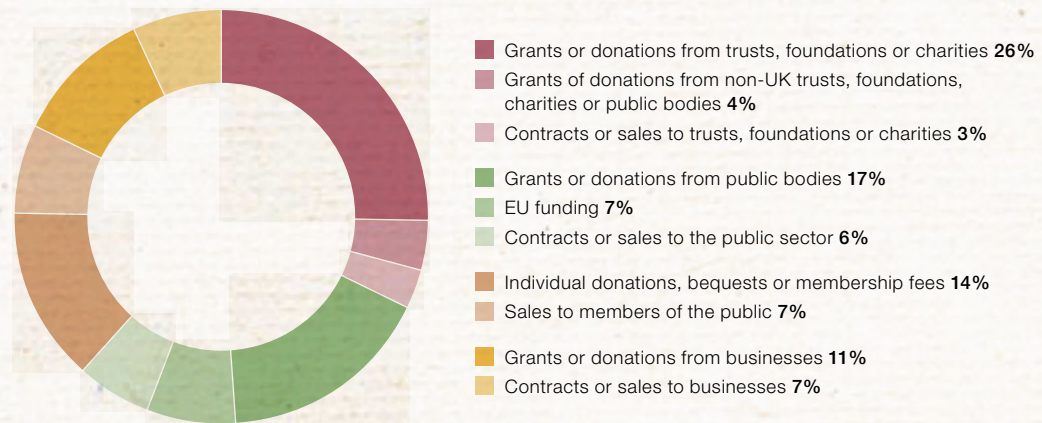
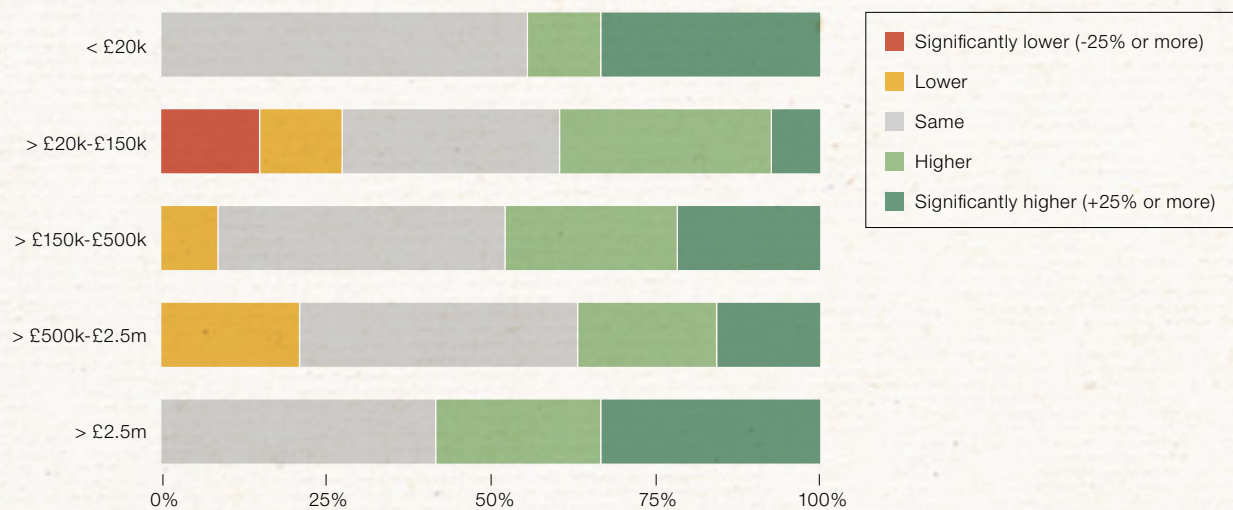


Figure 2.8: How income for work on food and farming has changed in different sized organisations in the last three years



Cornwall and Isles of Scilly Fisheries Animateur



This local project supporting small-scale fishermen was established by the Cornwall Rural Community Charity (CRCC), a small infrastructure charity with a passion to make Cornwall vibrant, sustainable and inclusive.

An Animateur was employed to support Cornwall's award of EU fisheries funding with diversification, equal opportunities, environmental sustainability and innovation underpinning the programme.

The Animateur helped develop and grow projects, securing funding and supporting applicants through the process and claims. Effort was focused on smaller projects supporting day fishers, adding value and growing the local food supply. Over 60% of funding for the Animateur came from the European Fisheries Fund 'axis 4 Local Action', and it has supported over 70 projects over 2 years.

Dreckly Fish is a co-operative of four fishermen using digital technology and social media to reduce the supply chain and sell directly to consumers. The Animateur and FLAG helped them develop a business plan which led to vital grant funding for the business to invest and train in IT. This created a platform for them to sell high value shellfish direct to customers using innovative methods such as live Twitter auctions whilst still at sea.

Digital technology also gave the fishermen an instant global channel through which to promote their sustainable fishing methods, the types of food they catch, and to share daily lives and stories with customers. The fishermen also received other business support such as branding and design, allowing them to highlight the sustainability of their products.

The co-operative is now totally self-sustaining, and has developed a high reputation in the food industry. It is one of the few seafood businesses catching and selling direct to customers. Fishers engage with customers on a daily basis, sharing photos, stories and short video clips of their daily lives, from baiting pots and heading out of the harbour, to fishing and sending the catch to customers.

The Animateur has provided support to many other small-scale fishermen in Cornwall. These include projects to reduce the impact on the marine environment by replacing shellfish pots with a new design that only targets a certain species and greatly reduces the amount of by-catch. The projects have been 80% grant aided and older pots destroyed and removed from fishing.

The Animateur and FLAG have also supported the Cornwall Good Seafood Guide, which creates a local (Cornish) version of the Marine Conservation Society rating guide. This local version more accurately represents regional waters and fish stocks, helps promote small scale fishermen and their stories by creating fishermen profiles, raises awareness about under-utilised species and provides recipes for Cornish seafood. This has been accompanied by a series of public promotional events that engage with communities young and old, and build a brand and celebrate Cornish seafood.

Good seafood guide, a Cornwall Wildlife Trust initiative:
cornwallgoodseafoodguide.org.uk

The animateur is supported by SeafarersUK and works in partnership with the Cornwall Development Company on the European Maritime & Fisheries Fund:
cornwallrcc.org.uk

3. Issues



Top findings

Respondents most commonly worked on issues (in order) relating to local food, food poverty & access, farming & horticulture, community development, sustainable production, and climate change.

Farming and health clusters got the most staff and volunteer time. The environment and local clusters had the highest expenditure.

Food poverty moved from 15th place in 2011 to 2nd in 2016 in terms of number of organisations working on the issue.

3.1 Introduction

Food is central to many social, environmental and financial issues, from food poverty to waste and biodiversity (see Box 1). The impact food has on these issues, and the impact they have, in turn, on food is incredibly diverse. This complex relationship is reflected in the wide range of work from organisations in the sector, from community projects to educational programmes, from national network organisations to campaigns against food poverty. Using an updated version of our 2011 list of identified issues (see 3.2 below), we went back to the sector to ask key questions such as: how time and money are currently distributed across this spectrum; and how much work goes towards addressing the environmental aspects of food or farming, for example, compared with health issues?^{viii}

3.2 Issues getting most and least attention

Summary

The survey asked respondents to provide best estimates of how their staff and volunteer time was spread across a set of 57 selected issues (with the option to specify other issues not on the list). 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. Issues were clustered into six categories in the 2011 census. In 2016, we updated the list of issues, but for continuity we kept the majority as in the original census. The same clusters were also used. For a breakdown of clusters, please refer to box 2.

The most represented cluster (in terms of number of organisations that worked on these issues) was environment (20%), followed by global (19%), local (18%), health (17%), farming (16%), and finally inclusion (1%). Within each of these clusters, distribution of issues varied a lot more (figure 3.1 overleaf). This chart shows that resources are not evenly distributed across clusters. There could be several reasons for this, such as certain issues requiring higher budgets, or being more labour intensive (requiring more staff or volunteers). We can see however that while the farming and health clusters get the most staff and volunteer time, the environment and local clusters have the highest expenditure.

Frequency distribution of issues

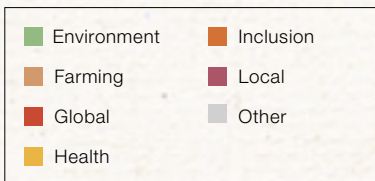
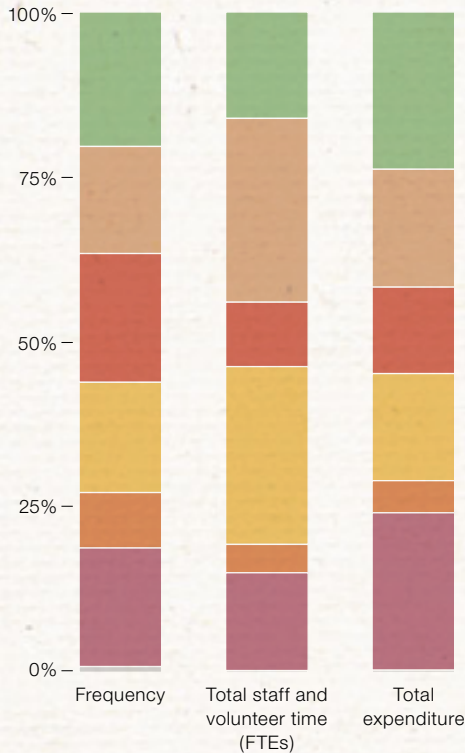
The organisations taking part in the census most commonly worked on issues (starting with the highest) relating to local food, food poverty & access, farming & horticulture, community development, sustainable production, and climate change (figure 3.2). Three of these come from the Environment cluster, which was the most frequently mentioned cluster among participants (20% of organisations). Local food, however, remains a strong favourite among participating organisations: it was the most frequently mentioned issue in our 2011 census.

The big mover is food poverty and access, which has moved from 15th place in 2011 to 2nd in 2016 in terms of number of organisations working on the issue. This corresponds with a considerable rise in the number of people estimated to be suffering from household food insecurity in the UK in that period (for which Trussell Trust figures are likely to be a low estimate⁵) and the greater civil society focus on the issue. Other notable moves up are waste (from 24th in 2011 to 13th in 2016), catering (from 27th to 16th) and public health policy (31st to 18th), which were all much more likely to be worked on in 2016 than in the original census.

viii. The results should be treated as indicative rather than being truly representative.

Figure 3.1: How resources are distributed by issue type (or cluster)

Note: distribution of expenditure assumes equal ratio of spending across issues.



Box 2: Issue clusters

| | |
|---|---|
| Environment theme | Farming theme |
| Air pollution Aquaculture Biodiversity Energy use & efficiency Fish stocks Land use & ownership Landscape preservation Marine ecosystems Recycling Soil health Sustainable consumption Sustainable production Water use | Animal feed Animal husbandry Antibiotics & other animal drugs Farming & horticulture Fertilisers Food processing & manufacturing Organics Permaculture Pesticides Urban agriculture Slaughter |
| Global theme | Health theme |
| Agricultural policy Climate change Corporate power Emergency relief Fair trade Food security Global hunger GM & biotechnology Labour conditions Nanotechnology Rural economy Technology & innovation Trade policy | Additives Adult health & nutrition Child health & nutrition Consumer protection Food poverty & access Food safety & hygiene Infant health & nutrition Market governance Public health policy |
| Inclusion theme | Local theme |
| Community development Participation & democracy Social inclusion | Food marketing Local food Retail Seasonal food Transport & distribution Catering Public procurement Waste |

Conversely, notable ‘fallers’ were biodiversity (4th to 9th), recycling (19th to 33rd) and water use (20th to 38th). Issues that were worked on the least included (in decreasing order) marine ecosystems, transport and distribution, consumer protection, emergency relief, air pollution, additives, and finally nanotechnology (which was not selected by any organisation). Nanotechnology and air pollution both came last in the original 2011 census.

Expenditure distribution on issues

Some issues are worked on by a lot of organisations, but only a little each. For example, one third of respondents told us that they worked on climate change, yet only three organisations spent more than 20% of their time on the subject. Hence the number of organisations working on an issue is only one measure to consider.

When looking at total expenditure the picture varies slightly, with 50% of spending concentrated on nine issues. In decreasing order, these are **retail** (including CSOs retailing food products directly and working to influence food retail), organics, food poverty and access, **child health & nutrition**, biodiversity, fish stocks, **sustainable production**, marine ecosystems and catering (figure 3.3). While the issues in bold were in the top 10 issues in terms of spend in 2011, the others have all moved up the table quite considerably.

Spending reported by respondents in 2016 is significantly higher than 2011 respondents for a number of these issues, particularly organics, which was second on the expenditure list in this survey, as opposed to 41st in 2011. Similarly, expenditure from respondents on the issue of food poverty & access was £6.3m in 2016, an almost threefold increase from the equivalent figure in 2011 (£2.2m), despite the number of survey respondents being lower in 2016.

The issue seeing the steepest fall was animal husbandry – the issue on which most was spent by respondents in 2011 (albeit this work was concentrated in relatively few organisations). In 2016 it dropped outside of the top 10 issues by expenditure level. Does this imply animal husbandry – and farm animal welfare issues - are regarded as less of a concern in the UK than they were previously or has this become an underfunded area?

Local food also fell sharply down the rankings in terms of total expenditure, from 12th in 2011 to 23rd in 2016, despite being top of the rankings in terms of number of respondent organisations working on the issue. The fall is likely to be because fewer small, local civil society organisations completed the census in 2016 than in 2011. Whether there is a genuine significant decline in spending on local food is difficult to gauge.

Workforce distribution on issues

Most staff time was spent (in decreasing order) on farming and horticulture, food poverty and access (up from being ranked 28th in 2011), child health and nutrition, biodiversity, retail and organics. Most of these issues fall under the environment and health clusters.

Whilst the issue on which most staff worked was farming and horticulture, it was only ranked tenth in terms of expenditure. Similarly, issues of seasonal food and animal husbandry were both in the top 10 in terms of number of staff (with seasonal food up from 42nd in 2011 to seventh in 2016), but both ranked much lower in terms of spending on these issues. Does this imply that farming and horticulture, seasonal food and animal husbandry are underfunded?

Figure 3.2: How many organisations worked on each issue?

Arrows denote change in ranking from 2011 census.

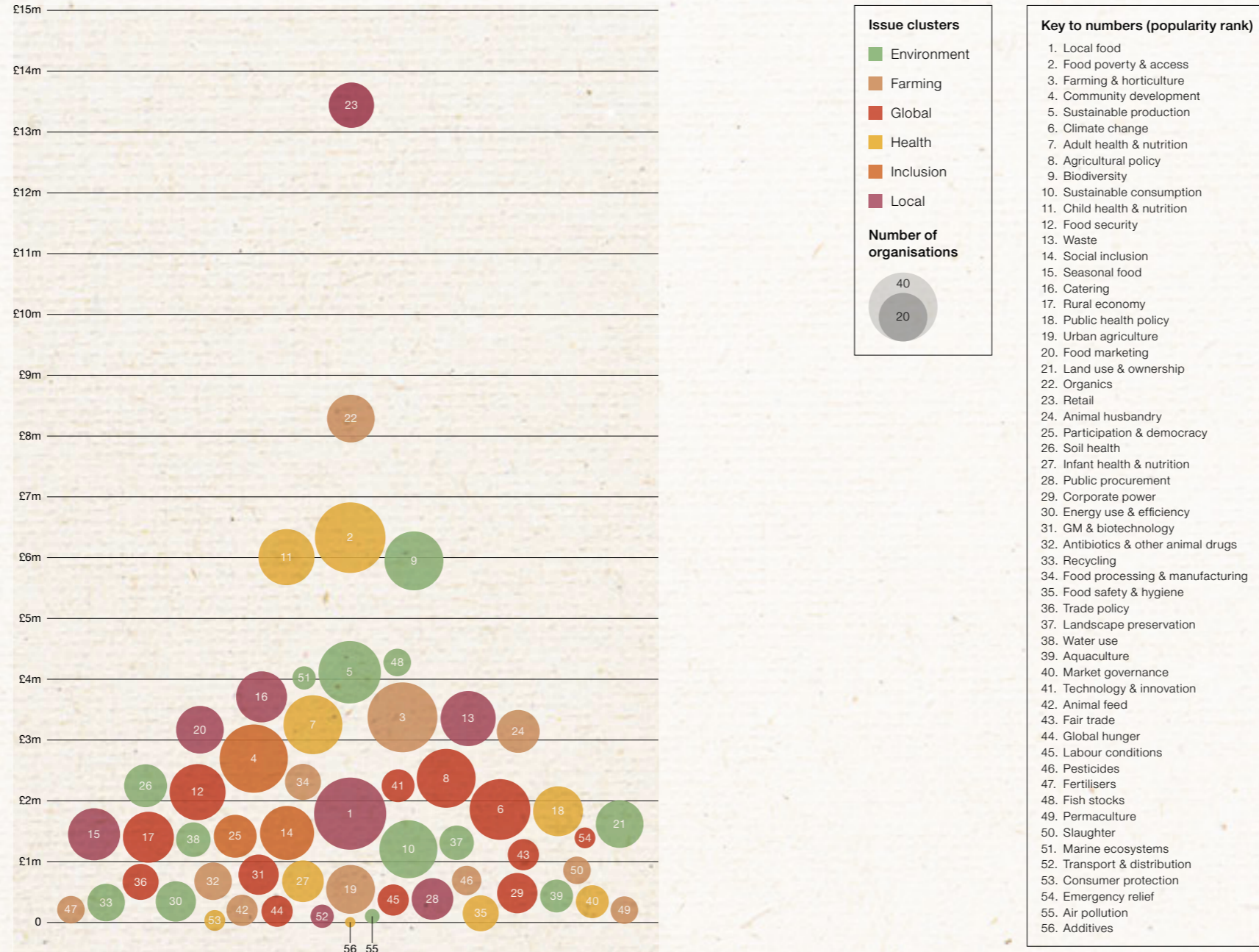


Figure 3.3: How much money was spent on each issue?

Arrows denote change in ranking from 2011 census.



Figure 3.4: Popularity versus expenditure for each issue



“[For greater impact, there is a need to] identify areas of common interest and agreement with representatives at every level of food supply chains, and build coalitions to influence emerging UK government policy.”

3.3 Gaps in issue expenditure

There was a disparity between the issues that got the most funding and those that were most popular among civil society organisations (figure 3.4). For instance, the issue that benefited from the most funding, with 12% of total respondents’ expenditure on food and farming, was retail (whether CSOs retailing food products directly or working to influence food retail), up from ninth in 2011. This is despite only being ranked 23rd in issue popularity (i.e. number of organisations working on this issue). Meanwhile, farming & horticulture, local food, food poverty & access, and community development, while prioritised by 18% of participants, received only 12% of total funding. It is possible to speculate that some CSOs may feel compelled to work on (seemingly) ‘sexier’ issues, rather than working on (what may be perceived) as less ‘fashionable’ issues such as pesticides or air pollution, that arguably need a lot more funding and a lot more CSO work. As with our 2011 survey, these rankings provide an overview of how effort is spent, but they should be treated with a little caution, as some sectors are likely to be under-represented in the survey.

Nourish



Nourish initiated and co-convened the Scottish Food Coalition to broaden collective civil society engagement in food issues. It took inspiration from the 'Square Meal' report and saw an opportunity to influence further development of the Scottish Government's 'Good Food Nation' policy (which Nourish had already influenced). Rather than focus on one issue, Nourish sought to build a collective commitment to tackling a range of food issues in parallel, including food insecurity, biodiversity, climate change, public health, workers' rights, farm support policy and animal welfare. The work was funded by Scottish Environment Link, the Tudor Trust and Esmée Fairbairn Foundation.

The project has already achieved the following:

- A joint report 'Plenty: food, farming and health in a new Scotland', calling for a just transition in the food system. This was debated in Parliament in March 2016.
- A series of hustings on food and farming issues in the run-up to the 2016 Scottish election, a fringe meeting at the SNP Party Conference, plus engagement with manifesto teams from all parties. This led to one of the key asks – a cross-cutting food farming and health bill – being included in SNP, Labour and Green manifestos. The Bill is now in the programme for government, with consultation starting in 2017.
- Maintaining and broadening coalition engagement. RSPB co-convenes the coalition (also lending its reputation and access to its highly competent Parliamentary team) and Nourish has active involvement from Unite, Unison, Soil Association, food research networks, allotments and community growing, Scottish Crofting Federation, Common Weal, Diabetes Scotland, Cancer Research UK and others.
- Discussion documents to inform the consultation on the Good Food Nation bill, and a series of seven parliamentary events from January to June 2017 to brief legislators on food policy issues, drawing on global best practice.

In response to the report from the short-life working group on food poverty (to which Nourish contributed significantly), the Scottish Government confirmed it will consider building the 'right to food' into the Good Food Nation bill. Overall, the project has made it difficult for the forthcoming food bill to be narrowly focused. It has also (post-EU referendum) created the possibility of connecting discussions of agricultural support with wider public policy goals. This work has been distinctive in the high level of cohesion within the coalition, and the willingness of participating organisations to look broader than their specific agendas.

External enablers

Many external factors have helped this project be effective: an existing national food policy, strong focus from the Scottish Government on social justice issues, some organisations' previous experience of co-operative working, on the Procurement Reform Act, Climate Change Act and in Environment Link.

Funding

Current funding supports 2-3 days per week of staff input, and this means that the coalition depends on active support from all core members, help with room hire, printing costs, catering for events and so on.

Time

The most challenging aspect has been reaching agreement on timing. It would be easier to first come up with five or 10 key asks for the Bill. However, it is important to have an extensive, inclusive process of public engagement in this pre-legislative phase, bearing in mind there is a danger of waiting too long and finding the Bill team has already started work on the shape of the legislation.

Transferability

While Scotland has a commitment to joined-up food policy, this has not yet been established in England. The system in England is larger, more compartmentalised and less committed to an inclusive, rights-based agenda. However, there may be enough common cause for civil society to make the case for a joined-up food policy and food bill.

4. Approaches

Top findings

Activities with the highest expenditure were service provision (average 29%) and research (average 22%). Expenditure on service provision was double what it was in 2011 despite the lower number of respondents.

Only 4% of expenditure went on education, 2% on fundraising and 3% on coordination and capacity-building.

41% of respondents said the government was the biggest hindrance to addressing food and farming issues (up from 34% in 2011).

To create the biggest positive impact on the food system, respondents told us that the sector needs to collaborate, build a unified response and develop a louder voice.

Core funding represents the most effective form of funding, say respondents.



CSOs take a wide range of approaches to address the particular food and farming issues that they work on. Some work on activities that make an immediate difference on the ground, such as providing food to people in need or community gardening. Others focus on campaigning or lobbying, to change the rules of the game, looking to the medium- and long-term. Different strategies can require different types of funding and face different challenges and opportunities. This chapter provides evidence to inform debates between NGOs, funders, policymakers and others on the most appropriate balance of effort between different approaches, for instance between service provision and advocacy, or between incremental and radical change.

4.1 Activities

Respondents were asked how they distributed their time across a range of activities, including:

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

Expenditure on different activities

Activities with the highest expenditure were service provision (average 29%) and research (average 22%) across all types of organisations (figure 4.1). However, the activity that most respondents took part in was education (18% of total frequency). Note: the list of activities that respondents could choose from differed slightly from the 2011 census, hence it is difficult to draw many direct comparisons. Nevertheless, it is worth noting that expenditure on service provision was double what it was in 2011 despite the lower number of respondents in this census. This may be linked to an emerging gap in public sector service provision in recent years – a gap that is increasingly being plugged (or trying to be) by civil society organisations.

Across organisations, expenditure on service increased from 11% in 2011 to 29%, while only 4% was spent on education (a drop from 13% in 2011). Two percent went on fundraising and 3% on coordination and capacity-building. Lobbying only accounted for 4% of expenditure. Expenditure on activism has increased (from 3% in 2011 to 10% in 2016). Meanwhile, despite lobbying and fundraising being highlighted as areas that needed more expenditure in 2011, organisations have not been able to allocate more funds to these activities.

Figure 4.1: Spending on activities

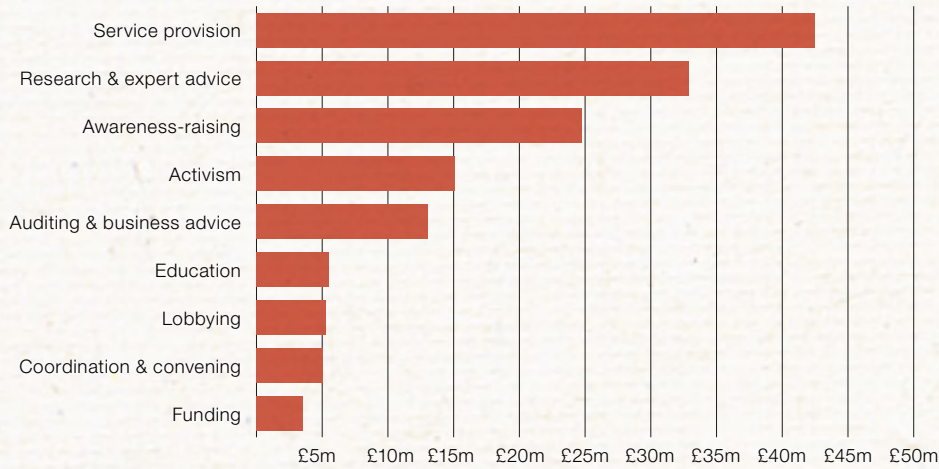
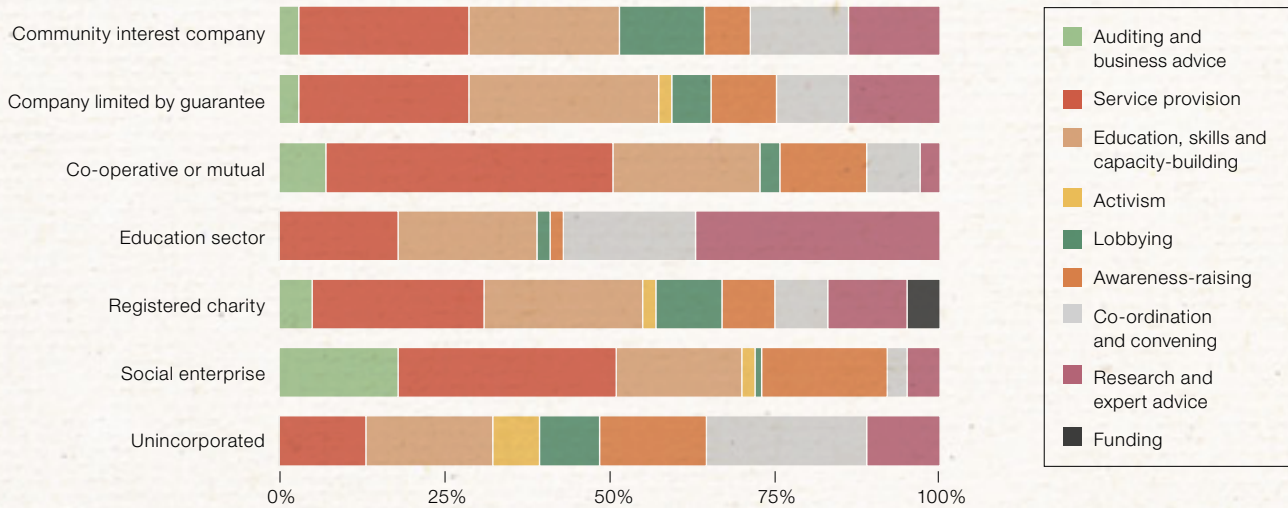


Figure 4.2: Percentage of time spent on different activities split by type of organisation



Spending varied between organisation type

The largest proportion of expenditure of registered charities, social enterprise and Co-operatives/Mutuals went on service provision and education (figure 4.2). Note: results were omitted where only one response was received in that category (trade association, trade union, business or public sector) to avoid those organisations being identifiable in the anonymised set of results.

Popularity of activities

Education was cited as the activity most people took part in by 18% of total respondents, yet only made up 4% of total expenditure (figure 4.3). This is a similar story to lobbying (mentioned by 13% of organisations and 4% of expenditure) and co-ordination and convening (14% of organisations, and 3% of expenditure). So, there is a mismatch between the number of organisations taking part in certain activities and their respective spending on those activities. This could suggest that a lot of CSOs are doing a little each on education, lobbying and/ or co-ordination and convening, or it might mean that organisations are using other unrestricted funding to 'top up' paying for certain activities.

4.2 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?" It also asked them to identify who or what is doing most to hinder efforts. The actors most commonly cited as helping food and farming were progressive NGOs (Sustain, the Soil Association and Sustainable Food Cities were the most frequently mentioned, in that order), funders (particularly Esmée Fairbairn Foundation), forward-looking businesses, celebrity chefs (Jamie Oliver and Hugh Fearnley-Whittingstall were mentioned) and grassroots groups and networks.

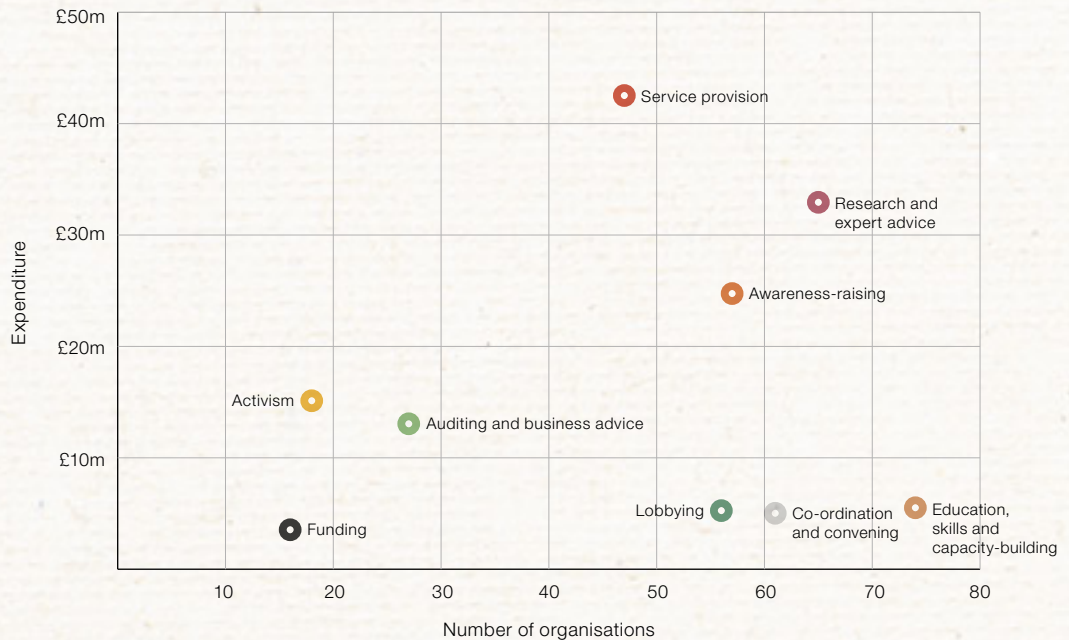
Other organisations highlighted more than once include Compassion in World Farming, the Oxford Real Farming Conference, Via Campesina and Nourish Scotland. For those that addressed the question of what is helping rather than who, a willingness to collaborate was emphasised as being important by some, as well as a willingness to volunteer.

Overall, responses for helping and hindering were broadly similar to the 2011 census. The major hindrance identified in 2016 was the (UK) Government, which (if you include specific government departments) was mentioned by 41% of respondents, up from 34% in 2011. This was almost four times more than the next most commonly cited response, namely farm unions (such as the National Farmers Union – which was mentioned by a few as helpers too).

Brexit and 'the EU' were also referenced as hindering efforts (but the EU less often than Brexit). The food industry – and particularly major supermarkets – were held up by multiple respondents as hindering progress.

Some respondents commented on the need to go against the status quo and "*beyond vested interests*", whether that meant the UK Government (including Devolved Administrations) or "*industry representative bodies who defend the status quo and negatively influence their members*". Another said "*There's an absence of informed grass roots participation in a debate which tends to be dominated by vested farming interests. Those same vested interests, accommodated by unimaginative national governments ... [are hindering] ...*"

Figure 4.3: Popularity of activity versus expenditure on it



4.3 How the sector can create the biggest impact

The survey included an open question about what the sector needs to do to create the biggest positive impact on the food system. Whilst this received a wide range of responses, the most common theme was the need to collaborate, build a unified response and develop a louder voice. Respondents also commonly highlighted the importance of reaching out to others outside the sector, rather than partnering solely within it. A selection of comments give a flavour of the responses:

“Scale up collaboration to engage society as a whole and not just preach to the converted.”

“The sector needs to have a stronger voice with united representation from businesses, voluntary organisations and consumers.”

“A unified response to the priorities for a new farming policy post Brexit, agreement re most practical workable solutions to delivering it and overcoming ... [the] divide between green NGOs and the NFU.”

“Obtain clarity on the usp/strengths of key organisations to avoid overlap and duplication and highlight potentially powerful partnerships.”

A few respondents linked the importance of collaboration to the upcoming challenges posed by the UK’s negotiated exit from the EU. For instance, there was a call to “... provide a compelling vision of a post-Brexit policy & engage the public to support it and push for it.”

4.4 Funding challenges

Those funders that were regarded as progressive and already supportive of food and farming were praised by a number of respondents, with Esmée Fairbairn Foundation most frequently cited. As noted elsewhere, there is some fantastic work being delivered by CSOs which is genuinely making a difference – on the ground and at a policy level (albeit the latter might be felt more slowly). Yet many CSOs told us that they are finding it hard to secure sufficient funds, particularly unrestricted core funding.

When prompted about challenges for funders (and potential funders), a number of themes were highlighted. Several respondents were concerned with the availability of financial support for tried and tested work. As one put it, *“Funders want ... new and innovative projects all the time. Really amazing work already ongoing is not sufficiently valued.”*

Another claimed there was *“A misplaced bias on the part of funders to avoid taking on the power structures that prevent farmers from occupying positions of commercial power.”* Yet another suggested that what is needed is *“More large-scale strategic unrestricted funding ... [to] drive creative partnerships.”*

This is all in the context of a challenging economic climate, budget cuts and uncertainty over the UK’s future role in the EU (and the rest of the world). Public sector funding is likely to continue to be squeezed. Many trusts and foundations that fund food and farming work are experiencing an upsurge in applications, while those UK CSOs currently relying on EU grants are likely to have to find alternative sources of funding.

One of the pleas from some respondents was for funders to consider multi-year funding, which would give them greater security and allow them to plan more effectively. Economic uncertainty can breed volatility in the financial markets, hence trusts and foundations may face challenges in delivering sufficient investment returns to enable them to increase – or even maintain – levels of expenditure on grants.

4.5 The value of unrestricted funding

One question put to respondents regarded the opportunities they have been able to pursue using core or unrestricted funding that they would have been unable to pursue otherwise. In summary, CSOs report that they have been able to deliver a great deal with core or unrestricted funding in the last three years. This includes an impressive range of activities from delivering cookery lessons to organising parliamentary events; from responding formally to public consultations to setting up pop-up kitchens; from fork lift drive training to fishing for litter. Two issues several respondents highlighted as particularly benefitting from unrestricted funding were tackling food poverty and food aid provision.

The most frequently cited activities were training, advocacy (including at EU level) and coalition/partnership building, particularly amongst national charities. For CSOs operating at a local community level, the range of activities provided by core funding was very diverse.

Core funding has allowed organisations to participate in strategic networks, including *“unfunded support for alliance work such as the Eating Better Alliance (less but better meat).”* A number of respondents also noted that unrestricted funding freed them up to focus on further fundraising and *“income-generating projects e.g. food hub (and) online sales platform.”*

Existing and prospective funders will have different approaches to offering core or restricted funding. However, our findings in this census suggest that – perhaps unsurprisingly – core, unrestricted funding is something many civil society organisations would love to have.

FareShare FoodCloud



FareShare has been working with the food industry for over 20 years to redistribute surplus food from the supply chain to people in need. In 2015, FareShare partnered with Tesco, the UK's biggest retailer, and Irish social enterprise FoodCloud, to develop a new scheme aiming to help UK retailers address the issue of edible surplus food they may have within their stores. The scheme brings together the technology platform developed by FoodCloud in Ireland and FareShare's knowledge of the UK charity food redistribution market, with a simple and safe solution that connects businesses that have surplus food to charities in the community.

FareShare FoodCloud ensures that charities and community groups are safely matched with a suitable Tesco store and that they are fully supported in getting the most out of their local collections. Tesco has invested significantly in the people and technology required to deliver a reliable and well managed programme.

FareShare FoodCloud has developed into a leading store level solution and enables good surplus food to be redistributed directly from stores to frontline organisations, leading to a reduction in waste and more people being fed. By the end of 2016, over 3,300 charities and community groups were collecting food from more than 900 Tesco stores, and this is set to grow even further with the rollout of the scheme in Tesco express stores during 2017. Enough food for 5 million meals for people in need has been collected from stores.

Beneficiaries of the scheme come from a wide range of charities including homeless hostels, women's refuges and breakfast clubs for disadvantaged children as well as projects supporting older people and people struggling with addiction. By accessing this food, the charities are better able to engage with their beneficiaries and provide them with additional support so they can get back on their feet. Tesco colleague engagement and satisfaction has improved as employees are now equipped to ensure that good food at store level isn't wasted.

Together FareShare and Tesco hope to share learnings so the project can be rolled out to other retailers to reduce food waste at supermarket level and help feed people in the local community. In October Tesco and FareShare won the Sustainable Futures Award for rolling out FareShare FoodCloud and FareShare's Kris Gibbon-Walsh, who leads the team that delivers the FareShare FoodCloud programme, also scooped the Leading Light Award.

Key to the success of the partnership has been how three partner organisations have combined forces and added their key skills and knowledge.

FoodCloud brings its knowledge of the technology and online applications needed to connect businesses with charities.

FareShare brings its unique knowledge of the UK charity food redistribution market and its experience of providing food and on the ground support to a wide network of charities. FareShare works very closely and continuously with the charities that register with the scheme to ensure that they are equipped to handle the food safely and that collections become a part of their work processes. This ongoing on-the-ground support is instrumental in ensuring the development of local relations between the charity and their allocated store(s). These relations ultimately are built on mutual trust in all parties delivering on their commitment and very often lead to long-term links that have positive impact beyond the provision of food.

Tesco has shown organisation-wide commitment, from top management to colleagues working in stores, to roll out the programme across the whole store estate. Tesco has invested in staff training and in-house technology so that the programme is truly embedded and integrated into its systems and procedures.

Charities interested in taking part can register their interest here: fareshare.org.uk/fareshare-foodcloud

5. Partners, beneficiaries and motivations

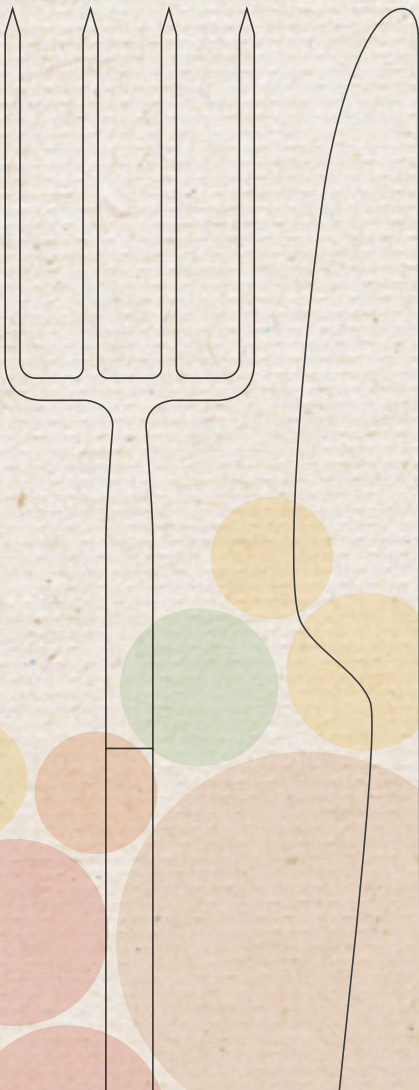
Top findings

Consumers and citizens were the top beneficiaries.

The environment motivated the largest number of CSOs.

For those organisations that already collaborate, the average number of partnerships was seven, a small but encouraging increase from 2011.

The top two partner organisations were the Soil Association and Sustain: the alliance for better food and farming.



5.1 Who are the intended beneficiaries?

Consumers and citizens remain top beneficiaries in 2016 (32% of organisations), while (farm and wild) animals remain low (5%). Ecosystems and nature have increased in popularity as respondents' key beneficiary (17%) since 2011, overtaking children and young people (13%). Otherwise, the ranking has remained fairly stable since 2011 (figure 5.1).

Funding sources

Based on both top beneficiaries and top funding source cited by recipients, it is possible to broadly illustrate trends in funding priorities. Ecosystems and nature had most support from the public sector: 35% of organisations whose primary focus was on ecosystems and nature listed public funding as their top funding source. All other beneficiary groups depended heavily on third sector funding: between 38% and 67% of organisations received their highest income from the third sector. Children and young people were top priority beneficiaries for 13% of organisations. Their funding came primarily from the third sector (43%), and individuals (21%). Issues affecting general consumers and citizens depended mostly on funding from the third (44%) and private sectors (25%). Wild animals, whilst only being prioritised by the smallest number of organisations, relied solely on individual funding, and farm animals were funded by a 50-50 split between individual donors and third sector funding.

5.2 Motivations

Respondents were asked: "How would you summarise the main motivation for your organisation's current work on food and farming issues?" As with the 2011 census, a range of ambitions and concerns motivate CSOs to do the work they do in this sector. A number of categories (sometimes overlapping) stood out, and there were no significant discernible differences in motivations cited compared to 2011.

The biggest motivation was the environment. Climate change and biodiversity loss were the environmental issues most specifically mentioned as motivators, with one respondent noting that "*Agriculture is the number one cause of biodiversity loss in Europe and worldwide.*" Second, and related, was a broad ambition of fair, sustainable food and farming, echoing a key set of motivations raised in 2011.

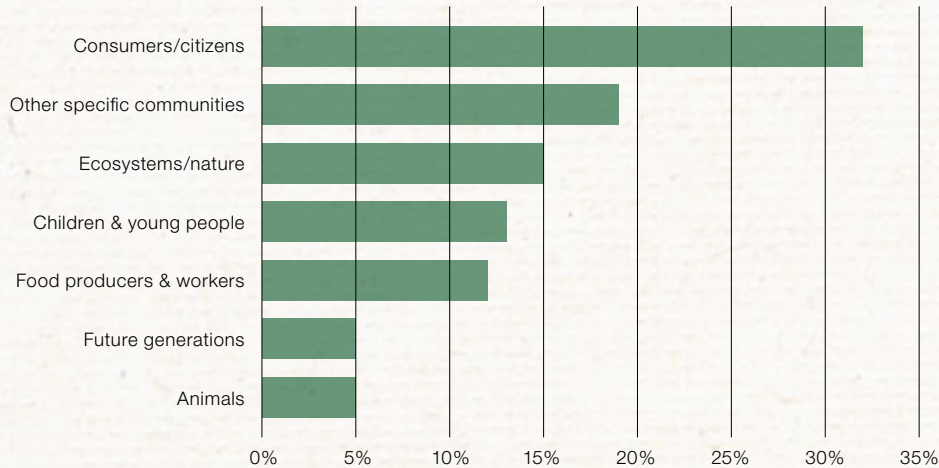
Third on the list was health and nutrition, and sustainable diets. Hunger, food poverty and access, was fourth, with one respondent saying: "*We are motivated by the sheer poverty and low income people from [named geographic area] are facing and we want our work to make a difference.*" Other commonly cited motivations included supporting local food communities and tackling food waste. Younger and future generations were also cited: "... *children leave school able to make inspired and informed decisions about their relationship to food ...*" and "... *ensuring future generations have access to healthy food and thriving nature.*"

5.3 Partnerships

The census asked respondents to name organisations (up to a maximum of 10) that they collaborate with in work on food and farming issues. The aim was to explore the extent to which organisations were working together, and how this varied across the sector. Effective partnering can create many benefits, as organisations bring different skillsets and networks in pursuing a common objective. As in the original census, the question was also helpful in identifying organisations that play a 'hub' role in their relationships with large numbers of other organisations. Identifying these organisations could be valuable in showing who is well-placed to co-ordinate collaborative initiatives on particular issues.

Figure 5.1: Top beneficiaries

Animals includes wild (1%) and domestic (4%) animals.



Number of partnerships

The average number of partnerships that organisations listed varied according to their size. Among the 99 that listed any partnerships, the average number was seven. This compares with a 2011 figure of just under six, which suggests a small but encouraging growth in partnership working. For organisations spending under £20,000 in the previous year, the average was 3.4, while for those spending over £2.5 million, the average was 7.4.

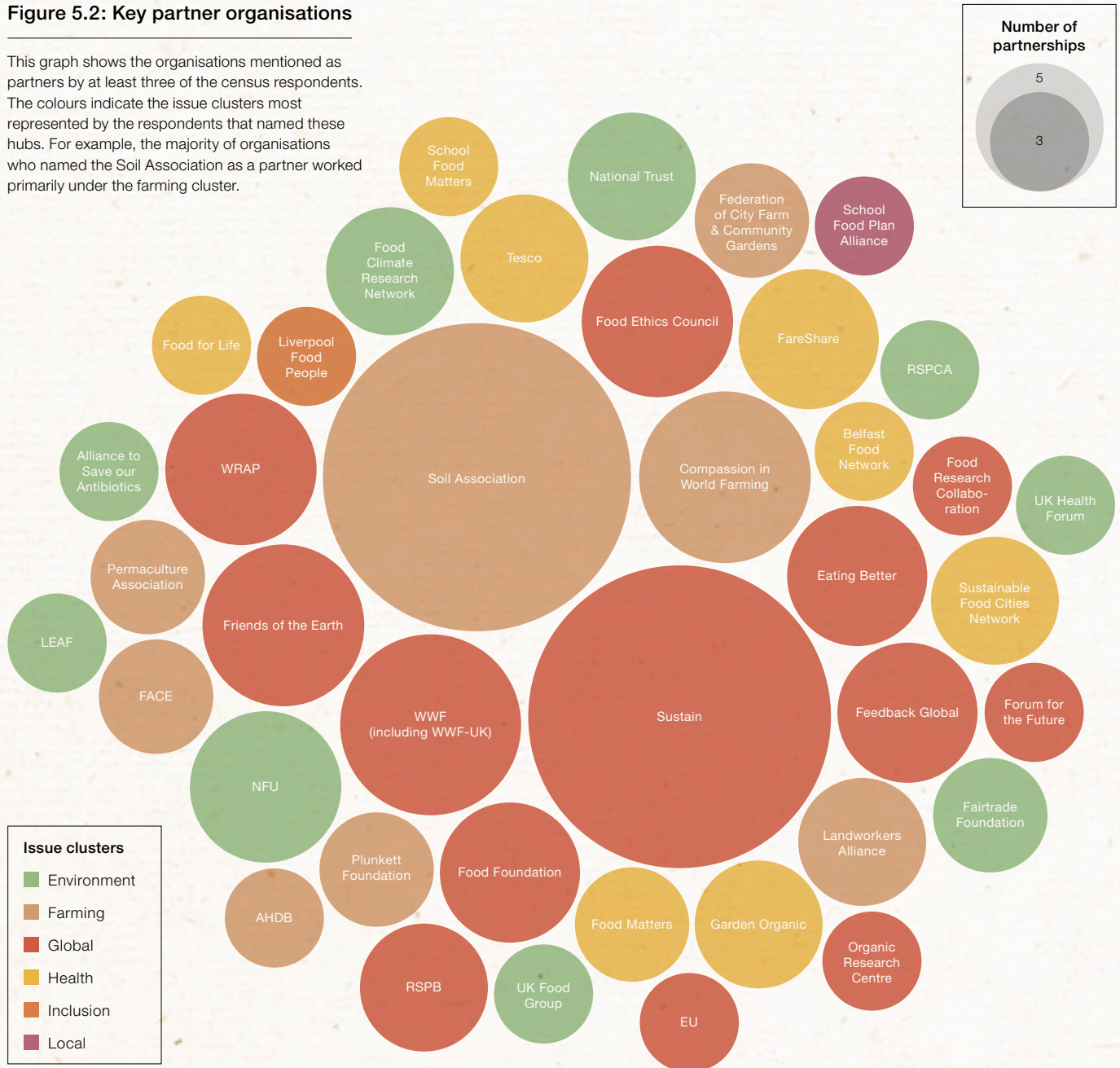
The Soil Association and Sustain were by far the most frequently listed as partner organisations (figure 5.2), which remains the same as the original 2011 census. Other frequently named partners included WWF (or WWF-UK), Compassion in World Farming, Friends of the Earth, the Food Ethics Council, the National Farmers Union, WRAP, Eating Better, FareShare, Feedback Global and the Food Foundation. Many of these featured in the top hub organisations in 2011.

Others appear in the list for the first time. Some did not exist at the time of the original census (e.g. the Eating Better alliance and the Food Foundation). Others have grown in prominence, in line with (or helping to drive) increased activity to address food waste and surplus food redistribution e.g. FareShare, Feedback Global and WRAP.

The Big Lottery Fund was one of the most frequently mentioned partner organisations in the original census, but it did not feature in the top list this time, perhaps because the Big Lottery Fund did not have a live local food funding programme in 2016, as it did back in 2010/11.

Figure 5.2: Key partner organisations

This graph shows the organisations mentioned as partners by at least three of the census respondents. The colours indicate the issue clusters most represented by the respondents that named these hubs. For example, the majority of organisations who named the Soil Association as a partner worked primarily under the farming cluster.



The Alliance to Save our Antibiotics

The Alliance to Save our Antibiotics was founded by Sustain, Compassion in World Farming and the Soil Association in 2009, and is supported by the Jeremy Coller Foundation. Today, the Alliance comprises 63 organisations from across the EU that span health, medical, environmental, animal welfare and civil society sectors.

The Alliance holds that routine antibiotic use is not necessary for the successful rearing of livestock, and campaigns for reductions to antibiotic use in livestock farming within Europe, to safeguard their efficacy for humans. While the overuse of antibiotics in human medicine has long been a recognised issue, the problem of veterinary overuse has tended to escape scrutiny. The Alliance was formed to shine the spotlight on this issue. It provides scientific evidence on the contribution of farm antibiotic use to human resistance, and it makes an evidenced-based case for farming practices that maintain animal health through good welfare and husbandry, not routine antibiotic use.

The Alliance's primary focus is on ending the routine, purely preventative mass medication of livestock – a practice it considers to be unacceptable. The Alliance is also calling for dramatic curbs to farm use of antibiotics classified as 'critically important' for humans.

The Alliance is increasingly confident that public debate on the profligate use of farm antibiotics has recently turned a corner. Its work has contributed greatly to the emergence of a broad consensus on the scale of this problem – and the need for greater action from the veterinary sector.

It has played a key part in influencing domestic and European policy, including the current EU reviews to the Veterinary Medicinal Products regulation, for which its suggested phrasing on routine prophylaxis was adopted in its entirety by the EU ENVI committee in early 2016.

It has secured unprecedented support from the human health and medical sectors. In November 2016, 16 signatories including Presidents representing the UK Royal Medical College and Societies signed its letter to the UK government calling for a ban to routine preventative mass medication of livestock. This was a hugely significant move.

The Alliance has worked hard to raise public awareness around farm antibiotic overuse. Between September and November 2016, its activities and investigations secured front page coverage in five UK national newspapers.

The results of its lab testing investigation (examining UK retail meat for resistance to key antibiotics for treating E. coli infections) were published alongside a public action which saw 10,000 individuals calling for supermarkets to tackle antibiotic use in supply chains. A corresponding Early Day Motion called on supermarkets to adopt such policies. This activity triggered unprecedented policy commitments from a major retailer and the FSA. The Alliance is pleased to see recent progress from the UK farming sector, and is committed to supporting further industry progress over the next few years.

The collective drive to tackle farm antibiotic use is entering a crucial stage. The Alliance is now close to winning the intellectual argument, and the need for action is widely accepted. Key to the campaign's success to date has been the Alliance's ability to evidence the contribution of farm-antibiotic use to human resistance.



Antimicrobial resistance science is complex. It is understood in depth by relatively few outside the scientific arena. It is also an issue ripe for distortion and the manipulation of facts. The Alliance's scientific expertise has enabled us to refute these claims and provide the latest in genuine scientific developments.

The Alliance has found great value in establishing strong partnerships in unlikely places. The diversity of its members, from the National Council of Women of Great Britain to ESCMID, the Royal College of Physicians and Greenpeace, has helped it reach new areas and provided real clout to its work.

It now faces the challenge of converting rhetoric into action and policy into practice. The level of ambition, and the course of action by which to achieve reductions are yet to be determined.

There are multiple voices attempting to capitalise on this 'empty space'. Some advocate new development of livestock units or increased bio-security. Others argue that reductions already taking place are 'adequate'. Very few prioritise a farming-systems or animal-welfare focus.

This challenge must be met with welfare-oriented solutions which consider economic viability, mid-term achievability, and options for how to mitigate any inadvertent consequences of action, such as reductions in farm incomes. As the Alliance moves towards finding solutions, it will support the leaders, scrutinise those lagging behind, and help build the market and policy levers that will incentivise positive action.

6. Funding, capacity and collaboration needs

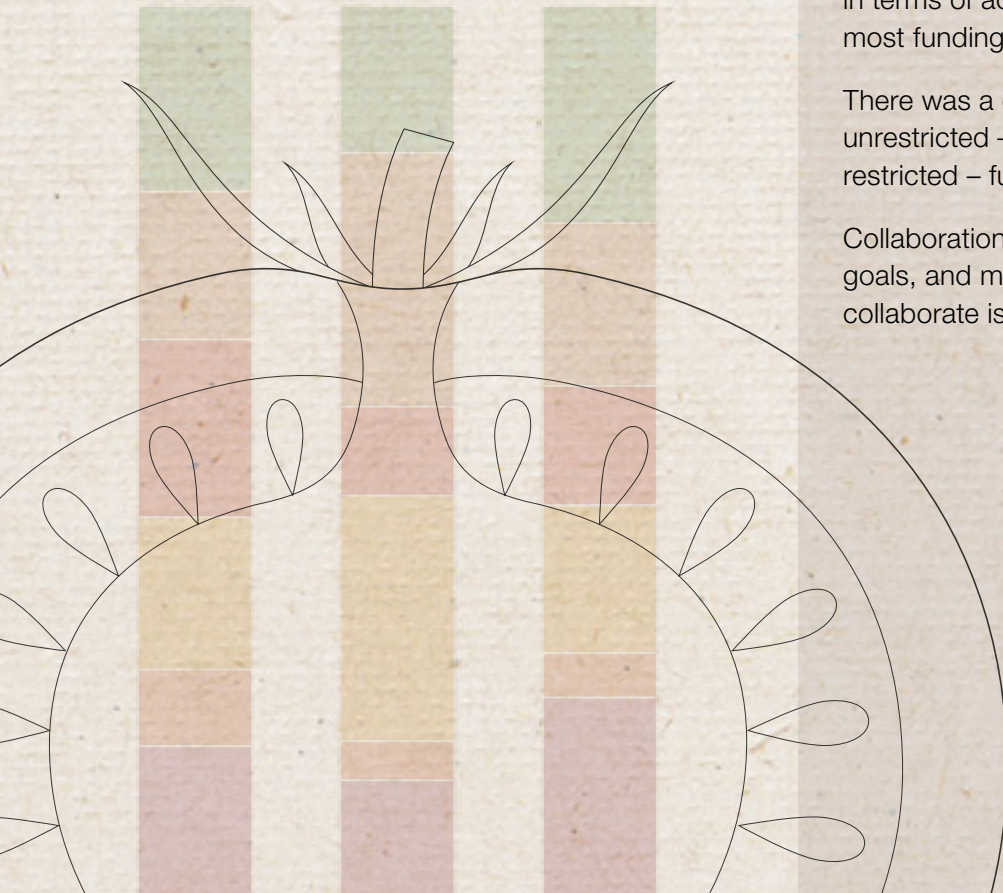
Top findings

The largest number of respondents said, in terms of issues, that food poverty needs more funding.

The largest number of respondents said, in terms of activities, training needed the most funding.

There was a general plea for more core, unrestricted – as opposed to project, restricted – funding.

Collaboration is key to achieving the sector's goals, and more funding for opportunities to collaborate is also important.



6.1 Introduction

A key objective of the census is to help funders understand the needs and priorities of civil society organisations working on food and/ or farming. In this chapter, we summarise responses to a number of questions we asked that relate to funding, capacity and collaboration needs.

6.2 Underfunded areas

We received a very wide range of answers when we asked about the issue or activity that would benefit most from more funding.

When similar responses were grouped together, the most frequently cited issue was food poverty and household insecurity (one respondent said that we need *“Solutions to food insecurity and chronic food poverty, and robust data collection about both”*). This is interesting, as – despite the apparent sizeable increase in funding into this area – civil society responses suggest that there is a lot more work to do. Other commonly mentioned issues included food waste (reduction and surplus food redistribution), local food, soils and sustainable diets.

In terms of activities that respondents felt needed more funding, there was a diversity of responses, but three broad themes emerged.

The first was training – both internal training of employees and external training of key stakeholders. This includes *“Training teachers and farmers to deliver powerful learning opportunities ...”*; *“Practitioner training and network building ...”* and *“Training hospitality professionals to add to the team of teachers taking food education into schools.”*

The second broad theme was campaigning, advocacy and policy, including *“capacity to engage in post-Brexit discussions.”* One respondent emphasised the need for funding for *“work to convene the progressive parts of the food sector to collaborate on developing joint responses to policy and market challenges which undermine the environmental health of UK agricultural land.”* This ties in with the theme of capacity to convene and the need to collaborate more effectively identified elsewhere in the survey. It reinforces findings from the 2011 census, which highlighted campaigning and lobbying as an area that was important yet difficult to fund. While slightly more collaboration seems to be happening, there does not appear to have been a significant increase in funding for lobbying and campaigning since 2011.

Thirdly, several respondents mentioned awareness raising, communications and outreach. For example, one respondent identified the need as: *“Outreach spreading knowledge of our findings to farmers and ordinary citizens. There is at present an insufficiently active debate, and as a result ... [there is] ... a weak understanding among citizens about the environmental impacts of farming.”*

6.3 Capacity building needs

A sizeable number of respondents wanted more capacity in general via more core funding, more staff and more volunteers. This was reflected in comments such as needing *“feet on the ground”* and desiring *“reliable longer term funding for paid staff including volunteer development and coordination”*. Another respondent sought *“bandwidth – people being able to read across the full range of issues and speak to multiple actors.”*

The most common response to capacity needs was an increasing focus on fundraising (featuring in around 10% of responses) – from core fundraising skills to “Connections to wealthy individuals – as many other organisations have more access for high net-worth donations”.

The second major category of responses related to communications – whether communications in general, “*web development and support for online learning and collaboration*”, digital skills and social media, or film/animation. The third related to research and included needs such as “*high level researchers with in depth understanding of food and farming issues*” as well as research into specific areas like farm-scale permaculture design and the corporate capture of seeds, to cite two examples.

Other skills or areas of expertise needed that were mentioned multiple times included marketing, monitoring and evaluation, campaign building, finance (including “*financial skills to enable the organisation to become self-standing*”), behaviour change, lobbying and policy. The diverse range of capacity building needs cited included everything from “*graphic designers with food system expertise*” to “*better farmer liaison*”, and from “*capital funding*” to “*capacity to better support grassroots activists*”.

Overall, responses implied it was challenging for civil society organisations to carve out the time and space to do what might be regarded as internal ‘foundational activities’ to ensure their organisations can deliver a positive, sustained impact in the future. The increasingly competitive funding environment may have forced some CSOs into taking a short-term approach, without the ‘luxury’ of core, organisational development funding to enable them to survive (or flourish) in the years ahead.

6.4 Enabling more collaboration

The need for more collaboration was a key finding from the Environmental Funders Network’s *Passionate Collaboration* report,²³ a survey of 140 UK environmental NGOs in 2013, and has been highlighted in a number of reports over the past few years.

Collaboration amongst CSOs (and others) appears to be growing. As one respondent noted: “*there is a much higher level of collaboration than when we started three years ago ... [and] ... Esmée Fairbairn [Foundation] ... [has] ... also played a strategic role.*”

We asked what would enable more collaboration. The most common responses were a plea for more time and more funding. A small number of respondents gave more specific suggestions, including “*funding streams that aided collaboration rather than competition*”, “*more systemic and integrated thinking and less working in silos*” and a “*national gathering focused on markets, customers – like the ORFC [Oxford Real Farming Conference] is focused on production.*”

The census has already suggested that CSOs working on food and farming are partnering more. Responses to the question on collaboration – and other questions about what is most needed – reinforce the notion that there is a healthy appetite for more (and more effective) collaboration amongst CSOs. Allowing CSOs to collaborate and build partnerships appears to be a key funding need.

Sustain's alliance campaign for a sugary drinks levy

In January 2013, Sustain: the alliance for better food and farming published the report 'Children's Future Fund' which examined the case for introducing fiscal measures to tackle obesity and promote a healthier, more sustainable diet. The report's top recommendation was for a sugary drinks duty, with the revenue used to pay for programmes that would improve children's health and the environment they grow up in. Since then, Sustain has championed a sugary drinks duty, and in April 2014 it secured funding for a one day a week campaigner to develop and progress the campaign more fully.

When the campaign for a sugary drinks duty was launched in January 2013, the idea was far outside of the political mainstream. What an achievement when a sugary drinks tax became a headline measure in March 2016's Budget, and was splashed across newspaper front pages the day after. It just shows how people and campaigns can change government policy and overcome the might of industry lobbying, vested interests and initially skeptical politicians. Together the alliance has achieved a great milestone in government intervention to improve children's diets and health. The campaign has sat alongside Sustain's renowned Children's Food Campaign (CFC) to make use of existing structures and networks of supporting organisations for campaign development and dissemination. The campaign for a sugary drinks levy has always been about an evidence-based policy which is targeted, proportionate and works. But by no means was success inevitable. CFC fully supports the Government's introduction of a soft drinks industry levy, as a bold and important first step to protect the future health of children. But it also needs to be accompanied by a range of government-led measures – including on protecting children from exposure to sugary food marketing and promotions – similar in ambition and regulatory force for the levy to have maximum effect.

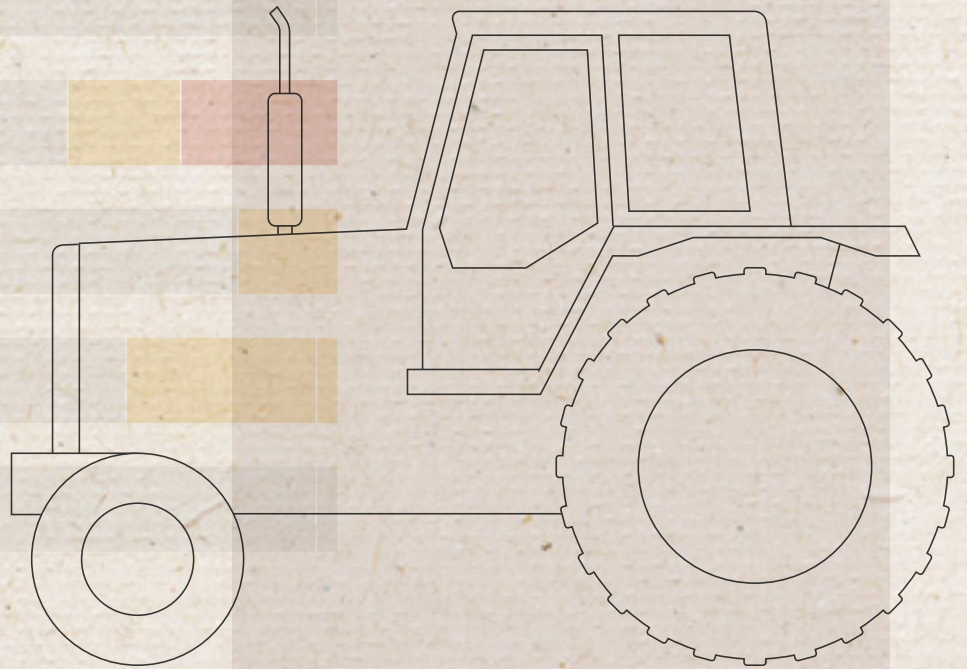
Key learnings:

- Don't be afraid of setting out a bold and radical policy solution – as long as you can back it up with evidence and a simple ask
- Make it easy for organisations to support your campaign, using inclusive language, asks, content
- Seek coalition partners to plug gaps in your argument, even if those partners are not so active. Citizens UK & trade unions helped us rebut 'tax hurts poorest' arguments; and dentists expanded the argument from obesity to dental health
- Personalise statistics and make them engaging (e.g. Sustain's sugary drinks tax impact calculator)
- Make yourself seem bigger than you are: showcase supporters; get known in industry and media circles and become one of their first points of contact
- Seize the moment; take advantage of high profile visual targets, e.g. Coca Cola's sponsorship of London Eye
- Pro-active myth busting, by taking argument to opponents, and incorporating positive phrasing of the case, rather than repeating their myths and trying to defend against them
- Celebrity involvement such as Jamie Oliver's profile, passion and expertise, married with Sustain's alliance of organisations and understanding of the evidence and case
- Ask for more in negotiations, and don't be afraid of testing barriers. Sustain made repeated asks to Petitions Committee and Health Committee about debates and giving evidence, following getting the requisite 100,000 signatures within 48 hours.

7. The road ahead



.....
“[We need to] identify areas of common interest and agreement with representatives at every level of food supply chains, and build coalitions to influence emerging UK government policy.”
.....



The food issues census is an attempt to build on the work of the first census by providing an up-to-date empirical overview of civil society work on food and farming issues. As already noted, the modest coverage of organisations working in this space and the nature of a survey of this kind mean that findings are tentative. Nevertheless, some clear messages about the future do emerge for funders and CSOs, which are briefly explored in this final chapter.

7.1 Civil society organisations

The need for civil society organisations to work on food and farming is undiminished; indeed many would argue it has grown in the last five years. The findings suggest that the sector remains diverse, although it is possible to deduce that a proportion of the (many) smaller organisations that took part in the 2011 census either no longer exist or have such limited capacity that responding to this survey was not possible. This might be part of a general trend in the voluntary sector, which includes consolidation of larger NGOs and sometimes smaller ones being squeezed out of existence. Whilst it is encouraging that more CSOs reported they had received new sources of funding in the past three years than those that said they hadn't received 'new money', the funding outlook looks challenging.

Many CSOs appear to be partnering more, and there is a strong appetite for more – and more focused – collaboration. This is particularly true for those working on policy, advocacy and campaigning, whose strategies have been turned on their heads overnight with the June 2016 EU referendum results.

As one respondent noted, the sector needs: *“better coordination, to pool resources effectively, for a bigger and more unified impact on priorities. There are no silver bullets, but there are critical issues that need priority attention, where going in unified and strong could make a big difference (e.g. sugary drinks tax; farm antibiotics).”* Another agreed that the sector needs *“to work together & focus on real drivers of harm not popular, traditional or feel good campaigns.”*

We urge those working in CSOs on food and farming issues to:

- Use the food issues census to inform grant proposals and to aid dialogue with grant-makers
- Emphasise and re-emphasise to prospective funders the need to support vital work on food and farming
- Continue to collaborate more where it makes sense to do so.

7.2 Grant-makers

We estimate that at best 2% of UK charity and voluntary sector income is spent working on food or farming issues, but, in reality, it might be closer to the less than 1% estimated in the 2011 census. Put in context against the scale of environmental, health, social justice and animal welfare issues that food is responsible for, £1-£2 in every £100 spent by the sector going towards tackling food or farming-related ills seems wholly inadequate. As more than £5 in every £6 spent by respondent organisations relates to non-food and farming work, there may be opportunities for grant-makers to look at their existing grantee base and to boost their funding for work on food and farming.

We urge grant-makers – both existing food sector funders and prospective food sector funders – to:

- Increase overall funding for food and farming, so it is commensurate with the scale of the challenges
- Be willing to offer unrestricted funding to allow CSOs the space to develop innovative ways of doing things and to collaborate more effectively.
- Specifically fund partnership working that allows for scaling up of best practice and amplifying CSO ability to advocate to government.
- Use this work to inform strategic thinking and help guide their funding approaches, to maximise the impact of their support. Grant-makers can take bold and joined-up approaches too – they are not the exclusive domains of CSOs or governments.

7.3 Government

Many different suggestions were put forward in response to the question “What single policy change do you think would most benefit food and farming systems?” Two sets of responses were particularly popular. The first was around the issue of farmer subsidies and finding a replacement for the Common Agricultural Policy e.g. *“Change subsidies policy to promote public goods”* or *“Changes ... to benefit small farmers.”* The second was the need for a coherent, joined-up Government vision, strategy and plan on food and farming that includes the environment and health.

Specific issues raised multiple times included climate change, local food, food in schools, issues relating to power and fairness in supply chains, and food waste (e.g. *“relaxing cosmetic standards on fruit and vegetables so more of the harvest is sold”*).

Ideas ranged from action that would affect local communities to those aimed at national level policy change, such as calls for a *“veg patch in all schools and food in every part of the curriculum”* and *“An official measure of food poverty, food insecurity or destitution.”* One respondent argued that *“a target of 20% local and organic food served in our schools, hospitals and other public places by 2020 is absolutely achievable; laws in other European countries set much higher targets ...”*

Another respondent argued: *“We need something as big and bold as the Climate Change Act, which affects policy and practice of businesses – mandatory reporting and accountability for key impacts would be helpful, and ... [reporting on] their direct and indirect impacts [including] worker incomes and welfare; disparities in pay; soil, water, nitrogen, pollinators, biodiversity; marine fish stocks; forests; greenhouse gas emissions.”*

A small number picked up on non-food policy areas (that affect food) such as *“Rent caps which would enable the public to spend more of their income on food”* and *“Changes to the welfare system.”* This highlights that when exploring policy solutions for our food systems, it is important to think beyond food policy solutions alone.

We urge the UK Government and Devolved Administrations to:

- Do more to make sure that CSO representatives from food and farming are round the table; listen to their views and reflect their concerns in policymaking at national and local levels
- Heed the call from civil society for a joined-up policy on food, farming, health and environment – a call that is likely to increase in volume if it goes unanswered
- Promote the importance of sustainable, healthy, humane and fair food and farming.

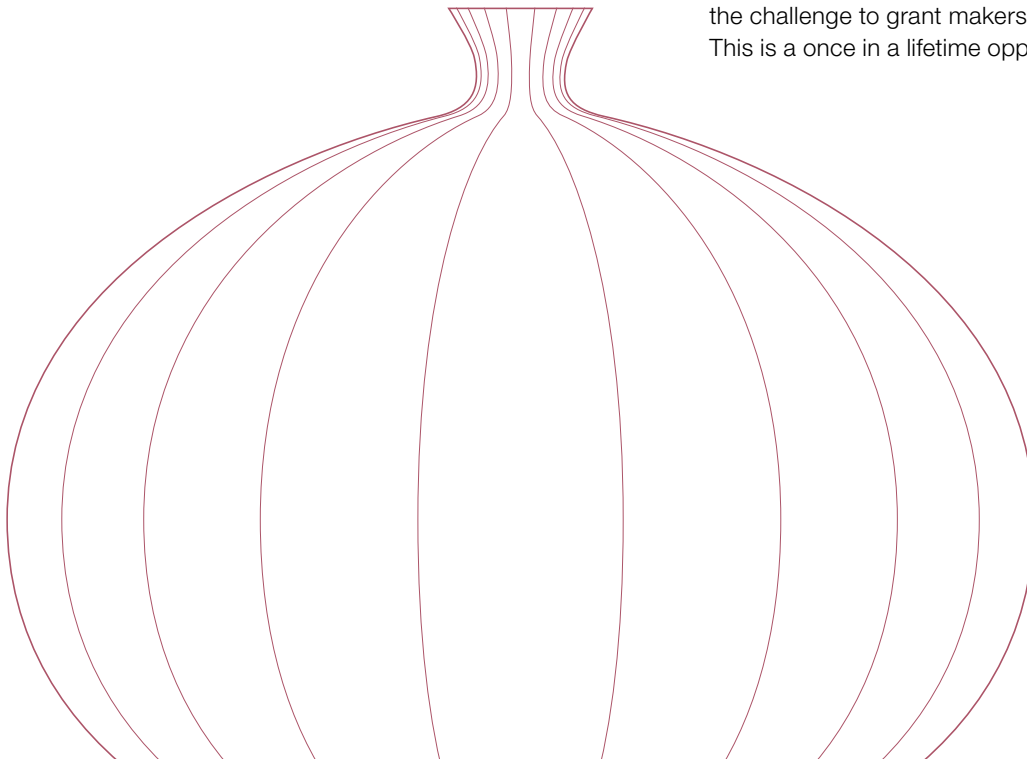
7.4 Closing comments – a golden opportunity to fund food and farming

Our survey has shown that food and farming is underfunded and under-resourced. And yet, as we have seen, the food system affects (and is affected by) every aspect of our lives, from our own health to that of the planet we rely on.

As we begin to negotiate the UK's exit from the EU, we are at the beginning of a political and cultural journey the like of which we have not experienced for many years. It is a journey that will significantly affect the UK's food system. Now is the time for CSOs to come together and make a unified case for sustainable food and farming that places equal value on human health and wellbeing, the environment and animal welfare.

“The UK’s departure from the EU provides an opportunity to think afresh about these issues and develop a truly sustainable suite of policies for the future of food and farming in the UK.”

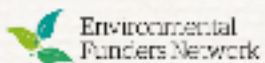
Only a significant step-up in funding will allow this opportunity to be seized. Grant makers have a crucial role to play in supporting CSOs to work in partnership to share best practice and to advocate to government with a loud and unified voice. Instead of asking “why fund food and farming,” the challenge to grant makers is “how can you not fund it?” This is a once in a lifetime opportunity: let’s not let it slip away.



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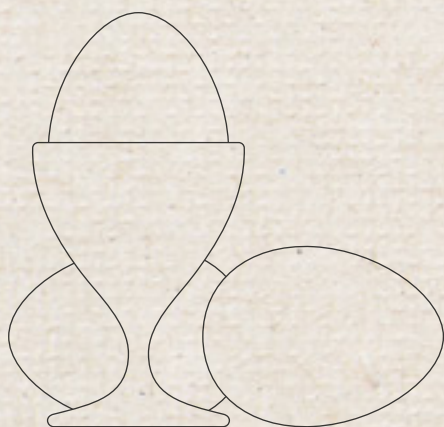
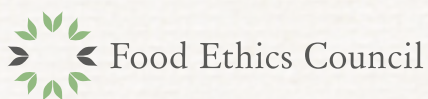
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Food and farming affect many issues of political and public concern, ranging from climate change to animal welfare to human health. Civil society organisations play a vital role in addressing these, through a wide range of activities including high-profile national campaigns, setting nutritional standards and growing local food. In 2011, the first food issues census was conducted to measure the extent of civil society's work, the breadth of issues, and the strengths and vulnerabilities of the sector as a whole.

This second census provides an overview of the work of civil society groups in the UK in 2016, based on survey responses from around 140 organisations. It provides updated insights on the size, shape and strategies of the sector. It shows that there is still a rich diversity of approaches and activities, but that food and farming remains underfunded by grant-makers. It reveals that the sector is at risk from ongoing public spending cuts and the impacts of the 2016 EU referendum. The report sets out the challenges that these facts pose for NGOs, government and grant-makers.

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