

SOCIAL
SERVICE
SECTOR
SURVEY
2018



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Foreword by President, NCSS



The Social Service Sector Strategic Thrusts (4ST) is a shared vision and roadmap for the social service sector that was launched in 2016. The 4ST presents an updated perspective that social progress requires the collective effort of the whole community, i.e., social service agencies (SSAs), social service professionals, funders, businesses, government agencies, community partners, and most importantly, service users. All of us have a role to play in empowering every person to live with dignity in a caring and inclusive society.

With the current 4ST roadmap laying out objectives and ideas for the sector from 2017 to 2021, we conducted the Social Service Sector Survey in 2018 to seek the sector's views and distil the experiences of social service leaders and other stakeholders as the sector embarked on the 4ST journey. As I write this foreword, we have crossed the mid-point of the current 4ST roadmap which makes it opportune for us to reflect on how the sector has progressed.

This report is our attempt at decanting the valuable insights on stakeholders' perceptions, pressing challenges faced, and gaps to be filled. We have also included key developments in the sector during the current 4ST, as well as suggestions on strengthening the social service eco-system. I am encouraged by how we have come together to co-create solutions and am heartened by the references to the 4ST vision in the work we do as a community. It is a sign that this has become a guiding light for the sector and what we need to do going forward.

The 4ST is a journey for the long haul, and we are but at the early stages of realising our sector's vision. May these findings resonate with you, regardless of the role you play in our eco-system. The recommendations in the report are but our way of keeping the ball rolling, with ideas on what else we can do, now that we have a better understanding of what the sector needs and aspires towards. I urge everyone to use the findings in this report, as well as your own wisdom and experience, to embrace new ways of working together, to strengthen networks with increased trust and cooperation, and to always keep an open mind.

Most of all, I would like to express my appreciation to everyone who participated in the study. Your responses have allowed us to form a collective voice for the eco-system through this report, and I look forward to working with all of you to improve the quality of life of those in need.

Anita Fam
President, NCSS
May 2020

A handwritten signature in black ink, appearing to read 'Anita Fam', written over a light grey background.

About the Social Service Sector Survey 2018

Introduction by CEO, NCSS

Since its launch in 2016, the 4ST (2017-2021) has served as a compass, guiding the social service sector's efforts to advance the quality of life of those in need. In this, NCSS plays the role of an enabler, and we are committed to supporting our members in their pursuit to provide quality services to meet needs.



To guide us in catalysing the work of our members and the social service eco-system, we have regularly gathered data and feedback from service users, partners, and other stakeholders. The Social Service Sector Survey is one such important source of information, and the findings will contribute to our understanding of where the sector stands, as well as where it should head towards.

The first instalment of this survey was conducted in 2018, and I am pleased to share the key findings in this report. Besides looking into the strengths and challenges faced in the landscape, the report also mentions some of the new initiatives from the current 4ST and offers a glimpse of the opportunities that lie ahead as we advance towards the next iteration of the sector's journey.

Notably, a fervent call was observed in the areas of capability building, innovation, and collaboration. This reflects not only the urgency felt in ensuring the eco-system is equipped to stay abreast with evolving needs and thrive in rapidly changing times, but also the potential for each stakeholder to think differently and do things in more progressive ways.

I see the eco-system already beginning to answer the call, with budding initiatives based on novel modes of partnership, and more opportunities to learn from each other. At NCSS, we have also used the insights from this survey to identify and address gaps in the landscape with our members and partners. The last section of the report highlights some of these endeavours, amongst other upcoming efforts.

NCSS plans to continue conducting this survey, with the next instalment slated for 2020. By then, we will be close to the end of the first phase of the 4ST journey, and the survey findings will serve us well as we look back on what we have achieved thus far as a sector, and shine light on emerging areas to direct our attention and resources to. Our heartfelt thanks to everyone who shared their views with us in 2018, and hope that you will participate as actively in the next survey as well.

For now, I hope you will find this report useful as you take stock of how far you have come and plan for the future. I encourage you to use the findings to have conversations within your organisations, with your service users, with NCSS and your other partners. We want to keep hearing from you - how you have come up with new solutions for existing problems, your thoughts on the changing landscape and how we should respond as a collective community. I look forward to continued partnerships to improve practices, form collaborative networks, and to optimise resources for a stronger social service sector.

Sim Gim Guan
CEO, NCSS
May 2020

A handwritten signature in black ink, appearing to read 'Sim Gim Guan', written in a cursive style.

Methodology

i. Focus Group Discussions

When:
February 2018

Why:
Three focus groups with representatives from small SSAs (5 participants), medium SSAs (7 participants) and large SSAs (8 participants) were conducted to examine views on developing organisational capability and capacity of SSAs.

ii. Surveys

When:
May to July 2018

Why:
To gain insights into the organisational strengths and desired areas of improvement in the sector. To understand corporate donors, members of the public, and partners perception of SSAs.

Who we surveyed

	Social Service	General Public	Corporate Donors	Partners
Number of respondents	331 Executive Directors, Presidents and Board members from 241 SSAs	2,000	78	61
Where respondents were from	NCSS member organisations	Public (aged 18 and above)	Corporate donors	Government Agencies, Institutes of Higher Learning, & Associations
How the surveys were conducted	Online	Online; face-to-face for ages above 54	Online	Online

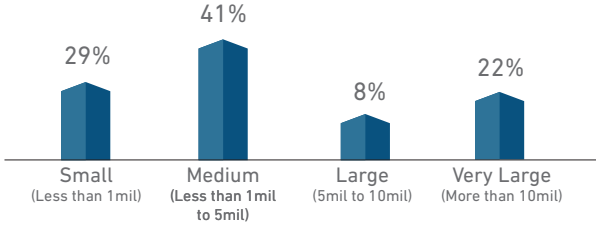
What we asked

Population	Topics
1. SSAs	<ul style="list-style-type: none"> A. Organisational characteristics (i.e., organisational capability and capacity) B. Challenges and initiatives (i.e., top three challenges in being an effective organisation) C. Importance of factors that contribute to organisational effectiveness D. Public perception of the social service sector E. Demographics
2. General Public	<ul style="list-style-type: none"> A. Awareness, trust, and confidence in SSAs B. Help-seeking behaviour C. Level of involvement with SSAs (donating, volunteering, etc.) D. Perception of the social service sector E. Demographics
3. Corporate Donors	<ul style="list-style-type: none"> A. Awareness, trust and involvement in SSAs B. Funding (i.e., how funders decide on funding quantum, commitment, type of funding mechanism and cause) C. Funders' reported expectations D. Motivation to provide funding E. Demographics
4. Partners	<ul style="list-style-type: none"> A. Awareness, trust, and involvement with SSAs B. Engagement and collaboration experience with SSAs C. Demographics

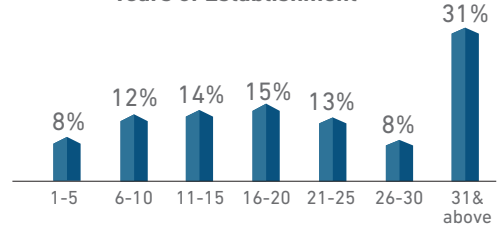
Profile of Respondents

Social Service Agencies (n = 241)

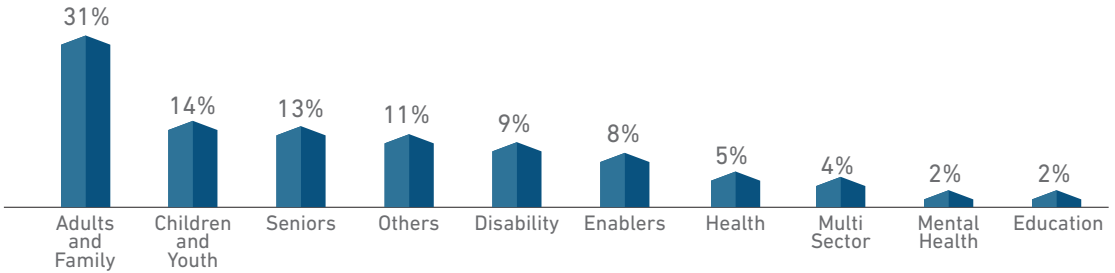
Size of Organisation (based on total annual income)



Years of Establishment

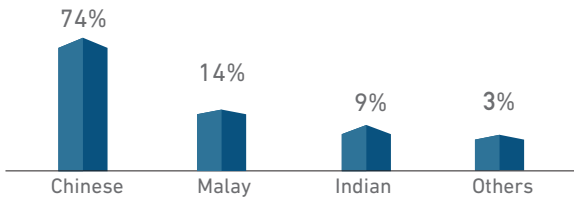


Subsector

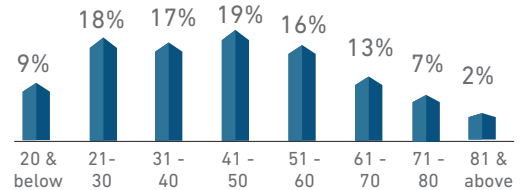


General public (n = 2,000)

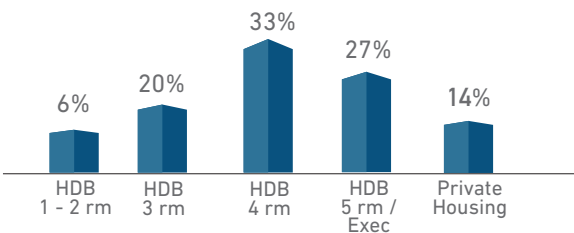
Ethnicity



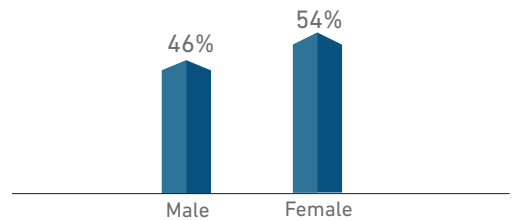
Age of Respondent



Housing



Gender



Key Findings

1 Social service leaders believe that the most important factors to make an SSA effective are: strong leadership, people management, and fundraising. They also identified these areas as the most pressing challenges faced by their agencies.

Question to social service leaders:
You are given 100 tokens to make a social service agency effective. How would you spend that 100 tokens?

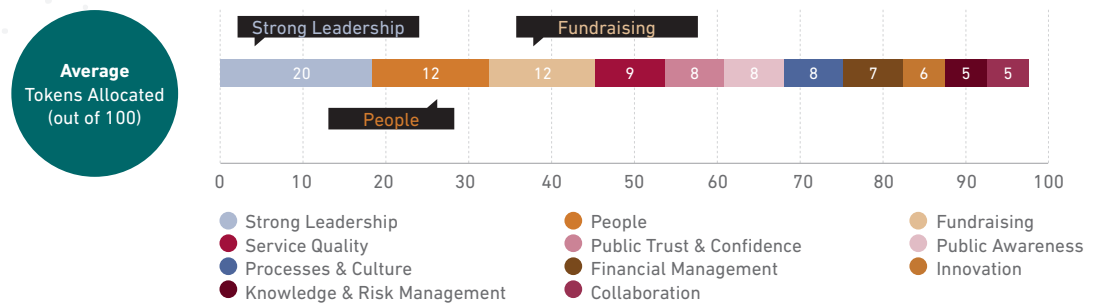


Figure 1: Ranking of important characteristics of an effective Social Service Agencies, according to social service leaders (n = 287)

Question to social service leaders:
Please select your organisation's top 3 challenges.

Top 3 challenges faced by SSAs



53%

Fundraising and Engagement



40%

Developing a strong senior management team



30%

Managing human resources

Other challenges



Figure 2: Challenges faced by Social Service Agencies (n = 287)

2

Service quality is directly affected by an agency’s knowledge of service users, culture, and innovation & collaboration.



What we found:

- *Knowledge of Service Users, Culture, and Innovation & Collaboration* directly affect an organisation’s service quality, with Knowledge of Service Users having the most bearing on service quality.¹
- In turn, each of these variables that influence service quality were affected by various organisational factors. Specifically, *Knowledge of Service Users* and *Innovation & Collaboration* were influenced mostly by staff and volunteer management. *Culture* was influenced mostly by strategy planning.²

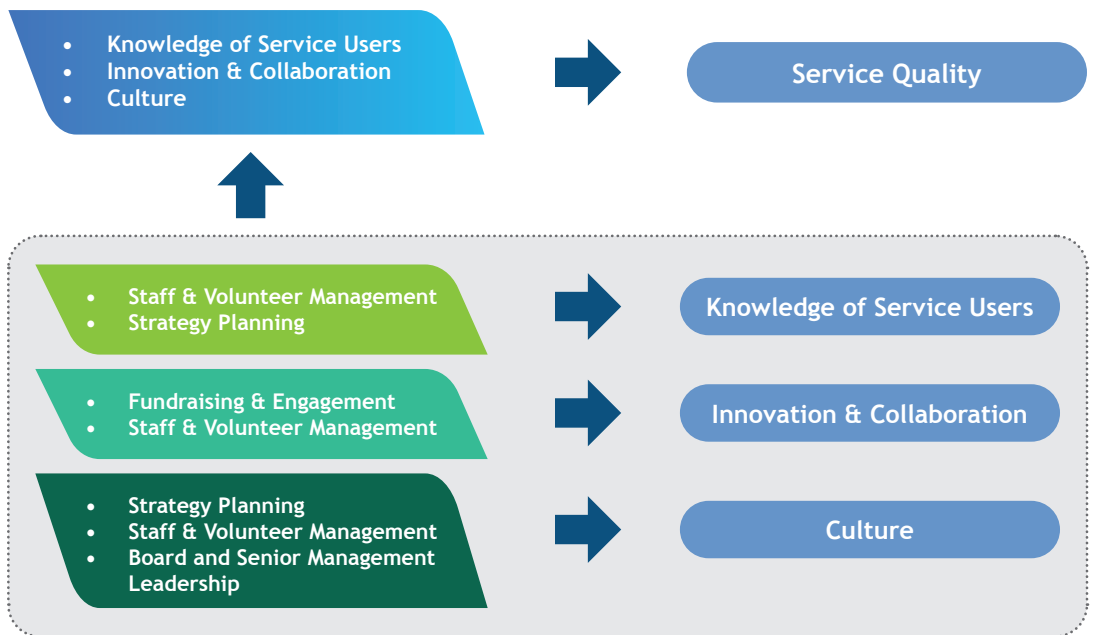


Figure 3: Important organisational factors affecting service quality.

Base: Executive Directors and Presidents of Boards (n = 287)

Note:

1. Finding is based on stepwise regression analysis. Service quality was regressed on 8 other organisational variables (i.e., board and senior management leadership, strategy planning, staff and volunteer management, financial/resource management, knowledge of service users, fundraising and engagement, innovation and collaboration, and culture) in a stepwise regression analysis.
2. Findings are based on three separate stepwise regressions where each identified predictor of service quality, controlling for the other two, was regressed on five other organisational variables.

3 Social service leaders' top desired improvement and lowest performing areas are broadly in financial sustainability, career and capability development, innovation and collaboration.

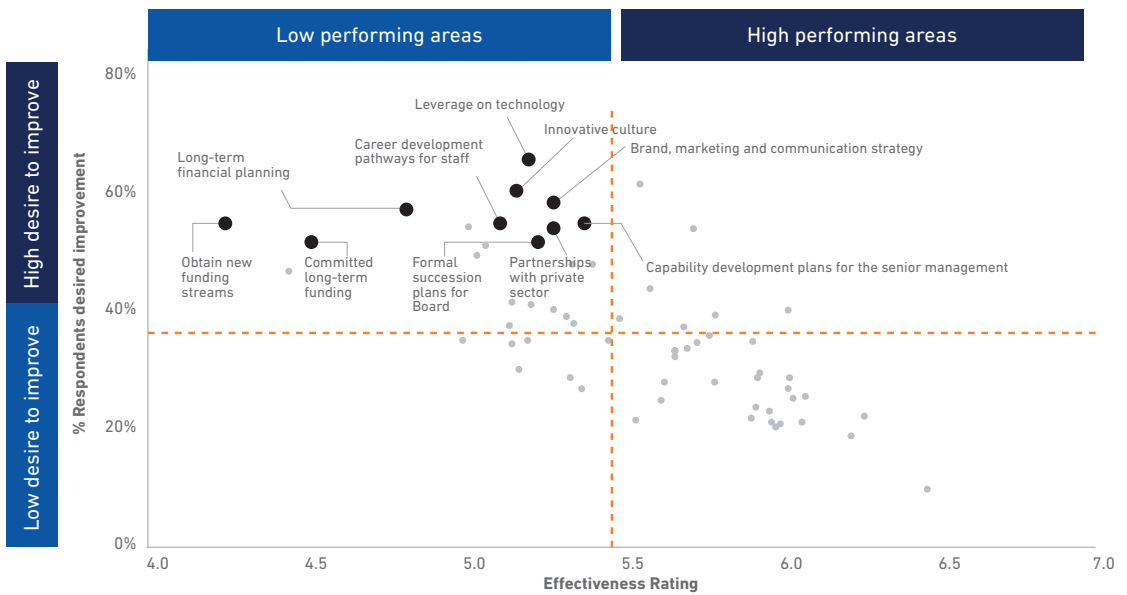


What we found:

We asked social service leaders for their views on their organisation's performance in different areas, and which of these areas they want to improve in. Their responses were plotted on a scatterplot, and 10 specific areas were highlighted in the upper left quadrant, which represents the top desired improvement and lowest performing areas.

In general, the areas were related to:

- Financial sustainability (i.e., performing long-term financial planning, having committed long-term funding, obtain new funding streams, and developing effective brand, marketing and communication strategy)
- Career and capability development plans (i.e., charting career development pathways for staff, having capability development plans for senior management, and formal succession plans for Board)
- Innovation and collaboration (i.e., leveraging technology, having an innovative culture, and forming strong partnerships with the private sector)



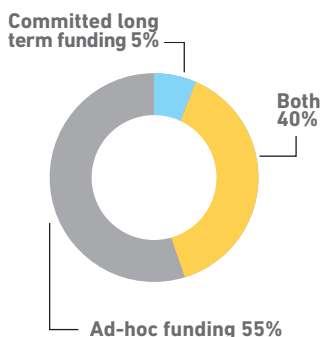
Base: Executive Directors and Presidents of Boards (n=287)

Figure 4: A scatterplot of performance against desire to improve

4

Funding from corporate donors is mostly on an ad-hoc basis and depends on economic conditions, suggesting potential gaps in today's funding ecosystem.

Question to Corporate Donors:
What type of funding does your organisation engage in?



In times of economic downturn, would your organisation continue to donate?

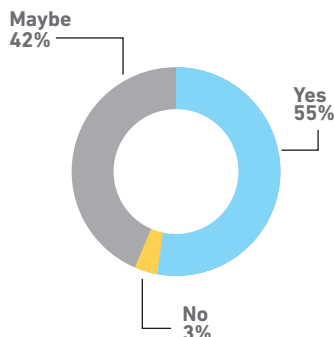


Figure 5: Types of funding, and corporate donors' commitment to donating during economic downturns. (n=78)

Has your organisation explored the following funding models?

Type of funding model

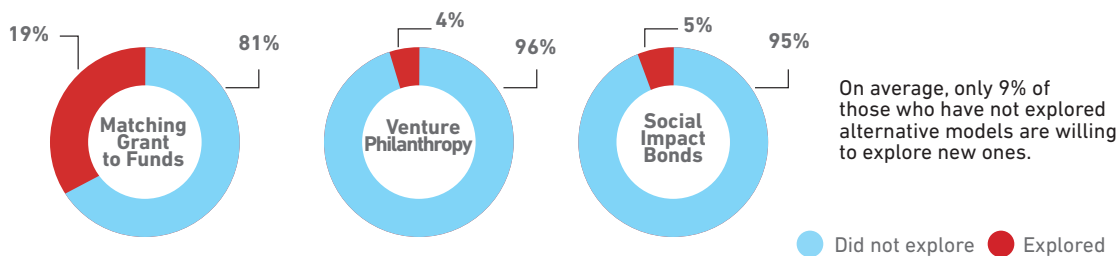


Figure 6: Types of funding models explored by corporate donors (n=78)



What we found from corporate donors:

- Over half of corporate donors are not committed to long-term funding - their organisations allocate funds on an ad-hoc basis.
- Others either give fixed amounts annually or amounts determined by the percentage of their organisation's profits or revenues.
- Half of the corporate donors are not committed to continue donating during an economic downturn.
- Most corporate donors have not and are unwilling to explore alternative funding models such as social impact bonds, venture philanthropy and matching grants to funds.
 - 95% have not explored new funding models.
 - Among them, only 9% are willing to try new models.

Why is it important to study corporate donors' reluctance to adopt new funding models?

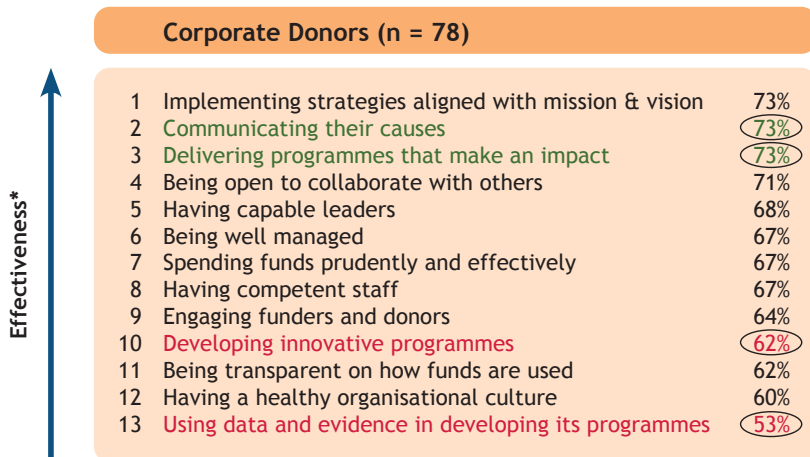
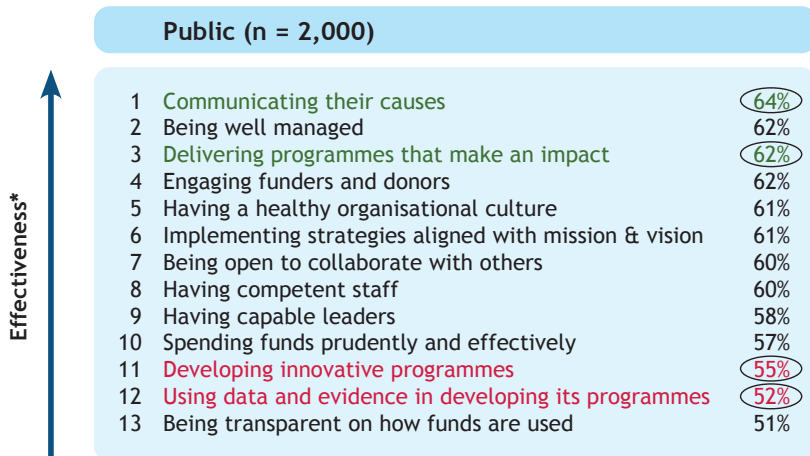
Donations from corporate donors are an important source of income for SSAs. Commitment to long-term funding will contribute to the sector's funding sustainability. Also, new funding models could potentially spearhead more impactful types of funding in the social services sector. Hence, it is worth examining the reasons behind this unwillingness to explore new funding models.

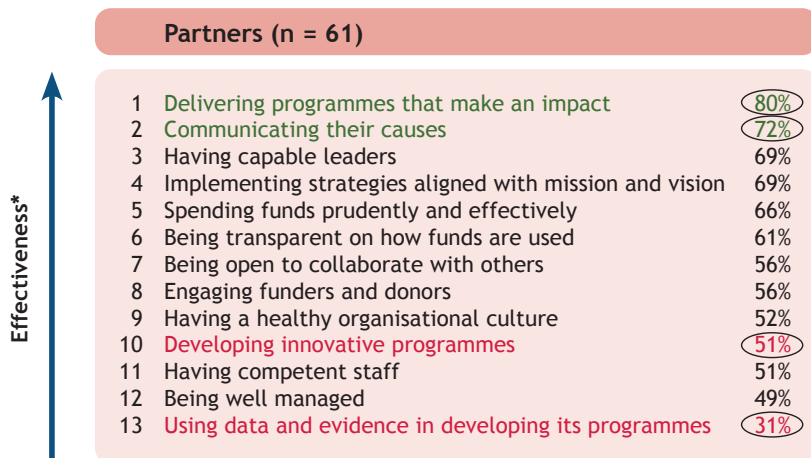
5

Stakeholders perceive SSAs to be effective in communicating their causes and delivering impactful programmes, but less so in being innovative, or using data and evidence in programme development.

Question to General Public, Corporate Donors, and Partners:

In your personal opinion, how effective are the Social Service Agencies in these areas?





The areas highlighted in green are areas where stakeholders commonly perceive SSAs to be more effective in, relative to other areas. Likewise, those in red are areas commonly perceived to be less effective in.

*Ranked according to the percentages of respondents who agreed Social Service Agencies are effective, i.e., indicated 5 to 7 (effective, very effective, extremely effective) on a 7-point scale.

Figure 7: The effectiveness of Social Service Agencies in various functions, as perceived by different stakeholders.



What we found from stakeholders:

1. General perception of stakeholders is that SSAs are effective in most areas, especially with regard to *Communicating their causes*, and *Delivering programmes that make an impact*.
2. The results suggest that more can be done to improve research and evaluation efforts in the sector, as a large proportion of the stakeholders feel that SSAs are not as effective in *Using data and evidence in programme development*, and to a lesser extent, *Developing innovative programmes*.
3. The Public's perception of SSAs is relatively lower compared to other stakeholders. Besides programme development, the public perceives SSAs to be less effective in areas related to finances and accountability - (a) *Being transparent on how funds are used*, and (b) *Spending funds prudently and effectively*.
4. Corporate donors and the public also felt that SSAs are relatively less effective in being transparent on how funds are used.

6

Trust in SSAs is key to increasing the stakeholders' level of involvement. More could be done to improve trust in SSAs.

Questions to General Public, Corporate Donors, and Partners:

How important is "Trust in the social service agency" in affecting your decision to support an SSA?

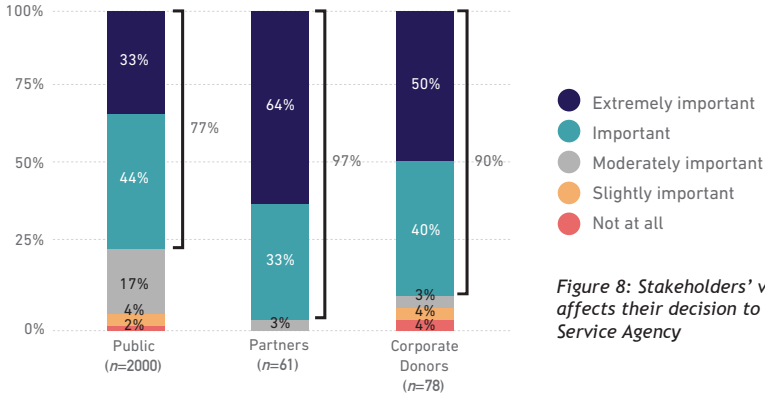


Figure 8: Stakeholders' views on how trust affects their decision to support a Social Service Agency

How much do you agree that SSAs are trustworthy?

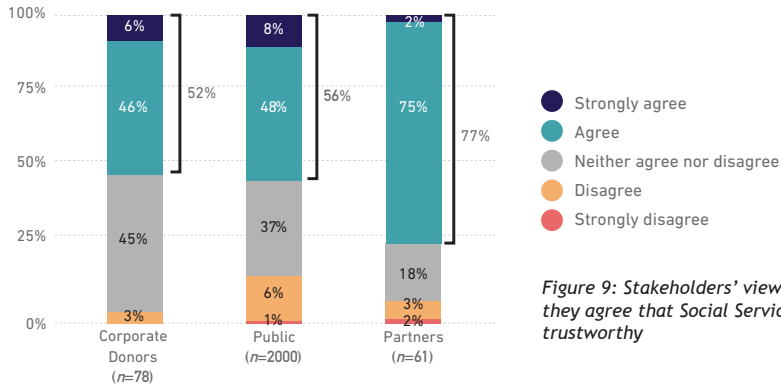


Figure 9: Stakeholders' views on how much they agree that Social Service Agencies are trustworthy



What we found:

1. Most respondents indicated that trust in the SSA is significantly important in their decision to support an SSA. However, only 56% of the public and 52% of Corporate Donors agreed that SSAs are trustworthy.
2. Public's perception of SSAs' trustworthiness is positively correlated with their involvement with SSAs (frequency of donations and volunteering, and amount of donations). SSAs should engage and involve their volunteers and public donors more, so as to build up a healthy virtuous cycle of trust and engagement.
3. While the sector continues to build on its strengths and work on its weaknesses, effective branding and marketing are also important to disseminate accurate information to the public and debunk misconceptions.

7

Vast majority of stakeholders agree that SSAs provide important services to meet the needs of our vulnerable.

Question to General Public, Corporate Donors, and Partners:
How much do you agree that:

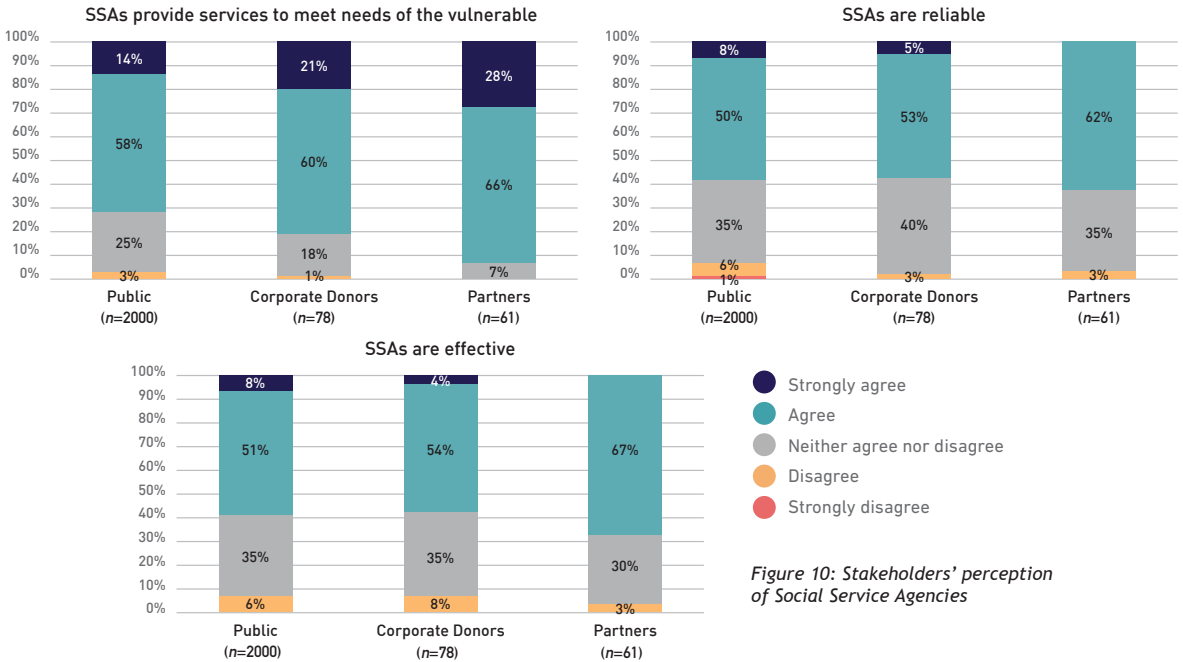


Figure 10: Stakeholders' perception of Social Service Agencies



What we found:

1. More than half of the stakeholders agreed that SSAs are effective, and reliable. Almost 3 in 4 stated that SSAs provide important services to meet needs.
2. SSAs were also reported to be the 2nd most likely source of help for respondents in times of need (62%), behind respondents' families (78%).

Question to General Public:

How likely is it that you would seek help from the following sources?*

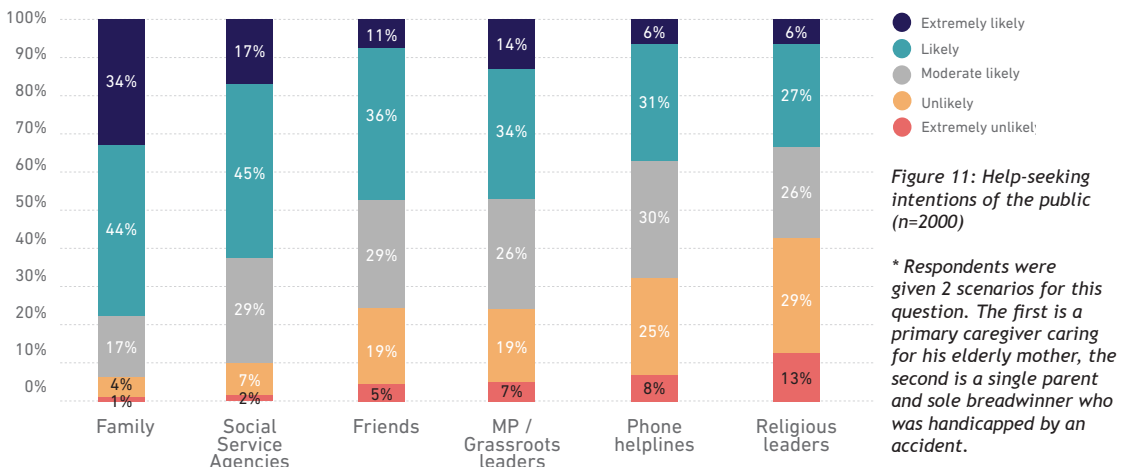


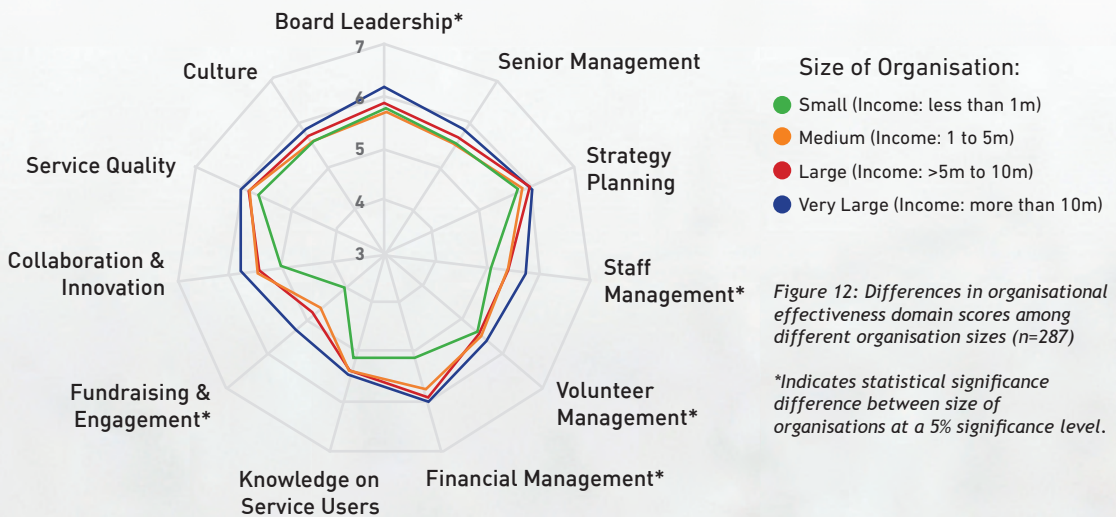
Figure 11: Help-seeking intentions of the public (n=2000)

* Respondents were given 2 scenarios for this question. The first is a primary caregiver caring for his elderly mother, the second is a single parent and sole breadwinner who was handicapped by an accident.

The survey also found that...

Organisation size affects respondents' rating on some aspects of organisational effectiveness.

Organisation size is a significant factor in the areas of Board Leadership, Staff Management, Financial Management, Fundraising, and Collaboration and Innovation. However, there was no significant difference between different-sized organisations in terms of Service Quality. This could be due to the fact that different-sized organisations possess different advantages - smaller organisations are able to provide more flexible services, and larger organisations can have economies of scale in delivering services.

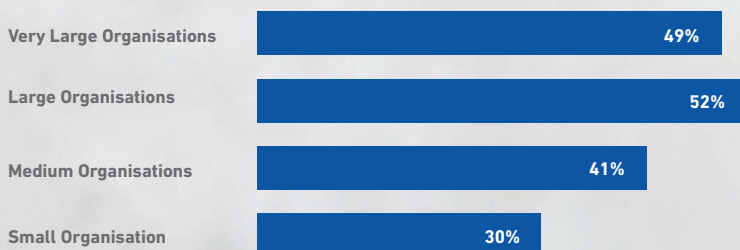


Social service leaders felt that there is increased competition within the sector and amongst SSAs.

Most social service leaders surveyed felt that there has been an increase in competitiveness within the sector, and larger organisations tend to perceive greater competition than smaller organisations.

Question to social service leaders:
“My organisation feels that there is increased competition within the sector”

% respondents who strongly agree or agree with the statement:



Our findings from the Focus Group Discussions (FGDs) suggested that increased internal and external (beyond the social service sector) competition was purported to hinder collaboration, one of the key domains in providing service quality.

Figure 13: Perceptions of competitiveness within the sector (n=287)

Collaboration, instead of competition, is important in helping the social service sector grow and improve.

In the FGDs, organisations defined “collaboration” as the sharing of knowledge and resources, and working together to create efficiency and achieve an impact. Effective collaboration will require the effort of everyone inside and outside the organisation, including Board members, staff, volunteers, the community, stakeholders, other agencies and new partners. Currently, small- and medium-sized SSAs have a stronger desire to collaborate more with private corporations - such a mindset should be adopted by larger SSAs as well.

Quotes from our FGD participants:

“Not just in terms of competing with commercials, but actually impeding in terms of competing with each other.”

Quotes from our FGD participants:

“This competition topic is a big reality. For collaborations to move forward, we need to talk about competition openly.”

However, the sector is not starting from ground zero. There are already examples of collaboration.

“We realised that there are a lot of players out there, so why don't we all come together to share notes and collaborate, rather than each of us doing things our own way and there's no sharing of knowledge and best practices.”

“We do make it a point to meet regularly to exchange information. I would say, hey, I noticed this trend, are you noticing it? And then you build a better, clearer picture.”



NCSS' recommendations

1 Prioritise the provision of quality services, and effectively articulate the impact of these services

Most donors and partners support social services when they find themselves aligned to the same cause and are informed of the social impact it is creating.

We need to invest more resources in research and evaluation, as well as adopt evidence-based practices.

2 Embrace innovation and be open to adopting new solutions for existing problems

Our dynamic social service landscape requires progressive and adaptable SSAs to effectively support the diverse and changing needs of various populations.

We need to increase the role of technology in our work, and create an organisation culture that supports innovation.



3 Explore ways to improve funding sustainability in the sector

Without committed long-term funding to sustain and support growth, SSAs find it difficult to conduct long-term planning to meet the needs of service users.

5 Increase trust in SSAs

Trust in the social service sector is positively correlated to the level of involvement (e.g., volunteering and donations) of the Public. We should adopt a multi-pronged approach to improve public trust in SSAs - through more accountability and better transparency, more engagement and involvement of our stakeholders and the public, as well as accurate dissemination of information to help correct misconceptions.

4 Form meaningful partnerships with corporate donors

There is a need for corporations, funders and SSAs to better understand each other to develop meaningful partnerships.

Corporations and funders must also see SSAs as valuable partners and convey their expectations of the partnership (e.g., volunteering opportunities to improve company morale).



Some steps that NCSS has taken

To provide long-term funding support

Community Capability Trust

The Community Capability Trust (CCT) will provide a long-term source of funding support for SSAs from FY2022 onwards, supporting capability- and capacity-building projects that:

- Strengthen SSA organisational capabilities, such as in HR, innovation, financial management, strategy, and governance;
- Improve productivity and optimise manpower, such as assisting SSA in the adoption of technology, so as to improve the productivity of their professionals and their services; and
- Enhance infrastructure of SSA to serve growing client and service needs.

\$230 million in initial capital for the CCT will be injected from the Government, Tote Board and Community Chest. In addition to the initial capital, Community Chest, with its mission of fundraising for the social service sector, will spearhead fundraising initiatives for the CCT. Donations will be matched dollar by dollar by the Government and Tote Board.

SSAs can start applying for the CCT from FY2022 onwards.



To help the sector to leverage on innovative technologies

Tech Booster

Tech Booster aims to ramp up adoption of ready technologies for manpower-intensive programmes to enhance operational efficiency for existing staff, in order to raise staff morale and retention, alleviate challenges in filling these positions, provide better service to more clients in a shorter time and increase client centricity. Attractively-tiered subsidies of up to 98% funding for ready technologies, along with fully-funded consultancy for project and change management support, will be provided.

Back-to-Basics

Back-to-Basics aims to increase existing professionals' capacity and capability by streamlining processes, redesigning jobs and technology adoption, to free up time for serving more clients instead of handling administrative tasks. Professionals can have higher job satisfaction and perform upgraded functions that better use their professional skills and knowledge. Fully-funded consultancy, and technology adoption subsidies of up to 95% capped at \$100,000 for Therapists and \$80,000 for Social Workers and Youth Workers will be provided.

To develop future leaders in the sector

40-under-40

This youth leadership programme is a new initiative by NCSS that aims to empower young, promising social service leaders to contribute their voice in shaping the sector's future, build collegiality, and leverage on new found connections to make change happen. 40 participants from diverse backgrounds across the public, private, and people sectors heard from distinguished speakers, had a dialogue with President Halimah, and were also presented with perspectives from the Ministry of Social and Family Development.



Conclusion

The social service landscape today is dynamic and fluid. SSAs have to be progressive and adaptable to effectively serve the diverse needs of different vulnerable populations. However, the progression of the social service sector does not solely rest on the efforts of SSAs - all the stakeholders in the ecosystem (i.e., corporate donors, partners, and the public) have an important role to play. We hope that the findings and gaps we have identified in this study can encourage SSAs and stakeholders in the social service ecosystem to bring about change both within and outside the organisation and as a result, produce better service quality and more effective services for the vulnerable population.

By focusing on developing the key areas of organisational effectiveness identified in this study, SSAs will invariably be able to achieve the ultimate goal of meeting the needs of the vulnerable population and achieve greater social impact.

National Council of Social Service (NCSS)

Ulu Pandan Community Building
170 Ghim Moh Road, #01-02
Singapore 279621

Tel : 6210 2500

Fax : 6468 1012

Email : NCSS_QSM@ncss.gov.sg

Community Chest Hotline : 1800-210 2600

