

1. MARKET ANALYSIS – FOR BRIDGE BRIEFING

2.1.i. Funding environment

- There is trend towards funding highly targeted provision or major national programmes. With increased competition trusts and foundations are focusing on the most disadvantaged as a consequence. At the other end of the scale major corporates are developing their own programmes focusing on PR benefits such as grant programmes (e.g. O2 Think Big, Starbucks, V Cashpoint etc.) competitions or themed awareness weeks.
- There is however a gap between these two positions for corporates interested in focusing support geographically where their operations are based. There is increased understanding and motivation within the business sector to engage with schools. In some cases this offers an opportunity as businesses have the will, but not the way. In other cases it is a threat as businesses develop their own capacity to engage directly with schools and new providers and initiatives are springing up such as BITC's Business Class offering Education Business Partnerships.
- A general trend is that the youth sector is becoming increasingly polarised with large 'TESCO charities' acting as intermediaries running national programmes outsourced to consortia of local delivery partners. As a smaller, delivery organisation this means it becomes very difficult to obtain funding for management overheads. As smaller charities seek to develop nice markets they are tending to specialise and this offers opportunities for collaboration, but it requires us to be clear what strengths we bring to the table.

2.1.ii. Education

- Despite the fact that employers say they need an education system which develops young people's personal competencies, education policy is placing an increasingly narrow emphasis on academic attainment.
- Many schools recognise the importance of developing employability skills, despite this being outside the curriculum, but they still want some sort of award or recognised accreditation for participation in our programmes (akin to the Duke of Edinburgh Award Scheme). The Step up to Serve campaign <http://www.stepuptoserve.org.uk/about-us/> is seeking to demonstrate the value of social action in developing young people's employability skills – but there is a mountain to climb to ensure this is understood by employers.
- Schools increasingly recognise the value of business engagement. Some schools and academy groups are developing their own in-house capacity to engage businesses themselves. As education business partnerships become more sophisticated, we may see businesses wanting to focus more on how they can support curriculum delivery which relates to their business such as STEM subjects. This offers them more payback than generally improving employability.

- Cuts in career advice have serious implications, but pose a threat for Envision as they are a distraction in terms of attracting business attention. Whilst we develop employability skills we do not want to get more involved in taking on the work of the careers service. There are other organisations more suited to filling this gap.

2.1.iii. Competitors and partners

The birth of a 'sector'

In November Step up to Serve <http://www.stepuptoserve.org.uk/about-us/> will celebrate its first anniversary. This national campaign now has a new CEO and team in place. It has high profile backers and aims to double the number of young people involved in social action by 2012. This is helping to make our cause much higher profile and a recognised market. However many large organisation such as the Scouts are jumping on the band wagon and rebranding themselves as social action organisations – this means that we are less unique and face increased competition.

Generation Change <http://www.generationchange.org.uk/> is working alongside Step up to Serve – to represent providers of social action charities. Envision is one of the founders of this organisation.

Social action in schools

- The rapid expansion of the government's National Citizen Service <http://www.ncsyes.co.uk/> and awarding of multi-year contracts has attracted many youth work organisations into the social action market. Many of these organisations have significantly scaled up resources. Although NCS is not delivered within schools young people are recruited through presentations given in school assemblies. NCS enables many schools to tick the community action box. NCS is becoming very proactive in seeking business engagement. Its key point of difference with Envision is that it is a huge government funded programme.
- We have identified several key organisations who are clearly moving into or expanding social action programmes within the schools market:
 - The biggest potential threat may be the Canadian charity Free the Children, <http://www.freethechildren.com/get-involved/we-school/uk-be-the-change-programme/> which has recently set up in the UK. It offers what is essentially an Envision-lite programme at much lower cost. Their main advantage is that they have a huge organisation behind them and therefore offer much more robust systems and evidence of impact. They also run a huge international event – 'We Day' – which ran in Wembley Stadium for the first time this year attracting big name celebrities. This also provides an opportunity to engage hundreds of corporate volunteers as Olympic 2012 style Gamesmakers.
 - V-Inspired <http://vinspired.org/vinspiredschools> has a schools team and a schools awards framework which they have recently re-launched. They are likely to get

government funding to expand this nationally. This offers us a way to track and reward young people's achievement. However it also means that it would be more difficult to envisage a demand for an Envision on-line support platform.

- The Citizenship Foundation run two platform based models for schools Giving Nation (secondary schools) <http://www.citizenshipfoundation.org.uk/main/page.php?175> and Go Givers <http://www.citizenshipfoundation.org.uk/main/page.php?327> which have a wide reach and have been well funded by the Cabinet Office. However these models do not currently engage corporate volunteers.
- The Youth Philanthropy offers a simple and easy to understand model: <http://www.instituteforphilanthropy.org/content/Youth-Philanthropy-Initiative>
- The Beat Bullying group have developed a really excellent model which combines face to face training in schools with digital platforms for peer to peer mentoring and coaching <http://archive.beatbullying.org/dox/resources/resources.html>. They are now applying this model to a range of issues such as teenage mental health and employability. They have been appointed by the Cabinet Office to develop an online skills passport which is being used by schools involved in the Youth Social Action Trials.
- A high-quality, but small organisation, Human Utopia, <http://www.humanutopia.com/> is expanding its social enterprise model through a partnership with Oasis academies.

Non social action competitors

- Many schools do not however perceive us to be about social action and place us in the wider market for 'enrichment options', which means that we sit alongside organisations such as Duke of Edinburgh's Award (much more than volunteering).
- Others schools consider us to be part of their provision for developing employability and there are other organisations in this space who offer programmes which are competitors for corporate funding for example:
 - Young Enterprise <http://www.young-enterprise.org.uk/>
 - Enterprise Challenge, <http://www.theenterprisechallenge.co.uk/>
 - Enabling Enterprise <http://enablingenterprise.org/secondary>

Social action outside schools

- City Year is proving popular with corporates <http://www.cityyear.org.uk/index.php/partnerships-in-action> . They recruit young people who give a full year to volunteer to help raise standards in primary schools.
- The Scouts are becoming very proactive in the social action market and the new CEO is aggressively focusing on the corporate market to tackle his challenge of volunteer recruitment http://www.demos.co.uk/files/Scouting_for_skills_-_web.pdf?1400681381
- V inspired is one of the most well established social action. It delivers a wide range of programmes – one of which , Team V, is similar to Envision but not run in schools http://www.ukyouth.org/our-work-with-young-people/corporate-responsibility/think-big#.VBnN5vldU_g . V inspired has been extremely innovative in using music and digital

technology to engage directly with young people to drive social action through programmes such as Do-it.

- The Challenge is one of the main providers for NCS and is starting to develop additional programmes in schools and has recently been successful in securing a contract with the GLA.
- Fixers <http://www.fixers.org.uk/> has a great model which pairs up young people with creative professionals such as TV production companies and graphic designers. They have a strong national reach.
- The main proposition for national infrastructure bodies such as UK Youth is that through their national network of youth clubs they can offer rollout corporate funded projects nationally. They are not a social action charity but do deliver some social action programmes as part of a wider mix including Think Big for O2 http://www.ukyouth.org/our-work-with-young-people/corporate-responsibility/think-big#.VBnN5vldU_g and Starbucks http://www.ukyouth.org/our-work-with-young-people/corporate-responsibility/youth-action#.VBnNxvldU_g

2.1.iv. Technology

- Behaviour change, campaigning and educational organisations are all moving on-line and we are not keeping up.
- People are increasingly engaging with on line communities rather than face to face and we need to respond to this in terms of the way we work with young people.
- There is an increased need for digital skills for employability.

2.1.v. Wider economic and social changes

- Young people are finding it increasingly difficult to find paid employment. It is likely that many more will be employed in SMEs and this places increased emphasis on skills such as enterprise and creativity. As highlighted above these skills are not being widely developed within formal education.
- There is growing socio-economic inequality and an increasing need to find ways to enable young people to mix with others from different economic backgrounds. The widening gap also means that there is more need for state schools to provide extra-curricular experiences through which young people can develop their social skills and confidence.
- Other social trends include an aging population and increasing concern about racial and religious integration. This means that there is increased demand for initiatives which help create more cohesive communities.
- There is a huge public sector debt. Increased social action is likely to remain topical in face of public sector cuts. There is increased interest in social enterprise and this makes makers demonstrating social return on investment more important.