



THE CHARITY WORKPLACE: RISING TO THE CHALLENGE

The pandemic, cost of living crisis, and wider economic uncertainty have all impacted charity operations to varying degrees over the past few years.

The next few years look set to see several more challenges that will influence the shape of the workforce and workplace for charities in London and across the UK.

CHALLENGES

ATTRACTING & RETAINING TALENT

36%

36% OF CHARITIES ARE STRUGGLING TO RECRUIT ENOUGH EMPLOYEES (VCSE BAROMETER)



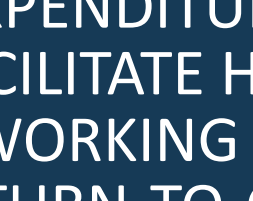
CHARITY SECTOR WAGES HAVE FAILED TO KEEP PACE WITH INFLATION, RISING BY ONLY 3.8% IN 2022**



RETENTION CRISIS SEES A LABOUR TURNOVER RATE OF 18.1% (CENDEX 2021)



DIFFICULTY TO COMPETE ON WAGES AND LOSS OF TALENT TO THE WIDER COMMERCIAL SECTOR



INCREASED OFFICE INCENTIVES & EXPENDITURE TO FACILITATE HYBRID WORKING AND RETURN-TO-OFFICE

SQUEEZED INCOME - INCREASED DEMAND

96%

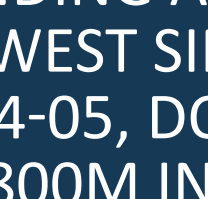
96% OF CHARITIES EARN BELOW £1 MILLION A YEAR*



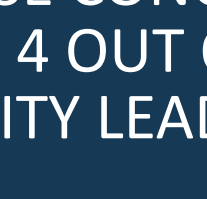
CASH IS NO LONGER THE MOST POPULAR WAY OF DONATING IMPACTING FUNDING LEVELS

57%

NUMBER OF PEOPLE DONATING FALLS FROM 65% IN 2020 TO 57%*



PUBLIC SECTOR FUNDING AT ITS LOWEST SINCE 2004-05, DOWN TO £800M IN 2024 (NCVO)



RISING ENERGY COSTS CAUSE CONCERN FOR 4 OUT OF 5 CHARITY LEADERS*

55%

OF CHARITIES HAVE DIPPED INTO CASH RESERVES**



COST OF LIVING CRISIS CREATES DEMAND SURGE



FINANCIAL ADVICE, FOOD BANKS AND MENTAL/DISABILITY WELLBEING ASSISTANCE INCREASINGLY SOUGHT

OFFICE LEASING IN LONDON IN 2022

26,000

CHARITIES BASED IN LONDON

3,565 SQ FT

AVERAGE CHARITY SECTOR DEAL SIZE IN 2022 DOWN 45% ON 2019



LARGEST OFFICE TRANSACTION IN 2022 16,297 SQ FT AT 107 LEADENHALL STREET



£47.12 PSF AVERAGE RENT PAID IN 2019



£38.33 PSF AVERAGE RENT PAID IN 2022



THE CITY IS MOST POPULAR WITH CHARITIES 41% SHARE OF LEASING

LARGEST CHARITY SECTOR OFFICE TRANSACTIONS 2019-22



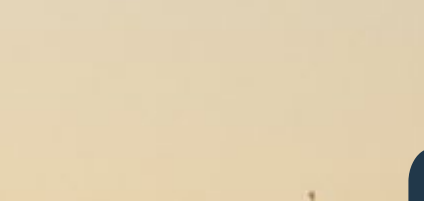
GREAT ORMOND STREET HOSPITAL CHARITY



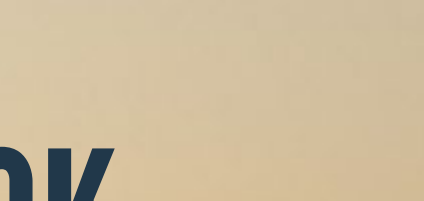
WWT



ageUK Love later life



Guy's & St Thomas' Foundation



COMIC RELIEF

OUTLOOK

RATIONALISE SPACE

62% OF CHARITIES HAVE ADOPTED HYBRID WORKING*

MAXIMISE COST EFFICIENCIES THROUGH REAL ESTATE REVIEW

FULFILL ESG GOALS

ESG GOALS CAN IN PART BE ACHIEVED THROUGH CHOICE OF OFFICE, OPTING FOR THE BEST-IN-CLASS SPACES

SHARED SPACES

JOIN FORCES WITH OTHER CHARITIES TO CUT COSTS, MAXIMISE SPEND AND BENEFIT FROM COLLABORATION

INVEST IN TECH

REAP THE REWARDS FROM INVESTING IN IT AND ONLINE SOLUTION FOR WORKPLACE AND MARKETPLACE

CHARITIES GO FLEX

CHARITIES TO HARNESS FLEX OFFICE OPTIONS

CHARITY FLEX SPACE

GREATER PROVISION OF SPECIFIC WORKSPACES LIKE X+WHY/GROSVENOR'S 30,000 SQ FT SCHEME IN VICTORIA

source: * charities aid foundation ** Pro BonO ECONOMICS

WORKING WITH THE THIRD SECTOR

Our consulting team has worked with many third sector clients over the past 3 years to harness the **benefits** of hybrid working.

CLIENTS OPERATING ON

1-3 DAYS

IN THE OFFICE PER WEEK

SPACE REDUCTIONS AT AN AVERAGE OF

37%

LESS SPACE, BUT MUCH

HIGHER

QUALITY SPACE

NOT COMPROMISING ON

LOCATION

ANNUAL RRSC REDUCTION OF

33%

RATIONALISING

SPACE

OUR WORKPLACE CONSULTANCY SERVICES

Our team can provide a range of services from desktop data review to full employee engagement.

TOOLS

Stakeholder management

Existing data analysis

Employee surveys

Leadership interviews

Focus groups

Existing space analysis

DELIVERABLES

Key Insights

Strategic space principles

Cultural alignment review

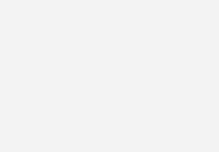
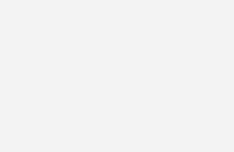
Adjacency mapping

Design/building brief

Locational recommendations

Space requirement with budget figures

DEVONO SUPPORTING CHARITIES WORKPLACE STRATEGIES



More people More active More often

