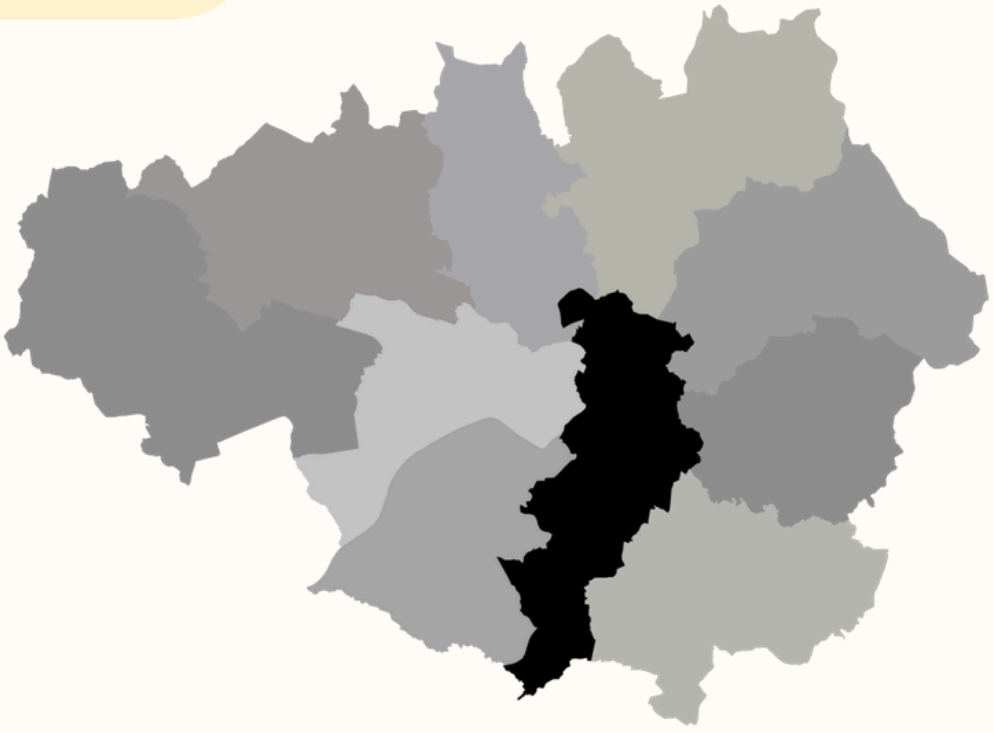
Manchester Community Central
Voluntary, community and social enterprise sector

10GM
A joint venture to support the local VCSE sector in Greater Manchester

Manchester

State of the VCSE Sector

2026



Acknowledgements

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We thank the organisations and groups that completed the survey and everyone who participated in the focus group. Their willingness to share their experiences, including the challenges of keeping support available for their communities, provides the foundation for this report.

Authorship and editorial responsibility

In this report, the foreword, conclusion, and highlighted reflections at the beginning of sections 3, 4, 5, and 6 are authored by Manchester Community Central. The executive summary is co-authored by Nottingham Trent University (NTU) and Manchester Community Central. All other sections are authored by NTU. Manchester Community Central reviewed the main report and proposed changes. NTU considered these suggestions and decided which to incorporate, retaining academic independence and responsibility for the analysis, interpretation and final wording of its sections.

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Foreword

Mike Wild, Chief Executive, Manchester Community Central



This is the fourth State of the Sector report we have published, building on those from 2013, 2017 and 2021. Over the years, I have spoken about our findings many times to many audiences and, without fail, there is always someone listening for whom the sheer scale of Manchester's voluntary, community and social enterprise sector comes as a revelation.

You can see in this report some familiar patterns: 4,313 organisations, generating an estimated £816 million a year, providing 2.59 million instances of support to people across our city. Powering all that work are 123,600 volunteers giving their time and over 13,000 full-time equivalent paid staff.

If this is your first time seeing these numbers, then you will be starting to understand the scale of the ecosystem of human support which is grown when local communities (of place, of identity and of experience) come together, organise and take action. You may also reflect on the impact this sector has as an economic force, as a powerhouse of community building, as an engine of support and sanctuary which complements and reduces demand on public services.

Fundamentally, I believe this sector is one of the most reliable means we have of cultivating hope in communities: the daily, practical belief that things can be better and the willingness to act on it. There are so many stories to tell from groups across every part of our city and every community. Each is rooted in the particular history and relationships of the people it serves - trust built over years (and frequently decades!) of being present in a community rather than visiting it. This is what our city is capable of when people are trusted and resourced to act.

Hope is something we build, deliberately, through the choices we make: who holds power, whose voice shapes decisions and whether the people doing this work are given what they need to keep doing it. Naming a problem honestly is the first act of hope, not the opposite.

Manchester Community Central's role is tending the conditions in which this work can flourish: connecting organisations to each other, to funders, to policymakers and structures shaping Manchester's future, without ever trying to control or direct that work ourselves. We are gardeners, not gatekeepers in a unique position: close enough to be of the community but far enough away to see the bigger picture. It is because of this that we need to be honest when those conditions are not good enough. In the following pages, you will find an uncomfortable truth alongside the impressive numbers.

Four in ten organisations describe themselves as vulnerable, struggling, or at risk of closing. Only one in twelve feels strong and secure. The reasons for this are clear: increased demand and reduced resources. Demand for support has risen for four in five organisations this year. Once again, organisations are supporting more people than they were twelve months ago.

At the same time, almost six in ten organisations have had no uplift on grants or contracts to reflect rising costs. More than three quarters have little or no multi-year funding to plan around. Organisations are coping with this by using reserves - the safety net they are supposed to fall back on in a crisis - increasingly, these are being spent just to keep the lights on and services running, not held back for emergencies. And they are running out.

If you look back across our previous reports, you will see these are not new issues, but they are escalating: these organisations are continually relied upon to absorb pressure. We see this in our day-to-day work supporting groups. I hear it from leaders in organisations who find they now have to develop multiple income streams to cover what would previously have been covered by one funder and who cannot sustain salary levels to attract and retain the workforce they need.

Increasingly, staff and volunteers in these organisations, the people who keep showing up, are paying a personal price for continuing to meet demand – that is now the cost of doing good. This is even more the case in organisations which already face the challenges of structural inequalities around issues such as race, disability and class. It is not right that this should fall so heavily and so invisibly on them.
Our sector's ability to keep doing this work is not guaranteed. It depends on choices being made now — by funders, by commissioners, by government at every level — about whether the organisations closest to communities are resourced to stay there or are expected to keep absorbing the strain indefinitely. Manchester's VCSE sector continues to show up for the city, often stretched further than it should have to be. This report is our evidence of that systemic risk.

The way forward has to be a shift towards collaboration across systems, institutions and communities. In March 2026, Greater Manchester signed the GM VCFSE Accord — a nine-year agreement between the sector and our public sector partners, committing to genuine partnership, fairer funding and a shift of power and resource towards communities. In Manchester, we are working with the Council and other partners to get into the hard details of how to make that happen. The pathway to hope lies in creating genuine collaboration.

This report is itself the result of collaboration. I want to thank our neighbouring Local Infrastructure Organisations across Greater Manchester, our 10GM partnership and Nottingham Trent University for making this happen. I particularly want to thank all those local organisations who took time to complete the survey in the midst of so many incredible things they do in our communities every day.

Executive summary

Across the UK, voluntary, community and social enterprise (VCSE) organisations are an essential part of community life and public service infrastructure. They provide practical help, specialist services, community spaces, social connection and opportunities for people to take part in their communities, often working through trusted relationships with people who may be less visible to, or less comfortable accessing, statutory services.



This work is taking place in the long aftermath of COVID-19 and a cost-of-living crisis, alongside wider economic and social disruption that has increased demand for support. For many organisations, this means responding not only to more people but to needs that are increasingly complex and interconnected. At the same time, many grants and contracts have not kept pace with rising costs, formal volunteering remains below pre-pandemic levels, and organisations are increasingly being asked to prevent problems escalating while relying on short-term funding, reserves and stretched staff and volunteers.

Manchester sits within this national context as one of the largest and fastest-growing places outside London. Such has been its growth over the past two decades that Manchester has attracted an increasingly diverse population which is the youngest in Greater Manchester.

This magnitude of change has brought prosperity to some areas, but there are also high levels of deprivation in others. Manchester is the most deprived local authority in Greater Manchester and the fourth most deprived nationally, with 42% of residents living in neighbourhoods among the most deprived 10% in England. While city-centre areas experience lower levels of income, employment and skills deprivation, areas beyond the centre include some of the most deprived neighbourhoods nationally across several domains. The role of the sector here is not just place-based but in supporting communities that are experiencing extreme levels of deprivation.

This report provides an up-to-date picture of Manchester's VCSE sector in 2026, considering what organisations do, where they work, the communities they support, their contribution to Manchester and the pressures they face. It draws on 158 usable survey responses, one focus group, wider local and national evidence, and informed estimates of the sector's overall scale.

The findings paint a picture of scale and strain in equal measure. **Over 4,300 organisations**, **£816.13 million of collective activity** and a diverse ecosystem of support powered by **a collective workforce of over 140,000 staff, volunteers and trustees** sit alongside a stark finding: four in ten organisations describe themselves as vulnerable, struggling, or at risk of closing.

That fragility is not evenly distributed, nor evenly caused. Manchester, with its rapidly growing population, remains one of the five most deprived local authority areas in England and much of the sector's work is around responding to this. As demand for VCSE services continues to grow, the findings also suggest that VCSE organisations are becoming frequent points of referral from other organisations and public services. Organisations are doing this while managing capacity challenges alongside increasing cost pressures, leaving staff and volunteers to absorb additional work to keep support available.

These connections reflect the role community organisations play in helping people access and navigate support, but they also mean that pressures elsewhere in the system increasingly reach them, often without the funding to match. A new path needs to be found to ensure that the organisations closest to communities are resourced to keep doing that work. They cannot be expected to absorb growing demand and pressures indefinitely. The **GM VCFSE Accord** and initiatives such as **Live Well Manchester** offer opportunities to change that balance but only if they translate into practice, not just intention. Getting this right is about more than sustaining organisations: it is how this city keeps building hope in every community and every neighbourhood.



Glossary

This table provides a glossary of terms, abbreviations, and acronyms used in the Manchester State of the Sector 2026 report. A detailed glossary can be accessed at: gmstateofthesector.org.

Term	Meaning in this report
Base / valid base	The number of respondents included in a percentage or analysis. A valid base excludes people who did not answer the relevant question and may also exclude invalid responses such as ‘don’t know’.
Below-the-radar (BTR) organisations	Informal or unregistered organisations and groups not captured on formal registers.
Full-time equivalent (FTE) / headcount	FTE expresses working hours as equivalent full-time posts: two people each working half-time equal one FTE. Headcount counts each employee individually.
Full cost recovery	Funding that covers direct delivery costs and an appropriate share of the organisation’s wider running costs.
Funding uplift	An increase in the value of a grant or contract to reflect rising costs.
GMCA	Greater Manchester Combined Authority, bringing together the city region’s ten councils and elected Mayor.
Instances of support	Contacts or episodes of support, rather than a count of different people. One person may receive support several times.
Local Infrastructure Organisation (LIO)	An organisation that supports, connects and represents the local VCSE sector, including through advice, training and help accessing funding.

Glossary

Term	Meaning in this report
Modelled estimate / extrapolation	A sector-wide estimate produced by scaling up survey findings using the estimated number and profile of organisations.
Multi-year funding	Funding lasting three years or more, as defined in this survey.
Paid-staff economic contribution / GVA	An indicative estimate of gross value added (GVA), calculated using estimated FTE employment and industry output benchmarks.
Real Living Wage	A voluntary hourly pay rate calculated from living costs, distinct from the government's statutory National Living Wage.
Reserves	Funds retained to support future activity or manage gaps in income and unexpected costs.
Social enterprise	An organisation that trades for a social or environmental purpose and uses most of its profits to further that purpose.
Social prescribing	Connecting people with community activities and support that address needs affecting their health and wellbeing.
VCSE / VCFSE	Voluntary, community and social enterprise. VCFSE explicitly includes the community work of faith organisations, which are also included within VCSE in this report.
Volunteer replacement cost	The estimated cost of replacing volunteer and trustee time with paid labour at the Real Living Wage.

1. Methodology

This report forms part of the wider 2026 Greater Manchester State of the voluntary, community and social enterprise (VCSE) sector project. The findings presented in this report relate specifically to VCSE organisations based in the city of Manchester and include estimates of the scale and contribution of Manchester's VCSE sector. The full technical methodology can be accessed at gmstateofthesector.org

Survey

The survey ran from January to April 2026 and received 158 usable responses from VCSE organisations based in Manchester. It asked about organisations' activities, who they support, where they work, demand for services, staff and volunteers, and finances and funding. Manchester Community Central distributed direct survey links through its networks. An anonymous response option was also available. NTU prepared and analysed the responses.

Focus group

One focus group took place with Manchester VCSE organisations in March 2026. It explored the role of organisations in communities, workforce and volunteering, and finances and funding. NTU developed the areas for discussion using early survey findings and input from the project's core working group. Participants were recruited through Manchester Community Central and follow-up contact with survey respondents. NTU analysed the discussion to identify common themes and understand participant experiences in more detail.

How to read the survey findings

Based on the 158 usable responses and an estimated 4,313 VCSE organisations in Manchester, the indicative margin of error is around ±7.7 percentage points at the 95% confidence level. For example, applying this margin to a finding of 60% gives a range of around 52% to 68%. This calculation assumes organisations were selected at random. However, organisations chose whether to take part, so this margin is only a guide and cannot account for differences between those that did and did not respond.

NTU compared the respondent profile with registered VCSE organisations in Manchester. Estimated below-the-radar groups, which are not captured on formal registers, were excluded from this comparison because they could not be sampled directly. The achieved sample contains a higher proportion of medium and large organisations than the registered organisation profile. NTU examined whether adjusting for differences in organisation size, known as weighting, changed the findings. Differences between weighted and unweighted findings were generally small and did not alter the overall patterns or conclusions. Survey percentages are therefore presented without weighting, meaning each organisation answering a question counts equally.

Most percentages relate to the organisations answering the relevant question, not all 158 respondents. Where a question applies only to a particular group, its findings describe that group. Some questions allow more than one answer, so percentages can add up to more than 100%. Findings on changes in service delivery reflect organisations' own assessments. Income and expenditure source shares describe the average share across responding organisations, not sector-wide distribution.

How organisation size is defined

Following the approach adopted in NCVO's Almanac, [1] organisation size is classified by reported annual income: micro (under £10,000), small (£10,000 to under £100,000), medium (£100,000 to under £1 million), large (£1 million to under £10 million), major (£10 million to under £100 million) and super-major (£100 million or more). Large, major and super-major organisations are combined as 'large' when describing locality size profiles and comparing findings by organisation size across all reports, because of the smaller numbers in these bands.

Estimating the scale and contribution of the sector

Manchester is estimated to have 4,313 VCSE organisations: 2,155 registered organisations and 2,158 groups not captured on formal registers, often described as below-the-radar (BTR). Registered organisations were identified through the Charity Commission, Companies House and the Financial Conduct Authority's Mutuals Register. Records were matched to Manchester using postcode data, and duplicate entries were removed. Below-the-radar groups were estimated using Office for National Statistics (ONS) population figures and the population-based approach developed by Mohan et al. [2] This estimated number and profile of organisations is referred to as the study's 'sample frame'.

The estimates in Section 2.1 scale selected survey findings to this wider sector. The main approach is extrapolation: averages are calculated within organisation-size groups, multiplied by the estimated number of organisations in each group, and added together. This allows the calculations to reflect differences between smaller and larger organisations. To improve the stability of the Manchester estimates, its estimated organisation-size profile was combined with Greater Manchester-wide averages or rates within the same size groups, rather than relying on smaller Manchester subgroups. Numeric checks were undertaken prior to extrapolation, and winsorisation was used to limit the influence of extreme values by capping them rather than deleting them. Estimates for income, expenditure and people supported use 90% winsorised means; volunteer hours and paid staff use 95% winsorised means; and volunteer and trustee totals use cleaned means.

The report includes two economic value indicators. The replacement-cost value of volunteering estimates what it would cost to replace annual volunteer and trustee hours with paid labour at the Real Living Wage. The economic contribution associated with paid staff applies ONS output-per-job figures to the estimated number of full-time equivalent staff, adjusted to reflect the range of activities of responding organisations. Both are indicative measures of economic value and should not be interpreted as audited financial figures.

2. Headline findings

The headline findings are presented in two parts. Section 2.1 presents modelled estimates for Manchester's VCSE sector as a whole. These informed totals are produced using survey data and an estimate of the number and profile of VCSE organisations in Manchester. The survey findings are scaled up from responding organisations to the estimated whole sector, so the figures should not be read as exact counts. Section 2.2 presents what organisations and groups in Manchester told us directly through the survey.

2.1. Estimated scale and contribution of Manchester's VCSE sector

4,313 organisations

Manchester's VCSE sector is estimated to include around **2,155 registered organisations** and **2,158 below-the-radar groups** not captured on formal registers.

£816.13 million annual income

Manchester's VCSE sector generated an estimated £816.13 million in income during 2024/25.

Mostly micro and small

We estimate that micro organisations and groups account for around two thirds of the total sector in Manchester **(65%).** Small organisations make up **18%,** medium organisations **14%**, and larger organisations **3%.**

2.59 million instances of support

Manchester's VCSE sector is estimated to provide around 2.59 million contacts or episodes of support to people and communities each year.

The sector's work is powered by an estimated **99,000 volunteers** and **24,600 trustees** or Board members.

14.14 million volunteer and trustee hours

Volunteers and trustees contribute around **271,900 hours each week**, equivalent to 14.14 million hours a year.

£190.14 million estimated value of volunteering

The estimated annual cost of replacing the time given by volunteers and trustees with paid staff earning the Real Living Wage.

13,473 full-time equivalent paid staff

This represents an estimated 17,438 individual employees working in Manchester's VCSE organisations.

£678.7 million estimated annual economic contribution from paid staff

The estimated economic value generated each year through services and activities delivered by full-time equivalent paid staff working in Manchester's VCSE sector.

2.2. What Manchester organisations told us

One hundred and fifty-eight Manchester VCSE organisations made their voices heard, sharing their experiences of working with and supporting communities across the city.

> “The impact of our work is really across the triple bottom line. It’s primarily about health and wellbeing... addressing things like loneliness, creating community hubs...
>
> It’s also brilliant for rebuilding vulnerable people... rebuilding lives, volunteering... Really since COVID, the demand on us has increased tenfold... we’re in hot demand when it comes to health and wellbeing related work... We’ve got groups from all over GM, which is brilliant, but we’re just suffocating with the demand placed on us... we don’t have the capacity to deal with it.”

Demand is rising
Four in five organisations **(80%)** say demand for their services increased over the past year, while **69%** are supporting more people.

Financial vulnerability
Four in ten **(41%)** describe their organisation as vulnerable, struggling or at risk of imminent closure. Only **8%** feel strong and secure.

Volunteer capacity
More than two in five organisations **(44%)** found it difficult to recruit volunteers, while one in three **(34%)** say they do not have enough volunteers to meet their objectives.

Reserves filling gaps
Among organisations using reserves, the most common reasons are routine operating costs, funding gaps and increased demand.

Funding risks
The leading risks are competition for funding (66%), short-term funding cycles (51%) and rising costs (40%).

Funding not keeping pace
Among grant or contract recipients, 58% say none had been uplifted for rising costs, and 77% say less than half is multi-year.

3. Manchester's VCSE sector: what it does, where it operates, and who it supports

Local Infrastructure Perspective: Manchester Community Central

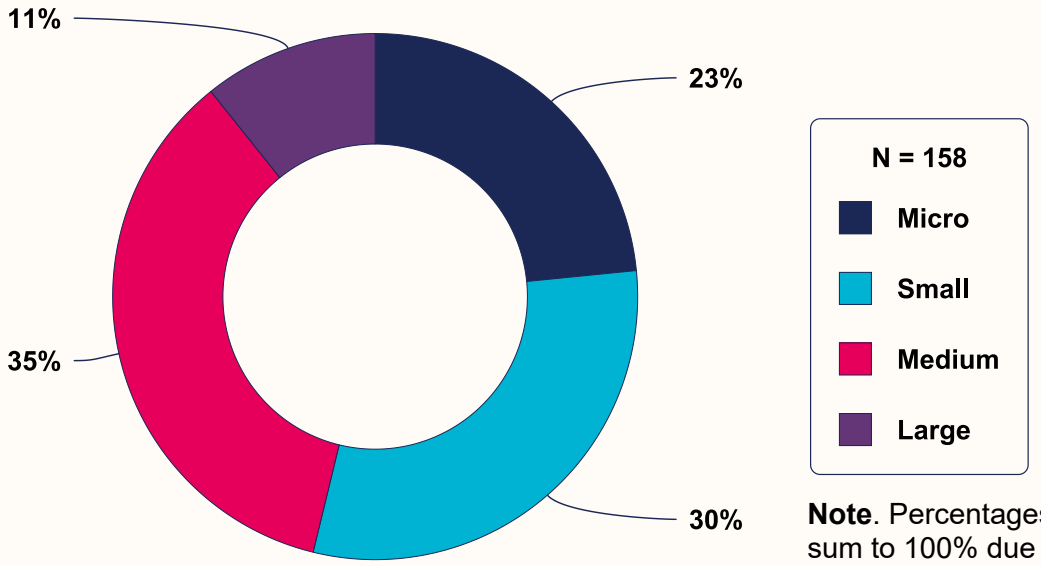
Manchester is one of the fastest-growing and most diverse cities in England. Its population grew by almost 10% between the 2011 and 2021 censuses to 551,938, with the proportion of residents from Asian, Black and other minoritised ethnic communities at over 43%. [3] The rich diversity of the city's communities is reflected in the work of the sector with support for migrant, refugee and international communities increasing since the last report.

This section sets out what Manchester's VCSE sector does, where it operates and who it supports. Organisations range from neighbourhood groups to those working citywide or across Greater Manchester, covering areas from health and wellbeing to education, the arts and community development. We know that these patterns evolve over time according not only to demand but also to shifts in funder and policy priorities locally and nationally. The key feature which remains consistent is of a sector which supports all communities across the city, on all kinds of issues in all kinds of ways.

3.1. Size, legal form and organisational age

Around half of responding VCSE organisations are micro (23%) or small (30%), a third are medium-sized (35%) and 11% are large, major, or super-major.

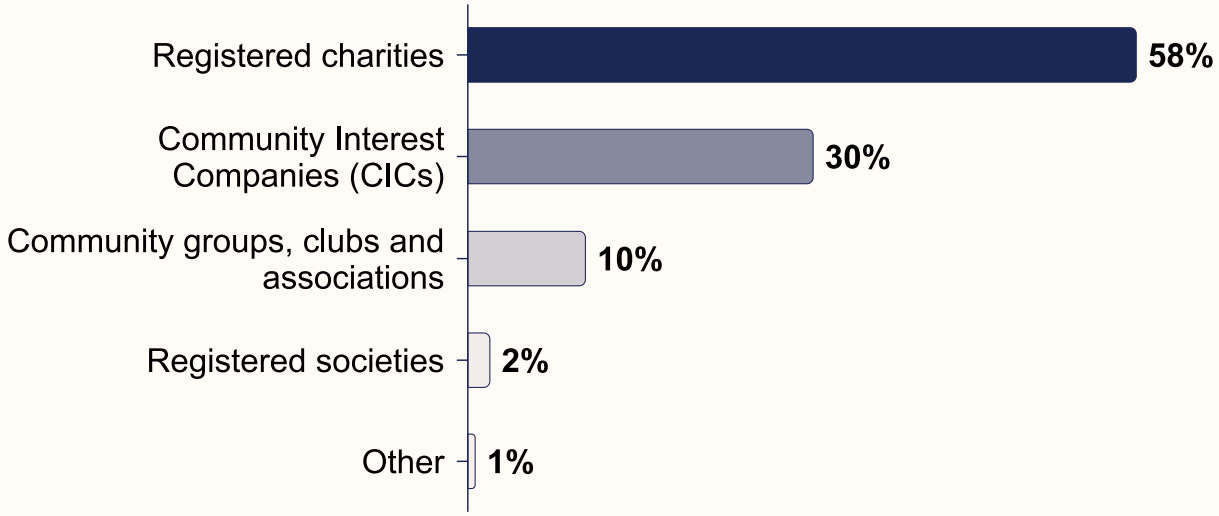
Figure 3.1. Proportion of responding organisations by size



Note. Percentages may not sum to 100% due to rounding.

Registered charities account for 58% of responding organisations, followed by Community Interest Companies (30%) and community groups, clubs and associations (10%). Two in five organisations (41%) identify as social enterprises, showing that trading and enterprise are part of how many organisations pursue their social purpose.

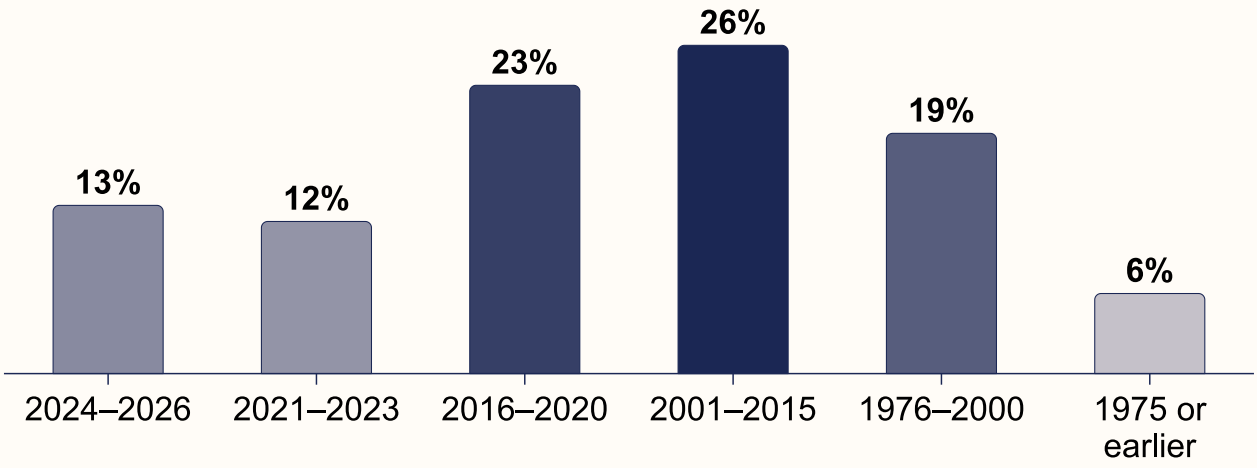
Figure 3.2. Proportion of responding organisations by legal status



Note. Base = 158. Percentages may not sum to 100% due to rounding.

The sector combines long-established organisations with newer groups. Around half of responding organisations have been operating for more than ten years (51%), while a quarter were established within the past five years (25%). Just under a quarter have operated for between six and ten years (23%).

Figure 3.3. Year in which organisations were established

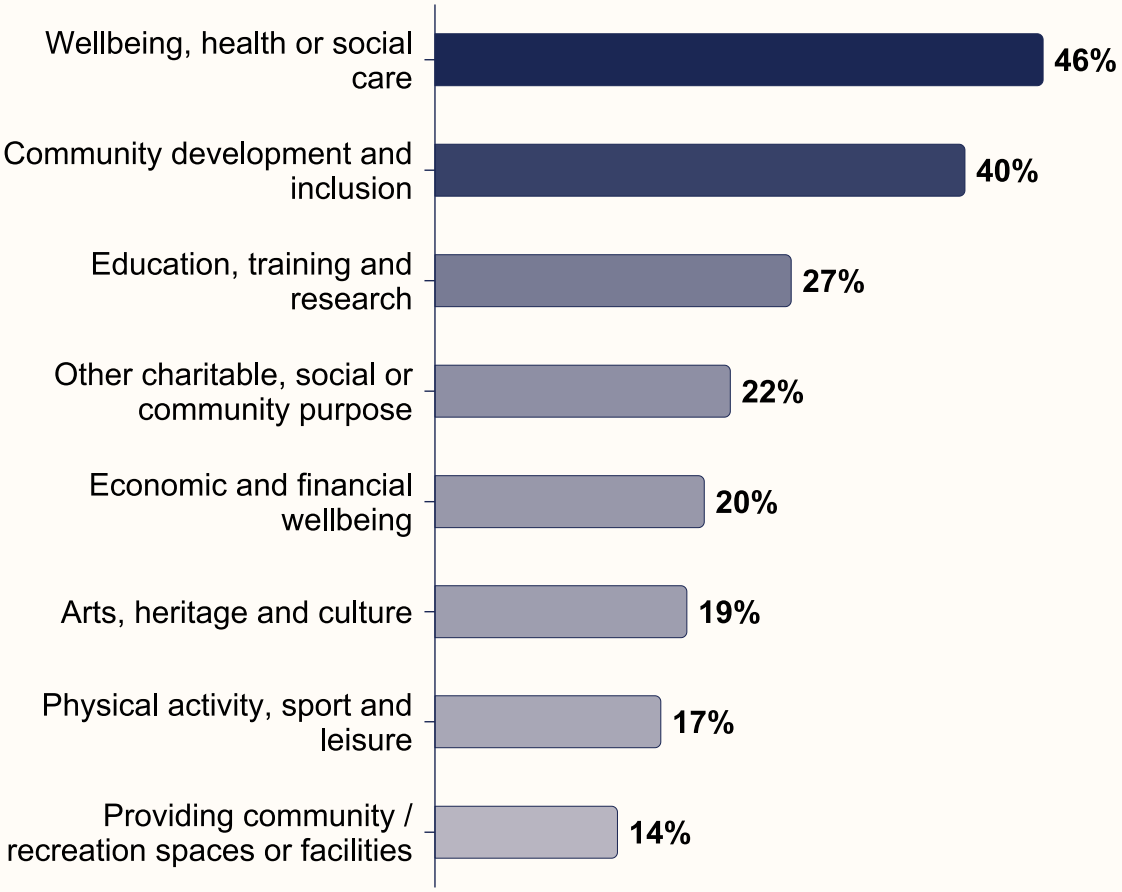


Note. Base = 157. Percentages may not sum to 100% due to rounding.

3.2. What they do

The breadth of Manchester's VCSE sector reflects the diversity of the city and the needs of its communities. Almost half work in wellbeing, health and social care (46%), delivering important work in a local authority area where almost half of neighbourhoods are among the most deprived 10% nationally for health and disability. [4] Two in five focus on community development and inclusion (40%), the activities for which will be strengthened further through the Live Well Spaces of Hope and Connection programme.[5] Around a quarter provide education, training or research (27%), one in five work to support economic and financial wellbeing (20%), and a similar proportion deliver activities around arts, heritage, and culture (19%).

Figure 3.4. Main areas in which organisations work (top 8)

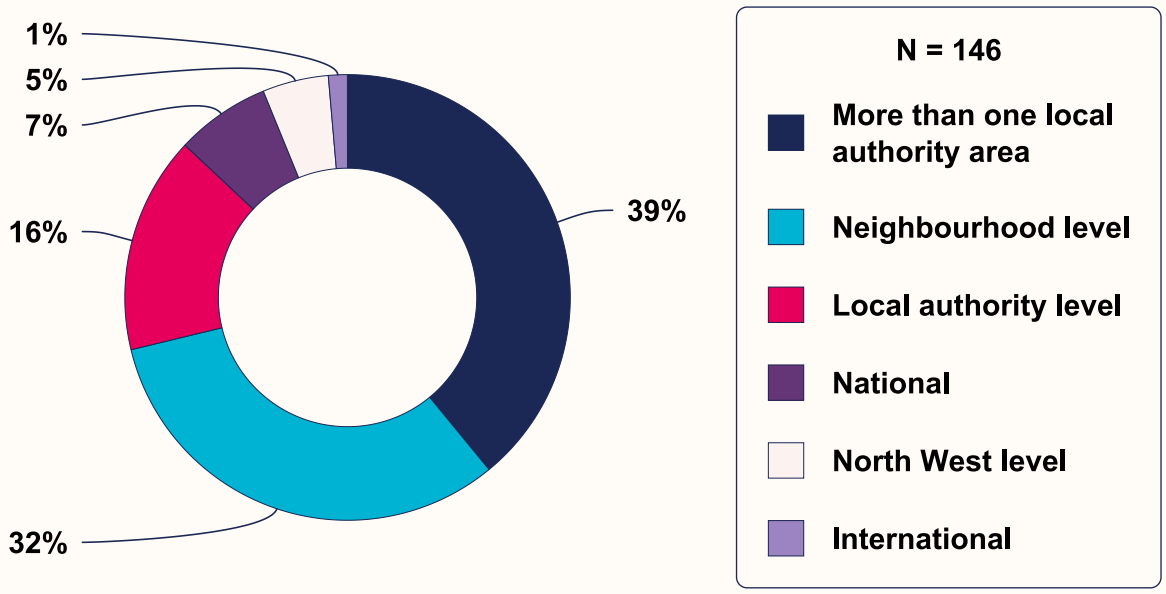


Note. Base = 153. Respondents could select more than one option, so percentages do not sum to 100%.

3.3. Where they operate

Manchester's responding organisations work at different geographic levels. Almost two in five operate across more than one local authority area (39%), around a third work primarily at neighbourhood level (32%), and one in six operate primarily in the Manchester area (16%). A further 13% operate regionally, nationally or internationally.

Figure 3.5. Geographic scope of organisations' work

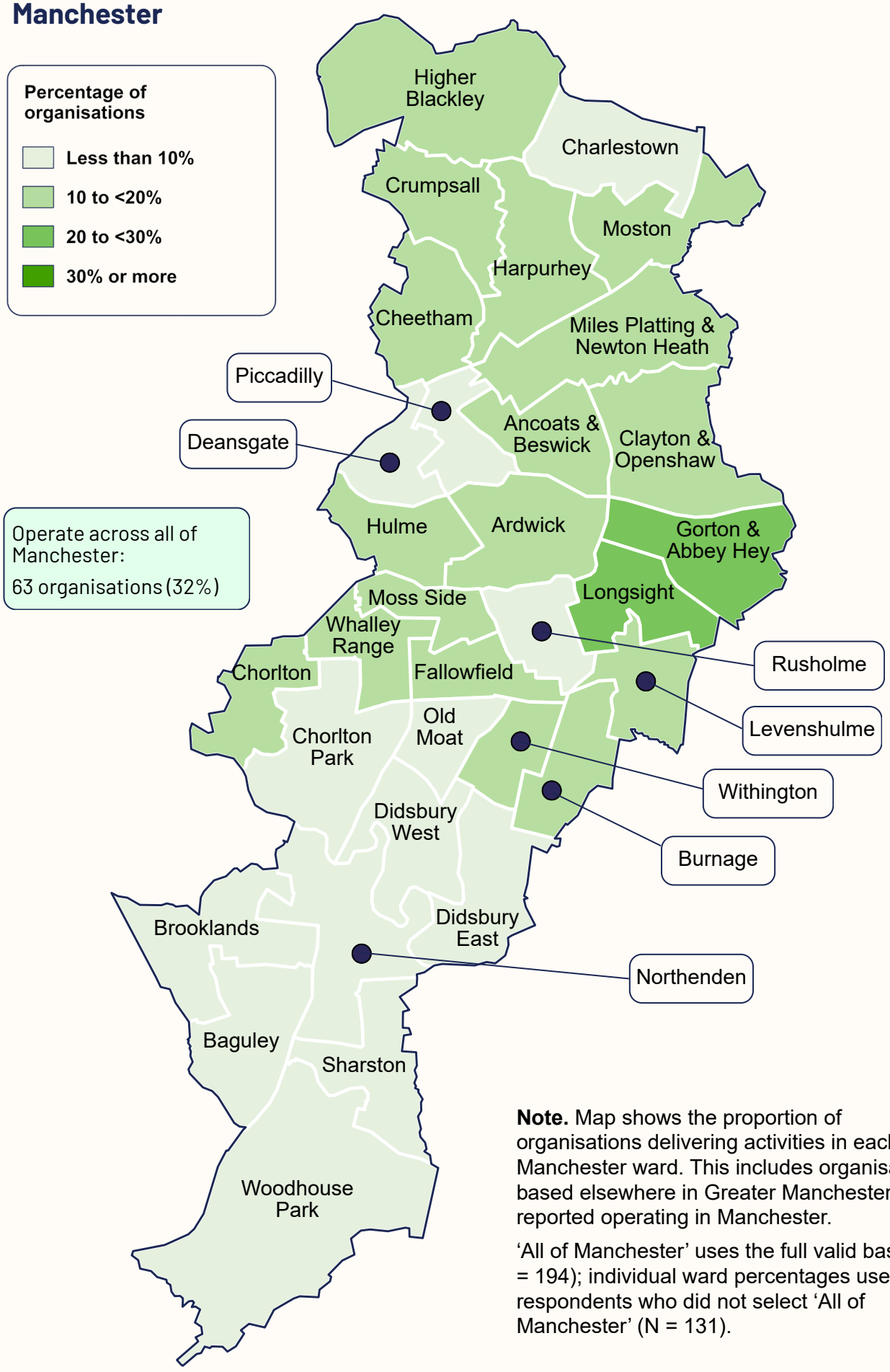


In part because of its central location, Manchester is also served by VCSE organisations based outside the city. We therefore asked all respondents who identified Manchester as one of their main areas of activity to indicate where within the city they worked. Nearly one third (32%) said they covered all wards in Manchester.

Respondents who did not select 'all of Manchester' could identify one or more individual wards. Among this group, Gorton and Abbey Hey (24%) and Longsight (22%) were the most frequently selected. Other wards experiencing high levels of deprivation – particularly child income deprivation [4] – also recorded comparatively broad coverage, including Cheetham (20%) and Harpurhey (18%).

This suggests that responding organisations are reaching several communities experiencing particularly high levels of need. However, coverage was not consistently greatest in every highly deprived ward. Lower reported activity may indicate uneven provision, but could also reflect the composition of organisations responding to the survey. Figure 3.6 shows the proportion of respondents delivering activities in each Manchester ward.

Figure 3.6. Ward-level coverage of organisations delivering activities in Manchester



Note. Map shows the proportion of organisations delivering activities in each Manchester ward. This includes organisations based elsewhere in Greater Manchester that reported operating in Manchester.

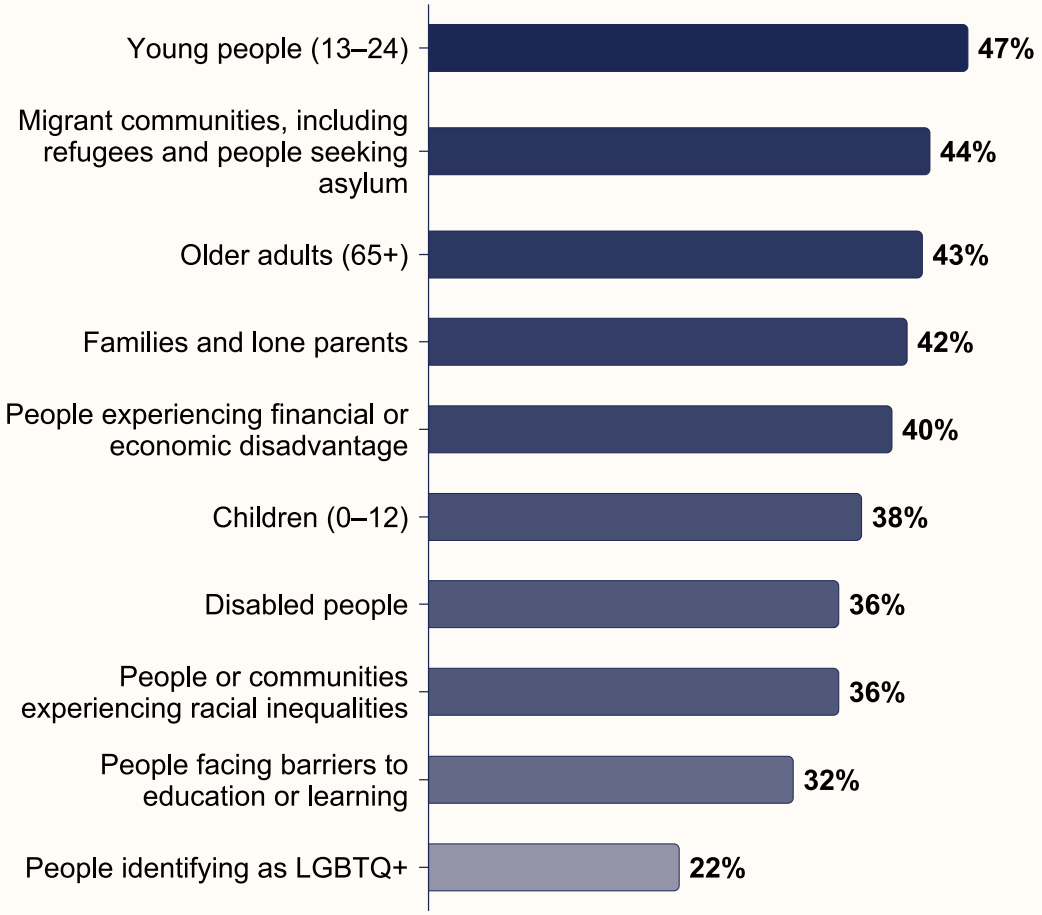
'All of Manchester' uses the full valid base (N = 194); individual ward percentages use respondents who did not select 'All of Manchester' (N = 131).

3.4. Who they support

Manchester's ethnic and cultural diversity, deprivation and health inequalities are reflected in the communities its VCSE organisations support, spanning different life stages and shared experiences of financial hardship, migration, racial inequality and disability. Teenagers and young adults are the most commonly supported group (47%). Manchester City Council's 2026 public health report states that 43.6% of children aged under 16 were living in poverty after housing costs in 2023/24. [6] This provides important context for the two in five respondents supporting families or lone parents (42%) and people experiencing financial or economic disadvantage (40%), as well as those working with children aged 0 to 12 (38%). More than two in five responding organisations support older adults (43%). Although Manchester has a lower-than-average proportion of older residents, income deprivation among older people is concentrated in some neighbourhoods. [3,4]

More than two in five respondents work with migrant communities, including refugees and people seeking asylum (44%), while over a third support people experiencing racial inequalities (36%), and a similar proportion support Disabled people and those living with long-term health conditions, including mental health conditions (36%). These findings reflect the breadth of communities supported by Manchester's VCSE sector, spanning different ages, identities and backgrounds in a city where financial hardship, health inequalities and barriers to participation affect many residents.

Figure 3.7. The people and communities that organisations support (top 10)



Note. Base = 151. Respondents could select multiple options so percentages do not sum to 100%.

4. Staff, volunteers and trustees

Local Infrastructure Perspective: Manchester Community Central

Organisations are made of people. In the VCSE sector, they are overwhelmingly local people coming together to take action on something that matters to them. The workforce includes paid staff, volunteers, trustees and Board members motivated by purpose, lived experience, social connection and commitment to their communities. Even in larger organisations with more paid staff, these are generally local people who have chosen work that aligns with their values.

This section looks at the people who make up Manchester's VCSE workforce — the sector's main resource. Development of that workforce, beyond standard recruitment of paid staff and volunteers, is an area often neglected by funders and commissioners. Without enough people with the right skills and support, the services described elsewhere in this report cannot be sustained.

As cost-of-living pressures continue to affect communities, we see some reduction in volunteering — a pattern reflected nationally [7] — yet it remains a significant contribution to city life. As employers, the sector strives to be inclusive, for example through Real Living Wage rates, but rising costs such as National Insurance, increased workloads, and limits on salaries and development opportunities are making it harder to recruit and retain skilled paid staff.

4.1. Paid staff and employment

There are an estimated 13,473 full-time equivalent paid staff employed by Manchester's VCSE sector, corresponding to approximately **17,438 employees**. The work carried out by these staff is estimated to contribute **£678.7 million** to the economy each year through the services and activities they deliver.



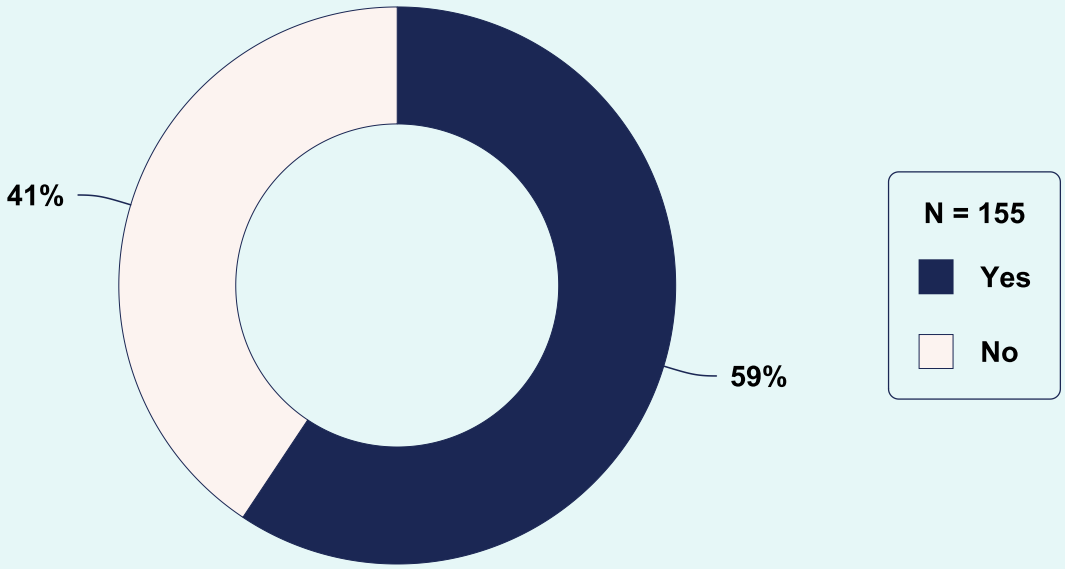
Manchester's VCSE sector is estimated to employ **17,438** people

Estimated annual economic contribution from paid staff

£678.7 million p.a.

Three in five responding organisations have paid staff (59%), and almost all of these organisations say they pay the Real Living Wage to all eligible employees (91%). Paid employment is concentrated in larger organisations: 96% of medium and all large organisations report a paid workforce, compared with half of small organisations (48%) and very few micro organisations and groups (3%).

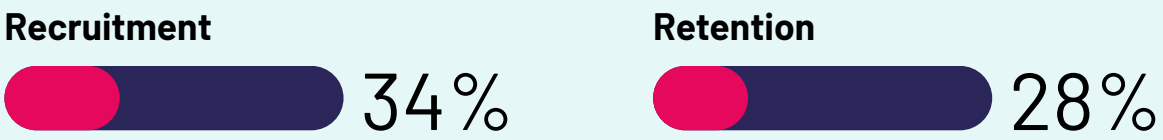
Figure 4.1. Organisations with a paid workforce



Just over half of organisations with paid staff have fewer than five paid FTE employees, with the largest proportion reporting between two and four FTE posts (36%). One in five have between five and nine (20%), a similar proportion have between 10 and 19 (17%), and slightly fewer have 20 or more FTE posts (12%).

Around a third report difficulty recruiting staff (34%) over the past year, while more than a quarter report difficulty retaining them (28%).

Figure 4.2. Staff recruitment and retention difficulties



Note. Question shown only to organisations with paid staff. Base: recruitment = 86; retention = 86. Shows the proportion answering 'Yes'. 'Don't know' responses excluded.

4.2. Volunteers and trustees

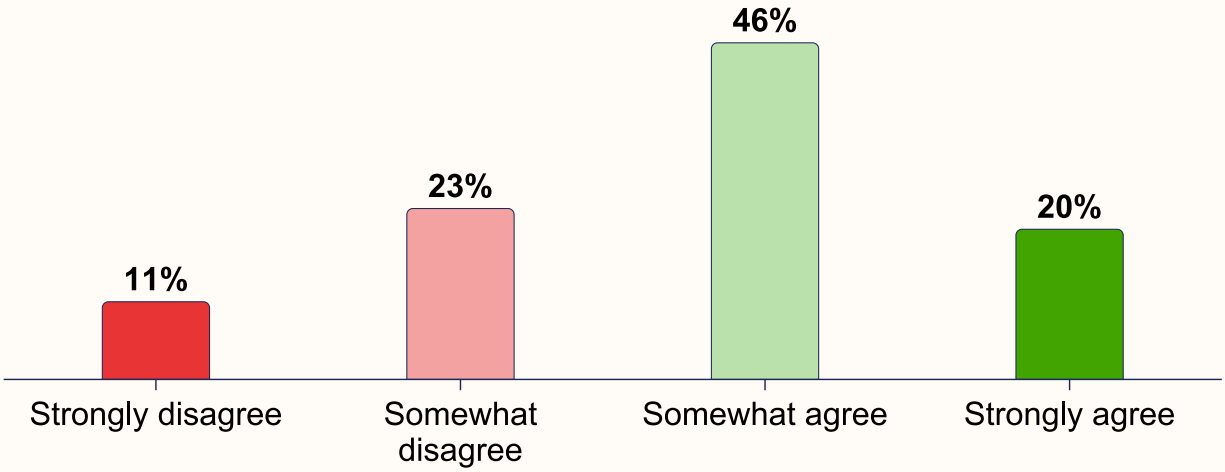
Across Manchester, the sector is estimated to involve around 99,000 volunteers and 24,600 trustees or Board members, contributing around 271,900 hours each week. Over a year, this is equivalent to 14.14 million hours of unpaid time supporting local people, running activities and governing organisations. Valued at the Real Living Wage, these hours have an estimated replacement cost of £190.14 million each year.

Volunteers make up a substantial part of the workforce within responding organisations. More than a third of responding organisations have fewer than ten volunteers (37%). A similar proportion report 25 or more (34%), reflecting the mix of different-sized organisations. Less than a third have between 10 and 24 volunteers (29%).

The support organisations offer volunteers is both practical and developmental. Three quarters reimburse expenses (75%), more than two thirds offer training, development or progression opportunities (68%), and three in five provide recognition or social activities (59%).

Two thirds say they have enough volunteers to carry out their work and meet their objectives (66%), leaving a third that do not. This pressure sits within a longer national decline. Formal monthly volunteering remains well below the levels recorded before the pandemic, and the proportion of adults volunteering formally at least once a month fell from 27% in 2013/14 to 17% in 2024/25. [7]

Figure 4.3. Whether organisations have enough volunteers to carry out work and meet their objectives



Note. Base = 142. ‘Don’t know’ responses excluded.

Recruitment seems to be a pressure point. More than two in five found it difficult to recruit volunteers over the past year (44%), compared to one in three that have found it difficult to retain volunteers (32%).

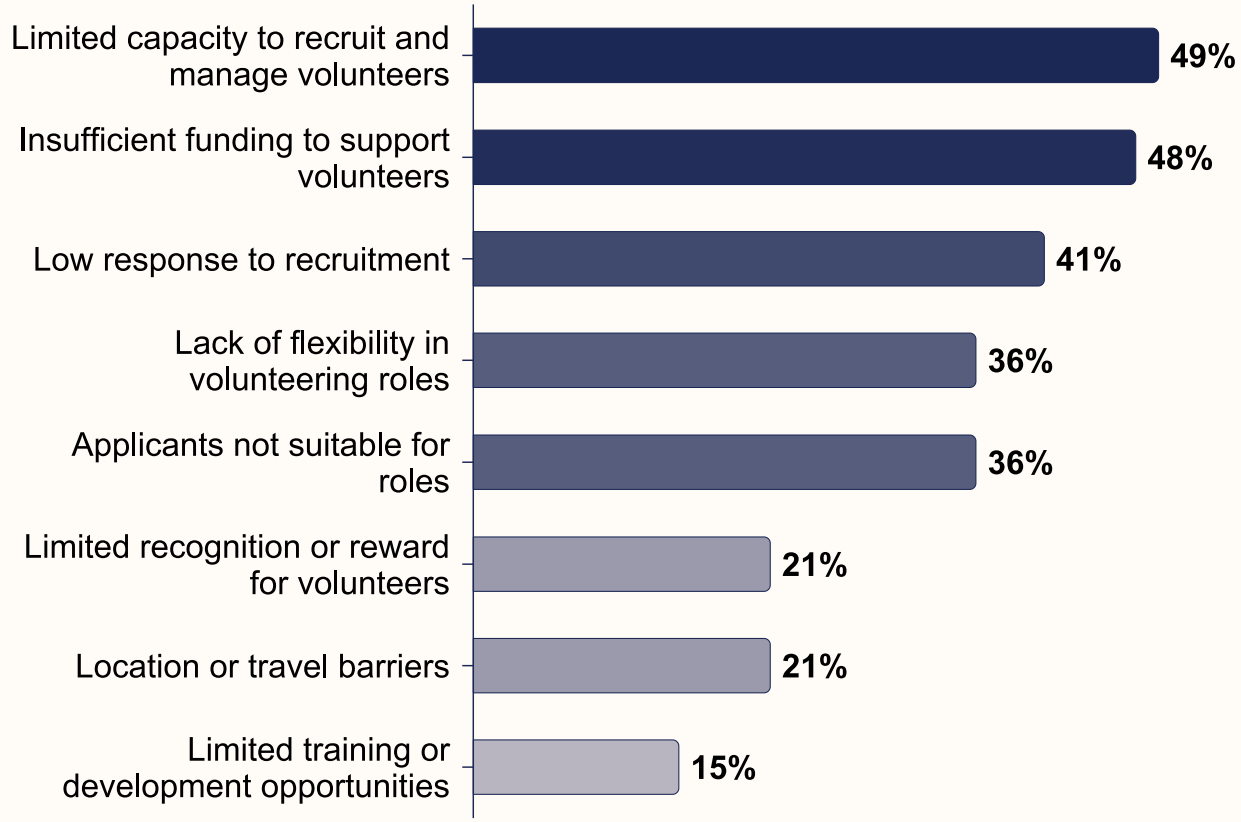
Figure 4.4. Volunteer recruitment and retention difficulties



Note. Base: recruitment = 140; retention = 139. Shows the proportion answering 'Yes'. 'Don't know' responses excluded.

Organisations experiencing recruitment difficulties describe barriers relating to both organisational capacity and volunteer interest. Around half say recruitment is made harder by limited capacity (49%) or insufficient funding (48%) to recruit, support, and manage volunteers, while two in five say that low response to their adverts (41%) also has an impact.

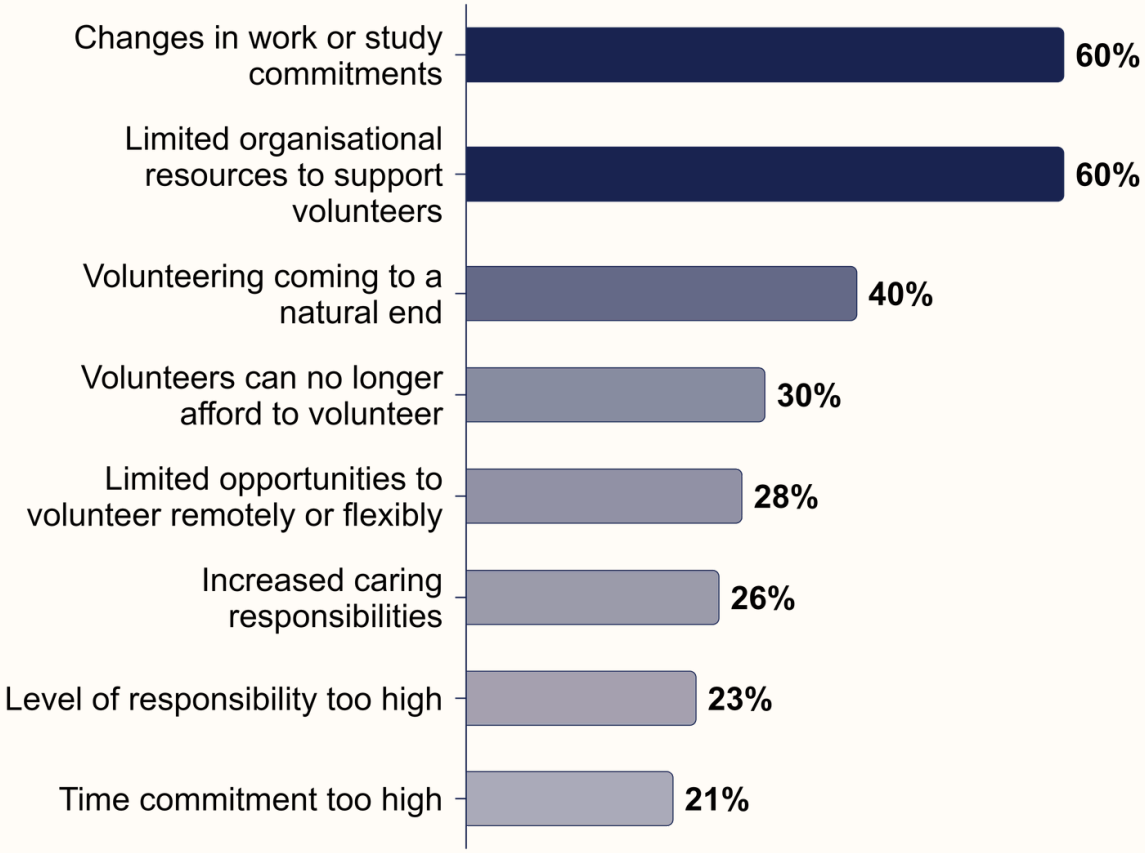
Figure 4.5. Volunteer recruitment barriers



Note. Base = 61. Question shown only to organisations reporting volunteer recruitment difficulties. Figure shows the eight most commonly selected recruitment barriers. Respondents could select more than one option, so percentages do not sum to 100%.

While many are finding it difficult to attract new volunteers, a third (32%) are also finding it difficult to retain existing volunteers. Similar to recruitment barriers, organisations linked retention challenges to a lack of organisational resources (60%) as well as changes in work or study commitments (60%) leaving people with less free time. This reflects wider national evidence showing that work commitments were the most common barrier among adults who did not volunteer at least monthly, reported by more than half (51%). [7]

Figure 4.6. Volunteer retention barriers



Note. Base = 43. Question shown only to organisations reporting volunteer retention difficulties. Figure shows the eight most commonly selected retention barriers. Respondents could select more than one option, so percentages do not sum to 100%.

4.3. Consequences of workforce shortages

When staff or volunteer capacity is stretched, demand does not stop. Services may continue, but the people sustaining them often absorb the pressure through increased responsibility and emotional strain.

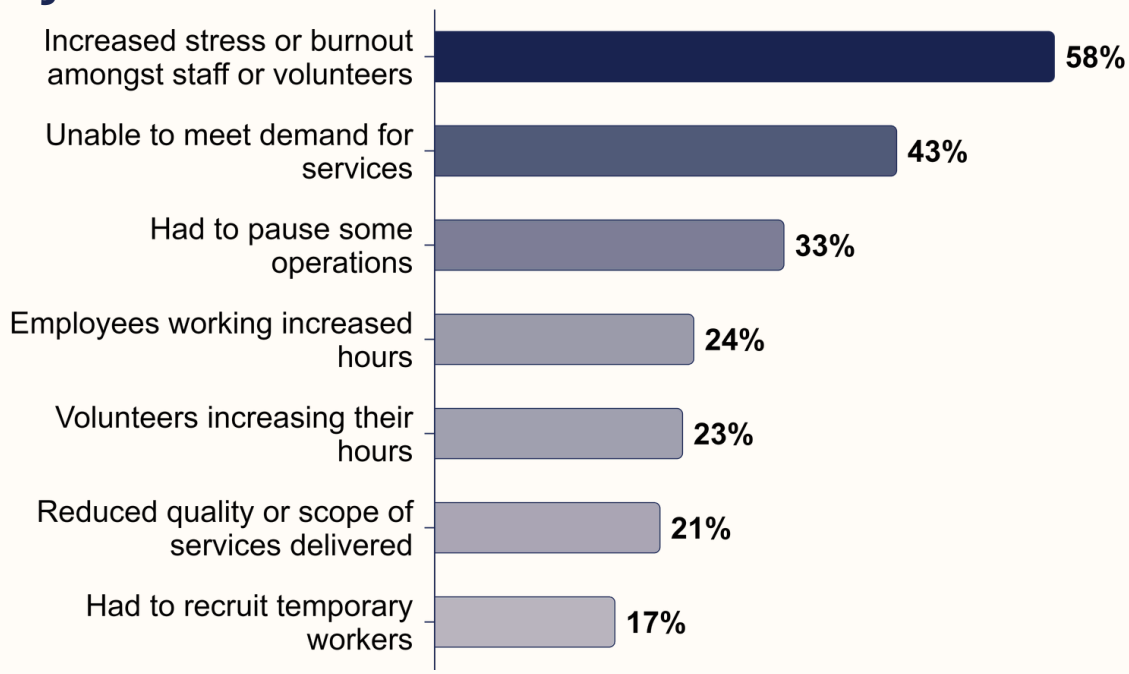
Focus group participants described the unseen and often unfunded time and effort that go into support.

> “The core funds, sometimes it’s only [to cover] like three or four hours, but in fact we are doing all day and night as well. We are doing a lot. It doesn’t cover lots of things… we need more to be sustainable and resilient, and also to gain the trust of our beneficiaries.”

We describe this as the cost of 'doing good' - a trade-off in which the people delivering services absorb strain in order to protect those services. Survey respondents described how workforce shortages were exacerbating this strain. Among those experiencing difficulties, three in five say staff and volunteers have experienced increased stress or burnout (58%), while a quarter say staff (24%) and volunteers (23%) are giving more of their time. National research has identified similar patterns, showing that many within the sector experience stress, anxiety and emotional exhaustion because of their work. [8,9]

Not having enough staff or volunteers also has an impact on what support organisations are able to provide. More than two in five say they have been unable to meet demand (43%), a third have paused some operations (33%), and a fifth say the quality or scope of support has reduced (21%). This suggests that shortages are contributing to issues which affect not only staff and volunteers but also the communities they serve.

Figure 4.7. How recruitment or retention difficulties are affecting organisations



Note. Base = 95. Question shown only to organisations reporting recruitment or retention difficulties among staff or volunteers. Figure shows the eight most commonly selected responses. Respondents could select more than one option, so percentages do not sum to 100%.

5. Communities supported, demand, and access

Local Infrastructure Perspective: Manchester Community Central

Although Manchester has seen considerable economic growth in recent years, the city has consistently ranked among England's most deprived local authority areas in every Index of Multiple Deprivation since 2010; 6th out of 317 areas in 2019, and 4th out of 296 areas in 2025. [4] An estimated 100,000 Manchester households had less than £30 a month in disposable income in 2024. [10]

This is the context in which the VCSE sector works to address the immediate impacts of poverty by providing support. Responses show how interconnected the sector's work is in this space, with high levels of referrals and signposting between organisations. It is telling, however, just how much of the work is also driven by referrals from public sector organisations: a challenge to look at how the flow of demand can be matched by a flow of resources to ensure this ecosystem is sustainable.

This section covers who Manchester's VCSE organisations support, how demand has changed, and what we see that still prevents people from accessing support. Rising demand does not automatically mean rising reach: organisations can be working harder while some communities remain underserved.

Manchester's VCSE organisations provide an estimated 2.59 million instances of support each year.

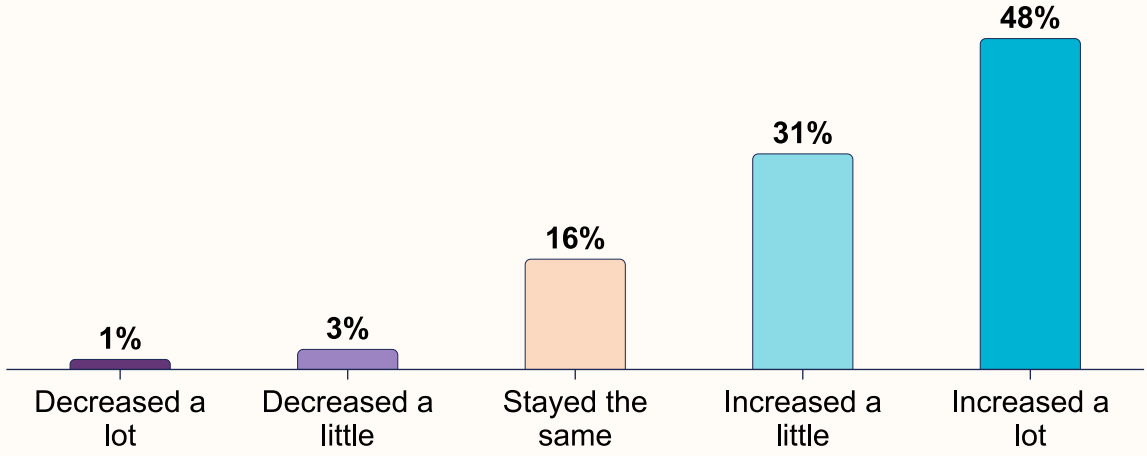
The support of Manchester's VCSE sector is particularly important in a city with pockets of very deprived areas. Focus group findings described supporting people with increasingly complex needs, often stepping in where public services fall short.

> "Government is doing less… local services are doing less… 16 years of austerity we've lived through has left us with a position where even the statutory services are being cut… people are not getting the level of support… we are dealing with people in acute homelessness, acute mental health difficulties, who aren't receiving necessary health care. We're dealing with people at the absolute bottom."

5.1. Demand for services

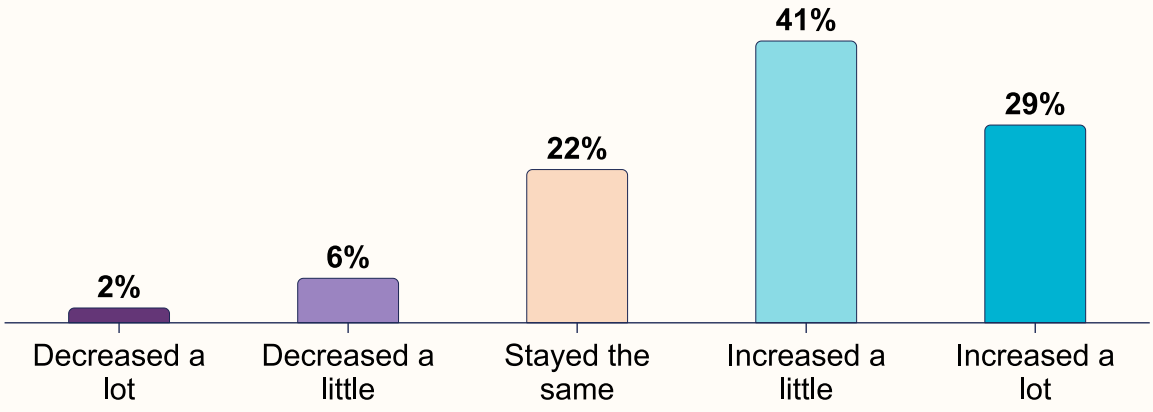
When asked how demand for services had changed over the past year, four in five report an increase (80%), with almost half (48%) saying it has increased a lot. More than two thirds (69%) say the number of people they support has increased in line with this, reflecting a wider national pattern of increased demand for VCSE support. [11]

Figure 5.1. Change in demand for services, last 12 months



Note. Base = 137. 'Don't know' responses excluded.

Figure 5.2. Change in the number of people that organisations support, last 12 months

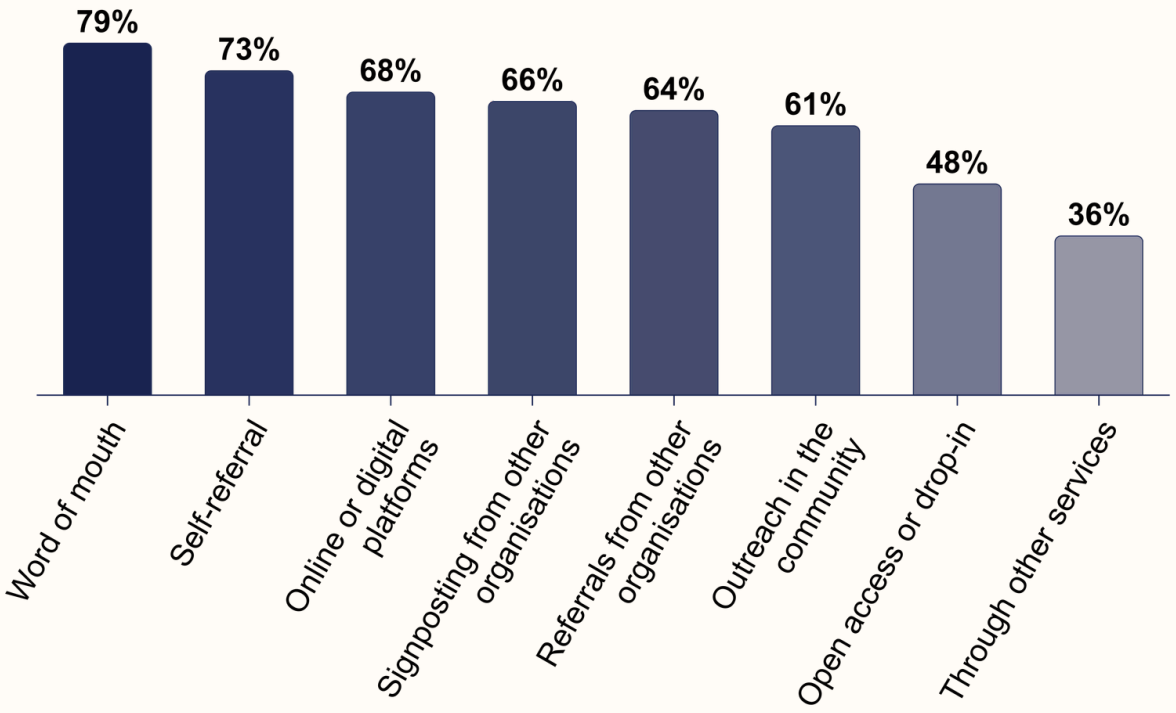


Note. Base = 140. 'Don't know' responses excluded.

5.2. How people access services

People reach support through direct and relational routes. Word of mouth is the most common (79%), followed by people contacting the organisation directly (73%) or via online or digital platforms (68%). Around two thirds say people are signposted (66%) or referred (64%) by other organisations or services, while three in five report contact through their community outreach activities (61%).

Figure 5.3. How people come into contact with VCSE organisations



Note. Base = 145. Respondents could select more than one option, so percentages do not sum to 100%. Figure shows the eight most commonly selected responses.

Among organisations receiving referrals, more than four in five receive them from other VCSE organisations (88%) and public sector organisations or services (84%), while a third receive referrals from the private sector (34%). Many referral routes relate to health, wellbeing, and social care, as well as a substantial proportion relating to migration, refugee, and asylum support. These pathways show how closely the sector sits within local systems for health but also in providing trusted routes into support for communities that are less likely to have access to services and opportunities. Making Manchester Fairer is just one of several initiatives and action plans that bring together health and care services with VCSE organisations to deliver community-informed support that is competent, culturally safe, and appropriate. [12,13]

While referrals are an important part of connecting people to trusted help, they also shift demand onto organisations that are already supporting more people and with fewer resources. One focus group participant described the conflict between not wanting to turn referrals away and recognising that continuing to meet growing demand is unsustainable without adequate resources and support.

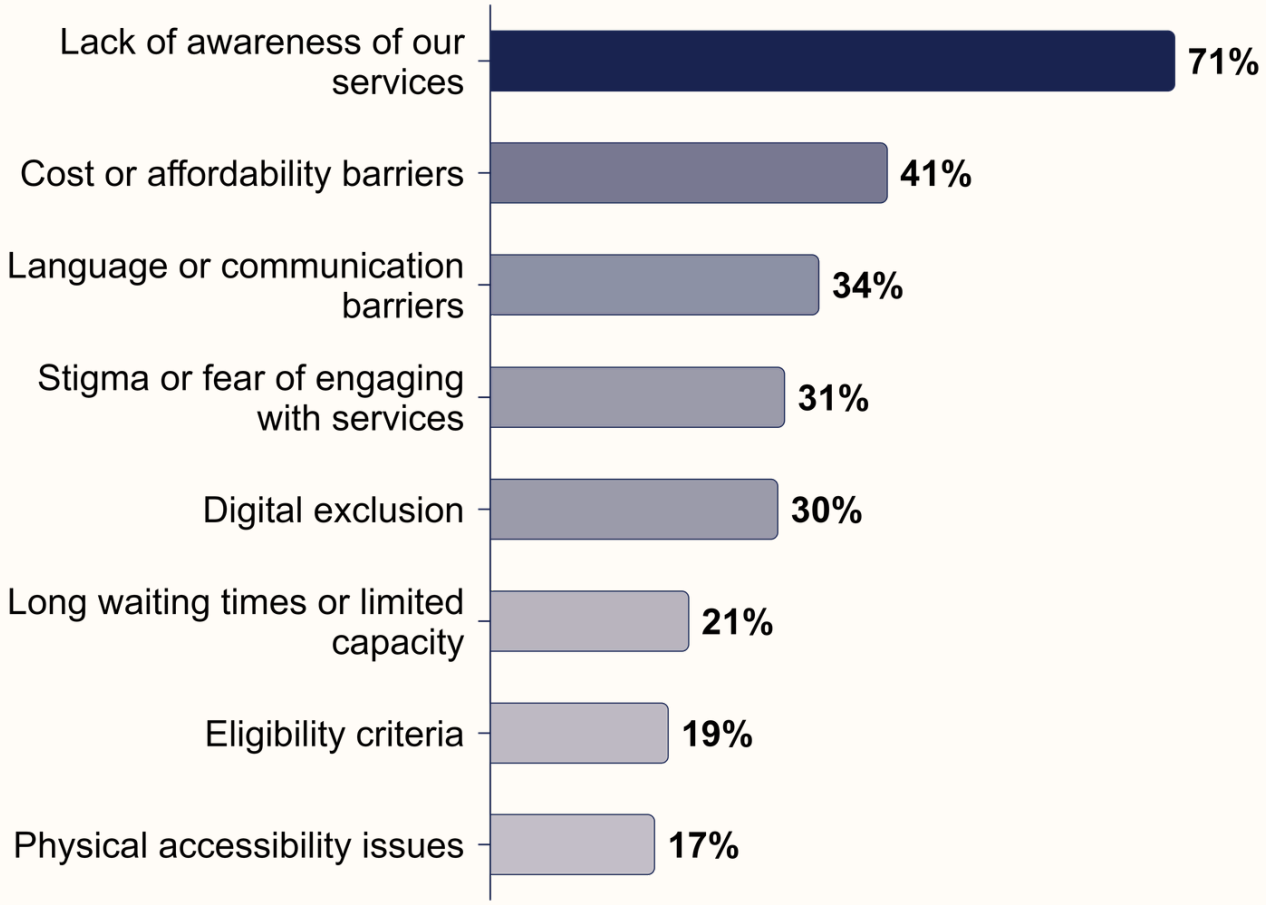
> “We’ve been getting a lot more referrals from social workers and health professionals in the area... referring older people who might have difficulties with mental or physical health and isolation. We have to really think about what we’re able to do as a charity and where to draw our boundaries. You get referrals for people... if we say no, they are left isolated. But we can’t meet that need... we need to make sure that the social workers and NHS are aware of our capacity issues and work out if there’s funding available.”

At least two thirds of organisations receiving referrals say no funding was received from the organisations and services referring. It is vital that adequate resources accompany referrals to enable VCSE organisations to deliver support.

5.3. Barriers to access

Manchester's VCSE sector supports a diverse range of communities, some of which face structural barriers to service provision and some which face cultural or language barriers which make finding support difficult. Almost three quarters of responding organisations say that a lack of awareness is a main barrier to accessing their services (71%), while two in five point to affordability or the costs of taking part (41%). A third say that language or communication (34%) and a similar proportion say stigma or fear (31%) are barriers which may affect people accessing support.

Figure 5.4. Barriers to accessing services

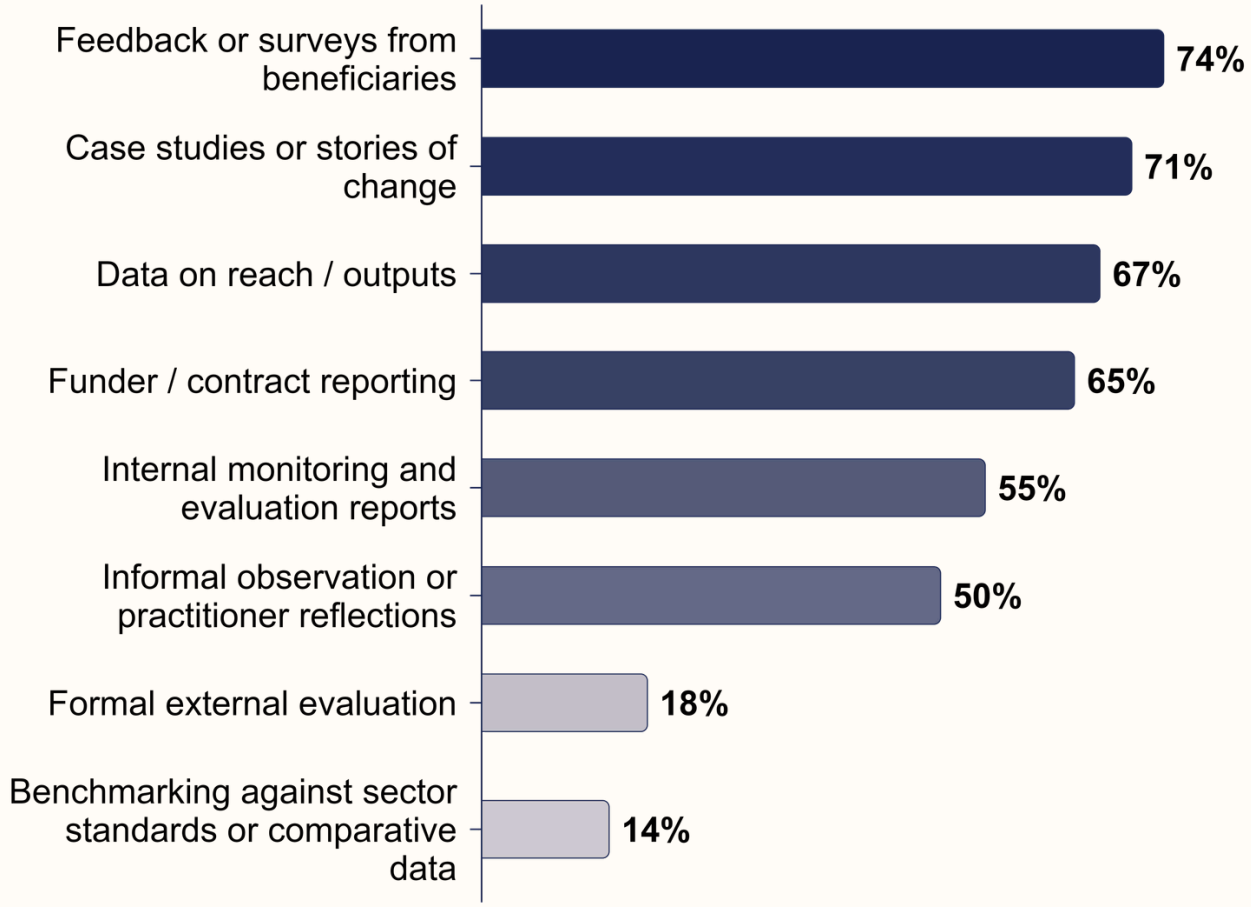


Note. Base = 140. Figure shows the eight most commonly selected responses. Respondents could select more than one option, so percentages do not sum to 100%.

5.4. Measuring impact and delivery quality

Organisations use a range of methods to understand and demonstrate what their work achieves. The most common are feedback or surveys from beneficiaries and service users (74%), case studies or stories of change (71%), reach or output data (67%), funder or contract reporting (65%), and internal monitoring and evaluation reports (55%).

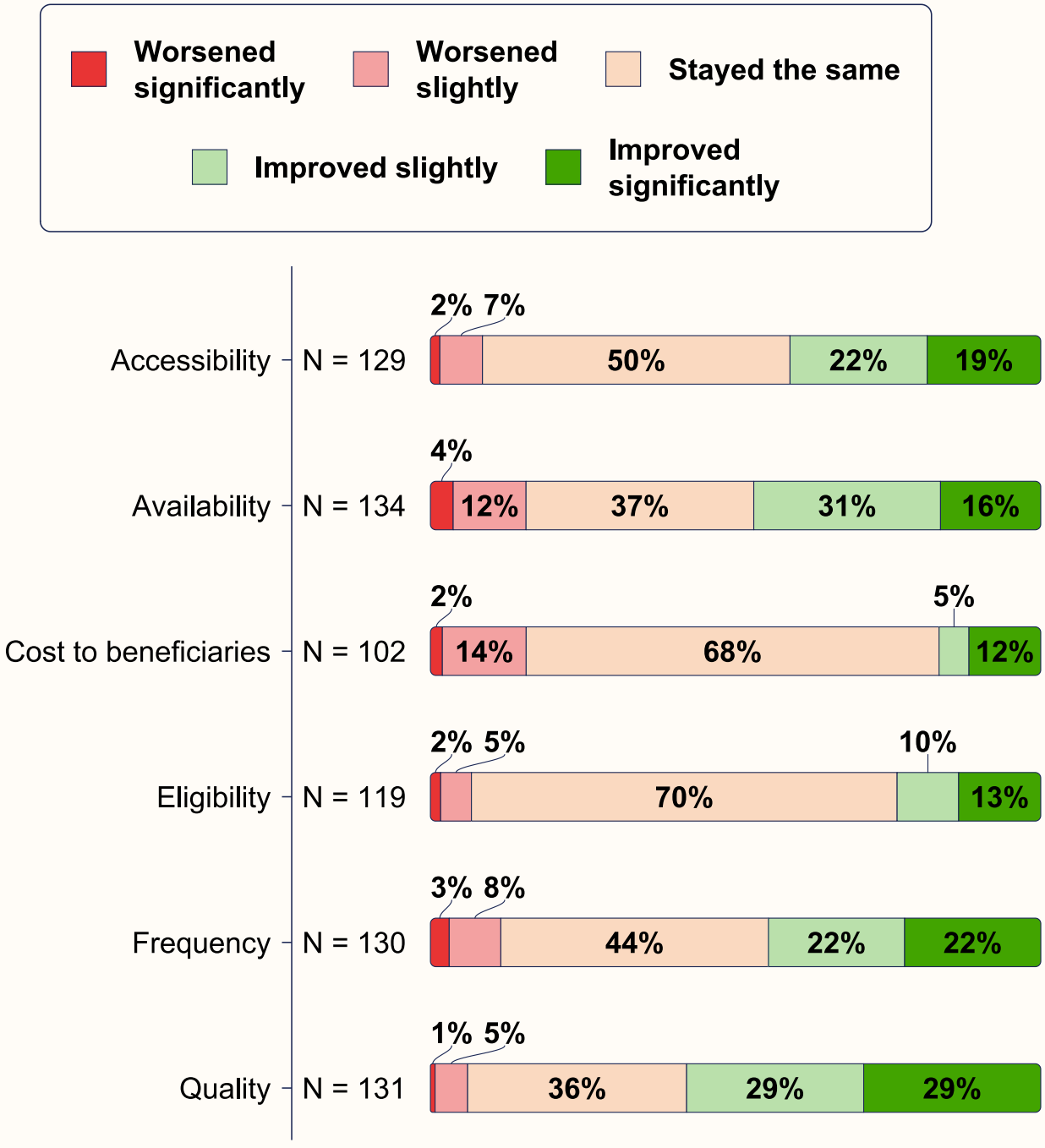
Figure 5.5. How organisations measure impact



Note. Base = 144. Respondents could select more than one option, so percentages do not sum to 100%.

Despite higher demand, many organisations say they have maintained or improved their level of support. More than half report improved quality (58%), while around two in five report improvements in availability, frequency and accessibility. In contrast, around one in six say the availability of support and the costs to beneficiaries have worsened.

Figure 5.6. Change in services over the past 12 months



Note. Bases are shown in the chart and vary by metric. 'Don't know / not applicable' responses excluded for each metric. Percentages may not sum to 100% due to rounding.

6. Finances and the funding landscape

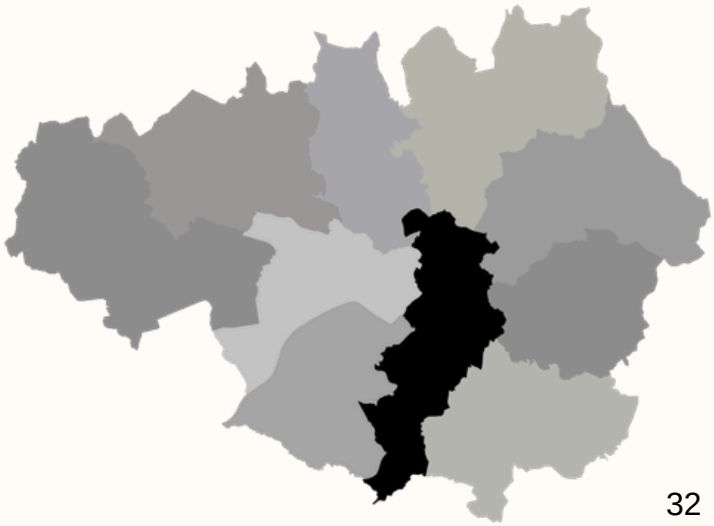
Local Infrastructure Perspective: Manchester Community Central

Financial sustainability underpins everything else in this report: an organisation's ability to keep serving its community depends on income, reserves and funding terms largely set by others. A sustainable VCSE sector needs access to income that enables it to increase its impact over time — not only funding that keeps pace with rising costs, but also investment in organisational capability such as premises, back-office systems and workforce development. These are the hidden pressures, in addition to increasing demand, which put support and services at risk.

The wider local economy also affects the sector. Much of the sector's funding originates with public bodies working under real constraints of their own. Manchester City Council estimates it lost £420 million in funding over the decade to 2022 due to national spending cuts, [14] though there are now signs of an improved position. Just as important, though less visible, is the short-term nature of public sector budget settlements, which limits the local system's ability to make longer-term investments in VCSE organisations — reducing the sector's ability to bring in additional funding to enhance capacity, rather than simply manage uncertainty.

VCSE organisations across the UK have been navigating an increasingly challenging financial and funding landscape in recent years. Shrinking public budgets and reduced donations have made it harder to generate income, while rising energy, wage and overhead costs have increased the cost of delivery. At the same time, the communities they support are facing greater pressures, driving demand during a period of constraint and uncertainty. [15]

Manchester's VCSE sector draws on a diverse range of income sources, and while reducing reliance on single-source funding helps mitigate risk, it does not offset short-term funding or funding that fails to keep pace with delivery costs.

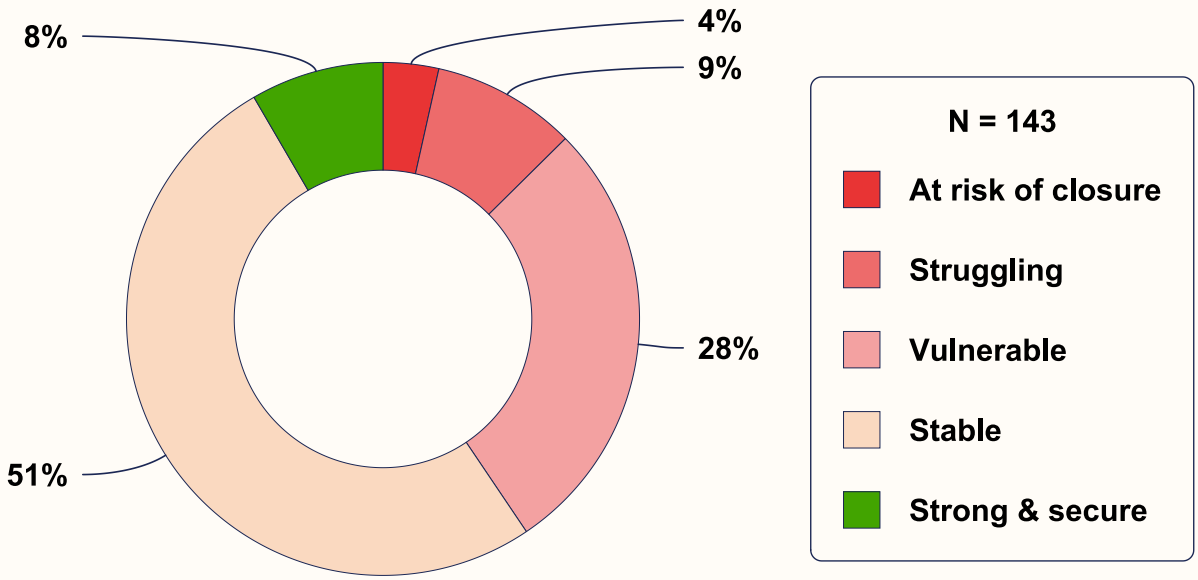


Manchester's VCSE sector generated an estimated £816.13 million in income in 2024/25, with estimated expenditure of £799.62 million.

6.1. Financial position

While estimates illustrate the scale of Manchester's VCSE sector, they do not mean that individual organisations feel financially secure. Half of respondents describe their organisation as stable but concerned about the future (51%). More than a quarter say they are vulnerable and facing significant pressure, with sustainability uncertain without changes being made (28%). Around one in eight say they are facing more serious struggles or at risk of imminent closure (13%). In contrast, only 8% feel strong, secure, and well-equipped for future challenges.

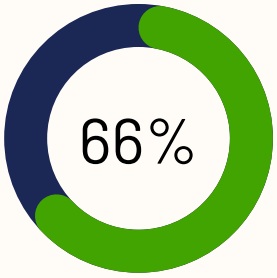
Figure 6.1. Organisations' current financial and operational state



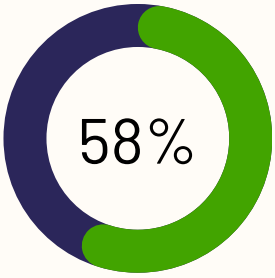
Two thirds of responding organisations hold reserves (66%), and three in five have used them to support operations over the past year (58%).

Figure 6.2. Use of financial reserves

Organisations holding reserves (%)



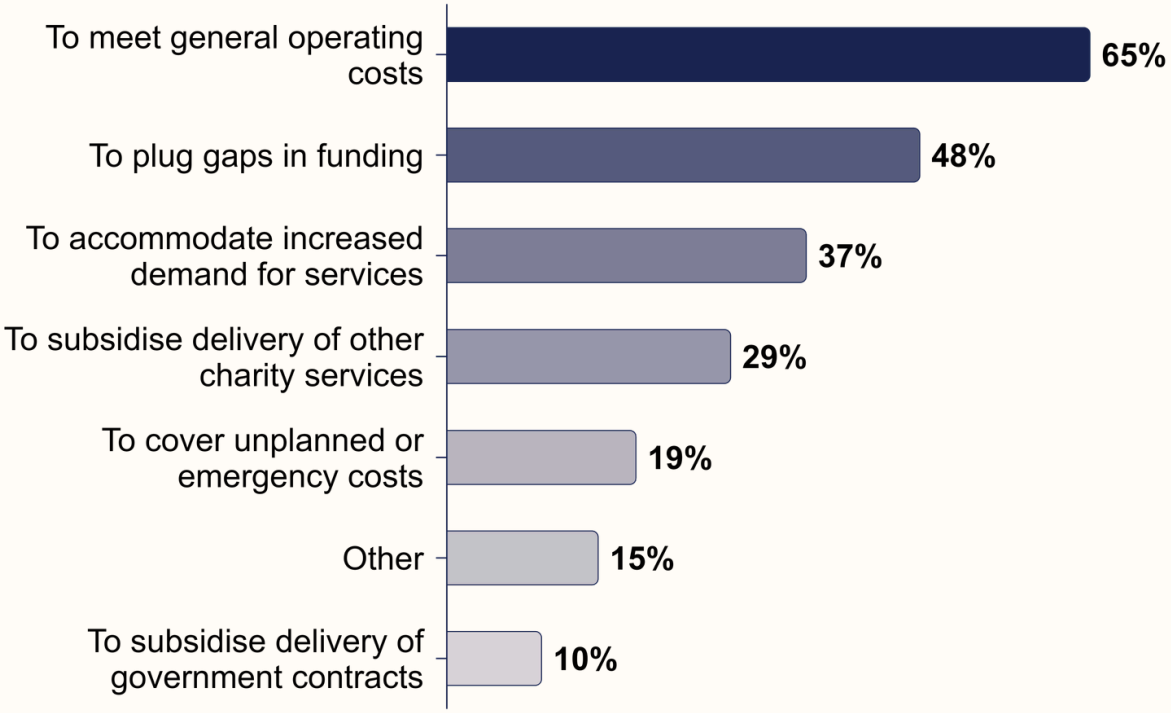
Used reserves to support operations over the past year (%)



Note. Base: holds reserves = 145; used reserves = 92. Figure shows the proportion answering 'Yes'. The 'used reserves' question was asked only of organisations that hold reserves.

The most common reasons include covering routine operating costs (65%), plugging gaps in funding (48%), and accommodating increased demand (37%). This indicates that reserves are being used to support everyday operations rather than being held as a buffer for emergencies. Using reserves in this way is often a short-term solution, particularly for those with limited reserves to draw from.

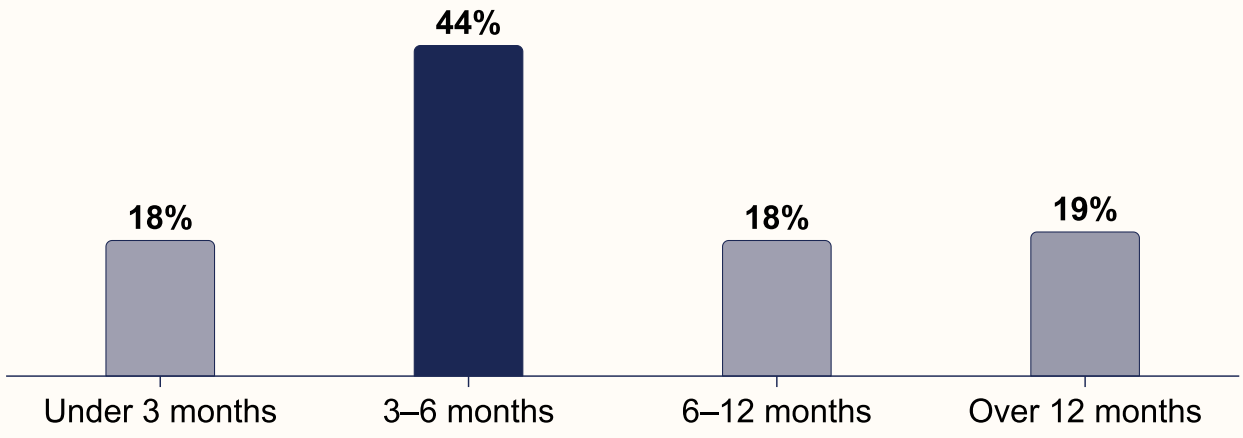
Figure 6.3. Reasons for using reserves over the past 12 months



Note. Base = 52. Respondents could select more than one option, so percentages do not sum to 100%.

Based on current levels of income and expenditure, more than two in five expect their reserves to last between three and six months (44%), one in five have more than 12 months (19%), and a similar proportion have fewer than three months (18%).

Figure 6.4. Number of months reserves are expected to last



Note. Base = 88. ‘Don’t know’ responses excluded.

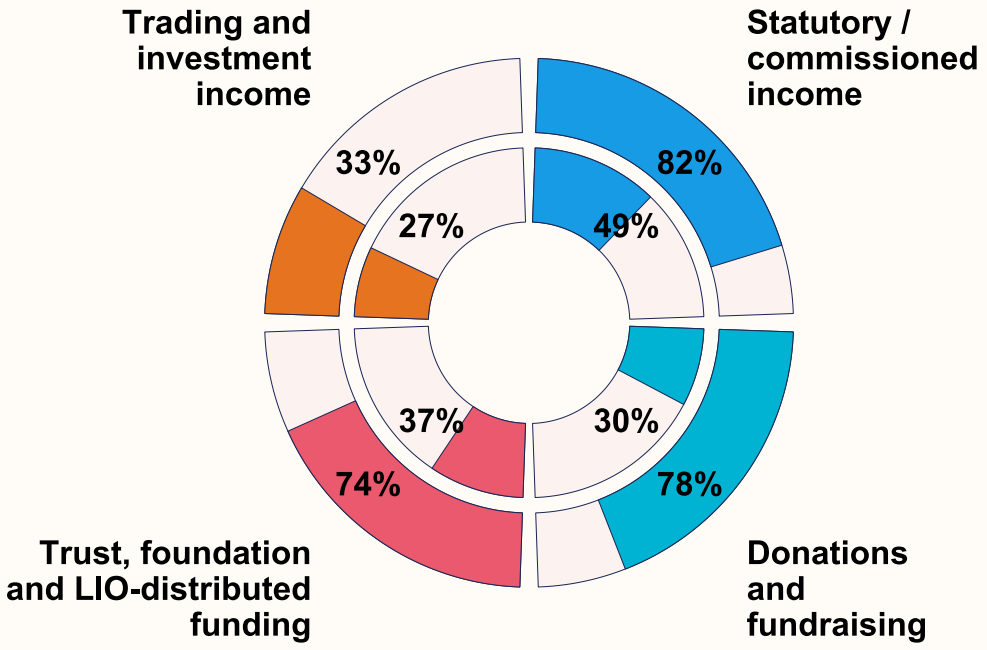
6.2. Income and expenditure

The ways in which VCSE organisations generate income have changed in recent years. The number of people donating has fallen by around six million over the past decade, and the total value of public donations in 2025 was 10% lower than the previous year. [16] ome organisations are looking to legacy fundraising, a source with long-term growth potential but uncertain time horizons. [17] While the number of government contracts delivered by VCSE organisations continues to increase, [18] evidence shows that these often do not cover the true cost of delivery. [19]

We asked organisations where their income comes from and how much each source contributes to their overall income. Income sources were grouped into four categories: statutory and commissioned income; funding from local infrastructure organisations (LIOs), trusts and foundations; donations and fundraising; and trading and investment income. For each, we calculated the percentage of organisations receiving income and its average share of their total income. Organisations receiving no income from a category were excluded from that category's average, so averages do not total 100%.

Most responding organisations receive some statutory or commissioned income (82%), which also accounts for the largest share of total income (49%). Around three quarters receive income from donations and fundraising (78%) or from trusts, foundations and/or LIOs (74%), accounting for 30% and 37% of total income respectively.

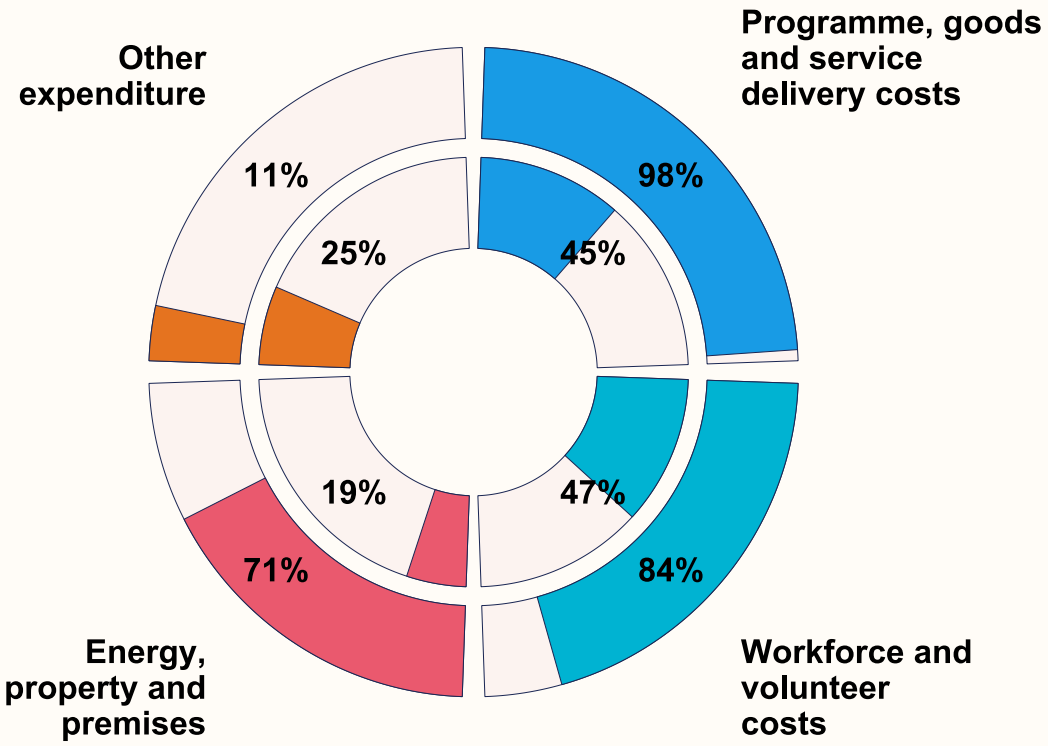
Figure 6.5. Income sources received and their average share of total income



Note. Outer ring shows the percentage receiving any income from each source (N = 120); inner ring shows the average share of total income among organisations receiving that source (N = 40–99).

Expenditure was analysed in the same way as income, showing both the proportion of organisations reporting each category and its average share of total expenditure. Programme, goods and service-delivery costs are reported by almost all organisations (98%), workforce and volunteer costs are reported by more than four in five (84%), and seven in ten report energy, property, and premises costs (71%). Workforce and volunteer costs account for the largest average share of expenditure (47%), followed by programme, goods and service-delivery costs (45%).

Figure 6.6. Expenditure areas and their average share of total expenditure



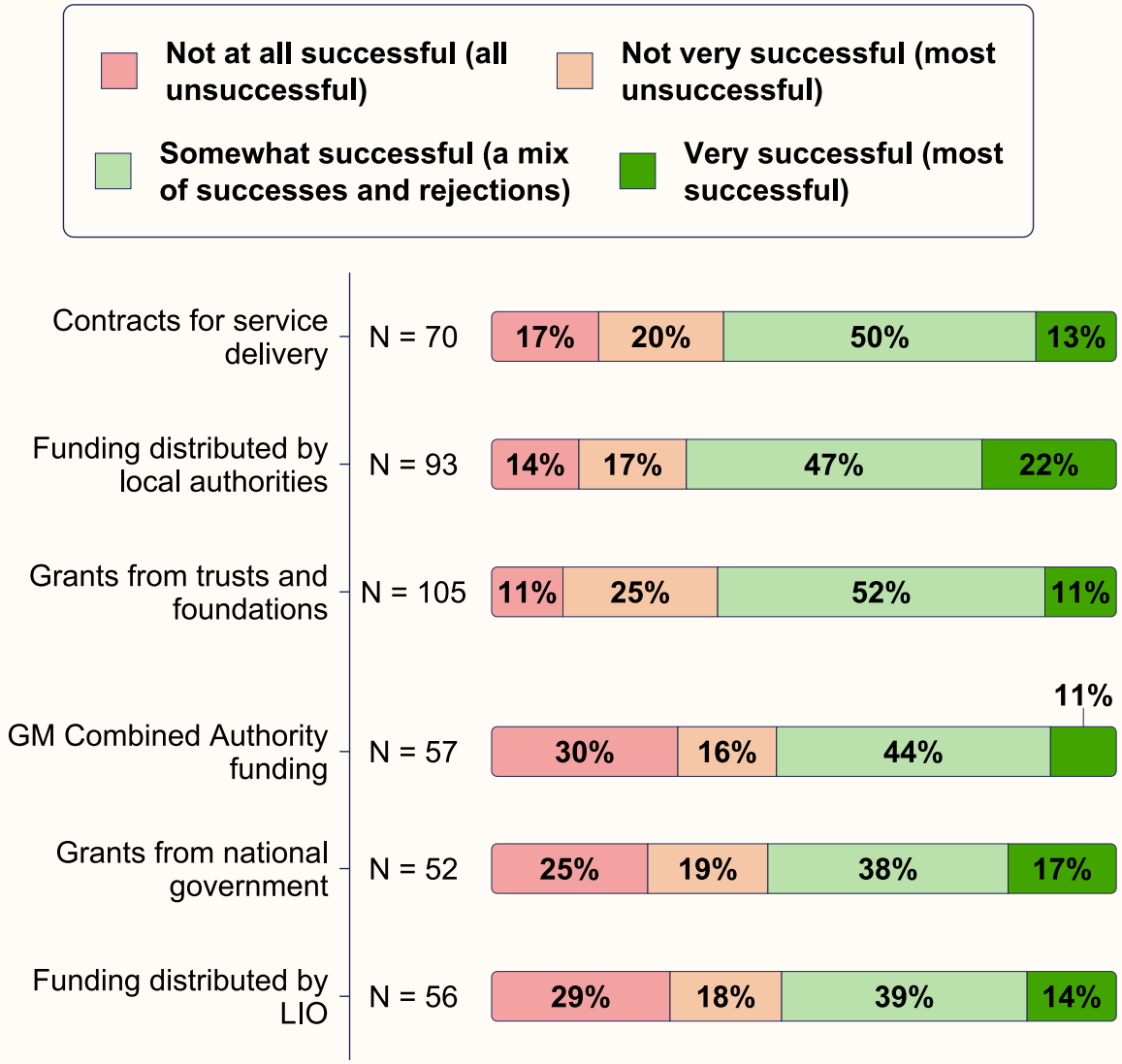
Note. Outer ring shows the percentage reporting any expenditure in each area (N = 131); inner ring shows the average share of total expenditure among organisations reporting expenditure in that area (N = 15–128, depending on area).

6.3. Funding

Local mechanisms such as the Our Manchester Voluntary and Community Sector (OMVCS) fund provide an established route for community grant-making, investing £16.5 million over three years and this year having that funding doubled by the council. [20] This sits alongside ongoing community development funds, such as Manchester Community Central's Neighbourhood Fund, to help smaller groups in their communities. These funds are important to enabling VCSE organisations to support some of the most deprived communities across Manchester.

When asked how successful they were in applying for funding sources relevant to them, responding organisations reported similar success rates across a range of local, regional, and national sources. Success was highest for local authority funding (69%), grants from trusts and foundations (64%), service-delivery contracts (63%), and national government grants (56%). More than half of applicants also report success with GMCA (54%) and funding distributed by LIOs (54%).

Figure 6.7. Success in funding applications over the past 12 months



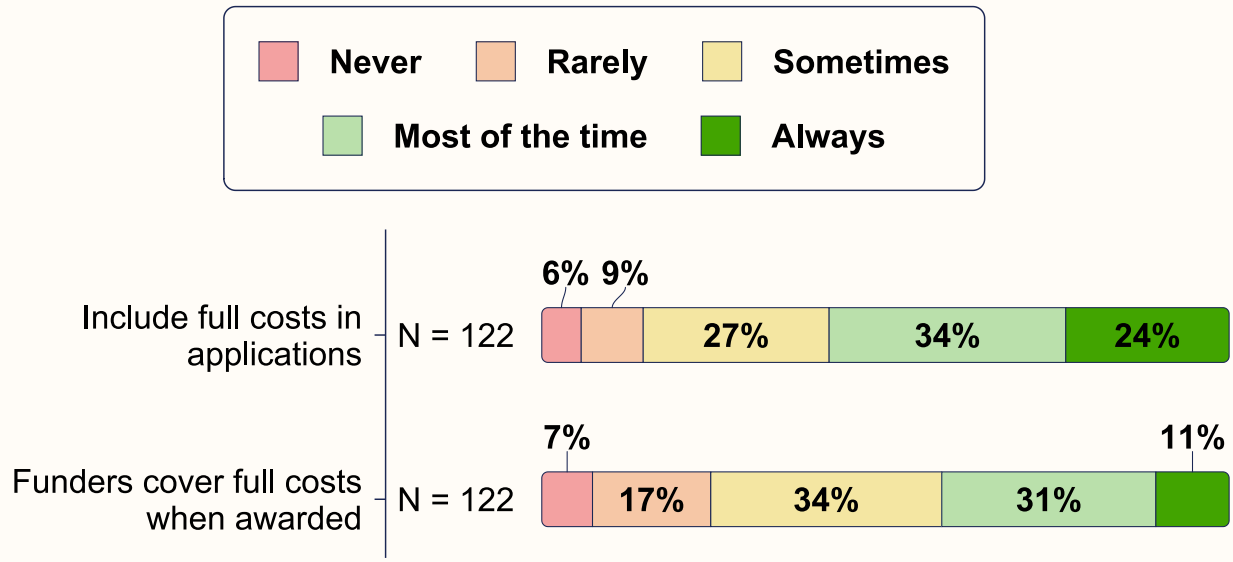
Note. Bases are shown in the chart and vary by source. 'Didn't apply' responses excluded for each source. Shows outcomes among organisations that applied to each source. Percentages may not sum to 100% due to rounding.

A successful funding application does not necessarily mean that the full costs of delivery are included. Three in five organisations say they always or mostly include full costs in funding applications (58%), while two in five (42%) say that full costs are usually or always covered when funding is awarded. Around a quarter (24%) say full costs are rarely or never covered when funding is awarded.

Focus group participants described how funding often does not account for much of the unseen time and effort that goes into funded projects. One participant who had been successful with fully-costed funding from a local trust described the substantial benefit it had for stability and resilience.

> "We hadn't tapped into that before and it has been great for core funding, giving us the time and resource to capacity build and that's been good."

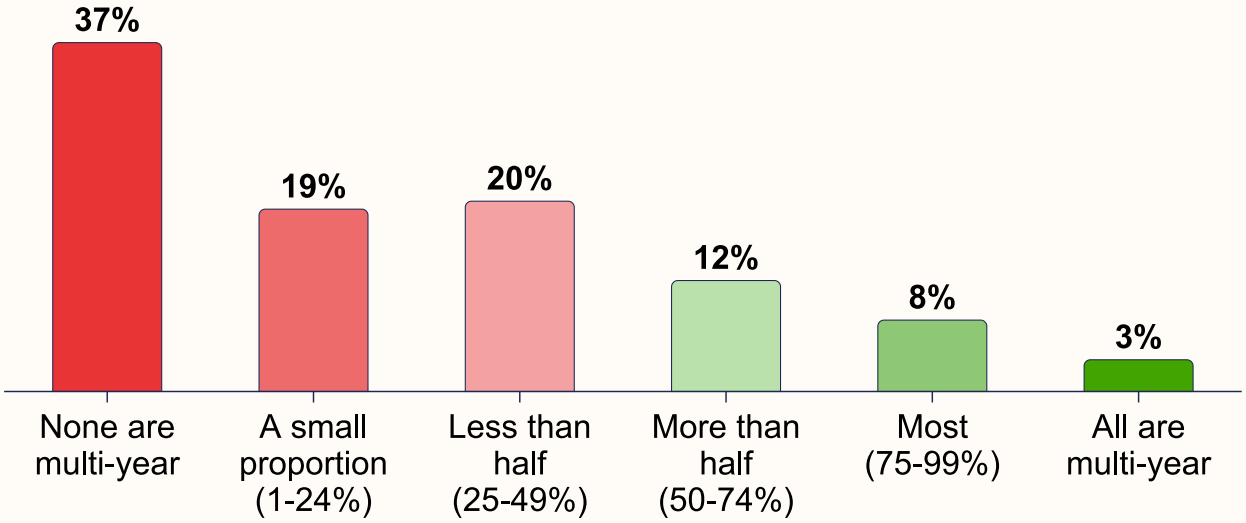
Figure 6.8. Full cost recovery



Note. Bases are shown in the chart. 'Don't know' responses excluded. Percentages may not sum to 100% due to rounding.

With national and international challenges increasing costs for many organisations, uplifts for grants and contracts are important, but national evidence shows that uplifts are uncommon, particularly for shorter-term pots of funding. [21] This is important to consider because, among organisations receiving at least some income from grants or contracts, more than three quarters (77%) say less than half of the grants or contracts they hold are multi-year, including two in five (37%) that say none of their funding is multi-year, despite national evidence showing that multi-year funding is often a top priority. [22]

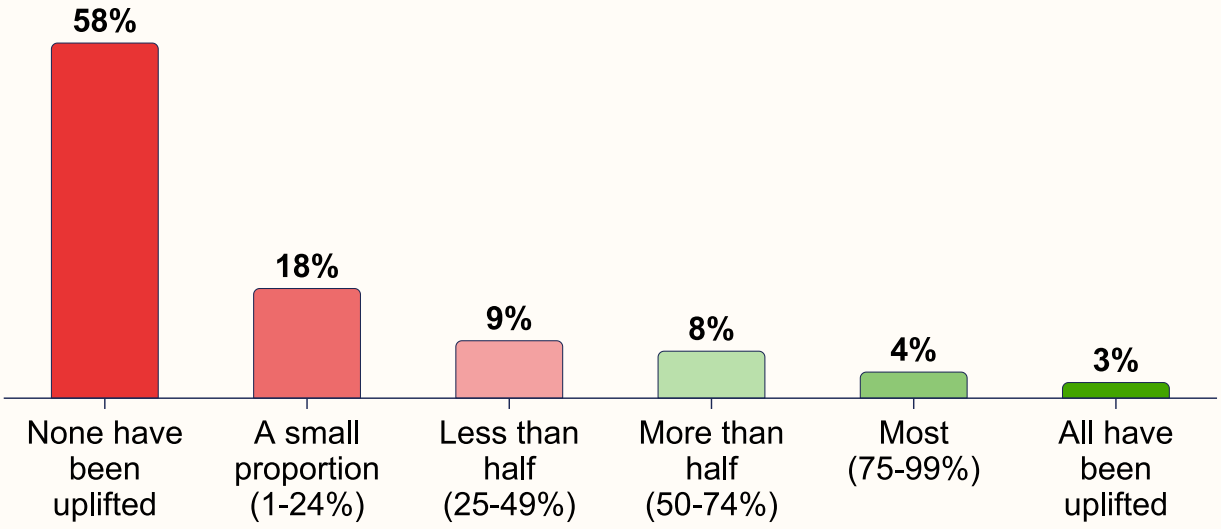
Figure 6.9. The proportion of organisations' grants or contracts that are multi-year (three years or more)



Note. Base = 118. Question shown only to organisations receiving income from grants or contracts from any source.

Among organisations receiving grant or contract income, almost three in five (58%) say none had been uplifted to reflect rising costs over the previous year. Only a small proportion (7%) say most or all of their grants or contracts have been uplifted. However, it is important to recognise that this covers grants and contracts from all sources, so it should not be read as an assessment of any single funder.

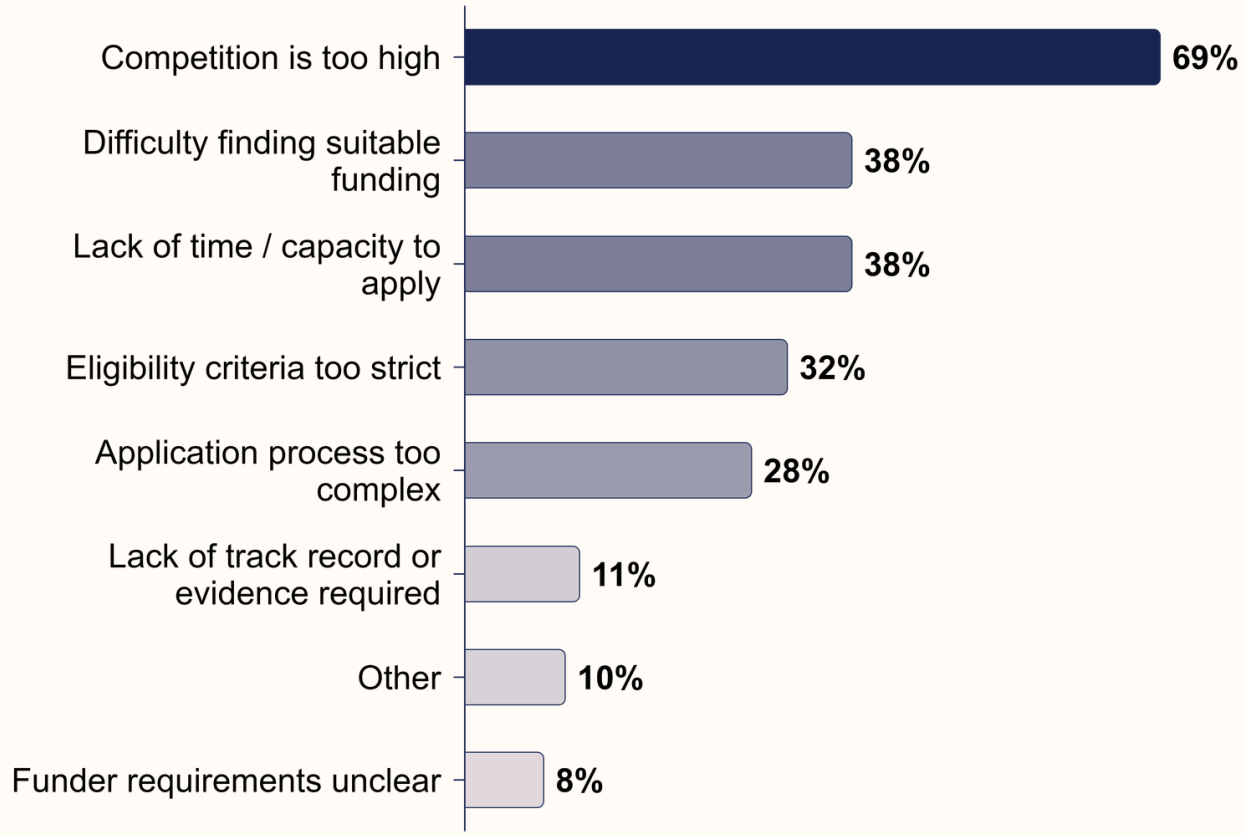
Figure 6.10. The proportion of organisations' grants or contracts that have been uplifted over the past 12 months



Note. Base = 117. Question shown only to organisations receiving income from grants or contracts from any source. Percentages may not sum to 100% due to rounding.

Recent years have seen competition for similar pots of funding increase, with funders reporting increasing numbers of applications. [15] This was reflected when responding organisations were asked what they believe to be the biggest challenges with securing funding. More than two thirds point to increased competition (69%), followed by difficulty finding suitable funding and lack of time or capacity to apply (both 38%).

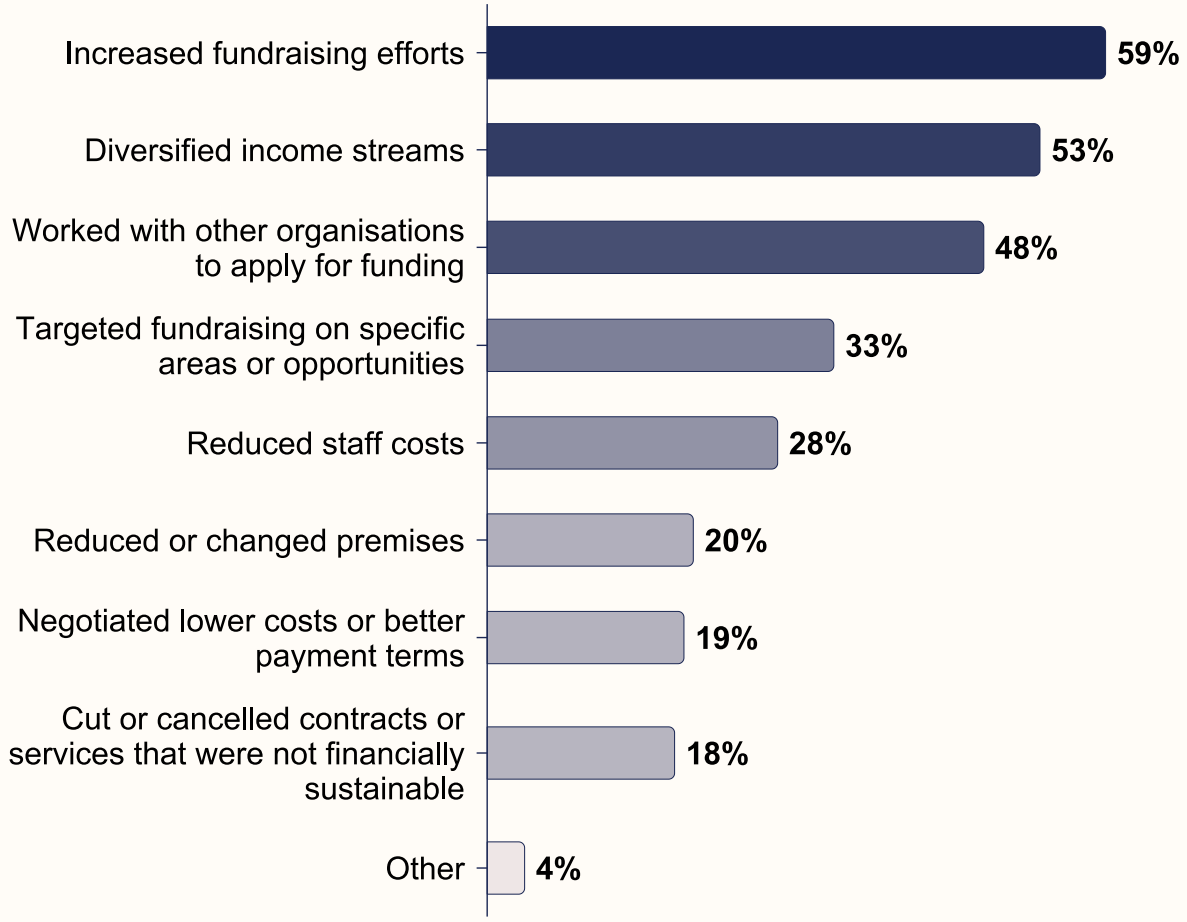
Figure 6.11. Funding challenges



Note. Base = 141. Respondents could select more than one option, so percentages do not sum to 100%.

To understand how organisations are responding to these funding challenges, we asked what steps they had taken over the previous year. Around four in five (80%) responding organisations had taken at least one action. Of this group, three in five increased their overall fundraising efforts (59%), around half diversified income or funding streams (53%) or worked with other organisations to apply for funding (48%), while one in three targeted fundraising on specific areas or opportunities (33%). For the one in five taking no new action over the previous year (20%), this may reflect limited scope to respond or measures already introduced before that period.

Figure 6.12. Actions taken in response to funding and income challenges



Note. Base = 111. Excludes respondents selecting 'No actions taken' (N = 28). Respondents could select more than one option, so percentages do not sum to 100%.

6.4. Premises

More than three in five responding organisations operate from premises they lease or rent (62%), while 32% use premises with shared or free access. One in six do not use physical premises (17%).

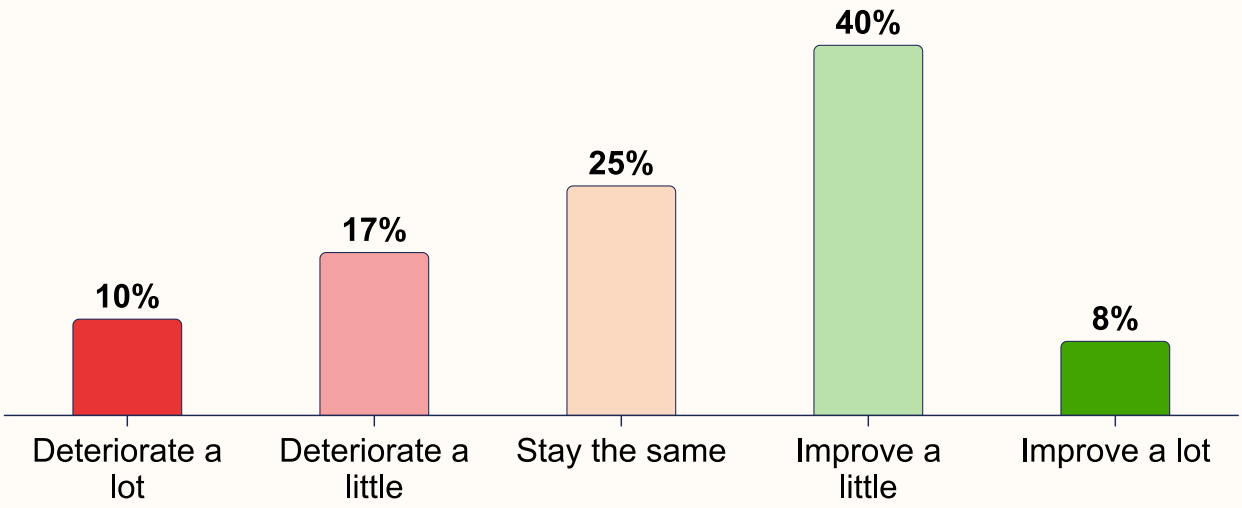
These spaces form an important part of the sector's contribution, providing places where people can meet, access support and build relationships, particularly in a city where space is at a premium.

Their value is reflected in the £16.5 million Live Well Spaces of Hope and Connection programme, through which more than 100 community-led spaces are being developed to strengthen opportunities for connection and support within communities. [5]

6.5. Future outlook

Manchester's VCSE sector is coping with increasing and more complex demand, a precarious and competitive funding landscape, and with workforce challenges, particularly around volunteers. Despite this, almost half of responding organisations expect their financial position to improve (48%) over the next 12 months. In contrast, just over a quarter expect it to deteriorate (27%), while a quarter expect it to remain the same (25%).

Figure 6.13. Expected financial position over the next 12 months

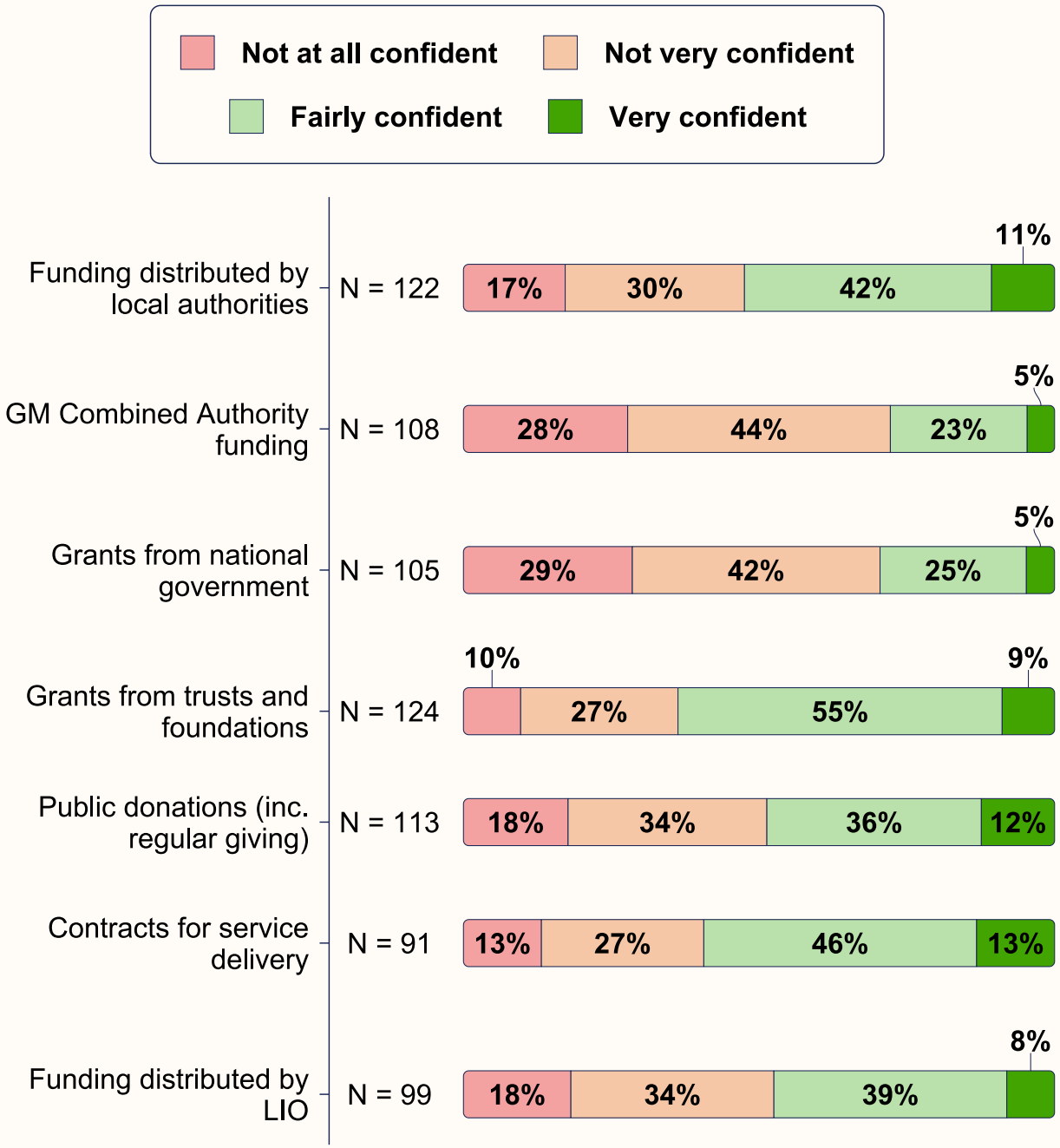


Note. Base = 126. 'Don't know' responses excluded.

Organisations have varying degrees of confidence in being able to secure funding over the next 12 months. Among organisations that considered each source relevant to them, almost two thirds feel fairly or very confident about securing grants from trusts and foundations (64%), while three in five are confident about service-delivery contracts (59%). Just over half feel confident about funding distributed by local authorities (52%).

Confidence is lowest for GMCA and national government funding. Around seven in ten organisations are not very or not at all confident about securing funding from either source over the next 12 months (72% and 70% respectively). These findings suggest greater confidence in funding that is more locally rooted or linked to established relationships than in regional and national public-sector sources, where funders also face pressures on their own resources.

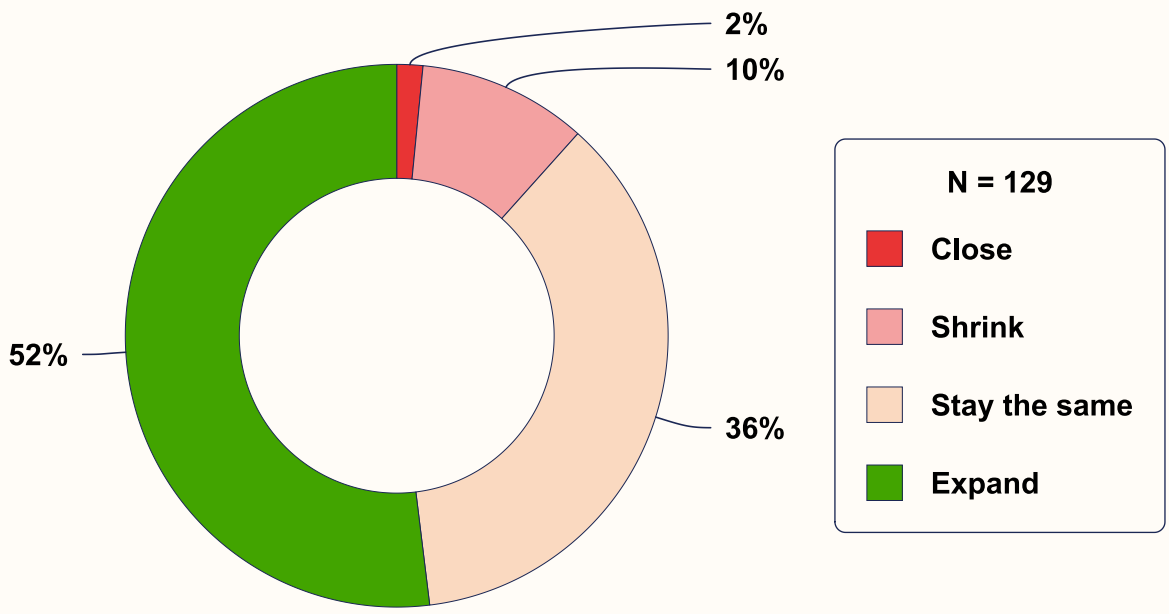
Figure 6.14. Confidence levels in funding over the next 12 months



Note. Bases are shown in the chart and vary by source. 'Not applicable' responses excluded for each source. Percentages may not sum to 100% due to rounding.

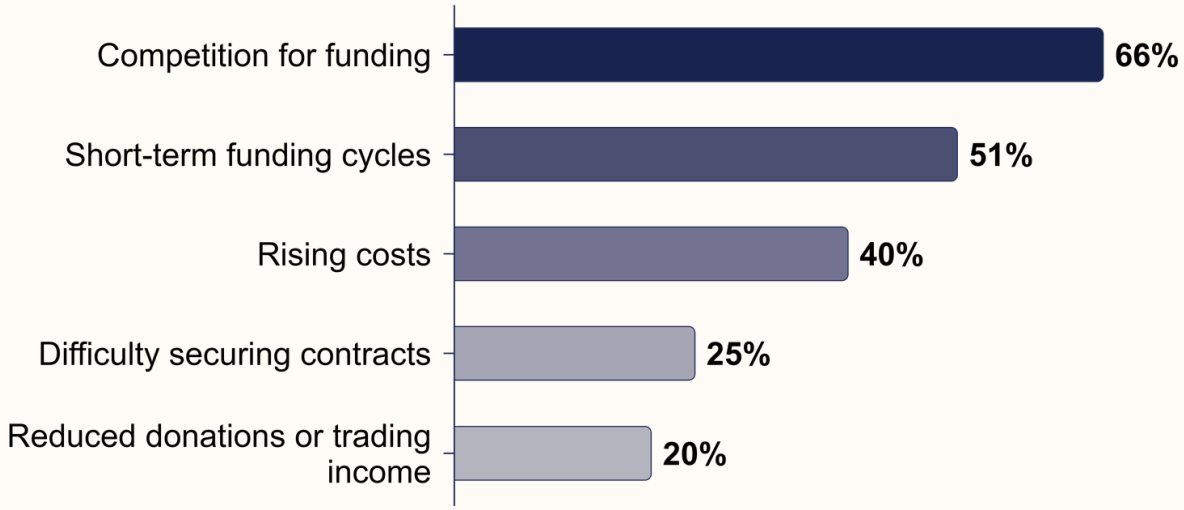
Despite this financial uncertainty, most organisations do not expect their overall operations to reduce. More than half expect to expand (52%), while over a third expect to stay at a similar level (36%). Only a small proportion expect to shrink (10%) or close completely (2%).

Figure 6.15. Organisational expectations for the year ahead



These plans for growth sit alongside financial risks, the most commonly reported being competition for funding (66%), short-term funding cycles (51%) and rising costs (40%). Collectively, these pressures place a triple squeeze on organisations. Higher living costs make services more expensive to run while leaving residents with less money to donate or spend on the activities organisations provide. As more people also turn to the sector for support, organisations face pressure to secure additional funding both to meet growing demand and to cover shortfalls in existing income, adding to competition for available funds. Short funding periods make this harder to manage, leaving organisations repeatedly seeking money to sustain work their communities already depend on.

Figure 6.16. Risks to financial sustainability (top 5)



Note. Base = 134. Respondents could select more than one option, so percentages do not sum to 100%.

Conclusion

Mike Wild, Chief Executive, Manchester Community Central

This report tells two stories at once and both are true. Manchester's VCSE sector remains a substantial part of this city's life: over 4,300 organisations, £816 million of collective activity and the hope fostered by staff, volunteers and trustees across every community.

It is also a sector where four in ten organisations describe themselves as vulnerable, struggling or at risk of closing and where the people doing the work increasingly pay a personal price to keep it going.

These are not contradictory findings. Manchester is a paradox: a city of rapid economic and social growth which is also one of the five most deprived local authority areas in England. This reveals an unsustainable position: demand flows from the wider system to VCSE organisations more reliably than funding does and reserves are being spent on routine costs rather than held for emergencies, limiting long-term investment in capability.

Across all four State of the Sector reports since 2013, a trend emerges: a sector relied upon to fill space left by others, finding it increasingly hard to secure the funding, workforce or recognition to be sustainable.

The sector is increasingly in survival mode, yet survival is not really the point - these organisations do not aim to endure indefinitely, they work to create change. The real risk is losing them while they are still needed and the impact that would have on public services and communities.



As our foreword notes, we welcome the GM VCFSE Accord's commitments to fairer funding and shared power. Locally, the clearest opportunity to put that into practice is Live Well Manchester: an ecosystem in which community organisations can thrive, connect and lead.

That means trusted community spaces in every neighbourhood which people can join (without an appointment or referral); a network of organisations sharing, learning, collaborating on funding and acting collectively on poverty and inequality; investment in the next generation of VCSE leaders. It requires a shift in how public services work with the sector, so real collaboration becomes the standard way of working.

If it develops as it should, the sector will emerge better resourced, better connected and more impactful. Voluntary and community groups, charities, faith groups and social enterprises are part of the city's social architecture - the first port of call for people facing hardship, the connective tissue holding communities together.

What Live Well can do, if it honours its own ambitions, is make that role visible, valued and properly invested in. That will take sustained commitment from public sector partners, real power-sharing, and a VCSE sector willing to hold the system to account, not just work within it.

Live Well
everyday support in every neighbourhood

This report demonstrates the scale, spread, diversity and reach of our sector. It is a testament to the effort of thousands of local people to improve the quality of life in Manchester. It is also a challenge: to safeguard that effort and invest in it for our city's future.

Once again, our thanks go to every VCSE organisation that gave us their time and honesty in responding to this survey.

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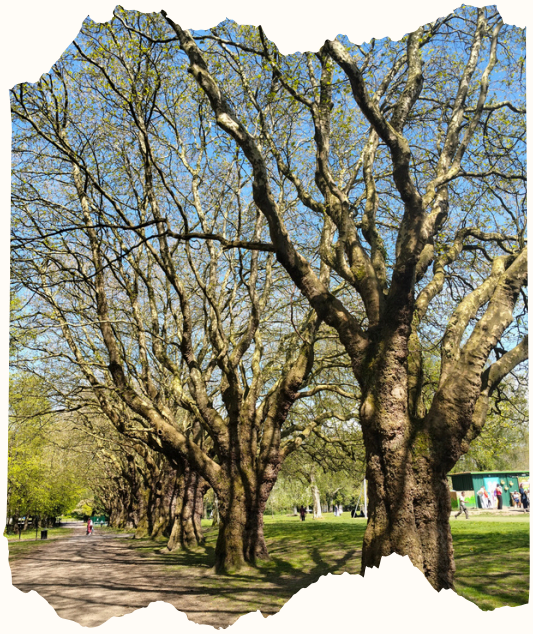

Greater Manchester State of the VCSE Sector dashboard - explore each area:
www.gmstateofthesector.org

https://10gm.org.uk/10gms-work/stateofthesector/

Report available in alternative formats on request

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