SOCIETY OF UNITED VOLUNTARY ORGANISATIONS WITHIN COMMUNITY

THE SUVOC APPLICATION

Why and how to develop substantial new resources for the Voluntary Sector through Workers' Payroll Giving

Fred Clement Freeman

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The front cover illustrations show the emblems of "*Society of United Voluntary Organisations within Community*" — "*SUVOC*" and of "*United Way*". The meaning of the SUVOC emblem is given fully in chapter four, page 33, that of the United Way emblem in appendix eight, page 256.

Society of United Voluntary Organisations within Community

THE SUVOC APPLICATION

Why and how to develop substantial new resources for the Voluntary Sector through Workers' Payroll Giving

by
FRED CLEMENT FREEMAN

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FOREWORD — SECOND EDITION

by William Aramony

Fred Freeman is a businessman who devotes countless hours from his own work to United Way work. There is a special significance in Fred Freeman because Fred represents a personal commitment, a personal dedication, a soul, a heart, a feeling, of trying to do something in his lifetime that will benefit his people and benefit his country, not only in Liverpool where he lives and has his business, but for all of Great Britain.

In recognition of Fred's tremendous personal contribution we have presented him with the "United Way Pioneer Award". This award is made even more significant because in 1863, 30 years prior to the United Way beginnings in America in 1887, Liverpool started the first federated campaign. It was my pleasure 105 years later to be with Fred at the First Delegates' Assembly Meeting of United Way of Merseyside — a direct descendant of the earlier organisation.*

William Aramony

Secretary-General, International Council
on United Fund Raising &
President, United Way of America &
President, United Way International.

*The history is as follows: *The Central Relief Society* operated in Liverpool from 1863 to 1933. It assisted in the formation of *Liverpool Council of Social Service,* which formed *United Voluntary Organisations, Liverpool (U.V.O.)* and financed it from 1952 to 1972. On 19th July 1977 *U.V.O.* adopted a new Constitution and changed its name to *United Way of Merseyside.* Its First Delegates' Assembly Meeting was held on 24th October 1978. See Footnote 11, page 224. Ref. also p. 8, 10, 19, 46, 90, *The Liverpool Council of Social Service: 1909-1959,* by H. R. Poole.

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For easy reference an Index and a Detailed Contents, with chapter sections and paragraph headings, are included at the back of the book.

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INTRODUCTION TO THE SECOND EDITION

Background to SUVOC and United Way

In response to requests for the background to the potential development of *United Way* within the United Kingdom, the Second Edition of *The SUVOC Application* is here issued.

This edition includes a new chapter on Donors' Directive Rights and, in the appendices, some tables and two background papers written prior to *United Way*, the U.K. national body, receiving charity registration.[1] Otherwise, with the exception of some minor amendments to the later added Summary and the provision of an Index, the contents have purposely not, in the journalistic sense, been "updated" for re-presentation. The views here expressed constitute a response to recognised need at this moment in time.

The SUVOC application is designed to improve further the social, economic and personal health of the nation at large and of its constituent groups and individuals through increased free-will giving of services and monetary aid. The first three parts of the book consider why this is a worthy and necessary objective, part four and the appendices outline, with administrative details, one possible democratic procedure whereby this objective could be realized.

Where there is a clearly defined objective, the means to its attainment is necessarily realizable. There is reward in recognising that the donor's confidence will grow proportionally with his belief in his own effectiveness, as the director of his own goodwill, and

[1] To simplify its operations and communications within the United Kingdom, including accounting to donors for gifts credited to different Local Area United Way Funds, it was decided to register this national charity with the brief name *United Way*. However, in its work overseas, this independent U.K. charity is referred to as *United Way of Great Britain*.

with this the assumption of his full conscious social self-responseability.

For purposes of simplicity and interfunctional wholeness, in considering a potentially much enlarged role for the voluntary sector, this book refers to all services which function within the SUVOC application as services which could be supplied through SUVOC, even though certain comparable SUVOC-type services are either presently available or could be made available through existing organisations. These include: *United Way; Charities Aid Foundation; National Council for Voluntary Organisations; Local Councils for Voluntary Service* and their equivalents; *The Volunteer Centre; Volunteer Bureaux,* etc. It is envisaged that all these organisations could grow considerably in strength through implementation of the SUVOC proposal and that each would retain its separate identity and independent status.

The background to *The SUVOC Application* and its early implementation is as follows. A Liverpool charity, known as "UVO", had for years raised a modest sum through individually authorised deductions from the pay packets of local workers. After administration expenses the total amount raised was distributed annually amongst a defined group of local charities. A difficulty faced was that the amount of the distribution did not increase and in consequence, due to inflation, its value steadily eroded. Consideration on how a new dimension of payroll giving could be developed led to the writing of this book and the appointment of the author as chairman of the charity's committee.

A limited number of copies of the First Edition of this book were privately circulated to individuals who were known to be interested in the development of payroll giving. One outcome was that the Chief Charity Commissioner arranged for the author to be introduced to representatives of United Way International[2]. This is a world-wide movement whose purpose is to increase the ability of nations to develop their voluntary charitable capacity to the fullest. Every national United Way movement independently promotes

[2] *United Way International* operates in close association with the *International Council on United Fund Raising,* which sponsors *International United Way Conferences.*

free-will giving within the community under the conditions most appropriate to that country.

Recognising the benefits of the already established United Way name the author suggested it be used in the United Kingdom. In due course United Way International approved the SUVOC proposal articles and granted the author a Licence to use the United Way name and Helping Hand Logo Symbol for the purpose of developing a SUVOC type organisation.

A United Way of Merseyside Pilot Operation was formed to take over the former work of UVO, and undertakings were given that for a period of five years the original UVO member charities would receive preferred distributions (inflation adjusted). In 1982 a national charity was formed, with the name *United Way,* to operate throughout the United Kingdom.

Experience gained through the United Way Pilot Operation and assistance generously offered by major national bodies, including Charities Aid Foundation, has led to some useful administration developments not outlined in this book. These developments, which are fully consistent with *The SUVOC Application,* will assist United Way in its objective to achieve minimum administration expenditure with maximum co-operation and support from established bodies.

The SUVOC Application refers to the role of the voluntary sector as a whole and how its different aspects may be harmoniously interrelated within our national community.

United Way is an organisation which it is conceived will be able to support implementation of *The SUVOC Application,* or its equivalent, by supplying within the United Kingdom essential payroll giving and gift distribution services which are not already generally available through other established bodies.

1982.

PREFACE TO THE FIRST EDITION

SUVOC is a Seed-Idea

This short work is offered to a small number of possible readers who might already in their meditations on the present human situation have approached to somewhat similar conclusions. Those who have thought in this manner might very well constitute in themselves the very persons who could successfully bring into being the means of the possibility of realizing the idea outlined in this work. To them the author dedicates his labours and wishes good fortune in furthering the project.

The manifest need in the world situation for increased awareness of the interrelations of apparently separate communities is obvious, but world organisation is not yet sufficiently advanced for any large scale project to better the human condition. Thus, for the time being, we have to deal rather with our immediate community problems and apply the rule "charity begins at home".

Every locally solved problem alleviates pressures which will be brought to bear in other situations and on other communities, but only personal integrity can gain the support and confidence of people who need, and know that they need, a figure-head on their ship voyaging into the future. What group this main figure-head might turn out to be can emerge only in the working situation in which intercommunity relationships develop themselves.

Those of us who work in smaller areas can by personal integrity inspire local confidence that, as the work grows, larger issues will clarify themselves. The author of this small work humbly seeks only to give a bare outline of the possible project which, in the right hands and given the right support, might indicate a general direction of a possible solution of one of our most pressing social and community problems.

It is believed that what is here set forward will in no way interfere with or reduce the effective purposes of any existing charitable organisations. Rather, the suggested project itself grows out of their work as a logical explication of their basic concepts, which can only orientate public feeling to give them more, rather than less, support in their work. In thus anticipating possible apprehension in existing organisations the author is confident that consideration of what is here set forth will allay any anticipatory fears that these suggestions conceivably might raise.

It is in the spirit of social and community service that this work is offered as a small seed-idea which, planted in the right minds as its proper ground, might grow to beautiful proportions hardly yet visualized. The fruits that we eat today we gather from trees planted by predecessors we ourselves have never personally known, but we are none the less pleased to be nourished by them.

The author would be happy if this seed-work should find acceptance and development wherever it may alight on fertile ground.

1975.

Quotation used by the United Way Pilot Operation

I expect to pass through this world but once.
Any good therefore that I can do,
or any kindness that I can show
to any fellow creature, let me do it now.
Let me not defer or neglect it,
for I shall not pass this way again.

This quotation is used on *United Way of Merseyside's* Gift Acknowledgement Cards. The quotation is attributed to Stephen Grellet, an American Quaker of French birth (1773-1855), but not found in his writings. The quotation is said to have the honour of being the best known and the most mysterious as to authorship.

PART ONE

SUMMARY

CHAPTER ONE

Summary of the SUVOC Idea

The Purpose

1/1. *Personal involvement.* The purpose of this book is to suggest how individuals within any area, who wish to benefit their community by direct personal voluntary involvement, may join with others to form local groups within an association which it is proposed be developed either with the abbreviated title "*SUVOC*", meaning "*Society of United Voluntary Organisations within Community*", or through use of some other name or names.

1/2. *The role of United Way.* As stated in the introduction, the writing and circulation of this book led to the formation of *United Way* within the United Kingdom. *United Way* is a registered charity which has been formed to support implementation of the SUVOC idea, by supplying workers' payroll giving and gift distribution services which are not already generally available through other established bodies.

1/3. Appendices six and seven, which have been added to the Second Edition of this book, contain papers on the background and experience of the *United Way of Merseyside* pilot operation and on why and how to develop a Local United Way Fund.

1/4. *The idea.* The SUVOC idea, by whatever name, may be viewed both as a way to improve further the social, economic and personal health of the nation at large and of its constituent groups and individuals, through increased free-will giving of services and monetary aid, and as a plan within the framework of national and local government boundaries to make charity more democratic, and thus to provide a responsible voluntary counterweight to national and local government bureaucracies.

1/5. Such a counterweight to government bureaucracy naturally will tend to orientate political thought towards a healthy relaxation of bureaucratic rigidity and the development of grass roots democracy[1]. Grass roots democracy implies respect for the individual, and thus also the liberty of individual citizens to feel personally involved in the constructively peaceful ordering of society, through voluntary involvement in improving those particular aspects of community life in which each individual is most interested.

The Need

1/6. *Definition of the voluntary sector. The SUVOC Application* outlines a method to attract, and suitably and effectively to distribute, greatly enlarged free-willed giving in support of what technically is termed *charity,* in other words, in support of the work of all those voluntary organisations and other bodies which are legally regarded as having charitable status.

1/7. These charities include voluntary organisations and other bodies listed on the Charity Commission's register together with religious bodies and charities which are not required by law to be registered.

1/8. The totality of charities in the country constitute what we term *the voluntary sector,* to be distinguished from *the statutory sector* which provides education, health and personal social services through departments administered by national and local governments. The voluntary sector may be viewed as the equivalent, in the sphere of social welfare, to the so-called independent or *private sector* in the sphere of industry and commerce.

1/9. Both the voluntary and private sectors function on private initiative which operates flexibly within certain imposed statutory

[1] Support for the SUVOC idea is consistent with the aims of all political parties. To clarify this fact, in the Second Edition (1982), the term "grass roots democracy", meaning "SUVOC democracy", has been introduced in place of the term "social democracy", which was used in the First Edition (1975) before the formation of a political party with that name.

controls, but neither sector is constituted by statutory controls[2] or is so rigidly bound by them as to be dependent on them for its motivations.

1/10. *The need for a voluntary sector.* Just as there is a need in industry and commerce for a healthy mixed economy of both the public and the private sectors by whatever names, so also there is a need in social welfare for a financially soundly structured comprehensive service to be supplied by both the statutory and the voluntary sectors in co-operation.

1/11. The relative significance in terms of national resources which it might be desirable at any time to plan to place upon the voluntary sector, as distinct from the statutory sector, is a matter of expert political judgement outside the scope of this work. It is however observed that:

i. within appropriate limits, development of the voluntary sector is a viable alternative to further increased taxation;

ii. considerable opportunity exists to extend the role of the voluntary sector the great potential national value of which is not yet fully appreciated;

iii. direct support for the voluntary sector is a more enlightened and socially responsible policy for all public and private sector bodies to adopt than is indirect support;

iv. willing and active support for the voluntary sector is a logical step for anyone who recognises the interdependence and interfunctionality of human beings within society, and the practical difficulties which would face any form of government which sought through its statutory sector to bestow on mankind all the required benefits.

1/12. For many years, and particularly since the last war, it has been the policy of all political parties to place relatively much greater emphasis upon the financial needs of the statutory sector

[2] Some voluntary sector bodies are statutorily recognised, eg, *The National Trust.*

than of the voluntary sector. This concentration upon the development of the statutory sector has probably so far been a political evolutionary necessity. However, the result of these past policies is a position where the needs of the voluntary sector now receive relatively little direct financial support from the public and private sectors of industry and commerce in comparison with the large measure of financial support non-voluntarily contributed by these two sectors towards the financial needs of the statutory sector.

1/13. In a number of cases useful partnerships have been developed between the statutory and voluntary sectors, and considerable appreciation is sometimes shown by the statutory sector for the work of the voluntary sector. Whilst finance by the statutory sector for the voluntary sector can be considered a necessary and even desirable development, and many excellent individual examples and experiences can be quoted in support of such a policy, from the overall point of view it is questionable to what extent in practice it would be wise for the voluntary sector to become dependent for its finance upon the statutory sector. Should the voluntary sector become largely, if not wholly, dependent for its finance upon taxation-money, two consequences could emerge:

i. a general reduction in the level of free-will giving by those who might consider that the voluntary sector had in effect become part of the Welfare State and that therefore "the State should pay";

ii. a loss of vital independence by the voluntary sector, large portions of which might in time be absorbed by the statutory sector to become insensitive impersonal offices of State bureaucracy.

The SUVOC Operation

1/14. *Payroll giving.* As was explained in the introduction, the idea of SUVOC grew in the author's mind whilst serving as a member of the Executive Committee of United Voluntary Organisations of Liverpool (UVO). On a small scale UVO economically raised money

on behalf of a group of local charities through individually authorised deductions from pay. These deductions were at one time termed UVO "Charity As You Earn" or "C.A.Y.E." and later renamed payroll giving.

1/15. The UVO experience led the author to consider how workers' payroll giving facilities could be offered on a national scale to benefit the voluntary sector generally. It was recognised that payroll giving had great potential and that, if it could be largely realized, accumulated gifts over a twelve month period of one minute's basic pay per working day times the country's working population would amount to a very large sum.

1/16. The SUVOC idea is for the formation of payroll giving orientated local charity-bank branches which would handle only charity-money transactions. The concept is that a national charity-bank movement could operate as a viable entity, and that certain technical services might be supplied by agreement through outside bodies, such as Charities Aid Foundation. This charity-bank movement could be controlled democratically by its donors and Donor Groups.[3]

1/17. *Donors' directive rights and safeguards for charities.* It is the essence of the SUVOC idea that with the co-operation of Donor Group representatives, and after administration charges, if any, donors within Donor Groups could be offered facilities each year to distribute the full value of their gifts to their own chosen charities. Should they prefer, donors could leave distribution of all or part of their gifts to Local Fund Allocation Committees whose members would include Donor Group representatives.

1/18. Charitable bodies which received monetary aid from SUVOC would remain fully independent and free to appeal for other funds in whatever manner they decided.

1/19. *SUVOC associated bodies.* In consideration of the potentially very large sums of new voluntary money for charitable purposes which could be raised through payroll giving, it also seemed

[3] Apart from terminological differences and some administrative developments, the SUVOC charity-bank idea is similar to the United Way idea. Ref. appendices six and seven, pages 215 to 255.

essential to the author to consider an enlarged concept and to produce a comprehensive, simple and flexibly phased plan able in due course to function at both national and local levels to benefit the voluntary sector as a whole.

1/20. On account both of the wide range of different aspects in this enlarged concept and of the view that, though interfunctionally related, the different aspects also may be viewed as separate and distinct functions, the proposition is for six separate but associated SUVOC bodies to be formed within the United Kingdom with the suggested descriptive name and primary purpose of each body being as follows:

i. a *confederation,* to supply SUVOC *sponsorship,* with approval and promotion of the payroll method of giving, together with further leading support for the voluntary sector.

ii. a *voluntary service agency,* to promote recognition of the importance of *voluntary service* and of the distinction between such service and the giving of monetary aid. Many *Volunteer Bureaux,* in association with *The Volunteer Centre,* now serve in different parts of the country "to recruit volunteers for voluntary organisations and statutory bodies in the field of health and social welfare". A federation of voluntary service agencies, or their equivalent, also could assist in the provision of a special service to benefit "officially unemployed" voluntary workers.[4]

iii. a *charity-bank,* to attract and mediate substantially increased free-will giving of *monetary aid.* Beyond payroll contributions from individual workers, additional giving could be found from companies and other donors through fuller recognition that because the voluntary sector benefits the community as a whole it thus also must benefit the constitutive parts of the community.

[4] Ref. appendix four. *The 'Workpower' Idea,* page 199.

iv. a *foundation,* to develop within different local areas a federation of *special capital funds.* Each branch fund could be used for a variety of multicentrally approved charitable purposes and on a co-ordinative basis in the event of major disaster. With the agreement of the concerned trustees, local foundation branch funds could be administered with the assistance of *Charities Aid Foundation.*

v. an *association,* to constitute a suitable *representative professional body,* which could advise on the locality-relevant needs and wishes of the charitable voluntary sector. It could be accepted that in the *Standing Conference of Councils for Voluntary Service* and the *British Council of Churches* the nucleus of this body already largely exists.

vi. a *fund allocation advisory service,* to meet the need for generally acceptable *independent local bodies* to be formed to assist those donors and Donor Groups who preferred to leave to others the responsibility for gift distributions. This need is further considered later.

1/21. The practical operation of the principles underlying the multicentral concept of an effectively co-ordinated group of associated SUVOC bodies, with many branches, may be viewed as partially illustrated in the principles governing the radiation of light-power within the national grid system of the central electricity board, with its framework of separate power stations geographically spread.

1/22. Assuming the availability of the technical services, previously referred to, it is envisaged that effective co-ordination and administration of SUVOC could be achieved with an organisation consisting largely of unpaid committee members and other voluntary helpers, assisted by a comparatively small number of executive staff.

1/23. The committees and voluntary helpers in each SUVOC branch area could supply branch policy direction and review,

together with other valuable assistance related to specific functions and areas; the executive staff of the different assocated bodies primarily could be responsible for the detailed work necessary to achieve agreed objectives and for the overall co-ordination and effectiveness of the whole SUVOC management operation.

1/24. Initial action to bring the SUVOC multicentral federations into being could be the approval in principle of the objective by *founder-trustees,* and their decision to authorise commencement of the necessary detailed administrative forward planning and other preparatory work to achieve a suitably phased development of SUVOC on a national basis. At the same time it could be considered appropriate to support development of a pilot operation to demonstrate the feasibility of payroll giving with donors' directive rights.

1/25. *Federation.* The basis conceived for a SUVOC *multicentral federation agreement* is that, in return for permission to use the SUVOC name, each democratically controlled branch of the six associated SUVOC bodies could contract with the SUVOC founder-trustees to observe all or some of the following articles:

i. to federate and co-operate in accordance with SUVOC constitution with every similarly recognised branch.

ii. to offer donors through the charity-bank the choice of alternative facilities for the distribution of their gifts, either personal distributions by donors themselves to their own chosen charities or fund allocations on their behalf through responsible local committees.

iii. to participate in the development of foundation branches and in other agreed phasing plans for the development of SUVOC, to ensure that charities had time to prepare for unpredictable increased free-will giving.

iv. to protect the financial interests of charities in respect of their existing fund raising through payroll giving.

v. to recognise the charity-bank to be the principal voting SUVOC body, on account of it being democratically controlled by its donors and Donor Groups.

vi. to respect the privacy and independent fund raising rights of all charities.

1/26. *Fund allocations.* Assuming large scale payroll giving for charitable purposes, it is recognised that it would not be a socially responsible policy to operate a gift distribution system solely dependent upon the decisions and actions of individual donors. Inevitably some donors would prefer to leave to others the responsibility for distribution of their gifts through fund allocations.

1/27. The problem which faces any fund allocation advisory service body is how to allocate charity-money through committees. Such committees need to be very caring and well-informed to have the same insight and knowledge as those they select to make effective use of that money. Sensitive recognition of this problem, more than any other fact, is probably the main reason why widespread general fund raising on behalf of the voluntary sector as a whole has not until now been developed.

1/28. At present there is a real need for greatly enlarged free-will giving in support of the voluntary sector. Thus positive work is required, by potential donors and recipients alike, progressively to develop a generally acceptable fund allocation advisory service body.

1/29. A major portion of *The SUVOC Application,* with its appendices, consists of exploratory considerations regarding possible fund allocation policy and practice, and a number of practical national and local safeguards are suggested to guard against any conceivable tendency which otherwise might exist for fund allocation to become a bureaucratic arbitrary remote-controlled procedure.

1/30. The governing concept accepted for SUVOC gift distributions is *consultative self-determination.* All Donor Groups and individual donors to be able, if they so desire, to direct their

SUVOC gifts in support either of an individual charity or of a group of charities fulfilling a particular need. Similarly, with regard to fund allocations, all charities individually to be able to decide for themselves both the manner in which SUVOC gifts could be made to them, and the rules and constitution of any groups of members they chose to form amongst themselves to receive SUVOC gifts on their behalf.

1/31. Mutual co-operation in the development of fund allocation arrangements, conceivably might lead some charities in time to develop further co-operation in other fields.

Socio-Governmental Considerations

1/32. *Reasons for support.* At this stage, the SUVOC idea is but a seed-idea. Whether this seed-idea is to develop and bear fruit will depend greatly upon the backing and support the idea receives from leaders in industry and commerce, including the trade unions.

1/33. *Support from all sectors can be given to the SUVOC idea, not only because it offers a valid ethical reason for giving services and monetary aid in furtherance of the necessarily developing role of the voluntary sector, but also because it points a way, through charity-giving, to further responsible human solidarity behaviour, and thus to a possible solution to some of the wider social problems of violence, drop-outs, general dissatisfaction and socio-political malaise.*

1/34. This solution is that people shall become again conscience conscious, that they shall become more reflexively aware of their personal human significance.

1/35. The natural desire in people to belong to a beneficently ordered community is such that if they are given an opportunity and a methodology of showing their human solidarity then they will accept it. They can show this through charity. Charity allows a man to lift himself up in his own image to a humane level of positive contribution to the human race.

1/36. Implementation of the SUVOC idea would be a readily attainable real step towards the practical embodiment of ideal

human interdependency and mutual aid, thoroughly acceptable to all responsible thinkers, and a new movement towards peaceful profitable socio-political development.

1/37. In implementing the SUVOC idea the United Kingdom could make manifest its positive determination to take a leading position in a solution to the problem of general world unrest.

PART TWO

PROPOSAL AND PRESENTATION

CHAPTER TWO

The SUVOC Proposal

SUVOC in Relation to Human Needs

2/1. *The proposal.* The proposal is that "*Society of United Voluntary Organisations within Community*" — "*SUVOC*" be formed within the United Kingdom with the following objective:

> *to improve further the social, economic and personal health of the nation at large and of its constituent groups and individuals through increased free-will giving of services and monetary aid.*

2/2. *The need for multicentralisation.* The SUVOC proposal aims to strengthen the nation's voluntary social services with increased free-will giving. Whilst successful realization of this particular objective greatly can benefit the nation and its constituent individuals, its realization alone does not offer any comprehensive solution to most of the wide ranging problems which today face members of the western world.

2/3. One of the major problems facing the western world is how effectively to resolve the historical conflict between labour and capital, how to create increased harmony between employer and employed, and between them a sense of common purpose.

2/4. Political events indicate that the electorate are becoming more and more disillusioned with party utopias, and in view of the facts it cannot be expected that either side will for long gain total domination of the socio-politic-economic situation.

2/5. Whatever capitalism may have meant in the past it can no longer look forward to survival in its original form. Instead the need is to look forward to recognition of the necessity for intelligent co-operation between left and right, and between community and

state, in a society which is increasingly knowledge based and participative.

2/6.This means that today determinative elements of society require more facts and, either more precise definition and general understanding of those emotive words and phrases in common usage, which often passively are accepted in terms of the ill-defined concepts of bygone ages, or the replacement of those emotive words and phrases with new terms which will help modern man in society to create new understanding around the realities of the present, not conditioned by the myths of the past.

2/7. To facilitate consideration and understanding of the SUVOC proposal in the context of the realities of the present, reference is made to the concept of metasociety. *Metasociety* (using *meta* to imply an attitude determined by the necessary evolutionary changes that must occur in the time process) is that society which becomes conscious of the necessity, nor merely of creating the pre-conditions of its own well-being, survival and immediate development, but also of not destroying the pre-conditions of the survival and further development of future generations.

2/8. The SUVOC proposal seeks the attainment of metasociety through more widespread conscious understanding and approval of the proposition that strong and healthy charitable voluntary organisations and religious bodies are inherently immeasurably beneficial and necessary to the community and nation.

2/9. The SUVOC idea is more than a simple method of giving. In addition it offers a practical basis for further voluntary involvement in community well-being and for the locality-relevant development of a more viable spiritual social policy complex of government. Thus the SUVOC idea points towards efficacious interfunctional multicentralisation.

2/10. Within the concept of metasociety, *multicentralisation* implies recognition of the valid socio-politic-economic function of each centre, and thus of a positive two-way contributory relation between bigger-self-government and smaller-self-government. Multicentralisation therefore implies a coming to consciousness of

the necessity for individual and small group responsibilities within the large group.

2/11. This concept of multicentralisation is different from concepts of decentralisation and devolution in so far as those imply loss of control from a monocentre. Monocentralisation has in its extreme form a unity imposed from above by force. Multicentralisation has the unity grown from mutual understanding for the necessity for co-ordinative unity, not of force-imposed unity.

2/12. In terms of world government a world monostate would be utterly unwieldly because the realities of monostate government involve oligarchal control. No matter how intelligent its individual members may be, each in their own particularised fields, an oligarchy cannot actually possess the power, and sufficiently controlled collective intelligence and sensitivity, to be able to process efficiently for world welfare the continuously accelerating flood of computerised and often confusing data, apart from the innumerable personal subjective factors of individual human evolution, which increasingly demand recognition.

2/13. Multinationalism implies multi-monostates, each with its own absolute authority over its constituent members. Internationalism implies tacit acceptance of multinationalism. Multicentralisation removes the authority from the level of the unwieldable monostate and places it in the hands of intelligences comprehending the needs of their own real situation. It thus follows that multicentralisation, not monocentralisation, is the future of world government.

2/14. *Effective government.* The concept underlying the SUVOC proposal is that functionally government, meaning *effective reciprocal control,* is the dynamic interrelation between the two conceptual aspects of its being, *the state* and *the community.* National health depends upon the standards and effectivity of that interrelation.

2/15. SUVOC seeks to improve national health through bringing the mediating influence of the community's conceptual spiritual social policy complex of government more directly into conscious functional interrelation with society as a whole. The term *effective-*

government here refers to the performance of the whole inter-functionally-related community-state government complex, in practical implementation of agreed government policy.

2/16. *Socio-governmental parity.* The SUVOC founding principle is the principle of socio-governmental parity: *from each according to appropriate need-relevant response-ability to each according to adequate need-relevant utilization capacity.*

2/17. The term *need-relevant* refers to the whole relevant situation, and therefore includes both that which is *need-determined* and that which is *need-relative.* A *need-determined* act is one the end or goal of which is wholly conditioned by its initiating need; a *need-relative* act is an act, not immediately conditioned by a particular need, but by some other fact related to that need elsewhere and/or elsewhen.

2/18. The term *response-ability,* which is a synonym for free-will, refers to individual actual response capacity which is self-determined, and distinct from *responsibility* which may be conferred on persons from outside and possibly without their assent or co-operation. A man is *responsible* when he knows he is liable to be called to account for his actions and punished where these merit punishment; he is *response-able* when he knows himself to be an adequately self-determining being. By definition response-ability is self-determined because one cannot confer upon a being from outside, and without its co-operation, a capacity not proper to it.

2/19. Socio-governmental parity defines government and society on a two-way principle that members of government are also members of society, and that members of society are also responsible for the election of leading members of government; both government and society therefore can recognise each other's rights to receive service and assistance provided it can be given adequate use.

2/20. In furtherance of this principle generally it can be recognised that the government is not an insulated superior body controlling a separate inferior body, and that the government is not effectively separable from the governed, any more than the essential organs of the human body can be viewed as healthily separable from the self resident in that body, but it is a necessary socio-governmental

expression of the self-regulating human social group termed the nation. This concept of socio-governmental relations is founded on high principle transcending merely temporarily expedient man-made laws.

2/21. *The role of the voluntary sector.* In addition to the commodities and services available to the public through the trade and business sector, which generally covers services supplied to exclusive private groups, it can be recognised that there are three possible modes of supplying the personal needs of the individual members of society which they are unable to obtain for themselves:

> *mode one — person to person:* from private citizens singly to each other as the individual members of society[1].
>
> *mode two — state aid through the statutory sector:* from the state as a body conceived as separate from its own members.
>
> *mode three — charitable aid through the "third" or the voluntary sector:* from voluntary organisations, meaning all charitable bodies[2], which are the only conceivable free mediators between the state and the individual.

2/22. Here charity stands as the saviour, saving the individual from the state and the danger of totalitarianism, and the state from overburdening and unwieldy responsibilities and the dangers of anarchy, breakdown and chaos.

2/23. *The role of SUVOC within the voluntary sector.* To a large extent the community is unaware of the benefit it receives from voluntary organisations. This is not the fault of those who do not know the facts, nor of the voluntary organisations themselves; it is because the information is not readily available.

2/24. Whilst it is desirable that individual voluntary organisations should continue energetically to appeal for funds and to speak directly for themselves whenever possible, it is believed that they

[1] The Wolfenden Committee referred to this mode as the *Informal System of Social Helping.* It described the help and support that family, friends and neighbours give to each other as "very substantial" and stated "if for any reason such help ceased to be available an enormous burden would be placed on other systems of provision". p.22, *The Future of Voluntary Organisations,* 1978.

[2] Some non-profit bodies also carry out charitable-type work but, for technical reasons, may not be legally regarded as charitable. See para 6/3, page 57.

also individually would benefit if the united voice of SUVOC was heard proclaiming the overall benefit to the nation of increased free-willed-giving of services and monetary aid to the country's charitable bodies as a whole.

2/25. If SUVOC's all-party-political and non-sectarian objective generally can be accepted as a desirable purpose worthy of achievement, and the formation of SUVOC widely encouraged, this will create from the outset a climate of opinion which will guarantee its healthy growth and development.

2/26. *Belief forming the basis of the proposal.* The SUVOC proposal is based in the following belief:

i. society requires an increase in the important and essential work which voluntary organisations can perform within the community.

ii. today many socially desirable goals are not achieved due to lack of funds, and in the future such financial needs will increase.

iii. the nation at large has services and monetary aid to spare for substantially increased giving to charitable voluntary organisations.

iv. there is something basic in humanity that does not function on the merely immediate quid pro quo, and which has very little opportunity to find expression in our high pressure society. At a deeply felt emotional level, though not always consciously recognised, most men and women want to help others, particularly the less fortunate.

v. the idea of SUVOC is a relatively small but significant gesture towards fulfilling the need to reinforce the idea of personal creative freedom, through voluntary giving and receiving, with a clearer definition of individual corporate responsibilities, beyond the idea of the generally accepted legal obligations of the statutory services.

vi. excessive monistic bureaucratic control has a crippling effect on the social, economic and personal health of national life. If the government will multicentralise its system of controls wherever local conditions may better be handled by local intelligences, it can release vast sources of latent energies through voluntary services. This policy is the essence of the concept of *topeconomy* referred to later.

How SUVOC Can Serve the Community

2/27. *The concept of charity-banking.* Charity-banking could be regarded as a form of banking running parallel with commercial banking but differing from it in the following aspects:

i. money paid into a charity-bank account would be accepted as a gift from the donor to be used only for charitable purposes.

ii. subject to administrative feasibility, facilities would be provided to recover tax on gifts received. Thus, assuming basic rate tax, net gifts would be converted into gross gifts.

iii. donors and groups of donors who wished would have the right to distribute the gross value of their own gifts, less SUVOC expenses, if any.

iv. in place of the shareholders of commercial companies, donors and their proxies and delegates could be entitled to attend and vote at the separate general meetings of the sub-regional and other branches together forming the proposed multicentral federation of SUVOC charity-bank.

v. through the storage and appropriate use of charity-bank information on sources of giving and the use of gifts received, beyond that required for purely book-keeping purposes, greater public appreciation could be encouraged of the desirability of increased free-will giving of services and monetary aid.

2/28. Subject to the phasing and other safeguards provided by the SUVOC proposal articles later referred to, charity-banking could substantially increase free-will giving of monetary aid by inviting workers to contribute from their earnings the income from one minute's basic pay per working day, or more if preferred, for the benefit of any voluntary organisation or other body lawfully entitled to receive charity-money.

2/29. For administrative simplicity, in some firms operating payroll giving, the value of one minute's pay per working day could be calculated by reference to average basic pay for a defined group of workers, with all contributions of one minute's pay being for similar amounts. Based on a five day forty hour week, contributions of one minute's pay per working day by employees earning between £85 and £95 a week would amount to 14p net or, assuming tax recovery, approximately 20p a week or just over £10 per annum. Contributions could increase annually by a net 2p a week for each £10 a week increase in basic pay.

2/30. If ten million employees, i.e. nearly one half of the country's working population, contributed tax recoverable net payroll gifts of 14p per week an annual figure of £100 million would be raised.

2/31. The following are possible appeal slogans:

— "Just a Minute!"

— "Surely YOU can spare a minute."

— "Charity Begins at Work."

— "The Charity that Gives YOU the Power to Decide."

— "One of your essential freedoms is your power of voluntary giving. Give personally through SUVOC. Every note a vote!"

2/32. Payroll gifts could be supplemented by corporate gifts from firms and shareholders, by interest accruing through the generosity of those able temporarily to spare the use of some money, and through legacies and other sources of giving. If, as additional giving, firms and other employers agreed to subscribe directly to SUVOC on the basis of a fraction of one per cent of payroll costs, another new and really worthwhile charitable contribution would be developed at fairly insignificant cost to the contributors.

2/33. Many donors and potential donors would wish to be assured and satisfied that there was good value in giving, and that charity-money could be used more effectively and beneficially than if expended on other purposes.

2/34. Given support SUVOC could provide factual charity-bank information so that, once donors were able to feel humanely involved in the cause of voluntary service and were aware of the enlarged opportunities which exist for voluntary effort in our developing society, many would no doubt desire to raise their level of giving.

2/35. By freely giving towards charitable voluntary organisations, whether or not through SUVOC, all donors could be conscious both of helping to meet immediate needs and also of making a deliberate long term investment towards the development of a more mature and stable society.

2/36. *The six SUVOC bodies.* It is envisaged that SUVOC could consist of six separate but contiguously associated bodies, each operating in furtherance of its own special function. Whilst each of the six associated bodies could be formed able to operate self-sufficiently, and without assistance from the other SUVOC bodies, it is not envisaged that non-related self-separation would occur.

2/37. The association between the six SUVOC bodies, together comprising the hexic formation named "*SUVOC*", could be created by their interfunctional relation, their joint use of the name SUVOC, and by their acceptance of joint aims and agreed special purposes. In some parts of the country the six SUVOC bodies might choose for specific reasons to work together in such close association as effectively to be one body.

2/38. The introductory name of one of the associated bodies incorporates the concept of *topeconomy.* Derived from *topos,* a place, and *economia,* good household management, the concept of topeconomy is the economy of specific areas and places in which *bank-account profit* is distinguished from wider *socially-functioning profit.* The former profit is the figures entered in an account which might give pleasure to someone reading a bank account, whereas

the socially-functioning-profit is the actual concrete increase in social health and viability, or in the quality of life.

2/39. It is proposed that the six associated SUVOC bodies be formed to operate primarily in furtherance of the following special purposes:

i. *SUVOC confederation (the founder body):*
to be formed (in association with *SUVOC founder-trustees)* by *constituent-members,* being influential groups and movements in society and government, and by individual and corporate *founder-members* and *confederation-members,* to give leadership and financial assistance to implement the SUVOC proposal, and generally to develop a fuller understanding of the existing and potential benefits to be derived through progressive realization of the SUVOC objective.

ii. *SUVOC voluntary service agency:*[3]
to function, through a federation of locality-relevant information centres, in the interests both of charitable and government bodies seeking voluntary service assistance, for work which would not otherwise be done, and of individuals seeking freely to give their services in personally chosen directions and locations. Every agency branch to aim further to develop public appreciation of the immediate and cumulative benefits of the free-will giving of services.

iii. *SUVOC charity-bank:*
to operate as a multicentral federation of national, regional, sub-regional and possibly also local branches, controlled by the donors, to provide increased opportunities for free-will giving of monetary aid, with the administration necessary for effective distribution of gifts received, such distributions to be made in co-operation with other SUVOC bodies. A further

[3] Note: added 1982, in many parts of the country the nucleus of this necessary service is now available through *The Volunteer Centre* and local *Volunteer Bureaux.* See, page x. *Introduction to the Second Edition.*

effect of successful operation to be to provide a fresh stimulus to free-will giving.

iv. SUVOC foundation:
to be developed (initially through the donations of SUVOC founder-members) as a federation of branches affiliated to corresponding charity-bank branches. Each foundation branch to accumulate a capital fund of its own and to be managed by its own trustees. By constitutional agreement, the foundation to distribute funds on a national or other basis in the event of major disaster and for other agreed co-ordinate purposes, and by individual branches on account both of topeconomic development and research projects and of a proportion of approved SUVOC administration expenses. These latter could include fund allocation advisory services and early implementation of the SUVOC proposal.

v. SUVOC topeconomic development association:
to be composed of representatives from charitable bodies, able to demonstrate the capacity of these member bodies to co-operate together to improve the quality of life within locality-relevant community boundaries.

vi. SUVOC fund allocation advisory service:
to be provided through independently appointed committees, on the basis of one *advisory service branch committee* to each charity-bank branch-area, plus *advisory service co-ordination committees* at national and regional levels. Each committee to have due regard to emergent and little publicised needs, and to advise, in accordance with declared policy, a sensitively determined and fair basis for the annual distribution through the appropriate charity-bank branch of the balance of SUVOC charity-money not previously distributed directly by donors. The trustees of foundation branches also, if they so wished, could receive fund allocation advisory services to prevent undesigned overlapping of grants.

2/40. The SUVOC hexic formation is proposed as a functional union based on unity of interest amongst the different sectors of human society and specialisation of purposes within that society.

2/41. The reciprocally interrelated activities between the six associated SUVOC bodies would maintain growth and further social evolution, each associated body profitably stimulating the others. Increased voluntary movement also would be created through the mutual energising taking place between these member organisations and their own inner members within the community.

2/42. The SUVOC proposal envisages that each of the associated SUVOC bodies would become a body of individuals transformed by their functional interrelations into a dynamic viable whole, with the natural effect of protecting the other members from the danger of one or more individuals unduly dominating the whole hexic formation, seeking to preserve the formation as a static end in itself.

2/43. *SUVOC proposal articles.* The following articles are designed to provide adequate phasing and other safeguards:

i. *SUVOC proposal article one:*
all charities and religious bodies legally regarded as charitable to be eligible to benefit through the charity-bank.

ii. *SUVOC proposal article two:*
each of the six associated bodies to be impartial and therefore to abstain on principle from seeking to influence how any charitable voluntary organisation is managed or how it raises funds.

No information to be published regarding individual member charities' salary payments, publicity costs, fund-raising expenses or such other information as might enable invidious comparisons to be made between individual organisations.

iii. *SUVOC proposal article three:*
development of the charity-bank to be phased to ensure that charities have time to prepare for unpredictable increased free-will giving, and thus that all charity-money raised be seen to serve a worthwhile purpose. For this purpose every

charity-bank branch to agree to participate in the development of SUVOC foundation.

iv. SUVOC proposal article four:
every charity-bank branch to develop both adequately publicised facilities to enable donors who wish to distribute their own gifts and an independently constituted fund allocation advisory service branch committee.

Beyond the initial implementation stages, the fund allocation policy for the following year of each fund allocation advisory service branch committee to be announced at the corresponding charity-bank branch's annual general meeting, or otherwise to be publicised in sufficient time and with sufficient prominence to enable interested donors to decide for themselves whether or not, that year, to leave obligatory responsibility for the distribution of all or part of their gifts to a particular fund allocation advisory service branch committee.

v. SUVOC proposal article five:
the charity-bank to offer compensation to other charitable voluntary organisations regarding their existing fund raising schemes through payroll giving and charity-banking services. For this purpose, the term *founder-charity* to refer to a charitable voluntary organisation or religious body which elected to release quantifiable income to assist initial development of SUVOC.

In the distribution of charity-money at national, regional, sub-regional and local levels the otherwise independent fund allocation advisory service committees to agree to give preferential consideration to founder-charities, to ensure that they would at least not lose as a direct result of their original co-operation.

vi. SUVOC proposal article six:
the *founder-trustees* to consist of certain persons, to be

named[4], and of representatives appointed by the founder-charities who would be willing actively to participate in the development of SUVOC. In addition to other functions, later referred to, the founder-trustees to be custodians of the names "*SUVOC*" and "*Society of United Voluntary Organisations within Community*" and to approve the appointment of the first leading members of the six associated SUVOC bodies.

voting rights of founder-charities:
unless otherwise decided, the founder-charities to be entitled to vote regarding the appointment of founder-trustees on a basis of one vote for each £1 of income which was released to assist initial development of SUVOC. Recognition of the amount released to be subject to confirmation by a simple majority of the other founder-charities and/or founder-trustees present and voting at the meeting.

vii. SUVOC proposal article seven:
no SUVOC branches (other than small local branches recognised by district or sub-regional branches) to be formed without prior approval to their formation being received from the founder-trustees. Unless otherwise decided by the founder-trustees, all such branches at all times to have boundaries and names similar to those applying for purposes of local government.

viii. SUVOC proposal article eight:
all branches to use the names "*SUVOC*" and "*Society of United Voluntary Organisations within Community*" in a manner and style to be approved by the founder-trustees, e.g. the term *SUVOC charity-bank* to prefix the charity-bank branch name.

Because of *proposal articles one* and *two,* SUVOC would not apply its name to community chests or other bodies giving donors immunity from appeals.

[4] It is suggested the first *founder-trustees* could be appointed by sponsors. Ref. sub-para 1/20i, page 7, and para 2/44, page 28.

ix. SUVOC proposal article nine:
all branches of the six associated bodies to federate and co-operate in accordance with SUVOC constitution with every similarly recognised branch.

x. SUVOC proposal article ten:
every charity-bank branch to grant voting rights to donors and their proxies and delegates either on the basis of one vote for each £1 given or on such other basis as was democratically agreed.

xi. SUVOC proposal article eleven:
the first constitutions for each of the six associated bodies, as determined by the founder-trustees, to be regarded as "provisional constitutions", pending their democratic ratification or otherwise at the first national general meeting to be held after the charity-bank had been firmly established throughout the United Kingdom. Following that meeting the role of the founder-trustees to become honorary and non-executive.

xii. SUVOC proposal article twelve:
not until at least five years had elapsed following registration of the first founder-charity might *proposal article five* be reviewed by charity-bank donors in general meeting.

2/44. *Implementation.* Implementation of the SUVOC proposal could occur through its approval and sponsorship by certain persons, and the appointment by the sponsors of the *first* founder-trustees.

2/45. A suitable body could then be formed to examine "*The SUVOC Application*" and to recommend possible profitable amendments, modifications and additions to the proposal and to the supporting memoranda. In the light of those recommendations, the detailed administrative forward planning and other preparatory work could be undertaken to achieve a suitably phased development of SUVOC on a national basis.

2/46. Simultaneously with commencement of this detailed work, steps could be taken at national and other levels to form SUVOC confederation, and a pilot operation commenced through formation of the first SUVOC charity-bank regional branch.

2/47. The purpose of the pilot operation could be firstly to demonstrate the feasibility of the SUVOC proposal, through development of the charity-bank in one chosen area, and secondly to provide a practical example which, with suitable amendments, in due course could be followed in other areas.

2/48. On account of the present lack of general awareness of the existing and great potential value to the country of charitable voluntary organisations and of the need for increased free-will giving, the pilot operation would require both financial and personally interested support from confederation members to enable it to develop the desired momentum.

CHAPTER THREE

SUVOC Aims

A Sense of Common Purpose

3/1. *The objective.* The proposal, as earlier stated, is that SUVOC be formed within the United Kingdom to improve further the social, economic and personal health of the nation at large and of its constituent groups and individuals through increased free-will giving of services and monetary aid.

3/2. *Joint aims.* In addition to the objective, some further possible joint aims of the six associated SUVOC member bodies could be:

i. *sense of common purpose*
to achieve an organisation throughout the country which allows the human beings involved to co-operate with the greatest efficiency and with the least friction, and where there is a community of interest and a sense of common purpose between all individuals and groups.

ii. *personal involvement*
to awaken fresh interest in finding new ways for voluntary effort further to benefit communities whose members believe that people in difficulty should be the concern of every member of the community, and who do not believe that members of real communities can be satisfied to abrogate responsibility for their weaker or less fortunate members by paying professional social workers to keep such problems out of the public eye.

iii. *individual needs*
to consider the needs of the individual members of the community which are not the exclusive concern of any

existing body, and to consider how best a welfare society or metasociety could fulfil the individual needs of its members.

iv. human relationships
to demonstrate the general value of co-operative efforts and the continuing importance of good human relationships in our highly mechanised and ever faster moving society, in which family ties have weakened, and in which moral and ethical values are undergoing such rapid change.

v. government co-operation
to develop further co-operation between the statutory and voluntary social service organisations so as to secure more effective co-ordination of effort, and thus to extend the present evolutionary process towards a healthy partnership in which public and voluntary funds are usefully employed together.

vi. social, ethical and spiritual
to encourage consideration of the social, ethical and spiritual aspects of charitable appeals, free-will giving and voluntary effort.

vii. communication
to establish improved channels of communication at all levels, both within individual communities and throughout the country, so that voluntary effort may better be understood, and our countrymen enabled to function more intimately as members of real communities contributing more meaningfully towards their social activities and differing modes of welfare.

viii. develop new ideas
to form a nucleus of voluntary effort and experience, ready and willing to pioneer experiment and the development of new ideas, to meet the changing needs of communities and their individual members.

ix. workpower for unemployed
to give assistance in the formation of responsibly and separately administered, but associated, local agencies through which "officially unemployed" voluntary workers could receive some tangible recognition or "fringe benefits", without prejudice to individual entitlement to unemployment and social security benefits.

x. personal development
to help the individual members of communities themselves to develop their valuable potentialities by enlisting their assistance in socially worthwhile and fruitfully interesting projects, likely to foster the personal initiative and self-reliance of the interested members, by assisting them to develop positive mental attitudes of participation, co-operation, self-help, self-direction and personal involvement in useful topeconomical developmental activities.

CHAPTER FOUR

SUVOC Presentation Concept

The Meaning of the Emblem

4/1. *The name "SUVOC".* The name chosen for the proposed hexic formation is of considerable importance.

4/2. Statistical findings of word association in advertising indicate a powerful association of specific word, syllable and letter groupings with determinant unconscious psychological reactions. The title *"Society of United Voluntary Organistions within Community"* contracts to *"SUVOC"*, which fortunately has the desired significance for the purpose. Advice has been received that SUVOC is a very good strong name with psychological reference with all words using the root-*voc* (meaning voice) as invoke, evoke, provoke, vocation, etc.

4/3. *"SUVOC"* may be interpreted as the voice of the people pleading for peace, or for the salvation of our national life from the threatening forces which pervade and surround it.

4/4. The essence of the SUVOC concept is regular and systematic free-will giving of services and monetary aid. By this means, and in co-operation with the state-financed social services, the individual members of different localities, large and small, further their own chosen personal and community developments. As a natural result of this process, topeconomy emerges, with all individuals concerned enabled to seek new and ever higher developmental levels of community and self-expression.

4/5. *The emblem.* The SUVOC emblem, illustrated on the front cover, is a radiant heart in a white hexagon with a triple border of gold mounted on a blue shield.

4/6. *The heart (blood red).* The individual citizen, whose good stands as the raison d'etre for the existence of the state and the

community, is represented by a heart. This heart also symbolises the people's affections.

4/7. The state of the people's heart, reflecting the feelings, desires and volitions of the totality of the nation's separate but functionally interrelated private individuals, is the most vital factor presented to government for its consideration. It preconditions the evolutionary responses immediately possible within the separate localities throughout the nation, and within the nation as a whole.

4/8. *The hexagon (white).* The hexagon represents both the six associated member bodies of the SUVOC hexic formation, and the six-sided government complex inherent within the very nature of the body politic.

4/9. The healthy effective functioning of the government complex is dependent upon the capacity of each of its six sides to make its own essential contribution to policy formation and implementation. Failure in the free and healthy response of any one policy complex is automatically detrimental to national health.

4/10. These six separate independently functioning policy complexes form a natural part either of the conceptual government policy determining triad, otherwise termed *the state aspect of government,* which contains the policy creation complex, the government services complex and the secular law complex, or of the conceptual government policy conditioning triad, otherwise termed *the community aspect of government,* which contains the policy ratification complex, the commodity and services complex and the spiritual social complex.

4/11. A system of government is essential to the locality-relevant health of every human social group. An enlightened government is capable of maintaining a healthy dynamic relation between the state and the community aspects of its being.

4/12. The hexagon on the SUVOC shield is white to symbolise purity of intention and the enlightened equilibrated state of mind generally desirable in those responsible for government, as well as in those personally involved in SUVOC.

4/13. *The triple border (gold).* The three-fold human aspects of

feeling, thinking, and willing are analytically represented by the triple border of the hexagon.

4/14. This border is in gold, as a symbol of the incorruptability of the human essence, representing both the common man's instinctive feeling recognition for what is good and the natural limits of any governmental system, which cannot function in a useful or healthy manner beyond the inner personal pure intention of those in authority.

4/15. *The shield (deep celestial blue).* The surrounding blue on the shield represents the presence of environing forces, temporal and spiritual, beyond the natural limits of any temporal government's authority.

4/16. A deep celestial blue is used in recognition of our conscious and intuitive awareness that some of those forces are of spiritual origin.

4/17. *Radiance (gold).* The radiance of the heart is a universally recognised symbol of expressed love and charity, for it symbolises the response from the inner feeling centre of man's essential vitality, the vehicle of which is the blood, that most mysterious delicately balanced fluid which responds in its metabolism to every impulse of our thoughts, feelings, desires and volitions. In gold this radiance also represents generosity and goodwill to all men.

4/18: The fundamental impulse in charity is love, love itself being the will to develop potentialities of being, here understanding love in the sense of the Christian "agape", as opposed to "eros" which is concerned only with pleasure. As the term "agape" unfortunately has no single-word equivalent in English, we have no present alternative but to use the word, or an extended definition of it.

4/19. The idea that one can work for the development of other beings without benefit to oneself is of course misconceived, because every good intention of the heart must necessarily bring benefit to the one from whom it springs, a benefit reaching down into the depths of the soul and permeating even the physical organism with the sense of well-being which inevitably arises from the consciousness of good intentions fulfilled.

4/20. True charity, as the co-operative reciprocal interactions of the

inseparable pure love and pure reason, is symbolised respectively by the undulating and rectilinear gold lines radiating to and from the heart.

4/21. These lines also represent the determinant and interrelating processes of society and the formulative influences operating on and within the total human situation of the body politic which give rise to a six-sided expression of government.

4/22. Rectilinear lines signify the right or true view which is always found in the man of clear intellect; undulating lines signify the gentle compassion which tempers the tendency of the intellect towards a too rigid definition of the whole real situation.

4/23. *The message.* Society as understood by human beings is a "human society" in the universally accepted sense of a *human heart-centred society.* It is not the cold society of a highly specialised articulated ant colony. It is a society the raison d'etre of which, if it is to survive, can only be love in its highest spiritual and ethical sense.

4/24. Just as the human heart has its own pace-maker which determines the nature of its response to any environmental stimulus, so within the affections of the people the body politic functions as the conscious field of political thought influencing the nation. It is analogous to a conceptical pace-maker of the people's heart and a determinant of the people's responses to any demands made upon it.

4/25. "Out of the heart the mouth speaks," "out of the mouth are the issues of life". Just as the human heart requires freedom in order to maintain its essential life rhythms, so the consciously expressed feelings of the people must be allowed their essential natural freedom if national health is to be maintained. Just as no circle can be struck by the compasses without a centre, so no viable society can be brought into existence without regard to the individual whose personal good stands as a raison d'etre of its existence.

4/26. Public support can be given to SUVOC because it aims to create a place in which the people's heart can beat, and more

consciously maintain that essential rhythm which determines the whole health of the nation and of its constituent individuals.

4/27. Every wise government recognises that the state of the people's heart is the condition of the heart of the State.

4/28. Truth is the form of Ultimate Reality, Beauty is the felt experience of that Reality, Goodness is its Generative Will. These three essentially inseparable functions of Ultimate Reality are embodied in the symbology of the SUVOC emblem, and cannot but receive full acquiescence from every illuminated intelligence, individual, collective or corporate.

4/29. The agreed universal voice of the people is the voice of God. The voice of SUVOC will prove itself to be the voice of the people.

PART THREE

THE SUVOC IDEA

CHAPTER FIVE

The Human Needs of the Community

New Extensions of Freedom

5/1. *Our opportunity and our challenge.* Future historians will look back on our time as crucial and momentous for mankind. We have the means of destroying whole peoples and, at the same time, have the opportunity of creating new realms of happiness. The clarification and determination of the new direction in which we must go is for each one of us the challenge of our time. Everyone is at least vaguely aware that something must be done to meet this challenge, but few seem to know what.

5/2. The logic of the space age is that we have in principle the power to conquer space in the material universe. But no matter how far we go in space and time on the level of empirical science, logically we are continuing merely to carry the same problem spherically further out. It may be believed that this spatial projection is not the final goal of human evolution and that new dimensions of creativity may come out of the centre of man's own inner initiative. Herein perhaps lies our opportunity and our challenge.

5/3. *A dynamic creative environment.* Modern machinery with its intensely automated assembly lines and increasing computerisation has largely abolished the tradition of individual craftsmanship, but has failed to eliminate the operators' frustrations.

5/4. These frustrations have increased as men and women have been progressively freed from the necessity to involve their physical and mental energies completely in their activities, for little has been done about these newly released energies, or about the boredom of a routine which demands attention, but cannot absorb the energies attention generates.

5/5. We may find new freedom through technology as further energies are released for fresh creative activities. However, if these released energies cannot be used positively to improve the well-being and happiness of the community, assuredly they will be used negatively to destroy some portion of the fabric of our society. It is impossible to absorb them totally in mass entertainment or other stimulations which do not require intelligent active participation, and it is these newly released energies, if they have no other target, which manifest in social discontent and express themselves as strikes and disorder.

5/6. Two questions arise:

i. Can these energies flow into voluntary effort and voluntary service?

ii. Do we need a larger amount of free-will giving to charitable voluntary organisations to ingest and utilise the new energy released in a technologically developed society?

5/7. The answer to the first question is Yes, a very large amount of such energies could be absorbed and utilised by voluntary effort and voluntary service, within a renewed and redefined concept of charity.

5/8. The answer to the second question is Yes, greatly increased free-will giving is needed, and in a creative environment this would be of great benefit to the existing charitable voluntary organisations as well as to new ones yet unformed.

5/9. The creative use of new energies released by technical advance poses a social problem which cannot be solved by the individual alone, as it pre-supposes the opportunity purposefully to use these energies interrelationally in an appropriate environment. Such an environment could be developed through the revitalising energies of a large number of creatively active community organisations.

5/10. The essence of the SUVOC concept is regular and systematic free-will giving of services and monetary aid. The development of SUVOC will lead to an environment where reconstituted partnerships between national and local governments and

individual community organisations jointly provide the essential activities necessary to preserve and improve the physical and general well-being of members of the community, as regulated by custom and law.

5/11. As a natural result of this process a more mature society will emerge, with all individuals concerned enabled to seek new and ever higher developmental levels of community and self-expression for the intelligent dynamising of socio-governmental parity.

5/12. The public can respond wholeheartedly to the SUVOC appeal for increased free-will giving only if the government, not seeking to damn SUVOC with faint hearted praise, welcomes its appearance with full support and co-operation, and demonstrates governmental readiness pragmatically to re-assess the concept of government, and to define both the purposes and limitations of the statutory services, and the growing need and opportunity for the nation's voluntary social services to flourish.

5/13. Economic considerations apart, Parliament can give support to SUVOC because the two bodies, both seeking to express the will of the people, must seek the further development of a more self-disciplined and better ordered society, firmly based on self-respect and clear charitable purposes.[1]

5/14. Such a policy could create a personal feeling of belonging to a real community of living individuals, and not just to community as an abstract concept. In this type of environment interest and a healthy competitive spirit could be more readily aroused, and creative energies more easily released into worthwhile projects.

5/15. The individual need for the creative use of energies is also a universal need which every human seeks to fulfil and, survival apart, this fulfilment may be said to constitute our greatest desire. A society which is aware of these needs, especially if fully conscious of their several specific natures, may constitute a dynamic creative environment.

[1] "Some chief officers of relevant [local government] departments find it convenient to 'divide and rule' the voluntary sector for it is their last desire that it should be coherent, efficient and co-ordinated; Report by Liverpool Council of Social Service." *The Government and the Voluntary Sector:* Analysis of the Response to the [Wolfenden Report] Consultative Document, p.57. The Voluntary Services Unit, Home Office, London, 1981.

5/16. *A renewed and redefined concept of charity.* To achieve a dynamic creative environment a renewed and redefined concept of charity is required.

5/17. Many people still think of charity as doing good to a sick person, a disabled person, a congenitally deficient person, and so on. Frequently people are thinking only about negatives to be corrected or compensated, instead of thinking that we also need a large amount of charity-money to provide activities to absorb and acceptably formulate surcharged creative energies.

5/18. The basic concept of charity, or human kindness/love, is helping one another. Varying interpretations have been offered, but we may say that originally the idea was that somebody had fallen into a pit, or hole, and needed help. The particular type of pit did not matter, it would be a pit indicating some kind of want or deficiency, physical, mental or economic. The important thing was that he did not want the pit turned into a grave and his troubles covered with the strewn flowers of sentimentality; he wanted charity in the form of positive help, in order to get out of the pit and happily and efficiently to regain the power to function in interrelationship with his fellow men.

5/19. A renewed and redefined concept of charity could recognise that by charity not only do we mean giving help to the deficient or impoverished, although this is certainly one important aspect of it that needs to be borne in mind; we mean also giving help towards the beneficial utilization of newly released energies and powers by opening positive outlets of a creative order.

5/20. Many charitable voluntary organisations, particularly those connected with youth work, already recognise the importance of the social utilization of released surplus energies and there is scope for much further positive creative work in this direction. More general considerations on a definition of charity are referred to in the next chapter.

Body Political Considerations

5/21. *A balanced state of national health.* As we have considered in the previous chapter, the national body politic is conceived to be the

conscious field of political thought influencing the nation. By definition therefore, the intelligent members of a body politic are aware that the national prescription for the cure of national malaise is conscious care of *the state of the people's heart.* This latter concept includes the body politic concept as stated, together with all the non-body-political thoughts, feelings, desires and volitions of our countrymen.

5/22. The totality of the form-power-function aspects of the national human social group is here subsumed under the conceptual socio-governmental triad of human systems termed *the state, society and the community,* with each aspect having different characteristics defined as so-called *virtues* and *vices:*

> *virtues* here mean the realizable harmonizable powers which make for possible realization of optimum freedom, i.e. that degree of freedom practically attainable within a human social group without acting as a disintegrating factor. "A virtue" therefore is that which produces a positive developmental differentiation in any situation.
>
> *vices* here mean anything that cuts down on one's essential freedom, but which is necessary to make one conscious of the value of one's freedom. "A vice" therefore is that which produces a negative developmental differentiation in any situation, moving it towards individual or social disintegration.

5/23. Every man potentially contains within his own being the triad of human systems found within a human social group, and thus every thoughtful man and every centre of government — large and small — by definition also constitutes a body politic.

5/24. The purpose of the offered definitions on the national human social group is to improve national health, by helping to develop fuller conscious awareness of the wholesome socio-governmental principle inherent within the very nature of the validly defined national human social group.

5/25. The affirmation of all the different characteristics of the

national human social group is essential to national health. Whether consciously recognised or not these different characteristics, of so called virtues and vices, together provide both the unifying concepts required for peace and national stability, and the dialectical pressures necessary for vitality and national development.

5/26. A political state presupposes either a permanently rigid and static body politic incapable of movement, a dead and totally unrealizable concept, or a necessary degree of off-balance, the defined vice characteristics, requiring compensating energies to work towards a more perfectly balanced state of national health, the defined virtue characteristics.

5/27. The traditional concept of a nation, with its state and society systems of government and people, differs from the following concept of the national human social group only in so far as the separate function of the nation's community system either is ignored, or its existence is treated merely as akin to a sub-nation exercising powers of self-determination within a larger containing-nation.

5/28. *Aspects of the human social group.* The following definitions are used of some of the human systems that can be recognised as different characteristics of aspects of the human social group. All these aspects are so interwoven that it is impossible to give absolute precedence to any particular aspect although the national aspect, viewed as referring to the concrete whole body of its members, must be given first place.

i. the national aspect:
here the human social group is viewed as the whole socio-governmental form of that unity of men and material power together functioning as the nation.

The terms nation or national do not refer exclusively to human mental interrelations, but also include the material possessions of any group of human-beings whose joint interests are governed by some national concept.

The *virtue* of the national aspect is its emphasis upon a sense

of common purpose and upon the essential unity of interests between the state, society and the community, in which the governing concept is that man should improve his control over his environment and his relationships so that, both as an individual and in his groups, he may be able to make a living in peace and in partnership with all his fellow creatures.

The *vice* of the national aspect is its traditional tendency to go towards the future facing backwards, and to ignore human-person values through emphasis upon its own material growth designed to secure for the few powers denied to the many.

ii. the private aspect:
here the human social group is viewed as the individual form of that unity of purpose and power functioning within each member of the group.

The *virtue* of private individuals is their divine discontent with unworthy concepts and their instinctive feeling recognition for what is good.

Their *vice* is from their isolation and their tendency to become bewildered in a worldly environment of apparently conflicting values.

iii. the state aspect:
here the human social group is viewed as the totality of stabilising concepts and functions which enable groups of human beings to maintain some recognisable relationship. The state may be regarded as a conceptual government *policy-determining triad,* designed to provide society with a form of healthy stability.

The *virtue* of the state is its capacity to confer upon its members some degree of stable unity upon which they may base their activities.

Its *vice* is that it may tend to place its own stability and purposes above the welfare of its members, and that it may pass from a mere concept and function progressively to

assume pseudo-entity status in opposition to its actual constituent members, e.g. the fascist state claiming a mystical-being status with absolute authority of life and death over its members.

iv. the community aspect:

here the human social group is viewed as the totality of concepts and functions whereby a group of human beings are enabled to join together to evaluate and realize their modes of self-preservation and development.

The community does not function merely as a smaller self-government, but as the structure and common function of a group of individuals in which information and benefits derived from the members of that group are pooled and made available for the well-being of each and every individual within the community. A concrete result of this communication function is that the community automatically serves as a government *policy conditioning triad.*

The *virtue* of the community is the collective intelligence and power whereby the group may more strongly maintain and develop itself within its specific and general environment.

Its *vice,* as expressed by any given group, is to assume that its own mode of maintenance and development is the only true mode.

v. the governmental aspect:

here the human social group is viewed as its intelligent self-regulating mechanism, functioning in the interests of the common good to determine the desirable limits of personal freedom and private responsibility on the one hand, and on the other of public rights and obligations.

A system of government is essential to national health and, if efficiently operated, is capable of maintaining a dynamic balance between the two defined systems creating its being, the state and the community.

The virtue of the government is its capacity to regulate a community of interest between all groups and individuals within the nation, and its ability to lead its people to ever higher levels of evolutionary development.

Its *vice* is its tendency to develop a rigid and static form lacking vital flexibility, and incapable of making the swift and sure movements necessary for survival and development within a continuously changing world environment.

vi. the social aspect:

here the human social group is viewed as the substantialised totality of human concepts and functions which dynamically interreact and save individual men from the degenerative processes that would manifest if each man were to be flung into his personal void in a state of complete isolation.

Society is the system of human functional interrelationships enabling its individual members to attain higher levels of well-being than would otherwise be possible. A man in society has higher survival and developmental potential than one in isolation, therefore society is in a real sense the saviour of the individual from the dangers that would beset him if he were isolated from his fellows.

The *virtue* of society is that it makes it possible for human beings in functional interrelationships to develop determinant qualities, characteristics and functions impossible for any single person isolated in a vacuum.

The *vice* of society is its tendency to level out essential differences of character and to produce, in place of real living unique individuals, beings conditioned by an abstract concept of a merely socially acceptable image and behaviour pattern.

vii. the body political aspect:

here the human social group is viewed as that aspect constituted by the totality of human functions in so far as these have a politically rational conceptual basis. It

comprises all those socio-governmental ideas which enable men to conceive themselves as members of a civilised human group, *civilised* here referring to such modifications of human behaviour as are necessitated by the fact of mutually conditioning influences exerted on each other by human beings within a relatively closed social situation.

The *virtue* of the body politic is the creation of the consciousness of the necessity for the modification of the acts of an individual in the presence of others.

Its *vice* is its tendency to suppress certain human natural functions and to confine mankind only to those activities which gain socio-political approval.

5/29. *The natural development of government.* As we have considered, the government is a necessary expression of the human social group as a whole, and in particular of the body political influence of the thoughtful and knowledgeable members of that group.

5/30. In addition to the influence of the body politic, the development of some form of locality-relevant government is the inevitable response of man to the following predominating group challenges which always face him in civilisation:

i. the wider influences:
the influences of environing forces, temporal and spiritual, originating beyond the natural limits of any temporal locality-relevant nation, largely determine the pragmatic actions and reactions open to the nation.

ii. the state of the people's heart:
the state of the feelings, desires and volitions of the nation's separate but functionally interrelated private individuals is a vital factor which preconditions the evolutionary responses immediately possible within the separate localities throughout the nation, and within the nation as a whole.

iii. the function of society:
the function of society itself, dynamically interrelating through human interrelationships, causes its individual members both to modify their own behaviour, and to form into groups intelligent and powerful enough to modify usefully the behaviour of other individuals. This dynamic interrelation function of society naturally predetermines a dynamic six-sided form of government.

5/31. Just as the gravitational and cohesive physical forces in nature, acting on and within the wax cells in a beehive, naturally impel the circular cells into hexagonal form, so the determinant and interrelating human influences in society, acting on and within the self-defined centres of human interests, loyalties and activities in a nation, naturally give rise to a six-sided formation of government within each recognised self-determining centre.

5/32. Higher general standards of education and intelligence, and improved technical methods of communication and control, now make it desirable and feasible for leading members of the body politic to demand the open acknowledgement of this six-sided government complex.

5/33. The healthy functioning of the whole government complex is dependent upon the capacity of each of its six sides to make its own essential contribution to policy formation. Failure in the free and healthy response of any one policy complex is automatically detrimental to national health.

5/34. The whole governmental aspect of the human social group is conceived as follows:

i. the policy determining triad, — the state, containing;

the policy creation complex: supplying policy integration, initiation and publication.

the government services complex: supplying policy research, administration and preservation.

the secular law complex: supplying policy definition, interpretation and execution.

ii. the policy conditioning triad, — the community, containing;

the policy ratification complex: supplying policy examination, deliberation and orientation.

the commodity and services complex: supplying policy advice and commodity and services distribution and utilization.

the spiritual social complex: supplying policy meditation, mediation and inspiration.

5/35. *The SUVOC Application* offers a basis for the formation of a more viable spiritual social policy complex of government. Appendix five briefly suggests a feasible plan for the parallel separate formation of a more viable commodity and services policy complex of government.

A Welfare Society or Metasociety

5/36. *The concept of metasociety.* Some people are alert to the challenge of our times and are anxious to accept change. Others are slower to adjust to changing circumstances and need the stimulus of new ideas and interests to break the inertia of a passive attitude to the role of voluntary effort within the national community. These needs can be supplied by offering the proposed development of the SUVOC hexic formation as vital new emergents of an evolving society.

5/37. To improve the national topeconomy, as earlier defined, is the true developmental purpose of a politically mature and democratically orientated nation.

5/38. This developmental purpose further may be realized by presenting, as a subject for active consideration and application, the topeconomical concept of a "welfare society" or "metasociety" in contradistinction to the concept of a "welfare state". Under this latter concept there is a danger of throwing too much responsibility upon the government as a body separate from its own electorate.

5/39. The term *welfare* here means healthy maintenance and evolution. A *welfare society* or *metasociety* is that organisation of human relationship which has as its raison d'etre the welfare of its

members, and in which there is conscious awareness, within democratic communities, that no static concepts can fulfil the essential needs of evolving humanity in its ever more complicating interrelational developmental activities.

5/40. The use of the term "welfare society" or "metasociety" is suggested as a freeing and developmental concept to protect the members of society from some of the associations of the stability concept of *the state* which is conceived by certain political theorists to have an absolute entity status over and against the constituent members of society.

5/41. In our large modern society it is desirable for its members to become conscious of the necessity, not merely of creating the pre-conditions of their own well-being, survival and immediate development, but also of not destroying the pre-conditions of the survival and further development of future generations. Through conscious acceptance of this necessity, such members of society may be said by definition to constitute a metasociety.

5/42. The progressive evolutionary emergence of metasociety, and its development beyond the earlier concept of the welfare state, places its members at the centre and heart of all human welfare considerations. It encourages and presupposes the acceptance of the personal responsibility that naturally accompanies personal rights, within a democratic form of government in which every mentally healthy member of society has a voice, and where no particular class of society has exclusive power of rulership.

5/43. *The development of the welfare state.* The term "welfare state" was first used in 1946 at a time when the weary, war-scarred people of Britain were emerging out of the darkness and perils of the preceding six years with high hopes of a happier future for themselves and their children.

5/44. The majority of demobilised service men and women who began to flow back into the civilian world were in no mood to return to the past. Many wanting a bloodless and democratic revolution repudiated the ordering of society characteristic of pre-war days, for under wartime conditions they had learned the hard way to work together towards a common human good. They saw the fulfilment of

their hopes in the creation of a new and better social order built upon the rubble and ashes of the past.

5/45. It was in this mood that a new government was elected into power, in the expectation by those who elected it that it would supply the desired vision and direction to provide the people with what they needed. The national emphasis was upon the provision by the state of much needed social services to be built, after modifications, upon foundations laid earlier.

5/46. Inevitably this emphasis tended to overshadow the work and other potentialities of the voluntary organisations which were not equipped for the major social changes demanded. Quick results were expected, and this necessitated massive government expenditure on behalf of a nation already accustomed to the very high level of wartime taxation. Thus taxation remained more or less level, and in this situation the welfare state was born.

5/47. It is not suggested that there was a full consciousness of all implications when choosing the name "welfare state", but it is pointed out that some desired to stabilize the form of our immediate post-war society, and that certain implications inherent in specific terms might well deserve further conscious consideration.

5/48. The chief danger of the concept of the welfare state is the possible passive acceptance of the status quo as the object to be preserved, and the loss of the consciousness of necessitated evolutionary changes.

5/49. The citizens who comprise the national human social group may come to regard the welfare state as an actual existential object, and not merely as a concept governing a static mental attitude aiming at mere group stabilization. Such a concept must become progressively more and more out of phase with the movement of dynamic reality. Thus those men and women who potentially may be able to play an active part in the generation of life and happiness may be led to misconceive their essential function, and abandon this work to a merely conceptual "state" of no existential reality.

5/50. *The lessons of history.* Great states of past history, now lying in ruins, have sufficiently demonstrated the inadvisability of

holding a static attitude to the dynamic facts of evolving humanity within a continuously expanding universe.

5/51. No man or woman at the centre of affairs can be unaware of the danger of the static mental attitude, which not so very long ago endangered the safety of our people by denying the possibility of heavier-than-air machines that our long distance bombers in the last war factually demonstrated. The Maginot Line still exists as a sunken monument to the static concept of a mind not then alerted and ready for strategic adjustments necessitated by technical advance.

5/52. *The value of metasociety.* Politicians and civil servants, and other intelligent members of society, really function from the concept of metasociety and will welcome the clarification and distinction between *the state* and *the metasociety* here presented.

5/53. *Society* and *state* are mutually exclusive terms. The State represents ordinarily a static mental attitude determined by a stability concept, which must become progressively more and more out of phase with dynamic reality. A society, from the reciprocal personal interrelations and exchanges of new information from all levels, must prove itself to possess infinitely greater flexibility, survival value and developmental potentiality.

5/54. In affirmation of socio-governmental parity, and with due regard to the basic function of government suitably to control the various tempi of developmental change, the progressive development of a metasociety presupposes that, as the individual citizen works out why he is a citizen, he will more consciously become aware that giving and taking are reciprocal functions.

5/55. Politically mature citizens thus will stand in the position, not as a passive patient to a doctor, but as persons able freely:

i. to contribute to the general human welfare such co-operative activity as may be seen to be essential to individual and social life;

ii. to be able to take an intelligent part in the diagnosis of malaise within the body politic;

iii. to indicate possible directions of the treatment that will maintain or restore health.

5/56. Within a metasociety, government more clearly will be seen as a function of society, and society as a fruit of government.

5/57. Members of metasociety therefore more generally will recognise that, international forces apart, the way the government operates determines the nature of society and the way society operates determines the condition of socio-governmental health within the whole human social group, and thus the condition of the social, economic and personal health of the nation at large and of its constituent groups and individuals.

CHAPTER SIX

What Is Charity?

Definitional Considerations

6/1. *The 1960 Charities' Act.* For the last two thousand years the word "charity" has been used with varying interpretations. Dictionaries define charity as:

i. Christian love, that is altruistic love or well-doing without regard to self-benefit;

ii. Natural affection, spontaneous goodness;

iii. A disposition to judge favourably and tolerantly of men's actions and motives;

iv. Benevolence, liberality, generosity in giving to the poor, for the relief of suffering, etc.;

v. An act of benevolence and liberality in almsgiving;

vi. A bequest, foundation, institution, etc., for the benefit of others, especially of the poor or helpless.

6/2. By a custom going back to the Middle Ages the government helps the effort of charities by remitting virtually all taxes[1] on money devoted to what it regards as charitable purposes. By now, this relief is so valuable that an organisation which fails to get on to the Charity Commissioners' register, or otherwise to be accepted by the Inland Revenue as charitable, may be made deficient to the tune of many thousands of pounds a year.

[1] At the date of publication (1983), *Value Added Tax* is a modern exception to this custom.

6/3. Although the difference in financial status is very sharp, the difference in function between an organisation which gets on to the register and one which does not may be slight. Nor will the former necessarily seem to a lay eye more charitable in its aims than the latter. Notwithstanding the public and benevolent work which may be carried out by a voluntary organisation in the relief of poverty and suffering, it is unlikely to be granted the legal status of a charity if also it seeks "to promote an attitude or frame of mind", as this may be interpreted as political activity.

6/4. Exceptions to this rule are made in the cases of religious bodies and independent schools, but there is no clear legal definition in this country of a charity.

6/5. The Nathan Committee, on whose report the 1960 Charities' Act was based, foresaw a pioneering function for voluntary effort in the welfare state, and numbered amongst its most valuable activities the ability to stand aside from and criticise state action or inaction. When Parliament debated the 1960 Charities' Act however, the government headed off all attempts to include a definition of charitable purposes in it on the grounds, which may have seemed wise at the time, that too rigid a definition might exclude new initiatives designed to meet unforeseen needs.

6/6. The result has been to throw the Charity Commissioners back on a mass of case law, based ultimately on an Act which was passed under Queen Elizabeth I in 1601; this was the first important non-religious definition of charity in English Law, and is still widely quoted in British and American legal decisions in this field. Commonly called the *Statute of Charitable Uses* its preamble includes the following wide variety of charitable purposes:

> *"Some for relief of aged, impotent and poor people, some for maintenance of sick and maimed soldiers and mariners, schools for learning, free schools, and scholars in universities, some for repair of bridges, ports, havens, causeways, churches, sea-banks and highways, some for education and preferment of orphans, some for or towards relief, stock or maintenance for houses of correction, some for marriages of poor maids, some for supportation, aid and help of young*

tradesmen, handicraftsmen and persons decayed, and others for relief or redemption of prisoners or captives and for aid or ease of any inhabitants concerning payments of . . . taxes."

6/7. These charitable provisions are almost identical with certain lines in William Langland's *Vision of Piers the Plowman* in which Truth tells erring merchants how they can use their profits charitably to gain religious favour. This pushes the Elizabethan definition back at least two centuries and shows its early religious roots.

6/8. *Definitions.* If the definition *altruistic love* be accepted as the true meaning of charity[2], political activity motivated by a general concern for the well-being of our fellows stems out of charity, not charity out of politics.

6/9. Politics can be regarded as the rationale of charity. The Charity Commissioners thus are faced with a seemingly impossible task if, without clear definitions, for the general satisfaction of the nation, they are required to separate out political activities from charitable attitudes.

6/10. Whilst the dangers of limiting concepts may continue to exist in a redefinition of charitable purposes by statute, some legislation appears desirable. The classic definition made by Justice Gray in the United States may be considered also to be applicable to our country:

> *"A charity, in the legal sense, may be more fully defined as a gift, to be applied consistently with existing laws, for the benefit of an indefinite number of persons, either by bringing their minds or hearts under the influence of education or religion, by relieving their bodies from disease, suffering or constraint, by assisting them to establish themselves in life,*

[2] "The mainspring of charity is a genuinely altruistic impulse, a desire to give money and voluntary service for the relief of those suffering from deprivation and to improve the quality of life for the community . . . Although altruism is not definable in legal terms it is nevertheless an important element in our social thinking which makes for a better quality of life". See p.7, 13, *Charity Law and Voluntary Organisations,* Report of the Goodman Committee, Bedford Square Press, 1976.

or by erecting or maintaining public buildings or works or otherwise lessening the burdens of government."[3]

6/11. The above definition does not exclude the renewed and redefined concept of charity, referred to in the previous chapter, nor would it in any way hinder Parliament, if it wished to do so, from more precisely defining "officially charitable" from "officially non-charitable" activities. Such a distinction need not define the general concept of political humanitarian activity as non-charitable; instead it could be based upon the public obligations which it is beneficial for individuals to accept.

6/12. The oldest natural right of man is liberty of conscience to believe as he freely wills, unconditioned by external compulsion from others. Most of man's other liberties have appeared and disappeared at various stages in his history, perhaps as an essential part of our developmental process.

6/13. At the present time personal freedom is threatened not only by the possibility of nuclear destruction, but also by the increasing pressures of national systems of control which have relieved us progressively during the last fifty years from so much personal responsibility. No opinion is ventured upon the desirability or otherwise of what already has happened. This may be regarded in retrospect as having been an inevitable part of our human and national experience.

6/14. The implication of the term metasociety has previously been considered as a freeing and developmental concept to protect members of society from some of the associations of the stability concept of the state. In this welfare metasociety sense, politically mature personal freedom is needed now more than hitherto as the need for intelligent and conscious change is so much greater.

[3] Ref. Jackson v Phillips, 14 Allen 539, 556 (Mass 1867), (Quoted, p.11, *Philanthropic Foundations,* by F. E. Andrews, Russell Sage Foundation, 1956). However, The Goodman Committee, in 1976, reported on an important advantage in retaining a legal definition based on the *Statute of Charitable Uses.* After referring to the point ". . . that to define is to confine believing the very flexibility of the law in relation to charities is, and should continue to be, its strength . . .", the Committee produced an updated version of the preamble to the Act of 1601 and stated: "As it would be made clear that this new classification is an updated version of the old classification, we do not think that the existing case law would become irrelevant." See p.14, 15, *Charity Law and Voluntary Organisations,* Bedford Square Press.

6/15. The danger of unrestricted personal freedom is that it can lead to anarchy and disintegration of the state and society. Some form of government is certainly needed to provide society with a form of healthy stability. This presupposes some desirable curtailment of personal freedom, through laws and exhortations to private individuals to shoulder obligations on behalf of other members of the community.

6/16. The function of a governing body, perhaps within a wider definition of charity, may be defined as those legitimate activities concerned with the general well-being of our fellows which purpose to provide society with a proper measure of stability through the enactment of appropriate legislation.

6/17. Within a general context it may be said that as "all things work together for good" for those of right intention, so both the extension and curtailment of personal freedom also will work together for good.

6/18. In the context of our present day existential position, with a metasociety recognition that more politically mature personal freedom is needed now than hitherto, an activity which develops personal freedom with a due sense of personal responsibility could be defined as "officially charitable", and one which purposes to curtail it as "officially non-charitable".

6/19. An "officially non-charitable" activity thus might be defined as:

> *any activity seeking further restriction of personal freedom in order to compel individuals to accept their needful or debatable communal responsibilities.*

6/20. The legal definition of what constitutes a charity is a task for Parliament. Meanwhile the SUVOC proposal is based upon the anticipated increased free-will giving of services and monetary aid to organisations which are legally regarded as charitable.

CHAPTER SEVEN

Underlying Reasons for the SUVOC Proposal

Religion and Community Life

7/1. *Urbanisation.* The development of technology has radically changed the way of life of most people living in industrialised society.

7/2. The growth of cities has led to a falling apart of the traditional units of society, such as the family and the local community. At the present time there is once more increasing interest in urban community development work, and more of the contemporary work of social science is based upon this emergent than upon the separate work of individual charitable voluntary organisations.

7/3. Many religious bodies also are reassessing their future role in our rapidly changing society.

7/4. It is sometimes forgotten that the words "town' and "city" took on a new meaning in the course of the industrial revolution. In 1800 only 3 per cent of the people of the world lived in towns of more than 5,000 inhabitants. Today it is almost a third, considerably more than that in England, and almost everywhere the trend towards urbanisation each year is increasing.

7/5. *Historical.* For the fifty or more years before the first world war, much good work was carried out in Britain, towards meeting social problems stemming from the industrial revolution, by small individual charitable organisations financed by a number of wealthy benefactors.

7/6. Since 1918 the social services provided by the tax-payer have been broadened very considerably and work previously undertaken by charitable voluntary organisations increasingly has been taken over by the statutory services.

7/7. This has caused many individual charities to group together into councils or federations[1] more effectively able to co-operate with these emerging statutory bodies.

7/8. At the same time have developed a number of major national charities serving needs in this country and abroad; many of these readily co-operate with statutory bodies and with smaller local voluntary organisations. Some national charities have expanded considerably since the end of the second world war.

7/9. *Contemporary changes.* Perhaps the most noticeable social changes which have taken place during the last thirty years have been the vast new housing estates, which have been built outside many of our towns and cities, and the mass production of the motor car providing many people with a degree of mobility almost undreamt of sixty years ago.

7/10. These rapid social changes have created widespread relational problems for many families uprooted from their familiar environments and housed in strange new surroundings; problems have further been aggravated by the pressures and tensions of our modern life.

7/11. Other social problems also exist in neighbourhoods which have remained relatively undisturbed although in these latter cases some of the problems take a different form.

7/12. *Community needs.* A great many communities still lack an individual community spirit and loyalty. This applies particularly in large towns where there may be no natural boundaries to prevent localities sprawling together into one vast connurbation.

7/13. Most town planners seek to remedy this position by designating certain carefully selected and easily accessible areas as *community* or *district centres.* Much can be contributed in this way by enlightened local authorities towards the development of active locality-relevant community life, but success chiefly depends upon the attitudes and responses of the local populations, and upon the personal capacities of the individual inhabitants to develop an active community consciousness within their own localities.

[1] For example, Councils for Voluntary Service, Youth Associations, Age Concern organisations, etc.

7/14. Many people believe today that there is an increasing desire within most localities for a catalyst able to create a focal point around which interest in community service and loyalties can be formed.

7/15. This cannot be provided by the churches and religious bodies alone as, even if they were prepared to make major changes in their traditional pattern of work and had the necessary resources in manpower and finance, their services alone would not be sufficient without the active co-operation also of voluntary and statutory social service bodies. Similarly it could not be provided by the voluntary and statutory social service bodies by themselves.

7/16. The true catalyst required for healthy community development can be provided effectively only with new forms of assistance by interested voluntary and other social workers at community level, in co-operation with religious bodies able to contribute spiritual leadership.

7/17. *Local churches.* Although local churches may appear largely to have lost the influence they once exercised over the lives of our countrymen, with the role of clergy in the community becoming relatively indeterminate even to some of the clergy themselves, no other effective body has emerged able to help the members of our different communities to stabilize their moral values and ethical concepts.

7/18. The moral confusion apparent in these days of rapid social change reflects also a loss of confidence in the formal authority of many of our traditional religious institutions, and in the capacity of some of them to adjust to our new technological scientific age, an age which tends explicitly to oppose assumptions of faith and revealed truth and to proffer in their place the proven results of scientific experiment. In spite of these difficulties however our religious bodies are not wholly ignored and there is a deep and widespread desire amongst people for religious redirection.

7/19. Paradoxical evidence of this desire for redirection may be seen in the attacks on all sides made on the structure of the churches, their denominationalism, their hierarchy, their archaic organisations, etc.

7/20. The continuance of radio and televised religious programmes indicates that large numbers of people are ready to listen to the churches' messages. On the other hand most communities provide evidence of the comparative isolation of the local church, and of its inability to help over the many human problems and needs which are crying out for someone to do something about them.

7/21. *SUVOC Topeconomic Development Association* offers religious and ethically concerned bodies improved opportunities actively to participate in spiritually and socially valuable work, and to make a wholesome contribution to the personal and social lives of the members of our many separate communities. The potentialities of this work would increase very considerably if all local church and social workers at community level worked together in close co-operation.

Voluntary Service

7/22. *The exceptions.* Within the affluent society of present day Britain there still exists a large number of people who do not benefit from our increasing prosperity. These are the persons for whose aid charities were endowed and voluntary organisations were founded — the sick, the aged, the very young, the lonely, the disturbed, the handicapped and many other such groups.

7/23. Many public services could not be carried on without the aid of voluntary organisations and voluntary workers, and there are frequent gaps in the mosaic of benefits provided by the statutory services.

7/24. In the last few years, report after report has revealed how many of our fellow countrymen continue to suffer hardships — cold, poverty, loneliness — which were believed to have been remedied, and how many exceptional and marginal cases escape the network of the statutory services.

7/25. *The opportunity.* Voluntary effort is still the best way to help such people. Its help can be speedy, it can deal with the unusual cases and it can meet new kinds of social needs as they arise.

7/26. Britain is said to lead the world in the range and comprehensiveness of its voluntary services. All this unique organisation is at our disposal and stands ready and able to help.

7/27. Hundreds of thousands of men and women generously devote time and effort through the nation's charitable voluntary organisations in the relief of suffering and want, and in providing a wider fuller life for the under privileged; but today, owing to lack of funds, many socially desirable goals are not achieved and, unless something is done quickly, this situation will further deteriorate.

7/28. Provided that their services are equally efficient, it is obviously sounder economics to support an organisation that can call on personal service freely given, than to pay taxes for a state service that has to be paid for throughout. Yet this enormous national asset is not used to the full and every voluntary organisation is conscious that there is scope for it to do more.

7/29. *Tithe.* If voluntary service was not freely given, in relatively limited spheres of activity, such as youth clubs, the cost to the state each year would be many tens if not hundreds of millions of pounds, even assuming the necessary staff could be obtained.

7/30. Not everyone can help by giving service, but almost everyone can help by giving at least a small regular gift towards the work of voluntary orgnisations. The term "tithe", originally meaning a tenth, by popular usage refers to a small portion or fraction.

7/31. With respect to free-will giving and to the individual donor's free-will, *tithe* can be re-interpreted, not as a particular percentage of income, but as that amount of either service or money deemed suitable by the donor for the specific purpose.

Shortage of Funds

7/32. *Reasons.* The urge to help our neighbours in misfortune is one of our national characteristics. The Aberfan disaster drew nearly £2 million from sympathisers.[2] Why is it then that other work, affecting many more people, is chronically handicapped by lack of money?

7/33. Several reasons contribute to this shortage of funds. These include: the changing laws of taxation, which have resulted in the virtual disappearance of the wealthy patron; the inertia of some

[2] In 1981 the Penlee Lifeboat Fund and collections by local fishermen together raised nearly £3 million.

members of the public, who have not readily available a channel of planned giving to causes which attract their sympathy.

7/34. *Administration.* This shortage of funds has caused the management committees of some charitable bodies to be very cautious about developing their organisations to meet changing needs and about offering adequate rates of pay to attract the trained specialists necessary for efficient administration.

7/35. Skilled and suitable staff have been lost to voluntary organisations through inadequate pay and/or frustration arising from static policies. Because of staff turnover the work of many organisations has been adversely affected, thus further reducing the income they otherwise might have received.

7/36. *National charities.* A shortage of funds does not apply to all voluntary organisations.

7/37. Over the years some national charities[3] have developed admirable methods of attracting continuous financial support, and nothing in these proposals is intended either to detract from their achievement or to encroach upon the fund raising schemes which they have organised for themselves. It is hoped rather that these proposals may provide them with additional contributions.

7/38. *Local charities.* Equally some local charities also have developed admirable fund raising methods, but the majority of these smaller organisations suffer acutely from financial difficulties.

7/39. However deserving, many local charities are too small to afford modern business techniques and aid that could facilitate the collection and administration of funds.

7/40. Income also has been lost to local voluntary organisations by the elimination or take-over of many small companies now

[3] "*What is a National Charity?* Just as local charities are highly diverse in size, purpose and activities, so too are national charities. The term 'national' is a generic term. It includes charities of all sizes but distinguishes itself from 'local' charities in that its purposes are nationally focused, either in the sense of having a network of branches nationwide (or at least in a majority of counties) or in the sense that they focus their attention on some national government policy. Even as national organisations vary in size so too they are constituted according to no set pattern but can range from Royal Charter to a simple trust instrument." See p.95 *Charity Law and Voluntary Organisations. Report on the Goodman Committee.* Bedford Square Press, 1976.

controlled from the national headquarters of a company network, whose policy towards charitable giving may be different[4].

The Individual Need

7/41. *Satisfaction.* There may be some who believe on principle that the State should undertake all necessary measures for the welfare of the citizen.

7/42. Most people however believe strongly that it is essential to our way of life that there should be alternatives to state aid, that the stronger, of their own free-will, should want to help the poorer and less able, and that the opportunities for service and for giving offered by our voluntary organisations are essential to the health of our national life.

7/43. Most men and women wish at some time to help those who are less fortunate than themselves and experience in doing so the satisfaction of an inner need to give aid to the less fortunate.

7/44. Because many cannot do so effectively, or are not sure which organisation deserves support, gifts are sometimes made without heed or thought to the needs or objective, and it is forgotten that "it is the thought or motive behind the gift that counts".

7/45. This indiscriminate type of giving makes a doubtful contribution towards the cause of true charity, as it encourages the activities of the importuning fund raiser, tenanciously pestering those whose sympathies lie in undetermined directions. Such methods create resentment, not only towards the fund raiser, but to the cause of free-will giving itself, and antagonise many who otherwise would give. For these reasons, some neglect to give, and in so doing fail to understand that it is as important to give as to receive[5].

[4] "The number of locally controlled businesses has diminished drastically over the last thirty years; the London based companies who have taken them over tend to feel no obligation to local communities and tend to favour national charities. Report by *Liverpool Council of Social Services*". See p.57, *The Government and the Voluntary Sector,* published by The Voluntary Services Unit, Home Office London 1981.

[5] See para 9/48, page 94.

7/46. *Understanding.* At the same time, one of the dangers inherent in the welfare state is that individual donors may feel discouraged from supporting voluntary organisations.

7/47. With so many of the needs of society already provided for by the state, an attitude has developed in society which tends to regard the state as responsible for instituting and providing new social services and for meeting all individual social needs out of taxation-monies. A reaction against this is already discernable, but the generosity of many potential donors is still checked by a general lack of clear definition of the different obligations of local and national governments and of the individual responsibilities of members of society themselves. This lack of understanding inhibits voluntary giving to worthy causes, for fear of wastefully duplicating government services[6].

7/48. Many people do not realize that their help is still needed, and it is often forgotten that no Act of Parliament is expected to cover every possible contingency for every person. The nation could not afford it, and many would not wish to remove the individual responsibility of forward-looking members of society itself.

7/49. With the redistribution of income which has taken place, and the evolution of the welfare state, society has forgotten that the essential ingredient of voluntary service is the *conscious and willing participation of the donor.* For this reason those responsible for legislation could wisely consider afresh the needs of voluntary organisations.

The National Need

7/50. *Experiment and charitable trusts.* Generally speaking the state is constitutionally ill-equipped to undertake the role of initiator in the social services. Even if willing and ready to spend

[6] "The aspect of the Wolfenden Report, which was most generally welcomed was its explicit recognition that the voluntary sector is an integral part of the pluralist system of social provision in this country. Although in the practical delivery of services this fact is understood, it is seldom acknowledged in the planning and development of services to meet new needs. Many respondents explicity asked for a long term strategy which is geared to the co-ordination of services, to reduction in duplication between statutory and voluntary sectors, and the more rational use of the total resources to meet specific needs." See p.10, *The Government and the Voluntary Sector,* published by The Voluntary Services Unit, Home Office, London, 1981.

tax-money in a desired direction local authorities do not always have the necessary statutory authority.

7/51. Government departments may be inhibited from bold experiment by having to answer in Parliament for their failures, and may fear lest public expenditure in one locality for a particular purpose later may provide an unwelcome precedent for similar expenditure in many other areas.

7/52. Clearly it is often easier for new fields to be explored by the voluntary sector.

7/53. In the past, most social developments have occurred through the pioneering work of voluntary organisations, equipped with the flexibility necessary to deal with exceptional and marginal cases, and able to carry out experiments on a small scale.

7/54. Today this pioneering work is still being done, often made possible through the generous financial assistance of private charitable trusts and foundations. The country owes a great debt of gratitude to those far sighted benefactors, whose generous gifts have provided us with the means to gain so much new knowledge and understanding.

7/55. *Increasing cost of social services.* It would hardly have been possible since the war for politicians to have ignored the democratic desire of the electorate for an increasing measure of government finance in the much needed social services, and the public naturally do not want existing social services curtailed to make room for new ones. Successful experiments by voluntary organisations therefore cause people to demand more from the statutory services.

7/56. As the scope of the health and social services continues to widen, so the cost of providing them will continue to rise.

7/57. Unless charitable voluntary organisations undertake an increased share of responsibility for the provision of social services, public expense, and thus taxation, will increase significantly. This increase will be caused by: the changing age structure of our growing population; the increased proportions of the population in each age group using the services; the rising relative standards of expectation in the social services; the need to replace obsolete buildings; the increased inputs of staff and finance required for each

person using the services; the rising money costs for each unit of resources employed; the technological developments which will open new areas of service requiring expenditure.

7/58. *Economic difficulties.* Serious social and economic dangerous changes must follow if this trend is allowed to continue. Many responsible individuals consider that government expenditure already has risen to an alarmingly high level, and there is a significant body of opinion which suggests that reduced taxation is necessary if the United Kingdom is to avoid economic disaster and more large scale unemployment.

7/59. The question remains, "What action can the government take towards solving this problem?"

7/60. This is a difficult question to answer, but surely no government believes itself capable of meeting the entire financial cost of providing for the totality of all essential needs of the community, to the satisfaction of the electorate, even if it should be desirous of so doing.

7/61. *A partnership.* Over the past decade there has been increasing awareness that the state and the voluntary organisations are dependent upon each other for assistance to meet many of the nation's new needs.

7/62. The alternative directions advocated for expenditure on community well-being frequently involve the pioneering of new ideas, together with the aid of skilled staff and substantial capital expenditure. These tasks are so big that voluntary organisations alone cannot tackle them, nor can the government provide the necessary resources and flexibility effectively to meet the demands from the nation as a whole.

7/63. Co-operation is improving between government departments and the voluntary organisations but communication still is not as quick and easy as it might be. This is unfortunate as it can stifle vitality and initiative.

7/64. *New frontiers for voluntary service.* Given adequate funds, new frontiers can be crossed by voluntary organisations to the great benefit of the nation and of the individual members of society.

7/65. It could be held that some of the large sums at present spent by the government on social security, the health service and other social needs could be directed more beneficially towards rehabilitation, or towards helping people in need of assistance to lead more normal lives and to make a more useful contribution to the community.

7/66. Use of rehabilitation facilities could be voluntary. Quite apart from the social and ethical considerations in favour of such a policy, some action also could be supported upon financial grounds.

7/67. It is not difficult to find undeveloped fields for welfare services, and no opinion is ventured upon the particular desirability of any social development; the possibilities referred to in the next paragraph are used for illustrative purposes. Financial consideration apart, difficulties in achieving new social developments lie in inertia, general lack of knowledge, the isolation of most government departments from the voluntary organisations and in the extreme difficulty either have by themselves in awakening public sympathy to the desirability of social reform.

7/68. Amongst the many fields of social service in which the statutory and voluntary sectors usefully might work more fully together are the provision and maintenance of such facilities as the following: sheltered centres of interesting and enjoyable activity for the mentally handicapped and mentally ill, the aged, the infirm, the disabled and other disadvantaged people; suitable accommodation for young and other homeless people including ex-prisoners and long stay patients eligible for discharge from hospital; local community convalescent homes, etc.

Provincial Communal Fund Raising

7/69. *Money to spare.* Purchasing power is now widely spread, but many men and women have not yet acquired the habit of voluntary giving.

7/70. No one can fully appreciate a benefit of which he is largely unaware, neither can he be expected to support it generously. Experience suggests that most men and women are willing to respond to an invitation to support charitable work that appeals to them, if they can be assured of an efficient and convenient method

of distribution of small regular contributions. The question arises, How to obtain increased free-will giving?

7/71. *Reported experiments.* Up to the present time, British communal fund raising schemes have achieved only a qualified success, but this is not due to any apparent lack of generosity in our countrymen.

7/72. Reported experiences indicate that success by the few provincial organisations which have been formed in various parts of the country to create communal fund raising schemes or other types of "common good funds" has been qualified by:

i. widespread lack of recognition of the value to the country of charitable voluntary organisations, e.g. reduction of the number of occasions requiring or justifying State interference.

ii. lack of general awareness of the existence of the new methods provided for free-will giving.

7/73. Whilst some communal fund raising organisations annually distribute all funds raised, in other cases the capital raised is invested so that income may be provided: to supply finance for periodic capital projects; study needs; provide information services; co-operate with, and help co-ordinate, the activities of many of the charitable voluntary organisations in the district; meet other needs as they arise.[7]

7/74. *More than twenty years experience.* In 1952, with the support of Liverpool Council of Social Service, United Voluntary Organisations (UVO) was founded in Liverpool to develop payroll giving on behalf of a group of local charities. Funds raised were distributed according to need on the advice of independent assessors.

7/75. The UVO idea was to reveal hitherto neglected sources of income, i.e. the weekly wage earner, each worker being asked to contribute one penny per week, the collection of this money being accomplished by a standard deduction during the normal wages and salaries calculations. The requested contribution of one penny was later revised to a variable amount as authorized by the contributor.

[7] Ref. Huddersfield Common Good Trust.

7/76. Managers, staff and trade union officials expressed approval of the UVO idea in principle, although some were unwilling to co-operate or promote deduction from pay schemes. Many of these refusals were due to lack of understanding of how a small weekly sum, multiplied by the number of weeks in the year, multiplied by the number of individual contributions, can result in a gift which can have real effect; usually in this respect the attitude of the accountant or office manager had considerable influence.

7/77. Further grounds for refusal were that managers and/or staff already supported other charities, or did not wish to support the particular group of charities represented by UVO Liverpool. It was also found that many potential contributors had strong individual preferences and/or prejudices regarding particular charities.

7/78. UVO discovered that a down to earth healthy element of give-and-take motivated its contributors, "must keep these organisations going, they're a good thing for all of us". This is different from the traditional middle class attitude to charity, as giving by one group of people doing good to another group of people. The support given engendered a feeling of loyalty towards charitable voluntary organisations as an essential part of the community.

7/79. A number of trade union officials supported UVO because the habit of freely giving for the benefit of others is consistent with the improved status of wage earners, who respond favourably when asked to help others rather than to be "on the receiving end" of such help.

7/80. The difference between UVO and the SUVOC idea is that the latter is a community-wide service based on donors' directive rights with the alternative being available, if preferred by the donor, of a local fund allocation advisory service.

7/81. Because it offers a means of supporting all bodies legally regarded as charitable, SUVOC can be viewed as an extension of grass roots democracy enabling interested individuals to express their need-relevant support for particular social priorities.

7/82. Appendix six, the background of the United Way pilot operation, gives further information on the history of UVO.

CHAPTER EIGHT

A Voluntary Movement within an Evolving Society

SUVOC is not a Community Chest Concept

8/1. *No immunity-rule.* The essence of the SUVOC concept is regular and systematic free-will giving of services and monetary aid. By this means, and in co-operation with the state-financed social services, the individual members of different localities, large and small, further their own chosen personal and community developments.

8/2. As a natural result of this process topeconomy emerges with all individuals concerned being enabled to seek new and ever higher levels of communal and self-expression.

8/3. Because SUVOC aims to offer support to all organisations and bodies legally regarded as charitable and to abstain on principle from seeking to influence how any charitable voluntary organisation is managed or how it raises funds, the proposal is that SUVOC shall not allow its name to be used by any community chest or other fund raising body giving donors immunity from appeals. No immunity-rule is fundamental to the SUVOC proposal. This subject is further considered in appendix six.

8/4. *The community chest concept.* "Immunity-rules", giving donors immunity from appeals, stem from the community chest concept which was successfully operated for many years in the United States and Canada, although the concept is now being modified with the development of *United Way of America* and *United Way of Canada*[1].

[1] In April 1982, at the *United Way of America Volunteer Leaders Conference,* it was announced that the *United Way of America Board of Governors* unanimously
continued on next page

8/5. There, large sums of money were annually raised for local community chests in concentrated single efforts lasting a few weeks, after which donors were not approached until the following year. The usual policy was to raise funds for organisations serving broadly based social needs, organisations serving controversial minority viewpoints being ineligible for membership.

8/6. Generally speaking community chests were started by groups of potential donors who had become dissatisfied and confused with the large number of conflicting appeals received from a wide range of apparently deserving causes. Many would-be donors found it impossible to discriminate between the more socially deserving and less socially valuable causes, and in many otherwise potentially generous donors this confusion resulted in a natural hesitation to give.

8/7. The retention of the goodwill of donors, to be attained by offering protection from the pestering activities of professional fund raisers, was often the prime reason for the formation of community chests. In such cases an "immunity-rule" was introduced to make participation in the proceeds of community chests conditional upon member organisations undertaking to refrain from making further appeals for funds. Thus, in return for their gifts, donors would receive immunity from appeals by member organisations.

8/8. *Immunity-rule policy considerations.* The policy of operating an "immunity rule" places great power in the hands of those responsible for fund allocations, with the possible danger of giving undue support to attitudes of social conformity. No matter how dissatisfied they might feel, few locally based organisations could feel sufficiently secure financially to leave the community chest, thus sacrificing the greater part of their established income.

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recommended every local United Way to provide a Donor Option programme: "*Donor Option* is a programme that allows the contributor at the workplace to designate all or a portion of the contribution to any tax-exempt volunteer-run health and social services programme that is not [one of the 37,000 voluntary health and social service agencies] currently funded by the United Way campaign; and which is in some way publicly communicated to the potential donor." The Donor Option programme in the U.S. is a major development from the traditional community chest concept, but it differs from the system of Donors' Directive Rights outlined in chapter nine; under this latter system, further consideration is given to the rights of the donor.

8/9. Whilst community chest funds raised might be distributed in an admirable manner, circumstances easily could arise in which deserving organisations felt overlooked, but unable to do anything beyond lobbying members of fund allocation committees. Alternatively organisations serving minority needs or whose work was in any way controversial, being unable to participate in the communal fund raising efforts, might have good reason for considering themselves to be unjustly handicapped.

8/10. A SUVOC no immunity-rule policy is proposed in the belief that it would be inconsistent with the SUVOC concept unnecessarily to restrict the freedom of our charitable voluntary organisations, or to place too much power in the hands of those responsible for fund allocations[2].

8/11. *British community chests.* A SUVOC no immunity-rule policy by definition refers only to use of the name. Under certain circumstances, and in the light of known facts and needs, the ascertained wishes of both donors and charitable voluntary organisations might make advisable the introduction of a locality-relevant immunity-rule for certain charitable voluntary organisations in a particular area.

8/12. In any community, district or other area in which the introduction of an immunity-rule was considered desirable or necessary, a local community chest, with its own separate fund allocation committee, could be registered as a charitable voluntary organisation and thus become lawfully eligible to receive SUVOC gifts. However, under the proposal articles, such a community chest could not use the "SUVOC" name or an equivalent name.

SUVOC Policy Towards Other Charities

8/13. *No criticisms.* A more active voluntary movement within society would be furthered by clarifying and illuminating more of

[2] The philosophy underlying the SUVOC no-immunity rule policy is echoed in the *Report of The Goodman Committee:* "There was deep concern [by the Committee] that charities should be guarded against undue interference from governments, or attempts to distinguish between 'deserving' and 'undeserving' charities once they were conclusively proved to be charities. The Committee felt this to be an important point, as the *raison d'etre* of charity is independent thought and action directed to a charitable purpose." See p.4, *Charity Law and Voluntary Organisations,* Bedford Square Press, 1976.

the work of voluntary organisations and their opportunities for further service, so that individual citizens at large could become more fully aware of the communal value of gifts and of services.

8/14. In our complex modern society charitable gifts are often requested for more or less unknown applications, making it difficult for the individual to support deserving causes in a manner fully satisfying to him.

8/15. Development of SUVOC would help to provide more information on the extent of the different needs within communities, and upon the opportunities to meet those needs open to voluntary organisations which could be strengthened with increased funds and voluntary workers. This information could be supplied by portraying the work of the voluntary sector from an overall viewpoint without seeking to discriminate in favour of any particular organisation.

8/16. In accordance with its proposal articles[3], SUVOC would not evaluate or criticise other charitable voluntary organisations. Criticism of any religious bodies or voluntary organisations could easily disrupt relationships within the hexic formation. In any case such criticism hardly would be likely to encourage constructive co-operation amongst the voluntary organisations themselves.

8/17. *Constructive co-operation.* It is emphasized that the SUVOC proposal aims not to "weld together" charities and voluntary organisations, but instead to develop community-wide constructive co-operation in the collection, distribution and utilisation of substantially increased voluntary resources.

8/18. It is basic to the SUVOC proposal that the separativity and independence of the different voluntary organisations should be maintained. One reason for this is that the energy output of the voluntary sector would continue to be higher and more effective whilst functioning through a large number of different energy sources, within which voluntary workers more readily could feel themselves to be essentially functioning members.

8/19. This means that charitable voluntary organisations still

[3] Ref. sub-para 2/43ii, page 25.

would require their own appeals organisations and would continue to seek their proportionate share of the enlarged donor generosity.

8/20. Whilst some isolated voluntary organisations could be strengthened by entering into joint fund raising arrangements with other charities, the dynamic movement and vitality of the nation's voluntary organisations as a whole would be seriously weakened if individual organisations were relieved of responsibility for the management of their own fund raising. Not only could this mean that too much responsibility would be thrown upon the members of SUVOC and upon the fund allocation advisory service, but it would threaten also the independence of the voluntary organisations themselves. In due course they might find that their rights had reduced in proportion to their lessened responsibilities, and that part of their freedom had disappeared.

Considerations on Fund Raising

8/21. *Appeal costs.* Members of charities' management committees will continue to be faced with the dilemma of how much to spend on fund raising activities, expressed both as a total sum and as a percentage of the monies raised.

8/22. Similarly members of the donating public will continue to be presented with the social problem of how to deal with innumerable requests to support charitable appeals of various kinds.

8/23. Instead of a balanced assessment of the relative needs within communities, and perhaps a policy of supporting the most deserving voluntary organisations rather than in bolstering-up the less efficient ones, the decisive factor which frequently influences whether a donation is made tends to be the vigour and drive with which the appeal organiser conducts his campaign. This is unfortunate as it tends to force charities to spend money on appeals organisations that could be spent usefully in other directions.

8/24. The suggested charity-directories, referred to in appendix one, and new knowledge about the need for charitable giving can help to alleviate this problem by encouraging more purposeful giving.

8/25. There is no general yardstick of the financial return one should be able to expect from a given effort to raise money for charitable purposes although the law gives a guide on this subject, in the specific case of Flag Day appeals, by laying-down that Flag Day expenses must not exceed 15% of the total money raised. Some very large sums of money have been raised through efforts in which the considerably higher expenses have been thoroughly justified, but the complications of modern marketing techniques prohibit public explanation.

8/26. From the little information available it would appear that the policies of different organisations vary considerably. Whilst some may spend a quarter or even more of their total income on fund raising activities and perhaps raise very large sums in the process, other organisations have claimed to spend none of their income on fund raising activities and have estimated that the cost of reminders and acknowledgements to subscribers and donors represented less than 1% of total expenditure.[4]

8/27. It is important to remember that the function of charitable voluntary organisations is not to raise money as an end in itself, but as a means to providing services and/or goods or equipment for the benefit of the community. It is as meaningless to attempt to judge the social value of a charitable voluntary organisation by its percentage appeal costs, as it is to attempt to judge the quality of a manufacturer's product by the percentage sales costs.

8/28. Modern machinery has taught us that mass production is dependent upon mass distribution, which in turn is dependent upon mass communication through mass media of communication. Many charitable voluntary organisations are faced with similar problems to manufacturers, except that they have a different product or objective.

8/29. It is worth taking an analytical look at the success of the large scale professional charity manager:

i. *first, his objective:* this is definable by the donor's sympathetic response to need; the starving need food, the homeless shelter, the sick medical supplies, etc.

[4] Liverpool Personal Service Society has, in the past, achieved these results.

ii. secondly, his approach: he is above all a professional; his endeavour is nationwide, and he brings to bear the modern methods of mass media — hence his effectiveness.

8/30. Even if reliable comparative appeal costs were available they might not supply much useful information. Quite apart from the many other factors which could be taken into consideration, there are such wide and seemingly non-rational differences in the sympathetic understanding of donors that objective comparison of appeal costs would be difficult if not impossible.

8/31. A number of voluntary organisations are extremely successful in projecting the work they do in a meaningful manner, and the public image of them is excellent, but high appeal costs create uneasy feelings in the minds of many members of the public that there may be something wrong with our current systems of raising charity-money.

8/32. These uneasy feelings tend naturally to manifest more readily in negative criticism of voluntary organisations in general for not doing better, than in giving positive help to increase total free-will giving. At the same time a number of these critics feel increasingly uncomfortable about the smallness of their own personal giving, and about the continuing growth of the authoritarian machinery of government control with the corresponding disappearance from our national life of variety, individuality and initiative. Given a clearer understanding of the fuller role which voluntary effort so usefully could play in our evolving society, this negative criticism could be transformed into much healthy free-will giving.

8/33. Whilst no suggestions are put forward regarding the administration of any individual organisation, it is suggested that it would be to the benefit of charitable voluntary organisations in general if additional funds could be raised more economically, as this could help to release greatly increased free-will giving.

8/34. *Social events.* A number of fund raising events primarily serve a social purpose, with a charity being required as a recipient of surplus funds. The ratio of expenses to money raised in these cases may be considered of less importance than with more commercialised methods of fund raising.

8/35. Quite apart from the desirability of providing money for charity, the best way of ensuring that one does not make a loss when organising a function is to plan to make a profit. A socially acceptable purpose helps to achieve this aim. In this manner a number of highly successful social functions have originated, with succeeding organisers perhaps inheriting the tradition of raising a substantial sum each year for a charity, which may have become financially dependent upon the devoted efforts of a group of voluntary organisers for this source of income.

8/36. If changing social habits cause a function to lose some of its attraction, this responsibility can become more of an anxiety than a pleasure to the organisers. The legislation authorising breathalyser tests is accelerating some changes and creating in certain cases the need for alternative methods of fund raising.

8/37. Methods of raising money vary considerably. Some ways are efficient and economical, other ways are almost unbelievably inefficient because of the high expenses and the time and effort involved. For instance, at some charity balls the amount raised is no more than the amount raised by the tombola, which in turn has been heavily subsidised by free prizes, and the whole price of the ticket is absorbed in the running costs.

8/38. It may be considered that, in spite of the financial support which is gained from people who might not otherwise support the charity, such functions as these make a doubtful contribution towards the cause of voluntary giving, and serve only a socially valuable purpose. But this social value can be considerable if voluntary workers and supporters of a charity are brought together for an enjoyable function and so helped to renew their sense of communal effort in a worthwhile cause. Publicity attracted by some functions also can be of value to the charities concerned.

8/39. *Voluntary fund raising efforts.* With the changing pattern of our society, there is some indication that voluntary fund raising methods as many have known them may have passed their peak. The burden of housework is being gradually lifted by more convenient homes and labour saving devices, thus freeing an increasing number of women to take up outside work. Many are

choosing paid employment and voluntary fund raisers are becoming less easy to obtain.

8/40. Women in work place a commercial value on their energy in terms of the wage rate for the job. This can act as a further discouragement to some voluntary fund raisers who may be expected to expend considerable devoted energy for a comparatively small return in relation to the help freely given. There is some evidence that coffee mornings, charitable balls, door to door collections and other charitable fund raising efforts are less popular than they used to be and many firms are less willing to donate gifts or prizes for such events.

8/41. It is important to recognise that the SUVOC proposal seeks to increase free-will giving, not to curtail existing voluntary fund raising efforts nor to substitute one method of giving for another. Social events and other voluntary fund raising efforts are still needed; in the future these may give even more valuable impetus to voluntary activities but their form may change to efforts more closely directed to conscious free-will giving for particular known needs.

8/42. All voluntary organisations need general income and the greater part of the work of voluntary fund raising efforts is devoted to this purpose. The effect of SUVOC will be to develop new and additional sources of regular giving which will be capable of supplying much of this need. If general income largely is provided in this manner more purpose will be given to many voluntary fund raising schemes, as their efforts then can be aimed more directly towards providing known needs, such as particular items of equipment, or special funds for specific purposes which may be additional to the general income required.

8/43. At heart people prefer to give to situations which they are able to recognise as worthy specifically as well as in general. They are less happy to give to more or less unknown situations or undefined needs. The more clearly they recognise the necessity to give and the more clearly they perceive the specific benefit to be derived, the more generously they will give.

8/44. The essence of a number of voluntary fund raising efforts,

particularly those with a social purpose, is their absence of continuity determined by special effort for a very short period; such special efforts can help greatly to meet specific needs.

8/45. *The donor in society.* There is no limit to the useful work which voluntary organisations can perform and no limit to the potential value of voluntary fund raising efforts.

8/46. Total free-will giving may be expanded very much more easily within the atmosphere of a dynamic society, vitalised by recognition of the value of voluntary effort emanating from the activities of interested workers drawn together in the common purpose of more effectively serving and developing the community, each contributing according to personal capacity and directive inclination. To achieve this aim, support for SUVOC can be sought, not only on behalf of the recipient voluntary organisations, but also on behalf of every potential donor in society who is aware of the need to give.

8/47. It is recognised generally that all men and women have a basic desire both to satisfy the promptings of their conscience for a good image-relationship with their own inner-self, personality or soul, as well as to form harmonious relationships with other people. The satisfaction of both these desires is essential for man's happiness and contentment, the two being mutually presupposing.

8/48. The donor in society not only feels an inner willingness to give but also desires to be recognised by his fellows as a functioning member of the community. Today as society is so large and complex this is not always easy. Many families do not today feel themselves members of any larger community, and from this are physically, psychologically and spiritually the poorer.

8/49. Most people are conscious that in the form of taxation they are already giving money to the State, but they have little or no feeling-awareness of any specific social benefits their money may produce. Rather they feel the taxes they have to pay are like life-blood drawn from an unwilling donor. Thus, giving through taxation gives no satisfaction to the "blood donor", except perhaps when activated by some national calamity or great crisis as in time of war.

8/50. There is a universal need for fuller relationships within society itself. Such relationships cannot be created through any system of imposition, taxation or other compulsion, but they can and will develop naturally within a society which believes in free-will giving, provided also that society recognises it to be necessary for the donor to be able to feel the value and merit of what he is doing, as well as to think that what he is doing is ethically and spiritually right.

8/51. To achieve these improved relationships, therefore, a link is required between the donor and the receiver, able to convey both the gifts of the donor and also the recompense the donor deserves. Recompense may be regarded as justified fulfilment for the donor in the form of his understanding that the gift is being efficiently used for the purpose intended, his awareness that his gift is fully appreciated, and his recognition by the recipient's conscious acknowledgement and acceptance of the gift as the product of the donor's free goodwill.

8/52. As a direct benefit of free-will giving many donors may feel themselves to be more intimately functioning as members of a real community, and to be meaningfully contributing towards its activities, well-being and positive development.

8/53. *New SUVOC services.* The proposed new services of SUVOC to some extent could meet the desires of the donors to give purposefully to known situations, and the corresponding needs of charitable voluntary organisations meaningfully to illustrate the value of the work they perform.

8/54. SUVOC topeconomic development association and its associated members could develop an equitable basis for co-operation in the field of public relations, thus reducing undue discrimination in favour of particular organisations. Such co-operation would greatly assist public relations experts in obtaining more widespread recognition of the value of voluntary effort, and could give fresh purpose to voluntary fund raising by enabling supporters more easily to see the direct and immediate benefits of their specific efforts.

8/55. At the same time, the charity-bank and other members of the

SUVOC hexic formation could provide a similar co-ordination service for donors by themselves becoming known organisations in the donors' minds.

8/56. In the case of the charity-bank, this could be achieved by satisfying its donors that charity-banking offered opportunities to embrace many needs in a manifestly expert way. Thus donors could know that their gifts amounted to valuable and significant sums which would be used in a desirably effective manner.

8/57. On the non-intellectual level, for those who preferred not to direct their gifts personally, this could be equivalent to fulfilling the general promptings of social conscience, or perhaps buying "a season ticket" to all charities instead of "a supporter's ticket" for a single charity.

CHAPTER NINE

Donors' Directive Rights

Explanation

9/1. *The principle.* The SUVOC application is based on the principle we term *donors' directive rights.* This principle states that, if he so desires, a donor through payroll giving may have the right either personally to direct his gift to his own chosen charity or, if he prefers, to direct his gift in association with his fellow workers whom we term a "Donor Group". Application of this principle is based on the co-operation of Donor Group representatives.

9/2. *An alternative gift distribution system.* Assuming large scale payroll giving for charitable purposes, it is recognised that, even if administratively feasible, a gift distribution system which was solely dependent upon the decisions and actions of individual donors would have in many ways similar inherent defects as a system in which all gifts were distributed merely through fund allocation committees. But, whilst a system of gift distributions by donors is growing, it may serve as a counterweight which would allow both modes to re-examine themselves.

9/3. *A fifty-fifty distribution policy.* The equitable distribution of large sums of money between many thousands of different charitable bodies is a very exacting and demanding business. For this reason charity-bank branch committees may suggest to donors through payroll giving that they voluntarily agree for one half, or thereabouts, of the value of their gifts to be made available for distribution through the local fund allocation advisory service. The term "value of gifts" here means the net amount deducted from pay, plus related tax recovered, less charity-bank administration charges, if any.

Donor Participation

9/4. *Maintenance of interest.* This chapter outlines considerations why it is important for SUVOC to encourage and assist donors and Donor Group representatives effectively to exercise at least partially their directive rights of gift distribution.

9/5. In brief, donors' directive rights are the key to active donor participation and involvement which could not otherwise be so fully achieved. Without this donor involvement SUVOC would lose much realizable energy and financial support.

9/6. It would of course be important to ensure that donors remained aware of their individual and group rights of gift direction and thus that their active interest was maintained. For this purpose it could be standard procedure within Donor Groups for *Provisional Distribution Lists* to be posted by Donor Group representatives on Notice Boards. Provisional Distribution Lists could inform donors how their representatives proposed to distribute their gifts and the donors, if they were satisfied, would leave it at that.

9/7. *Administration.* Recognition of donors' directive rights would necessitate charity-bank office administration able to account by firms' Donor Groups for payroll contributions received from within each area. This administration could be provided economically. Periodically, probably annually, *donors' statements,* comparable to bank statements, would be sent by the charity-bank to each firm's Donor Group representative. These statements would show the total value of gifts by the Donor Group which could be distributed through donors' directive rights.

9/8. Once a year, or more frequently by arrangement, the Donor Group representative could receive a charity-bank message for donors with a request that it be posted on the Notice Board. This message would explain the procedure to be adopted by individual donors or by representatives of sub-groups of donors who wished to apply for charity vouchers, worth stated amounts, which could be used to distribute gifts directly to charities. Applications for charity vouchers could be made either to the Donor Group representative or as specified in the charity-bank message on the Notice Board.

9/9. The Donor Group representative would be requested to place an order with the charity-bank by a stated date for the Donor Group's full charity voucher requirements, to receive a bulk delivery and to distribute vouchers to those individuals who had applied for them.

9/10. The charity-bank would arrange to transfer, for distribution through the local fund allocation advisory service, the difference, if any, between the Donor Group's total value of gifts for the year and its total charity voucher requirements.

9/11. Donors could either post or deliver charity vouchers to any voluntary organisation or body they believed to be legally regarded as charitable.

9/12. To cash the voucher the recipient charity would enter in a panel on the voucher details of its charitable status together with the name and address of its bank and its bank account number. The voucher would then be posted by the recipient charity to the charity bank's agent, which might be *Charities Aid Foundation.* After verifying the recipient's charitable status the agent would sanction payment of the voucher. The voucher would then be processed through the Clearing Banks' Giro Credit and its value credited to the bank account of the recipient charity.

9/13. A number of further SUVOC administration services could be supplied to assist donors and Donor Groups to distribute their own gifts, for example: with the co-operation of charities, lists of needs and good causes could be prepared for the information of potential donors; charities could be asked to advise SUVOC of over-surplus gifts which — depending on the situation — could be re-allocated by donors or through local fund allocations.

9/14. *Appeal considerations.* There are two appeal considerations why recognition of donors' directive rights could help to stimulate increased payroll giving. First, the potential generosity of the average employee. Second, the need to satisfy the potential donor that it is good principle to give.

9/15. Experience has shown that, given an adequate explanation, the average employee when individually approached is willing to authorise a small deduction from pay for charitable purposes. Some

employees have preferences for the work of a particular charity or charities which, with donors' directive rights, they are able to support. Many employees are suspicious and hesitate to give, but that does not mean that they are not potentially generous.

9/16. Employee prejudices and suspicions, which would largely disappear with donors' directive rights, include the following:

i. opposition to the work of one or more individual charities, not infrequently criticisms expressed may be based on scanty and possibly inaccurate information;

ii. dislike of "too many" charitable appeals, which can be viewed as "simply another charity in competition with other charities";

iii. disapproval of the high administration costs which it is believed some individual charities incur, necessarily or otherwise, in conducting competing fund raising campaigns;

iv. suspicion that charitable gifts might not be used for the purposes for which they had been given; this general suspicion has been heightened by television documentaries showing how charitable gifts to some Third World countries can be syphoned off and not reach their intended destinations.

9/17. A Shop Steward, whom the author consulted on donors' directive rights, wrote in reply — "These days some people tend to believe that someone must be making money out of a charity. Allowing donors who wish to distribute their own gifts, I am sure, would stop these fears being expressed by the Doubting Thomas's of our society that we now live in".

9/18. The provision of full donors' directive rights would remove a very large amount of donors' suspicion of charities. The removal of this suspicion would greatly increase donors' generosity.

9/19. *Attitudes of trade unions and managements.* A major factor in the development of SUVOC, or its equivalent, will be the attitude

of the trade union movement which largely represents the existing and potential donors.

9/20. Trade unions support the concept of donors' directive rights because these rights are implicit in trade union principles — that is, workers' abilities to respond intelligently to social needs — and because they offer a means of demonstrating the virtues of social co-operation. SUVOC would welcome trade union representatives on its committees and their assistance in the distribution of Donor Group gifts.

9/21. Trade unions and managements in general, and managers of wages offices in particular, dislike multi-applications for the provision of payroll giving facilities on behalf of individual charities. A national employer's central wage office would be faced with considerable administrative difficulties if it were agreed to make separate payroll deductions on behalf of a large number of separately competing local and national charities.

9/22. The provision of donors' directive rights would, by that means, enable SUVOC or its equivalent democratically to co-operate with other united fund raising bodies. One such charitable appeal[1] has requested payroll gifts of one hour's pay per month. That charity, other united fund raising bodies, and Local National Health Service appeals, are all evidence of the felt need for the people's response-able involvement in the finding of a solution to the present social problems.[2]

9/23. There is no doubt that human-beings feel better if they are helpful to each other. For this reason, a labour force where management and workers are consciously co-operating to further

[1] An appeal for *War on Want*, launched on 14th April 1981 by former Prime Minister Sir Harold Wilson.

[2] "There is little doubt that self help [mutual aid] is growing in importance. Governments in many parts of the western world are cutting back on welfare services, and are wondering what people who suffer various forms of personal and social disabilities and handicaps can do for themselves in overcoming their problems. At the same time, the growth in numerical strength of self help [mutual aid] groups of various kinds, particularly in the last decade, shows that many people are increasingly unwilling to sit back and be cared for by state (and voluntary) services that are finding it harder and harder to deal with all the problems that are brought to them," *Self Help in the Inner City*, p.9, 10. Barry Knight and Ruth Hayes. London Voluntary Service Council, 1981.

the well-being of their community is likely to be a more productive labour force than otherwise. This obvious fact is one reason why enlightened managements at all levels are expected to supply their workforces, where requested, with payroll giving facilities based on donors' directive rights.

Socio-Governmental Considerations

9/24. *The effect on morale.* By stimulating increased free-will giving, donors' directive rights will enable additional human-concerned-services to be supplied which could not otherwise be made available.

9/25. Important and valuable though the provision of these human-concerned-services may be, both to the individual recipients and to the community at large, the provision of donors' directive rights can supply an additional and even more vitally essential service to the nation at large and to its constituent groups of individuals.

9/26. This further service will be supplied because, in the exercising of their directive rights, donors and Donor Group representatives will become thereby more conscious of their own personal involvement and unique significance, and this in turn will affect their morale.

9/27. Lower members of governments and managements often fail to recognise the fact that, if they lower the morale of people, they also reduce the energy that could be creatively at work.

9/28. Other things being equal, high morale means high survival probability. But morale is high only where there is personal conscious self-awareness of creative giving-power.

9/29. The SUVOC idea with donors' directive rights is not a panacea for all social ills but, given the right backing and support, not only can it help to raise money; just as important, it can help to raise morale both locally and also further afield.

9/30. *More response-able donors.* The problem that faces democratic government is the tendency for individuals not to exercise their personal response-ability for social actions.

9/31. Democracy implies a non-division between the governed and

the government. A true democratic government logically will support increased free-will giving with donors' directive rights because it means giving people a further opportunity to take part in the solution of their own living problems. It will thus cause a forward movement in social evolution towards more generally response-able behaviour.

9/32. The more sense of response-ability people have through their social projects, the less likely will be their desire to overthrow the existing social order, because they will feel that they themselves are an effective part of a real establishment which has been originated by them. The more people feel that this established social order lets people have a hand in the salvation of people, the more they will recognise that charity gifts and work fulfil a real human need as well as helping to solve some of the problems which face government.

9/33. In short, support for the SUVOC movement, or its equivalent using donors' directive rights, is a means whereby true government can profitably stave off possibilities of social upheaval.

9/34. *Charity as the essential mediator.* In its community-wide effect, charity functions as the collective co-operative intelligence of members of society as a whole. This collective co-operative intelligence is the goodwill that lubricates, harmonises and makes workable the complex machinery of socio-governmental relations.

9/35. In its all-party-political and all religious and wholistically ethical role the SUVOC idea with donors' directive rights is a united way to assist local people to handle local affairs on a self-help basis. Thus concerned individuals render a whole-situation-improved quality of service.

9/36. We are all in the same universe, all in the same boat. Groups of self-help or mutual aid[3] organisations are the key to the solution to many of our problems.

[3] "Many of the people we spoke to preferred the term '*mutual aid*' to '*self help*' . . . However the term 'mutual aid', in having its historical roots in the development of friendly societies, trade unions, and the co-operative movement during the nineteenth century, was thought by some people to be old fashioned. It also seemed associated with thrift, saving, and good solid virtues of restraint that many considered outmoded. More seriously, it was not a term used by the sorts of community based groups that we wished to study. Although we frequently encountered the term 'self help' in our subsequent field work, we never heard the term 'mutual aid'." *Self Help in the Inner City,* p.11. Barry Knight and Ruth Hayes. London Voluntary Service Council, 1981.

9/37. The State's function is to provide a rationale of relationships of individuals, to protect the individual against other individuals and to make interrelations easier and more accessible and productive. The individual's function is to investigate new possibilities of survival and development not easily investigated by the State as such. Group charitable work is a dynamic field of investigation and utilisation of possibilities not clearly seen or not possible of realisation either for the State or for the isolated individual.

9/38. In the face of recognised danger and in response to a challenge situation, the appropriate or right mental attitude means the assumption of success, creative positive thinking and individual self-determination.

9/39. Free-will giving to the charitable voluntary sector, which implies donors' directive rights, is productive of the right mental attitude because it is personal self-determined ability to respond to the needs of a person or situation which motivates free-will giving.

9/40. There is today a dual danger to human society. One, of increasing impersonal bureaucratic interference in every aspect of our lives which, in time, could lead to excessive State domination and reduction of the free individual to the level of a mere state-cypher. Two, of individual irresponsibility to, and non-co-operation with, the community, with the possible breakdown of the social structure which everywhere throughout the world foreshadows itself. Both would result in diminution of creative productive activity in every field of human endeavour.

9/41. The charitable voluntary sector as a whole may be viewed as an essential mediator between the State and the individual with their corresponding opposed dangers. Charitable purposes thus imply group activities intelligently aimed at mutual aid, and the provision of finance by those who are able to give for those less fortunate who would benefit by receiving.

9/42. Michael Angelo's famous saying, "Perfection is made of trifles but perfection is no trifle", is very applicable to the voluntary sector. An outsider, looking at a particular aspect of the voluntary sector's intricate mosaic of services, could call any particular aspect

in isolation so small as to be trifling with the problems of society as a whole. However, if all this charitable activity is viewed in its total effect, the very opposite applies.

9/43. *Ethical considerations.* All other considerations apart, the main reason why donors' directive rights are important is because the individual human being has his own generosity impulses. This generosity has to be felt personally by the donor, as the individual grows and develops his awareness of his creative generous impulses by exercising his own free-will giving capacity.

9/44. Human nature is two-sided. Man has a kind positive creative "good" side as well as an unkind negative destructive "bad" side. The side which is most manifest at any moment in time is largely a reflection of the individual's feelings and thoughts or attitudes to his own life-situation. A major determinant in this respect will be the state of the individual's own self-respect or inner morale, irrespective of the current social situation, discontent, vandalism and violence.

9/45. Affirming the person's good side, we know that in part at least every healthy human individual seeks whenever possible to develop his own life potential and those of his fellow humans, and that to this end everyone will welcome an appropriate procedure making this possible for him. "If only I knew the way to do good I would do it" is the innermost central thought of every positively thinking normal human being.

9/46. All religious people have fundamentally the same idea — that we are all in the Noah's ark together in mutual interdependency.

9/47. The ground of SUVOC depends on a common sub-structure with which everyone will agree. This basis quite simply is human charity. The SUVOC idea is the united way of general human charity and this unites in one thing, recognition of the principle that giving and receiving are reciprocal actions which must benefit both parties.

9/48. Because giving and receiving are reciprocal actions, the receiver can by his conscious acceptance of a gift thereby become a giver. Whilst it is good to feel that one has the power to do a generous act, we are to remember that such an act cannot be done

without there being an appreciative recipient of it and that really it is a psychological error to wish always not to be at the receiving end. This is because the receiver is giving to the giver the opportunity to exercise his generosity and thereby to complete the circle of goodwill generated by givers and receivers.

9/49. *A policy question.* In some charity-bank branch areas the need for donors' directive rights may not be fully recognised and a policy question could arise whether donors might be encouraged to allow the whole of their gifts to be distributed through the fund allocation advisory service. A number of arguments might be advanced to attempt to justify such a policy, but inherent in this policy would be a danger that the fund allocation advisory service might become an impersonal committee or in effect a hypothetical extension of a government department.

9/50. Arguments put forward for the withdrawal of donors' directive rights would in essence be those advanced by governments of all colours to justify the provision of public services financed by tax money only.

9/51. The SUVOC idea recognises that some state financed social services are essential, also that most, if not all, the present statutory social services originated from the pioneering initiative of individuals.

9/52. Thus it follows, it would be an error to attempt to shift the initiative in helping our fellow-men from the individual to some non-individual governing body.

9/53. Atrophy of individual initiatives and of individual creative generous impulses might arise from total dependence on the State. Individual initiative is needed, or the ship of State loses way. The electorate gets the government it deserves.

PART FOUR

THE HEXIC FORMATION

CHAPTER TEN

SUVOC Confederation (The Founder Body)

The Purpose and Membership

10/1. *The hexic formation.* For the convenience of the reader the next six chapters repeat some of the ideas earlier referred to briefly in the opening chapters. The proposal is for SUVOC to consist of the following six separate but functionally associated bodies, these to be formed through the initiative of well-wishers conscious of the needs and opportunities for service offered by such bodies:

i. SUVOC Confederation (the founder body)
ii. SUVOC Voluntary Service Agency.
iii. SUVOC Charity-Bank.
iv. SUVOC Foundation.
v. SUVOC Topeconomic Development Association.
vi. SUVOC Fund Allocation Advisory Service.

10/2. This hexic formation is conceived as a functional union, based on community of interest amongst the different sectors of human society and specialization of purposes within that society. Whilst each associated body of the hexic formation could be formed able to operate self-sufficiently, and without assistance from the other SUVOC bodies, it is not envisaged that non-related self-separation would occur. In some parts of the country the six bodies could choose for specific reasons to work together in such close association as effectively to be one body.

10/3. Ultimate constitutional authority regarding the whole hexic formation could rest with a democratically recognized charity-bank national council.

10/4. *The concept.* The proposal is that, in association with *founder trustees* as referred to in chapter two, *SUVOC Confederation* (the confederation) be formed as the founder body, to give leadership and financial assistance to implement the SUVOC proposal, and generally to develop a fuller understanding of the existing and potential benefits to be derived through progressive realization of the SUVOC objective.

10/5. The aim could be in due course to have a national branch and a network of local branches, with each branch being affiliated to a corresponding charity-bank branch. Membership of the different branches could include *constituent-members,* together with individual and corporate *founder-members* and *confederation-members.*

10/6. *SUVOC constituent-membership.* Leading policy support and facilities for communication, rather than direct monetary aid, are the main contributions it is suggested could be sought from constituent-members of the confederation.

10/7. Constituent-membership could be freely open by invitation to every influential or potentially influential co-ordination institution or movement in the United Kingdom which approved the SUVOC idea. Amongst other bodies these could include professional institutions, trade unions, trade associations, chambers of commerce and industry, religious bodies, voluntary organisations and government departments.

10/8. Constituent-members could agree to appoint one or more representatives at national, regional and/or district branch levels to liaise and to participate with others in SUVOC policy creation and implementation.

10/9. In the early stages it might be desirable, subject to economy and mutual convenience, for policy communications within the confederation to be mainly via the constituent-members' existing channels of communication.

10/10. In addition to policy and communication assistance, some constituent-members might be willing to assist also in the suggested valuable work of confederation members, referred to later.

10/11. Appendix five points towards a possible wider policy consideration for the confederation within the field of *meta-enterprise,* or enterprise that looks beyond the merely private benefit of an individual or group and beyond the merely present generation.

10/12. *SUVOC founder-members.* The idea is that early donors of relatively substantial amounts of monetary aid to particular branches of the foundation and/or of the charity-bank could receive special "appreciation recognition" as individual or corporate *founder-members.*

10/13. Founder-members could be entitled for an indefinite period to honorary membership of a branch of the confederation and to certain exclusive locality-relevant voting rights. The right to vote, which might be on the basis of one vote per founder-member, could relate to the appointment from within the area of, say, one third of a foundation branch's trustees and/or one quarter of the members of a fund allocation advisory service branch committee.

10/14. The special voting recognition of founder-members could cease at some appropriate time, say, when the role of SUVOC founder-trustees became non-executive[1]; thereafter some other appreciation recognition might apply in respect of substantial donations to the foundation.

10/15. If founder-membership were to be related to a particular branch, the amount of monetary aid to be contributed in return for founder-membership could vary considerably between district, regional and national branches.

10/16. In the case of individual donors, the granting of founder-membership of a particular branch might depend simply upon the actual size of the covenated or other promised gift.

10/17. In the case of corporate donors, the granting of founder-membership could be in respect both of the relative size of each annual gift and of the promised number of similar gifts to be made in the future. The relative size of each annual gift might be expressed as a declared percentage of the corporate donor's payroll. For example, a corporate gift to the charity-bank of 0.2% of payroll

[1] Ref. *SUVOC proposal article eleven,* sub para 2/43xi, p.28.

would be equivalent to the value of gifts of one minute's pay per working day by that firm's total workforce. A gift equal to a small fraction of that figure could be sufficient to cover all charity-bank administration expenses relating to the firm's Donor Group.

10/18. *SUVOC confederation-membership.* The purpose of confederation-membership could be to provide direct assistance, including finance, towards development of the SUVOC objective within a defined branch area.

10/19. Confederation membership of a stated branch, which could be on either a personal or corporate basis, could be open to any person or body including, as earlier mentioned, the confederation's constituent-membership. Thus confederation membership could include individuals, religious bodies, voluntary organisations, community associations, firms, trade unions, trade associations, professional institutions, clubs, etc.

10/20. Whilst it is envisaged that the operation of the confederation would be distinct from the work of the other associated members of SUVOC, useful economies might be achieved by using the administration services of the charity-bank.

10/21. If thought desirable, locality-relevant membership of the confederation could be arranged either through a confederation local branch or direct through the confederation's central administration office. This latter procedure might make it simpler for large concerns simultaneously to join all appropriate branches of the confederation, as well as providing further useful economies.

10/22. With a broadly based membership it might be possible to provide a variety of branch services through different groups of members. Thus, in addition to contributing financially, all desirous of doing so would be enabled actively to participate in furthering the general work of the confederation. Membership groups could include:

i. *personal confederation membership:*
this could be open on a locality-relevant basis to any individual who was recognized to be actively participating in the functional work of the confederation, referred to later, or who had registered as a member by paying an annual

subscription or who had contributed above a certain minimum figure to the Development Fund of the charity-bank or of one of the associated members of the hexic formation.

ii. corporate confederation membership:
this could be open to any employer on a similar basis to personal confederation membership, other than the amount of the annual subscription. Membership also could be open, without cost, to any employer who made a corporate gift above a certain minimum figure to the charity-bank or the foundation. Such a gift might be expressed either as a fraction of one per cent of payroll or be related to numbers employed.

10/23. Assuming adequate finance, all members could receive a copy of the confederation's annual report, or its locality relevant equivalent, and information on how to obtain other SUVOC literature. In due course the annual report might be a brief portion of a more detailed locality-relevant report upon the wider activities of SUVOC as a hexic formation. In return for their increased subscriptions, corporate members might receive additional copies of useful SUVOC information.

The Operation

10/24. *Functional areas.* In order to further the general purposes of SUVOC, if considered desirable, branch activities could be developed in regional, district and community areas by interested groups of members willing to give service. Such activities might include some or all of the following functional areas:

i. management services:
with membership open to any consultant, accountant and other manager or professional worker who was willing and able to contribute specialist services to the voluntary sector and thus to further the purposes of the confederation.

ii. shop stewards and trade union leaders services:
with membership open to eligible persons who were willing and able to assist development of the charity-bank and/or to nominate individuals to serve on voluntary service agency policy boards, as referred to in the next chapter.

iii. community and/or district employers' associations:
with membership open to any employers in the public or private sectors, plus invited members, who were willing to attend or be represented at a Forum which could provide an opportunity for the mutual exchange of information on the practical work of SUVOC.

iv. social service work — information exchange:
with membership open to any professional or voluntary workers or teachers in the social services who were interested in exchanging information relevant to SUVOC purposes.

v. community, district, regional confederation meetings:
with membership open to all personal and corporate confederation members in the locality. Depending upon the wishes of the members concerned, some or all of these confederation meetings might be held as *SUVOC Council Meetings* and attended by representatives of all SUVOC bodies. By this means a wider understanding of the general work of SUVOC could be gained, and the necessity for some separate parallel meetings by other associated bodies could be obviated.

vi. the national council of the confederation:
in the first place membership of the national council might be by invitation from the constituent-members of the national branch.

10/25. *Charities' branches of the confederation, or of a non-SUVOC body.* Should the confederation (or, for this purpose, a specially formed separate non-SUVOC body) function as an officially-non-charitable body, charities' branches of that body might be

formed. The composition of these "officially-non-charitable" branches, which could express political views, might be similar, if not identical, to corresponding "officially charitable" branches of SUVOC Topeconomic Development Association.[2]

10/26. Given adequate finance, charities' branches, formed as stated, might be able to use advertisements on local radio and television to inform the public why and how to make increased charitable gifts through SUVOC to benefit the community in general. *Note:* at the time of writing, charities, as such, are legally unable to thus advertise.

10/27. *Constitution.* It is not suggested at this stage that a democratic system of voting be introduced for the confederation, along lines comparable to the proposals for the charity-bank.

10/28. The governing body of the confederation could be the officers of its national council, who might first consist of persons invited to serve by the SUVOC founder-trustees.

10/29. The national council of the confederation could be empowered to approve whatever constitution and administrative arrangements were considered most suitable. This procedure could be subject ultimately to the donor-members of the charity-bank being satisfied that the constitution approved was in accordance with the wishes of the members of the confederation, and of the best interests of the members of SUVOC as a whole.

10/30. In the very unlikely event of significant dissatisfaction with the constitution or operation of the confederation, amongst either the members of the confederation or the donor-members of the charity-bank, the national board of the charity-bank could have authority to arrange for a suitable referendum to be held to consider adoption of an alternative constitution and/or policy.

[2] "Where a group of people promotes a body with charitable objects and another body with political objects it is said that the division is artificial. We disagree. The two institutions have different functions which should not be confused." See p.47, *Charity Law and Voluntary Organisations.* Report of the Goodman Committee, 1976.

CHAPTER ELEVEN

SUVOC Voluntary Service Agency

The Volunteer Centre and Volunteer Bureaux

11/1. *Relation within SUVOC.* As stated in the Introduction, for purposes of simplicity and interfunctional wholeness, in considering a potentially much enlarged role for the voluntary sector, this book refers to all services which function within the SUVOC application as services which could be supplied through SUVOC, even though certain comparable SUVOC-type services are either presently available or could be made available through existing organisations.

11/2. These organisations include *The Volunteer Centre* and *Local Volunteer Bureaux* who together already supply many of the SUVOC-type services outlined in this chapter. It is envisaged that all these organisations could grow considerably in strength through implementation of the SUVOC proposal and that each would retain its separate identity and independent status.

The Purpose

11/3. *Definition of voluntary service.* The term *voluntary service* here refers to the unpaid free-will giving of services. A worker is regarded as *unpaid* who receives no remuneration in return for services rendered, other than reasonable reimbursements on account of travelling and other out of pocket expenses. A donor of voluntary service who chooses not to claim such reasonable expenses is regarded also as a donor of monetary aid.

11/4. *The concept.* The proposal is that *SUVOC Voluntary Service Agency* (the agency), or its equivalent under another name(s), be formed or recognized as one of the six associated SUVOC bodies to function on a federated locality-relevant basis as a voluntary service employment agency.

11/5. The idea is for the agency basically to supply an information and introductory service for the benefit both of individuals, willing to give voluntary service in particular directions and locations, and of charitable and government bodies able adequately to use the available voluntary service. Every agency branch also could aim further to develop public appreciation of the immediate and cumulative benefits of the free-will giving of services.

11/6. Due to the administrative and other assistance potentially available to it from branches of the charity-bank and of the confederation, it is envisaged that the agency could operate effectively and successfully at very low cost, possibly on occasions its branch offices might be housed with charity-bank branches.

11/7. The most important factor affecting the viability and success of the agency could be the general attitude towards it of paid workers and their leaders. It could therefore be prudent for the agency's constitution to ensure that it would not threaten the reasonable financial interests of paid workers.

11/8. To provide this necessary safeguard the agency could be required constitutionally to promote only officially charitable work and work in the public sector of the community which would not otherwise be done for economic reasons.

11/9. Implementation of the aforementioned constitutional safeguard could occur within different areas through the locality-relevant appointment of *agency policy boards.* Agency policy boards could consist of shop-steward and trade union leader members of confederation local branches and/or locally elected leaders of community or neighbourhood association councils. Alternatively, agency policy boards could be appointed by local authorities. Each board might appoint a standing committee to co-operate with the trustees of the agency and other appropriate bodies in order to agree a fair and practical interpretation, for that branch area, of work which would not otherwise be done.

11/10. It is not envisaged that the agency would be a body which voluntary workers could join as members, as for example with the charity-bank; instead, the objective could be that individual membership and loyalty would be direct with the body receiving the

voluntary service. However some records might be kept as, from time to time, it could be decided to offer to certain donors registered with the agency testimonials or other token-recognitions in appreciation of services given.

Service to the Unemployed

11/11. *Workpower.* In some areas with significant unemployment the agency could assist to divert present destructive and wasted energy into topeconomic development activity. For this purpose it might be agreed by agency policy boards that "work which would not otherwise be done" would be interpreted liberally, in order that the agency could assist other bodies, such as community associations' councils, in the formation of responsibly and separately administered but associated local agencies, termed "*Workpower*".

11/12. The Workpower idea, which is outlined in appendix four, recognizes that unemployment is a general human problem, at least as much as it is a social and economic problem.

11/13. A close association between Workpower and the agency would be prudent to ensure that, beyond certain necessary administrative distinctions to facilitate the operation of Workpower, little or no distinction would be recognized between voluntary service by officially unemployed persons and voluntary service by other members of society.

CHAPTER TWELVE

SUVOC Charity-Bank

The Purpose

12/1. *The concept.* The proposal is that *SUVOC Charity-Bank* (the charity-bank) be formed to operate as a multicentral federation of national, regional, sub-regional or district and possibly also local branches, controlled by donor-members, to provide increased opportunities for free-will giving of monetary aid, with the administration necessary for effective distributions of gifts received. Such distributions could be made in co-operation with other SUVOC bodies and also by arrangement with certain non-SUVOC bodies such as *Charities Aid Foundation* whose existing services need not be duplicated.

12/2. An effect of successful operation would be to provide a fresh stimulus to free-will giving.

12/3. The whole national federated charity-bank movement is conceived as a single company with charitable status. The initial idea is for SUVOC founder-trustees to appoint the first national and regional honorary officers and executive officers who in turn could make further appointments.

12/4. The concept of charity-banking is that money paid into a charity-bank account would be accepted as a gift from the donor to be used only for charitable purposes.

12/5. Some contributors might have more than one type of charity-bank account, for example a firm's corporate gifts account and its employees' payroll gifts account, but each of these could be treated separately with all gifts received being credited to the appropriate account[1]. No distribution would be made from an account unless

[1] In the example, quoted, the firm's corporate gifts account might be with *Charities Aid Foundation* and its employees' payroll gifts account with SUVOC, or its *United Way* equivalent. As stated in the Introduction, p.x, for purposes of simplicity and interfunctional wholeness, this book refers to both these charity-banking services as relevant to *The SUVOC Application* concept.

authorized by a donor issued charity-bank type cheque, termed a charity voucher, or by a duly certified authority from SUVOC fund allocation advisory service.

12/6. The number of charity-bank accounts could be large, but it is unlikely that payments into any account would be more frequent than once a month. For natural self-recognition donors or their representatives could receive charity-bank donors' statements.

The Operation

12/7. *Charity-bank branch appeal offices.* It is envisaged that the aforementioned charity-banking facilities could be provided partially through receiving bank accounts with clearing banks, although this would not be administratively essential, and that the charity-bank's staff could be largely appeal staff.

12/8. The idea is that as far as possible a SUVOC giro service and a system of centralised accounting could be used to relieve charity-bank branch offices of routine clerical work, thus leaving the appeal staff of those branches free to use their personalities and local knowledge to the best of their abilities.

12/9. As the appeal staff might wish to be guided by targets and standards, some additional head office information services and procedures could be useful. Systems could be designed to check for errors and exceptions, to check the regular receipt of gifts and to follow-up variations from targets. This latter follow-up could require the preparation of different standard letters, appropriate to the particular circumstances, for signature and despatch by the appeal staff of district and other branches.

12/10. Financial information could be stored to facilitate the preparation of annual accounts for each separate branch, together with fund allocation advisory service information, as later referred to.

12/11. This proposed charity-banking service differs from many community chest and other communal fund raising schemes as:

i. it is directed principally at large scale regular and systematic payroll giving and upon the probably annual distribution of all monies raised;

ii. it avoids prejudicing the non-payroll giving fund raising schemes which existing charitable voluntary organisations already have developed for themselves;

iii. it does not seek itself to allocate the funds raised or to influence how the charitable voluntary organisations are managed.

12/12. *Eligibility to receive distributions.* The charity-bank could operate as impartially as any other bank operates over the cheques drawn by its account holders. Neither the national branch nor any of its federated regional, sub-regional or smaller branches would determine the particular recipient organisations to benefit from funds raised. As earlier stated, distributions through these branches could be made through either donor issued charity vouchers or through recommendations of the fund allocation advisory service.

12/13. To be eligible to receive distributions it would be necessary for the organisation or other body to be legally regarded as charitable. Eligible organisations would include: *registered charities,* being voluntary organisations on the register of the Charity Commission, including organisations working for the relief of distress, and the development of welfare services in other parts of the world; *ecclesiastical charities,* being charities for the advancement of religion; *exempt charities,* being institutions and societies exempted from registration requirements by statute; *war charities;* certain public appeals and also, subject to the qualification following, charities termed *unregistered charities* which are not required by law to be registered; these latter include charities which have neither a permanent endowment nor investment income exceeding £15 a year nor the use or occupation of land or buildings.

12/14. To qualify to receive distributions and for administrative simplicity, Charity Commission registration would be desirable. The obtaining of this registration need present little difficulty to unregistered charities as they could apply for voluntary registration. Alternatively in some cases, without incurring additional administrative expense, the charity-bank could indirectly

finance the community work of unregistered charities with the goodwill and assistance of "umbrella organisations"[2].

12/15. It is suggested that there would be no charge for SUVOC registration as a charity eligible to receive fund allocations, and that every eligible organisation could be so registered which was agreeable to acknowledge SUVOC fund allocation advisory service gifts separately in its accounts and to answer such factual questions as reasonably might be asked by a donor. The acknowledgement in accounts of fund allocation gifts would enable donors who wished to verify for themselves that all declared fund allocation distributions had in fact been made.

12/16. *New sources of giving.* It is forecast that substantially increased giving for the voluntary sector could be developed through the following methods: with contributions from individual earnings, i.e. payroll gifts; with corporate gifts stemming from fuller recognition that, because the voluntary sector benefits the community as a whole, it thus also must benefit individual firms within the community; with the temporary use of money through special new type SUVOC bank deposit accounts and investment trusts and unit trusts[3]; with government co-operation so that tax legislation could be interpreted in a more liberal manner, this

[2] The term *umbrella organisation* refers to a registered charity or religious body which would be agreeable conditionally to receive a charity voucher direct from a donor, in the knowledge that the donor wished the proceeds of the voucher to be used to finance the work of a certain unregistered charity. This indirect distribution through an umbrella organisation could be subject only to the umbrella organisation being satisfied that the unregistered charity was carrying out wholly charitable work of a type the umbrella organisation was both willing and constitutionally authorised to finance. Appendix One outlines a procedure for the production of *charity-directories,* or their equivalent; together with other information, these directories could list "umbrella organisations" willing to receive charity vouchers on behalf of specified unregistered charities.

[3] It is envisaged that, with the co-operation of the Clearing Banks and/or *Charities Aid Foundation* and of the managers of new charitable trusts yet to be formed, special arrangements could be made for SUVOC to receive the interest and dividends earned on specially designated bank deposit accounts, or their *CAF* equivalent, and on certain new types of charitable unit trusts and investment trusts.
Some non-SUVOC charitable investment trusts provide a service where the charity directly benefits from the dividends and the investors collect the capital appreciation of the shares when the trust is wound up. These include: the Child Health Research Investment Trust, the Marine Adventure Sailing Trust (both managed by G. T. Management) and the Cystic Fibrosis Investment Trust run by Fidelity International.

subject is further referred to in appendix three; with additional sundry gifts being received through legacies, collection boxes, etc.

12/17. *Low administration costs.* Additional giving could be encouraged through minimal, desirably nil, deductions being made for normal administration or other operating costs, so that practically all money donated would be available for charitable distributions. This could occur through: administrative economies stemming from modern business methods; interest earned on funds awaiting distribution; direct financial assistance from the confederation, the foundation and other sponsors.

A Donors' Agency

12/18. *Donor participation in gift direction.* Some donors would wish to leave obligatory responsibility for the direction of at least a portion of their gifts to a local fund allocation advisory service branch committee, the suggested work of which is later referred to.

12/19. Other donors would prefer either to direct their gifts personally to particular local or national charities or instead to direct their gifts for stated purposes, e.g. for the elderly, for specific medical research, etc. Gift directions for stated purposes might be made either by gift directions to a local or national co-ordination voluntary organisation, which then could co-ordinate distribution of the accumulated gifts to other charities[4], or by gift directions to meet local or national needs. In this latter case SUVOC fund allocation advisory service could assist.

12/20. In some firms donors might decide to form their own firm's SUVOC Gift Direction Committee or Charity Committee, which could operate as an extension of a Works Council or Welfare Committee. Chapter nine, on donors' directive rights, offers considerations why donors and Donor Group representatives should be encouraged and assisted to exercise at least partially their directive rights of gift distribution.

12/21. As normal charity-bank administration procedure, those donors and firms' Donor Group representatives, who preferred to

[4] The attention of the reader is drawn to the footnote on this subject on page 247, ref. sub para A7/26ii, also to para 15/19 on page 137.

distribute all or part of their gifts directly to their own chosen charities, could receive for that purpose *SUVOC vouchers,* being charity vouchers or charity-bank-type cheques, or their equivalent.

12/22. In addition, if considered desirable to facilitate donors' democratic participation in the work of the charity-bank, as later referred to, *SUVOC recognitions,* being charity-bank-type recognition receipts, could be received by Donor Group representatives. These recognitions could be issued annually in appreciation recognition of those gifts which the Donor Group had agreed should be distributed that year through the fund allocation advisory service.

12/23. Each Donor Group's recognitions and vouchers — including vouchers issued through the Donor Group to individual donors — together could have a face value equal to the total value of that Donor-Group's gifts during the SUVOC financial year, less charity-bank charges, if any.

12/24. It is envisaged that in most cases, for administrative convenience, SUVOC vouchers and recognitions would be distributed in the first place direct to Donor Group representatives for the firm as a whole. Subsequently, by arrangement, some or all of the vouchers issued to a firm's Donor Group representative could be handed for distribution to Donor Group representatives for individual departments or sections.

12/25. *Provisionally directed gifts.* Whilst it would be desirable to encourage active interested donor participation in gift direction, entirely personal gift direction by individual and corporate donors conceivably could lead to undesirably large concentrations of gifts in the hands of a relatively small number of well known organisations, some of whom might receive very much more money than was needed.

12/26. With the agreement of donors, donor-directed gifts through the charity-bank could be regarded as "provisionally directed gifts" providing always that each charity had reasonably adequate need for the total SUVOC gifts provisionally directed to it that year.

12/27. If at any time, in the considered judgement of the members of the fund allocation advisory service branch committee concerned,

the total annual gifts provisionally directed by donors to one or more individual charities should appear grossly excessive[5], the committee could formally advise the officers of the relevant charity-bank branch of their reasons and recommend suitable alternative distributions of funds, possibly in support of similar worthy work.

12/28. On receipt of the above mentioned formal advice, the officers of the charity-bank could be authorized to take whatever action they considered most appropriate, subject only to no adverse publicity regarding any charity in accordance with the terms of SUVOC proposal article two, or its equivalent. One possible action might be for the officers personally to inform a representative of the charity of the fund allocation advisory service branch committee's reasoned advice and of the total amount of over-surplus gifts involved, applicable to that branch, together with full relevant details of all amounts provisionally directed to it by donors.

12/29. Should the charity be willing to accept the fund allocation advisory service branch committee's advice, the charity-bank branch committee could decide whether the donors concerned would be informed of the over-surplus gifts and requested to redirect their gifts, or whether instead they would be thanked in the normal way by the recipient charity which could authorize the redistribution of over-surplus gifts through the fund allocation advisory service.

12/30. Should the charity wish further consideration of the fund allocation advisory service branch committee's advice at a charity-bank general meeting, the terms of SUVOC proposal article two need not apply.

12/31. *Votes and voting.* In place of the shareholders of commercial companies, the proposal is that charity-bank donors and/or their representatives could be entitled to attend and vote for the appointment of honorary officers and committee members at general meetings of charity-bank sub-regional or district branches.

12/32. Unless otherwise locally preferred, as might be the case in some geographically small regional areas, the officers of district or

[5] Fund allocation advisory service branch committees might make provisional approximate forecasts of the detailed fund allocations considered advisable. Ref. para AI/36, p.155.

other sub-regional branches could be authorized to make regional and national appointments.

12/33. Probably all business at charity-bank branch meetings would usually be settled by a simple majority of responsible persons present and voting, most of whom could be the appointed representatives of firms' Donor Groups. However, in view of the potentially large amounts of gifts which could be available for distribution through charity-bank branches, it could be advisable to have constitutional provision for the calling of a donors' poll vote; this could be the non-commercial equivalent of a shareholders' poll vote. For administrative simplicity and fairness the suggested basis of such voting could be one donor-vote for each £1 donated during the previous SUVOC financial year.

12/34. Should a donors' poll vote be called for, it is envisaged that voting would take place through duly authorized firms' Donor Group representatives or their proxies. The voting power of each Donor Group representative could be based on the total value of the gifts, for the appropriate year, of all members of that firm's Donor Group. This voting authority could be evidenced by a *SUVOC donors' statement,* the equivalent to a bank statement, which would be issued by the charity-bank at the end of each financial year.

12/35. Alternatively, if a different procedure was preferred based on SUVOC vouchers and recognitions, it is anticipated these could be issued with detachable counterfoil voting-rights on which space could be included for the appointment of proxies.

12/36. For the convenience of trade union representatives and Works Councils, charity-bank branches could arrange on request to exchange proxy voting authorizations for consolidated voting cards.

12/37. On balance it could be considered *simplest and best to give votes to all donors.* However it is recognized that, *if preferred,* full-donor-membership, carrying voting rights, could be confined to donors through payroll and other methods of personal giving. This alternative procedure would not disregard the importance of the substantial contributions which could be received through

contributions from firms and shareholders, from legacies, and other sundry income.

12/38. The purpose of this alternative voting procedure could be simply to establish a grass roots democratic basis in which every individual donor had a voice, and in which no particular section of society had exclusive power of rulership. If donor-votes were allotted only to individual donors, and not to corporate donors, large blocks of votes, which otherwise might be controlled by a relatively few major corporate donors, could not override the grass roots democratic principle recognized.

12/39. Rather than to develop constitutional arrangements which might prove cumbersome whereby particular community interests might nominate honorary officers or committee members, it is suggested that with the approval of the donors concerned the committee of each charity-bank branch could have power to co-opt additional members who then could be eligible for subsequent election.

CHAPTER THIRTEEN

SUVOC Foundation

The Purpose

13/1. *The concept.* The term *foundation* here refers to a non-governmental non-profit organisation having a principal fund of its own, managed by its own trustees and established to maintain or aid social, educational, charitable, religious and other activities serving the common good.

13/2. The whole foundation, termed *SUVOC Foundation* (the foundation), is conceived as a multicentral federation of separate national, regional, district and possibly also local foundations, with each separate foundation being referred to as *SUVOC foundation place-name* (foundation branch).

13/3. Every foundation branch could be formed in accordance with both agreed *SUVOC proposal articles,* or their equivalent, regarding the relation of the foundation to other SUVOC bodies — including the affiliation of every foundation branch to its corresponding charity-bank branch, and a federation agreement to distribute a proportion of funds on a national or regional basis in the event of major disaster and for other agreed co-ordinate purposes.

13/4. With due agreement, the co-ordinated accounting and investment of individual foundation branch funds could be administered with the assistance of *Charities Aid Foundation.*

13/5. The idea is that each foundation branch could:

i. accept gifts directed to it in order to maintain an adequate capital reserve, to be used on a continuative basis for agreed purposes.

ii. receive (in the early stages of implementation of the SUVOC proposal) surplus charity-money raised by the charity-bank

which could not be immediately fully utilized by charities. By this means the foundation could facilitate phased development of the charity-bank, to ensure that charities would have time to prepare for unpredicted increased free-will giving, and thus that all charity-money raised could be seen to serve a worthwhile purpose. Unless otherwise decided this early distribution to the foundation could be at the discretion of SUVOC fund allocation advisory service.

iii. give leadership towards realization of the SUVOC objective by regularly distributing each year a suitable percentage of income and capital towards agreed foundation distribution purposes. The suggested purposes, later referred to in detail, could be: topeconomic project grants[1]; major disaster relief funds; specified and approved SUVOC administration expenses.

iv. maintain adequate records to enable the national trustees of the foundation to produce consolidated annual reports and accounts comprehensively covering the work of all foundation branches.

v. register, with due authority, some or all foundation branches as *Common Good Funds*[2], under the terms of the Charities' Act 1960. These foundation branches thus could be authorized with the approval of the Charity Commissioners to act as repositories of obsolete local and national charities and charitable trusts[3].

[1] For a definition of *topeconomy* see para 2/38 on page 22. This subject is further considered in the next chapter.

[2] After referring to evidence received on "Neighbourhood Trusts, Community Trusts and Common Good Funds", the Report of the Goodman Committee, Bedford Square Press, 1976, p.88 states: "We prefer to use the words 'Neighbourhood Trusts' [rather than Community Trusts or Common Good Funds] which we take to be a trust for the benefit of the inhabitants of a given area". The suggested *Common Good Funds,* referred to as *Foundations* in *The SUVOC Application,* would have much in common with *Neighbourhood Trusts,* except that the Foundations, operating democratically through a federation, also could make grants for disaster relief and for topeconomic projects outside the given neighbourhood area.

[3] "We obtained a vivid picture of the enormous number of small charities involved over the country as a whole. Although many of these charities have microscopic

Trustees and Operation

13/6. *SUVOC founder-members and the appointment of trustees.* In addition to the possible early stage receipts from the charity-bank, previously referred to, the idea is that much of the initial capital of the foundation could be raised through gifts from donors. As suggested in chapter ten[4], the generosity of donors could be recognized by the granting of individual and corporate founder-membership of the confederation.

13/7. The size of gift to be requested in return for confederation founder-membership might vary considerably between district, regional and national branches, with major donors only being eligible for founder-membership of the larger branches.

13/8. Some founder-members could be representatives of charities or charitable trusts which had elected to merge with a foundation branch on the grounds that it was a "*Common Good Fund*".

13/9. A possible basis for the appointment of foundation branch trustees could be: one third of the trustees of each foundation branch to be appointed by the elected officers or committee for that year of the appropriate charity-bank branch, who thus could determine the number of trustees to be appointed; one third by elected representatives or their nominees of locality-relevant government within the branch's area; one third by locality-relevant SUVOC founder-members, i.e. the registered founder-members of the corresponding confederation branch. Voting by founder-members might be on the basis of one vote per individual founder-member and one vote per corporate founder-member.

13/10. The trustees of individual foundation branches could be expected to exercise wide discretionary powers regarding local public relations and capital and income distribution policies, but subject to an agreement to provide for the equitable re-apportionment of branches' capital reserves to take into account boundary changes and significant movements of population.

income, the total sum involved is quite significant — probably £3-4 million in all . . . In one county studied, the total number of parish charities for the relief of poverty was 365, with a total income of £13,249 . . . and 157 out of the 365 charities had an income of less than £5 per annum." See p.83, *Charity Law and Voluntary Organisations.* Report of the Goodman Committee, Bedford Square Press, 1976.

[4] Ref. paras 10/12 to 10/17, page 100.

13/11. *A federation agreement.* In conjunction with recognition of the need for necessary and desirable independence, in respect of local projects and policies, the idea is that foundation branches also could develop clearly agreed national and regional policies and co-ordinate purposes; this would enable additional resources to be concentrated in areas where foundation work was most needed.

13/12. It is suggested that every foundation branch could be formed subject to an irrevocable federation agreement by the trustees to abide by majority proportional voting decisions at national and regional foundation branch general meetings. Proportional voting could be on the basis of, say, one *foundation-branch-trustee-vote* for every £1000 or part thereof of foundation branch capital reserve.

13/13. The federation agreement could stipulate that, at national and regional foundation branch general meetings, the decision of a one-half or two-thirds voting majority of foundation branch trustees' representatives and their proxies could be constitutionally binding upon the trustees of all foundation branches.

Distribution Policies

13/14. *Purpose one, topeconomic project grants.* Many desirable outlets for creatively useful community work are unable to materalize without initial capital to launch them reasonably free from debt. Given this support much socially valuable work could be developed, either as extensions to the work of existing charitable voluntary organisations or as the responsibility of new independent bodies.

13/15. Assuming available resources, foundation branches each year could make grants to bodies undertaking projects likely to improve the quality of life within the branches' immediate localities and/or beyond.

13/16. It might be agreed policy that separate accounts would be maintained for the following types of topeconomic project grants:

i. *development grants,*
these could be grants towards projects the practical

topeconomic value of which was already generally recognized. Amongst others, these projects might include: sports stadiums, playing fields and other sporting facilities; cultural, educational and recreational facilities; a wide range of welfare and community work generally recognized as socially useful.

ii. research and pioneering grants,
these could be grants towards projects the practical topeconomic value of which for one reason or another was not generally recognized, but which had a reasonably good chance of improving the quality of life. Amongst others, these projects might include: medical research of all types; the construction, testing and modification of new equipment; amenities and housing for the handicapped and the disabled; new, and yet to be discovered, potentially useful alternative services, to those currently provided by the statutory and voluntary social services, for the care of the sick, the feeble, lawless social misfits, etc.

13/17. Possible co-ordinate distributions by larger foundation branches for topeconomic project grant purposes are later considered.

13/18. *Purpose two, major disaster relief funds.* In the event of major disaster, and assuming available resources, the foundation as a whole, through its federated branches, immediately could provide:

i. for the afflicted,
a reasonable and substantial amount of monetary aid to be distributed efficiently and sensitively through selected charitable or other agencies for specific purposes[5].

ii. for outside sympathisers,
who preferred not to donate to one isolated disaster-fund appeal, a well respected channel for giving monetary aid generally to provide disaster relief.

[5] It is emphasized that the suggested purposes of SUVOC's major disaster relief funds could be, not to provide direct services, but instead, to reinforce the work of established charitable or other agencies working in the field of disaster relief, as for example *Oxfam*, by making financial grants to such bodies in support of specific work.

13/19. Major accidents and disasters form an unfortunate but almost regular part of national life. Whilst it is not necessary for misfortune to be widespread for it to be a disaster to those concerned, a small scale disaster rarely justifies a large scale financial appeal. Therefore the term *major disaster* is used to refer only to a regional, national or international disaster, i.e. to a disaster of such magnitude that the financial implications of the loss would indicate the advisability of a general appeal[6].

13/20. In the event of reported disaster, including a disaster overseas, the foundation's national and/or regional branch trustees together, or their appointed representatives, could judge in financial terms whether the reported disaster would be regarded as a small scale disaster or as a major disaster.

13/21. Should it be judged to be a major disaster, the trustees could decide:

i. the amount, subject to review, to be distributed as relief funds;

ii. whether distribution would be made by foundation branches on a regional or a national basis;

iii. whether a specific foundation appeal should be launched to recover some or all of the monetary aid to be distributed on account of that disaster.

13/22. In accordance with agreed federation policy, every foundation branch in the U.K. could undertake to maintain a reasonable disaster-fund reserve ready for immediate advance, in whole or in part, at the discretion of the national or regional trustees.

13/23. The amount of the disaster-fund reserve could be on a uniform basis for every foundation branch. This uniform basis

[6] Referring to the problem of over and under-subscription to Disaster Funds, *Charity Law and Voluntary Organisations:* the Report of the Goodman Committee p.78 states: "The important thing in these cases is that the trust deed should provide for these contingencies". To readers of *The SUVOC Application,* the concept of a democratically constituted federation of *SUVOC Foundations* may be viewed as consistent with this recommendation.

might be either an agreed amount per head of the resident population within the foundation branch area, or an agreed equal proportion of the total capital of the foundation branch.

13/24. Every disaster-fund advance by a foundation branch could be made on the understanding that, should a disaster-fund appeal be made on a national or regional basis, every foundation branch concerned would receive from the appeal in direct proportion to the amount advanced on account of the disaster.

13/25. *Purpose three, SUVOC administration expenses.* The exact level of distribution for this third purpose could be determined each year on a locality-relevant basis by the foundation branch trustees concerned.

13/26. Assuming available resources, it could be hoped that every foundation branch would contribute towards the initial cost of development and implementation of the SUVOC proposal. Thereafter each branch could contribute such agreed sum towards the work of the other associated SUVOC bodies as reasonably might be sufficient to enable the charity-bank economically to operate at minimal, desirably nil, cost to its donor-members, and for the work of the fund allocation advisory service and other SUVOC bodies to be adequately financed.

13/27. *Co-ordinate distributions.* As matters of general policy, foundation branch trustees might periodically agree the allocation of a separately accountable portion of total foundation branch income and/or capital to be used to finance major topeconomic development, research and pioneering projects. These co-ordinate distributions could be made through the foundation's regional and national branches.

13/28. Beyond the above mentioned co-ordinate distributions, there would be considerable scope for additional voluntary association between individual foundation branches. In this respect the national and regional branches might serve as convenient channels of communication to all foundation branches.

13/29. For example, in the case of very desirable major topeconomic projects, a large number of foundation branches could wish separately to provide grants. The result might be not only a

substantial worthwhile sum, in addition the lead set by the branches could encourage many others also to give.

13/30. Again, the trustees of some foundation branches might not favour a policy of sprinkling little grants over a multiplicity of research and pioneering grant projects. Instead they could prefer that the whole of their branch's research and pioneering grant allocations be used to support larger work being sponsored at national and regional levels.

13/31. *Selection of topeconomic project grants.* The essential qualification for a topeconomic project grant could be whether, in the considered judgement of the trustees, the project would be likely to improve the quality of life. It is not however suggested that the trustees would be expected unaided to select the projects to receive grants.

13/32. It is envisaged that applications for grants would be made in the first place direct to foundation branches. The trustees could then:

i. request reports and recommendations from members of SUVOC topeconomic development associations and/or from statutory and local government bodies.

ii. seek foundation advice, as referred to later[7], through SUVOC fund allocation advisory service.

iii. make whatever other enquiries they considered appropriate.

13/33. The purpose of the suggested advisory service's assistance, referred to in sub-para *ii* above, could be to provide a preliminary screening of appeals and a co-ordinate service. This service could advise the trustees if a project grant might: be used to finance an unnecessary duplication of existing work; be unlikely to achieve its topeconomic aim; be paid to previously unsuitable recipients; be given either without further question, or subject to audit and accounts.

[7] Ref. para 15/10, page 135, and sub-para AI/24iv, page 153.

13/34. Although all advice and recommendations would naturally receive due consideration, the trustees need not necessarily be bound to act upon any specific advice received. The suggestion is for the foundation's trustees' decisions to be final.

13/35. *Maintenance of reserves.* Whatever might be the eventual individual and combined sizes of foundation branches, deserving applications for topeconomic project grants would be likely to exceed the funds available for distribution.

13/36. To establish the continuative principle of each foundation branch maintaining adequate capital reserves, and to guard against the trustees of any foundation branch being subjected by pressure groups to excessive demands regarding distribution, the constitutional proposal is made that the purpose of the foundation be "to give leadership towards realization of the SUVOC objective by *regularly* distributing *each year a suitable percentage* of income and capital towards separately accountable agreed foundation purposes".

13/37. *Reports.* The annual reports of the trustees of the different foundation branches from time to time might refer to the general policy reasons determining the percentage distribution figures adopted.

13/38. In some foundation branch areas the trustees could, in the preparation of their reports, see an opportunity to focus community interest and support on other new important work it was hoped to sponsor in the future through the foundation.

13/39. On occasions, the leadership role of foundation branches might be indicated in annual reports by brief reference to subsequent total giving from other sources to projects sponsored in the first place by branches of the foundation.

CHAPTER FOURTEEN

SUVOC Topeconomic Development Association

The Purpose

14/1. *Definition of topeconomic development.* The term *topeconomic development* here refers to environmental improvement in the quality of life or in social, economic and personal health.[1]

14/2. At heart *topeconomic development* means the socially-functioning-profitable inner personal development of the individuals within the community.

14/3. Whilst committee work, co-ordination, co-operation and social planning are essential parts of topeconomic development, they may be regarded simply as necessary preconditions for the main purpose of creating an environment conducive to the healthy growth of every human personality.

14/4. Many social workers believe that voluntary co-operation and effort is the key to topeconomic development, or its equivalent, as it encourages the creative participation of the volunteer, a participation which matures and develops the whole person.

14/5. *The concept.* The proposal is that interested charities and bodies eligible to receive charity-money be encouraged to develop *SUVOC Topeconomic Development Association* (the association) as a multicentral federation, with constitutional heads of agreement either as later referred to or as otherwise were agreed.

14/6. The association is conceived as a group of independently functioning national, regional, district and local branches. Each separate association branch could be an advisory body functioning generally to further development of the SUVOC objective through the voluntary co-operative association of charitable bodies.

[1] The derivation of the concept of *topeconomy* is explained in para 2/38, p.22.

14/7. The conceived aim of the association could be practically to achieve fruitful topeconomic development, on a locality-relevant basis, with a fresh wholistic need-relevant approach to individual neighbourhood and community problems.

14/8. To achieve this aim each association branch could seek to create a common bond of interest amongst its members in the corporate provision within its area of: topeconomic planning information; sensitive and enlightened topeconomic development plans; advice to the associated SUVOC bodies.

14/9. *Topeconomic planning information.* It could be agreed policy, within and between association branches, to pool the information on social needs available to members.

14/10. In addition, from time to time, specifically directed surveys could be conducted within suitably sized branch areas. These surveys could examine and report on topeconomic achievements as well as on specific social needs. If voluntary helpers were recruited to assist with these surveys, and trained how to ask suitable questions without pressing or upsetting people, much further useful topeconomic planning information could be obtained on many varied aspects of socio-communal need and opportunity.

14/11. *Sensitive and enlightened topeconomic development plans.* It is assumed the members of each association branch would agree their own topeconomic development planning policy in the light of available information and in co-operation with interested persons and bodies.

14/12. By definition topeconomic development planning policy requires more than simply to effect a desirable balance between the quantifiable needs in each community and the available resources. The essence of topeconomy is that it is qualitive as well as quantitive in character.

14/13. Local appreciation of whether or not any particular project would be likely to improve the quality of life naturally would determine the quantity of that community's response in the form of free-will giving of services and monetary aid. Thus topeconomic development planning policy would need to be sensitive and enlightened to achieve within the area sufficient public interest,

feeling of participation and goodwill to generate the desired community response[2].

14/14. A topeconomic development plan functions to help the individual members of communities themselves to develop their valuable potentialities by assisting them to develop positive mental attitudes of self-help and involvement in worthwhile community creation and development activities. These activities would include not only caring for the unfortunate, but also dealing with existing and emergent social needs within the whole situation, including those social needs which arise in whole or in part as a result of a local community's reciprocal interrelationships with other areas.

14/15. Preparation and implementation of an association branch's topeconomic development plan would be likely, in some form or another, to contain the following components:

i. *appreciation* by interested members and groups of members of relevant topeconomic planning information, including the assessment and correlation of attitude reports.

ii. *consideration* by members regarding existing and new opportunities for worthwhile co-operative activity. This consideration could be both between association members individually and between association members and local government, the statutory social services and other interested persons and bodies.

iii. *agreement* by the majority of members upon at least some leading and other need-relevant social priorities within the

[2] *The Government and the Voluntary Sector:* analysis of the response to the consultative document [Report of the Wolfenden Committee] published by The Voluntary Services Unit, Home Office, London, 1981, p.15, 16, states: "The majority of responses were in favour of strategic [topeconomic] planning at local level, but were doubtful of the opportunities for such activity at regional level. One respondent summarised the position by saying that 'most voluntary activity takes place at a very local level, a level which in geographical terms is very immediate to the people living there'. The point was well made that the interaction between statutory and voluntary services really takes place at a county or district level and that given the extent of local determination of priorities, including allocation of budgets, it is really at this level that . . . planning can be most effective." Readers of *The SUVOC Application* may consider that, assuming the co-operation of its members, *SUVOC Topeconomic Development Association* could be formed to operate effectively both at local levels and at county, district and regional levels. See sub-para 14/21iv, page 131.

area. This agreement could be either informal or by constitutional resolution.

iv. *recognition* by the members concerned that a topeconomic development plan also could be expected to have appropriate regard to the known democratic wishes and to the foreseeable emotional reactions of a community to particular needs even if, in the opinion of an association branch's members, different social priorities otherwise might have been agreed.

v. *communication* to the local community of those aspects of the plan considered by members most likely to further topeconomic development. *Note:* unless otherwise decided, all public communications on behalf of an association branch's members first could be constitutionally approved by those members.

vi. *participation* by members individually, as independent charities, in phased implementation of practically attainable aspects of the plan.

Operation and Constitution

14/16. *Advice to the associated SUVOC bodies.* The main requests to association members for SUVOC advice would be likely to come from foundation branch trustees, for the topeconomic project grant purposes already referred to, and from members of SUVOC fund allocation advisory service committees.

14/17. Fund allocation advisory service advice could be given by association members in as much detail and with such publicity as was considered appropriate. If minimum publicity were requested, fund allocation advisory service advice could be supplied through association members individually completing questionnaires on social priorities; this advice need not name any individual potential recipients[3].

[3] The attention of the reader is drawn to Footnote 12, on pages 247, 248, ref. sub-para A7/26ii.

14/18. In addition to the foregoing, as referred to earlier[4], should it be decided to form SUVOC confederation (or a specially formed different body) without charitable status, every association branch member also could be a member of a corresponding but legally separate "officially non-charitable" charities' branch of that other body. These "officially non-charitable" branches might be able to advertise on local radio and television to promote greater public appreciation of the voluntary sector. In addition, if considered for any particular purpose as likely to be prudent and effective, these branches could offer, through formal branch resolution, politically motivated advice which sought publicly "to promote an attitude or frame of mind". No suggestion is here or elsewhere made that it would be either advisable or desirable for charities to become party-politically active.

14/19. *Constitutional considerations.* The association could be brought into being as a national charitable voluntary organisation through the appointment by the SUVOC founder-trustees of the association's first trustees.

14/20. The association's trustees could be authorized, with or without reference to the SUVOC founder-trustees, to appoint association officers and to approve a simple constitution suitable for adoption by all federated branches of the association.

14/21. To indicate a basis upon which an association constitution could be agreed, the following notes on some possible heads of agreement are tentatively offered for consideration:

i. *the appointment and function of association trustees:* the first association trustees could be appointed for, say, a minimum of three years, with one third retiring annually thereafter and being eligible for re-appointment. Future association trustees could be appointed by members of the assocation's national branch or, if preferred, by the voting members at a national general meeting of the charity-bank.

Unless otherwise decided the trustees alone could be authorised to determine matters relating to constitutional changes and major policy, branch boundary adjustments, the

[4] The attention of the reader is drawn to Footnote 2, on page 104, ref para 10/25.

appointment of paid officers and recognition within the federation of association branches and their members.

ii. *membership:* association membership, could comprise two groups of members:

constituent-members could be representative members appointed, to serve within an association branch, by charities or religious bodies. It is envisaged that any charity, or branch thereof, recognised by the other association branch members as "operating actively *throughout* an association branch area" could be entitled to appoint a constituent-member of that association branch.

additional-members could be interested persons invited by the constituent-members to serve within an association branch. It is envisaged that additional-members could include amongst others representatives from local government and from the statutory social services.

iii. *voting:* constituent-members and additional-members each could have one vote.

iv. *co-ordination voluntary organisations and national charities:* association district and local branches should not duplicate the function of co-ordination or intermediary voluntary organisations. It is envisaged that for the most part co-ordination voluntary organisations and national charities alone would be recognized as operating actively *throughout* the association's national and large regional branch areas, and thus as eligible for constituent-membership of the association's national and/or large regional branches.[5]

v. *relationship with co-ordination voluntary organisations:* unless otherwise determined by an individual constituent-member, membership of an association branch would not take precedence over membership of a co-ordination or intermediary voluntary organisation.

[5] The attention of the reader is drawn to Footnote 3, on page 129.

vi. the formation of association branches: at any time, with the approval of the association's trustees, one or more persons could convene an inaugural meeting with a view to forming an association branch. By giving their subsequent formal recognition to the formation of an association branch, the trustees would indicate that those responsible for the management of a significant number of charity-activities had agreed to co-operate together within the association branch area for topeconomic development purposes.

vii. purse and policy: subject only to the terms of a constitution agreement, each association branch could be a free and self-determining body with direct control over its own purse and policy. A constitution agreement could state:

advisory body: each branch of the association could be formed as an advisory body, with no power to bind its members or to receive funds on their behalf.

financial appeals: appeals for funds for specific purposes would not be made under an association branch's name unless supported *unanimously* by the association branch members present at a properly constituted meeting, due notice of the proposal having been given.

finance: each association branch would be able to receive charity-bank and other gifts towards reasonable administrative expenses. *Note:* any charity-money in excess of, say, two years normal administration expenses could be regarded as "surplus funds", to be available for use by the foundation on special topeconomic projects or for distribution through SUVOC fund allocation advisory service, but not otherwise to be available for direct distribution amongst members of the association.

CHAPTER FIFTEEN

SUVOC Fund Allocation Advisory Service

The Purpose

15/1. *Principles, aims and policies.* The proposed *SUVOC Fund Allocation Advisory Service* (the advisory service) is conceived basically to consist of two different groups of interfunctional services:

> *group one:* collection, verification and presentation of advisory service information for consideration.
>
> *group two:* consideration of advisory service information, and co-ordination and communication of advisory service advice.

15/2. The first group of services could be provided through advisory service affiliated members and advisory service branch sub-committees. Appendix one outlines how this valuable grass roots assistance could be developed. The second group of services could be provided through advisory service branch committees and advisory service co-ordination committees.

15/3. It would be clearly of vital importance, for the whole success of SUVOC, to establish a basis of mutual confidence and trust between charities and the advisory service regarding the latter's principles, aims and policies.

15/4. Initially a number of potential recipient charities might view the SUVOC proposal with some natural degree of prudent caution. But most of these bodies would no doubt accept today's general need for some major new emergent in the field of the voluntary social services, and would approve the idea of increased income being made available to further their work.

15/5. At the same time it could be anticipated that those responsible for the management of each individual voluntary organisation would expect to be satisfied that implementation of the SUVOC proposal would be likely to be of direct financial benefit to their own organisation, that there would be no SUVOC interference in their own existing procedures, and that the management of each organisation would remain free independently to continue to exercise full purse and policy control over its own individual purposes.

15/6. It is assumed, with regard to the operation of the advisory service, that SUVOC contributors and potential recipients alike would approve of a policy which positively sought to recognise the individual purposes and functions and independent status of charities. Implementation of this policy might require, for example, that:

i. information used for advisory service purposes could be seen by each potential recipient charity to be factually and objectively correct, adequate in content and not negatively critical, i.e. that it "affirm only the good".

ii. within appropriately sized advisory service branch committee-areas, one or two suitable individuals could be appointed by charities, or with their approval, as independent *SUVOC fund allocation advisory service review assessors* (allocation review assessors).

15/7. The role of allocation review assessors, like that of conceptual "SUVOC ombudsmen", could be to investigate complaints, if any, by charities regarding the advisory service, with authority in appropriate cases to recommend direct to the executive officers of the relevant charity-bank branch that an additional fund allocation sum retrospectively should be paid to an individual charity. A possible *advisory service reconsideration procedure* to implement this policy is outlined in appendix one.

15/8. *The concept.* The proposal is that the advisory service be formed to function through independently appointed committees,

on the basis of one *advisory service branch committee* to each charity-bank branch, plus additional parallel *advisory service co-ordination committees* at charity-bank national and regional branch levels.

15/9. Each committee could be expected to have due regard to emergent and little publicised needs and to advise, in accordance with declared policy, a sensitively determined and fair basis for the annual distribution by the appropriate charity-bank branch of the balance of SUVOC charity-money not directly distributed by donors and Donor Groups.

15/10. The trustees of foundation branches also, if they so wished, could receive advisory service assistance to prevent undesigned overlapping of grants towards particular topeconomic development and research projects.[1]

15/11. Unless otherwise decided by voting donors at a meeting of the charity-bank branch concerned, the members of all advisory service branch committees (excepting sub-committees) and advisory service co-ordination committees could be appointed annually as follows: one half by the elected officers or committee for that year of the corresponding charity-bank branch, who also could determine the size of each committee; one quarter by elected representatives (or their nominees) of locality-relevant government within that committee-area; one quarter by registered founder-members of the corresponding confederation branch.

15/12. The idea, outlined in chapter two, is that the charity-bank could be responsible for provision of the administrative underpinning necessary for the operation of an efficient and fully comprehensive advisory service. And that, in as much detail and with such publicity as was considered appropriate, there would be consultation regarding locality-relevant social priorities and desirable fund allocation policies between the different advisory service branch committees and members of corresponding association branches, and/or with members of appropriate neighbourhood, community and intermediary organisations.

[1] See sub-para A1/24iv, page 153.

15/13. Beyond the early stages of implementation of the SUVOC proposal, it is envisaged the fund allocation policy for the following year of each advisory service branch committee could be announced and considered — but not necessarily approved — by donors at the corresponding charity-bank branch's annual general meeting, or otherwise be publicised in sufficient time and with sufficient prominence to enable interested donors within the charity-bank branch area concerned to decide for themselves whether or not, that year, to leave obligatory responsibility for the direction of their gifts to a particular advisory service branch committee.

15/14. As much of the information required for the advisory service already would have been stored by the charity-bank for other purposes, production of necessary advisory service information could prove relatively economical.

Implementation of Policies

15/15. *Charities to choose how they wish to receive funds.* As earlier stated, the governing concept accepted for SUVOC gift distribution is *consultative self-determination.*[2]

15/16. With the co-ordinated use of data processing equipment, a fund allocation system could be developed under which every charity would be entitled to choose the fund allocation source from which funds would be received for each of its branches on account of each separate type of activity carried out in each branch. Fund allocations could be made either directly through advisory service branch committees or, if preferred, indirectly through one or more chosen intermediary or co-ordination voluntary organisations to which the charity was affiliated.

15/17. A fund allocation system along the lines described could incorporate suitable safeguards to prevent overlapping fund allocations and the provision of unnecessarily complex fund allocation sources. The former safeguard would be provided through the co-ordination advisory service committees, later referred to. The latter safeguard would be provided with the agreement of charities

[2] Ref. para 1/30, p.10.

to pay reasonable, but not excessive, charges on account of the provision of multi-source fund allocation facilities.

15/18. SUVOC policy generally might be to provide charities without charge with a single source fund allocation facility.

15/19. For SUVOC advisory service purposes a number of otherwise independent charities might choose to receive fund allocations as a group. This could occur locally, for example, through a youth association's co-ordination body. Also national bodies, concerned say with medical research or different aspects of education, could group together into bodies able to receive funds and to agree the distribution amongst themselves. In these cases it need not follow that the larger bodies would dominate smaller or new emergent bodies. Different arrangements, regarding the internal distribution of SUVOC gifts, mutually could be agreed by the charities concerned to ensure just recognition of need, with the right to appeal to either internal or independent arbitration, and the right for individual charities to contract out of unsatisfactory arrangements the following year.

15/20. Unless it be the particular wish of an individual charity, there need be no arrangement whereby a single advisory service branch committee would cover the whole of SUVOC's fund allocations to a major national charity, for all its different activities throughout the country, which might place too much power in the hands of too few persons. Instead that charity could decide to pay reasonable advisory service charges on account of the provision of multi-source fund allocation facilities, and choose, either nationally or on account of different branch and/or activity-groupings[3], to receive SUVOC gifts through advisory service regional and/or district or sub-regional branch committees.

15/21. *Purposes of advisory service branch committees.* The purpose of every advisory service branch committee could be to advise the officers or committee of the corresponding charity-bank branch on an acceptable basis for detailed fund allocations within that committee-area.

[3] Ref. sub-para A1/9v, p.144.

15/22. It is conceived that in theory it could be the responsibility of the officers of each charity-bank branch to decide whether or not to accept the fund allocation advice they had received. In practice that advice would be almost certain to be accepted, as probably the only constitutional alternative would be for the officers of the charity-bank branch to call a special general meeting at which the voting donors themselves could consider whether or not to accept the advisory service branch committee's recommendations.

15/23. Of its nature, fund allocation is a difficult task. It is therefore suggested that advisory service branch committees could be publicly accountable only for what they had advised, and not for their detailed reasons why they had given particular advice.

15/24. The suggested authority of advisory service branch committees would of course be qualified by two important safeguards: first, donors could choose to direct their own gifts to charities of their own choice; second, the following year the same advisory service branch committee need not be re-appointed.

15/25. An additional purpose of advisory service branch committees could be to co-operate with the charity-bank in publishing *SUVOC charity-directories,* which would contain essential advisory service information and list the voluntary organisations operating within different areas.

15/26. These directories could be useful to donors, intending to distribute their own gifts, who wished first to verify which organisations served particular needs. Thus their publication could assist the work of the advisory service generally and help also to develop more interested discriminating donors, greater public appreciation of the scope of local voluntary sectors and generally increased levels of giving.

15/27. *Purposes of advisory service co-ordination committees.* The suggested purposes of advisory service co-ordination committees are fourfold:

purpose one:
through consideration of additional information from other areas, and through subsequent advice to all advisory service

branch committees, to achieve a constitutionally accepted co-ordinated annual agreement regarding the advisability of transferring responsibility for fund allocation advisory service from one advisory service branch committee-area to another, e.g. from national to regional and/or sub-regional committee-areas or vice versa. This would be the first, and probably most discriminative, function of an advisory service co-ordination committee.

In determining its co-ordinative advice, the committee could have regard, not only to need, but also to the amounts of charity-money received by individual charity-bank branches direct from major corporate and other donors. Some of this charity-money could have been given to benefit charities in general.

purpose two:
to assess, nationally, regionally and sub-regionally the total implications of the proposed recommendations, or provisionally determined advice, of all individual advisory service branch committees and to give appropriate advice to the members of those branch-committees, some of whom might then choose to reconsider their previously provisionally determined fund allocation advice.

In making their assessments, members of advisory service co-ordination committees could observe as far as possible any significant variations from the general pattern of fund allocation policy. No suggestion is made that any observed variation might be wrong, or need amendment. The relevant co-ordination committee simply could ensure that the particular advisory service branch committee receiving advice would be aware of the existence and relative significance of any observed variations.

purpose three:
to verify that SUVOC's constitutionally accepted financial responsibilities to its founder-charities had fully and adequately been met for that year.[4]

[4] Ref. *SUVOC proposed articles five and twelve,* see sub-paras 2/43v and xii, p.26, 28.

purpose four:
to form a standing committee of persons conscious of the purpose of SUVOC to serve the wider interests of the nation at large, and able to liaise as required with members of government, as well as with the associated members of the hexic formation.

15/28. *Further information.* Some detailed administrative suggestions regarding the possible future operation of the advisory service are contained in appendices one and two.

PART FIVE

APPENDICES

APPENDIX ONE

Operation of a Fund Allocation Advisory Service

Introduction

A1/1. *Explanation.* This appendix seeks to illustrate, with some administrative details, the feasibility of the development of sufficiently widespread local participation and reliable sources of information to enable the proposed *SUVOC Fund Allocation Advisory Service* (the advisory service) multicentrally to advise charity-bank branches on the annual distribution of the balance of SUVOC charity-money not directly distributed by donors and Donor Groups.

A1/2. The administrative details, here offered for consideration, envisage a situation where *SUVOC Charity-Bank* is already operating nationally on a sufficiently significant scale to justify the financial investment which would be required to implement a system along these lines.

A1/3. The concept of the advisory service, and its proposed principles, aims and policies, is outlined in chapter fifteen. That chapter and the following section on an information service constitute an introduction to this appendix.

An Information Service

A1/4. *Integrated information accounts.* The advisory service could make good use of detailed and integrated quantifiable information on both the magnitude of services and the variety of functions of individual branches of charitable bodies working in particular areas, and of information on the relationship of those branches to other bodies and to larger co-ordination organisations.

A1/5. Integrated information could include *integrated accounts* or the combination through mutually convenient cross-referring, for

particular locality-relevant and/or need-relevant purposes, of the accounts of different independent charities. Amongst other uses, some of this integrated information could be included in charity directories.

A1/6. *SUVOC charity-directories.* As earlier suggested, assuming adequate finance, a function of advisory service committees could be to co-operate with the charity-bank in publishing locality-relevant voluntary sector directories, or charity-directories, for use by potential donors and other members of the general public. A charity-directory also could be published to include bodies on the Charity Commission's national register of charities.

A1/7. For advisory service administration purposes, each individual branch and separately accountable activity of a charity, should it so wish, could be regarded as a separate *potential recipient charity.* This means the total number of potential entries in charity-directories could number some hundreds of thousands.[1]

A1/8. Charity-directories could contain information covering all known charities and religious bodies, including individual branches of larger bodies, operating within the geographical committee-areas served by the relevant advisory service branch committees. It is envisaged that much, if not all, the information considered useful for inclusion in charity-directories also might prove of potential utility for preparation of other necessary advisory service information, later referred to.

A1/9. Assuming the availability of information from charities, charity-directory information, regarding each individual branch of a potential recipient charity, could include some or all of the following:

[1] The Filer Report in 1975 stated: "counting all local chapters of regional or national groups, there may be as many as six million private voluntary organisations in the United States"; ref. p.36 *Giving in America — Toward a Stronger Voluntary Sector,* Report of the Commission on Private Philantropy and Public Needs. In 1981 *United Way of Merseyside* published a Voluntary Sector Directory which identified four thousand different charitable bodies serving within Merseyside Metropolitan Region. This latter figure did not separately identify all the different charitable activities taking place within multi-purpose buildings such as Community Centres and Church Halls. *The Future of Voluntary Organisations,* Report of the Wolfenden Committee, p.34, referred to 4,000 different voluntary organisations in the city of Birmingham.

i. the branch's name and address and its charity registration number.

ii. similar details, if applicable, regarding the national and/or regional head office of the branch.

iii. the identities and functions of senior executives, including local branch executives.

iv. whether or not, for *any* SUVOC advisory service administration purposes, the branch had registered as a separate potential recipient charity. For example, within a Community Centre Association, a Senior Citizens' Club might choose to receive fund allocations through the Local Age Concern, rather than through the Community Centre.

v. the branch's main activity and its different subsidiary activities, e,g, main activity — a youth club, subsidary activity — old people's welfare. *Note:* for advisory service purposes, the term *activity-grouping* could refer to a group of need-relevant activities, with agreed common terminology and abbreviations being used to describe all SUVOC recognised activity-groupings.

vi. the approximate size of the branch. *Note:* an indication of size (as a whole and/or by different activity-groupings) could be provided through agreed statistical classifications. For example, by reference to charities' approximately estimated and declared annual locality-relevant expenditure (less, possibly, exceptional expenditure): e.g. *group one,* to be, say, up to £10,000; *group two,* to be, say, between £10,000 and £25,000; etc.

vii. the relationship of the branch to related national and other charities, including the names of any co-ordination or intermediary voluntary organisations to which it was affiliated.

viii. the committee-area, for each separate activity-grouping, through which the branch had requested to receive SUVOC fund allocations. This could be direct through an advisory service national, regional or district branch committee, or through a particular co-ordination or intermediary voluntary organisation, or through its own national, regional, district or local branch.

ix. the names and activities of those unregistered charities, if any, on whose behalf it had agreed to serve as an "umbrella organisation".[2]

A1/10. The information on activity-grouping, referred to in the previous sub-paragraph v, simultaneously might be presented in two ways:

i. through inclusion with the other information stated under the name of the charity.

ii. through the provision, either elsewhere within the same charity-directory or within another directory, of additional information on SUVOC recognised activity-groupings. Here the name of each known potential recipient charity, including unregistered charities, could be listed separately under the name of the mediating body through which it had elected to receive fund allocations in furtherance of each activity-grouping. The mediating body could be a stated advisory service branch committee or a non-SUVOC administered body, perhaps the potential recipient's national or regional branch.

A1/11. If desired, national and area *SUVOC annual reports* and other information also could be included in charity-directories. For example, it should be feasible for the charity-bank's data processing equipment to be programmed to provide annual figures on locality-

[2] Ref. Footnote 2, p.111, this distribution through an "umbrella organisation" could be subject to the umbrella organisation being satisfied that the unregistered charity was carrying out wholly charitable work of a type the umbrella organisation was both willing and constitutionally authorised to finance.

relevant free-will giving and fund allocations in support of particular activity-groupings.

A1/12. Charity-directories could be distributed where they would be most useful. This might include firms with staffs large enough to warrant the expense of distribution, and certain other organisations, such as libraries, post offices, etc., willing to accept them for general public reference.

A1/13. Some charity-bank branches might decide to include within their charity-directories useful SUVOC appeal and other information and, possibly also, advertisements.

A1/14. Whether to charge for charity-directories could be a local decision. In some areas local authorities might be willing to contribute towards the cost of preparation of charity-directories, in recognition of their utility to the local authorities themselves.

A Co-ordinated Multicentral Operation

A1/15. *The concept.* For successful development of the proposed co-ordinated multicentral national advisory service it is envisaged that, in addition to the advisory service affiliated members and sub-committees referred to later, five different kinds of advisory service committee could be created as follows: an advisory service national co-ordination committee; an advisory service national branch committee; advisory service regional co-ordination committees; advisory service regional branch committees; advisory service sub-regional (or district) branch committees. See table one on page 148. In addition advisory service sub-district (or local) branch committees could be useful.

A1/16. It should be feasible for each different advisory service committee to be supplied, through standardized charity-bank administrative procedures, with specially prepared advisory service information to further its particular policies, purposes and functions. Table two on page 150, and the tables in appendix two, indicate some of the advisory service information which could be made available.

A1/17. *Advisory service affiliated members.* Valuable grassroots advisory service assistance could be developed through the

widespread recruitment, as *advisory service affiliated members* (affiliated members), of suitable individuals willing and able to provide a two-way communication link between, on the one hand, the advisory service and, on the other, both potential recipient charities and community members served by those charities.

A1/18. It is envisaged that some affiliated members would assist only in the collection and verification of information on behalf of the advisory service sub-committees, later referred to, whilst other affiliated members also would serve as full members of those sub-committees.

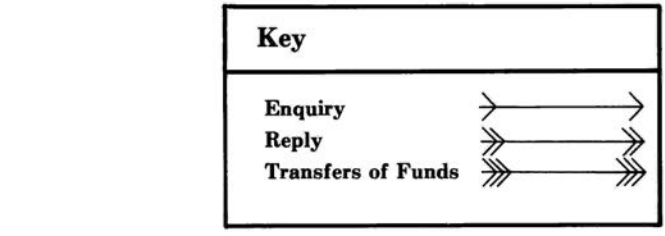
A1/19. In order generally to establish responsible independent community participation in the impartial work of the advisory service, it is suggested that suitable individuals could be nominated for affiliated membership by any community group or body. Thus, individual nominations could be received from, amongst others, any of the following: a potential recipient charity; an association branch; a branch of a public-sector-of-the-community body willing and able to assist in the work of the advisory service, e.g. the social science department of a university and/or the medical social work department of a local hospital; a local street, neighbourhood or community association council; any other democratically recognised group of existing and potential consumers of voluntary social service, i.e. of charities' present and possible future customers.

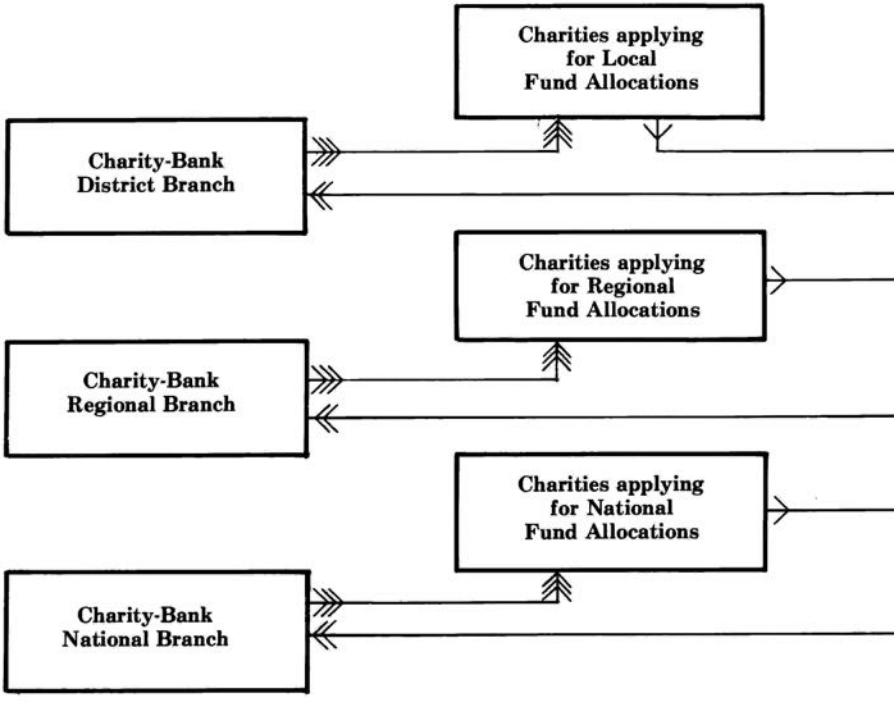
A1/20. Nominations for affiliated membership could be with reference to the work of a specific advisory service branch sub-committee. A nomination having been made, the members of the advisory service branch sub-committee concerned democratically could decide whether or not to recognise the nominated individual as an affiliated member.

A1/21. Nomination as an affiliated member could be subject to the agreement of the individual concerned with general SUVOC policy regarding the presentation of advisory service information.

A1/22. This policy might require that all advisory service information submitted by affiliated members be in writing in order that, as previously stated, it could be seen on request by each

TABLE ONE *A Possible Fund Allocation*





Advisory Service Communications Chart

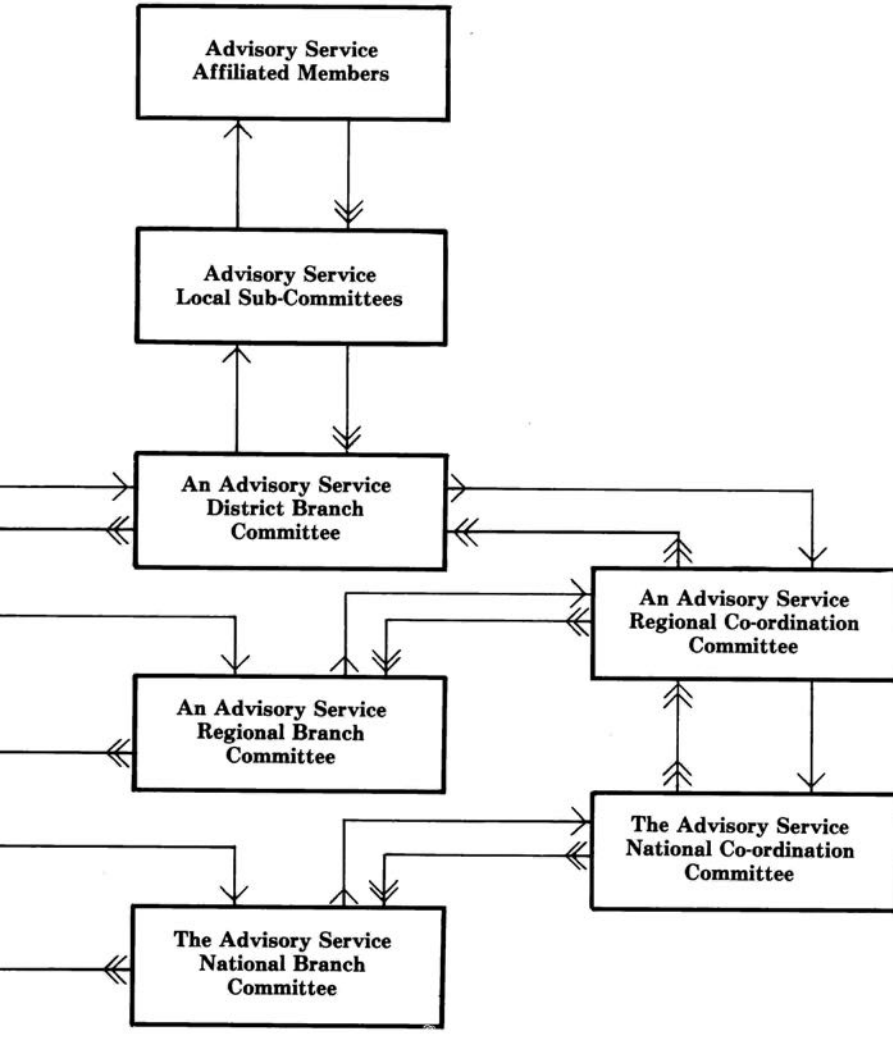


TABLE TWO *Types of Locality-Relevant*

Advisory Service Designation	**Master Annual Advice Sheets** *by names of potential recipients*
Affiliated Members	Preliminary Advice Sheets
Local Sub-Committees	Preliminary Advice Sheets
Local and District Branch Committees	Preliminary Master Sheets and Master Sheets
Regional Branch Committees	Preliminary Master Sheets and Master Sheets
National Branch Committee	Preliminary Master Sheets and Master Sheets
Regional Co-ordination Committees	Integrated Master Sheets
National Co-ordination Committee	Integrated Master Sheets

Fund Allocation Advice Sheets Which Might Be Supplied

	Functional Annual Advice Sheets *by potential recipients' activities*	**Special Purpose Advice Sheets** *re: special appeals and applications for foundation grants*
	Preliminary Advice Sheets	Preliminary Advice Sheets
	Preliminary Advice Sheets	Preliminary Advice Sheets
	Preliminary Functional Sheets and Functional Sheets	Preliminary Special Grant Advice Sheets and Special Grant Advice Sheets
	Preliminary Functional Sheets and Functional Sheets	Preliminary Special Grant Advice Sheets and Special Grant Advice Sheets
	Preliminary Functional Sheets and Functional Sheets	Preliminary Special Grant Advice Sheets and Special Grant Advice Sheets
	Integrated Functional Sheets	Integrated Special Grant Advice Sheets
	Integrated Functional Sheets	Integrated Special Grant Advice Sheets

potential recipient charity to be factually and objectively correct, adequate in content and not negatively critical.

A1/23. In case of any disagreement regarding implementation of this policy between a potential recipient charity and an affiliated member, the procedure could be for the relevant information to be verified at a meeting between the parties concerned and an appropriate group of advisory service branch committee representatives and/or fund allocation review assessors, as later referred to.

A1/24. Affiliated members could assist the work of the advisory service in a number of ways, including the following:

i. liaison with potential recipient charities regarding advisory service work generally including, if requested, assistance in preparation of applications for fund allocation.

Note: it is envisaged that some charities' openness to fund allocations would be largely, if not fully, covered through presentation to the advisory service of a copy of their latest annual report and accounts.

ii. liaison with their advisory service branch sub-committee regarding advisory service work generally including, on occasions, the collection from potential recipient charities of additional available advisory service information.

iii. collection, on behalf of their advisory service branch sub-committee, of responsibly verified information regarding the social priorities to be given to particular fund allocation applications.

Note: in accordance with the suggested advisory service policy on information, the identity of all sources of information would be given recognition. These sources of information could include: potential recipient charities; representative members of association branches; representative members of local street, neighbourhood and

community association councils; other suitable qualified persons and bodies.

iv. the provision, as needed, of other varied advisory service assistance.

Note: this assistance could include work on behalf of the foundation, such as the giving of occasional assistance in preparation of a potential recipient charity's application for a foundation project grant, and the collection and verification, on behalf of the advisory service branch sub-committee, of relevant information regarding a project currently being considered for a possible foundation grant.

v. full participation in the work of an advisory service branch sub-committee.

A1/25. It is envisaged that affiliated members would also tend to reinforce and support the proposed topeconomic development planning work of the association.

A1/26. *The role of advisory service branch sub-committees.* The suggested role of an affiliated member in relation to an advisory service branch sub-committee could be analogous to the suggested role of an advisory service branch sub-committee in relation to its *appointing committee,* i.e. the advisory service branch committee which had appointed it.

A1/27. The purpose of an advisory service branch sub-committee could be to assist its appointing committee with specialist fund allocation advice, such advice to relate to either locality-relevant or particular activity-grouping fund allocations.

A1/28. Whilst advisory service branch sub-committees could be appointed as required by advisory service national, regional, and sub-regional branch committees, it is envisaged that the majority of advisory service branch sub-committees would be appointed by advisory service sub-regional or district branch committees to give locality-relevant fund allocation advice.

A1/29. The role of an advisory service branch sub-committee could be as follows:

i. recruitment and training of affiliated members in advisory service information collection and verification procedures.

ii. co-ordination of the work of affiliated members to ensure provision to that advisory service branch sub-committee of an adequately comprehensive supply of reliable verifiable advisory service information.

iii. verification, where appropriate, and correlation, in a readily assimilable and comprehensive form, of collected advisory service information.

iv. examination and consideration of the correlated advisory service information, and preparation, for further consideration by the appointing committee, of *preliminary fund allocation advice sheets* (preliminary advice sheets), the suggested form of which is referred to in appendix two.

v. the provision, as needed, of other varied advisory service assistance. This assistance could include the preparation, for use by the appointing committee, of reports regarding projects currently being considered for possible foundation grants.

A1/30. There could be a simple constitutional procedure regarding the appointment of members of advisory service branch sub-committees. For example, it might be agreed that only affiliated members and members of advisory service branch committees could be eligible to serve on advisory service branch sub-committees, and that all appointments of members would be reviewable annually, i.e. that individual appointments would not be made for a period exceeding the life of the appointing committee. Policy consideration could be given also to the debatable question as to whether it would be in the interests of SUVOC that individuals should be appointed members of advisory service branch sub-committees only if their proposed appointment had received substantial approval. This could be by, say, a two-thirds or three-quarters majority vote of approval by the appointing committee members.

A1/31. It is assumed that the particular purpose and function of each advisory service branch sub-committee, and the names of its members, would be published in suitable SUVOC literature, such as the locality-relevant charity-directory.

A1/32. *The roles of advisory service branch and co-ordination committees.* Suggestions were outlined in the preceding chapter regarding the composition, basis of appointment and possible purposes of advisory service national, regional and district branch committees and co-ordination committees.

A1/33. It is anticipated the main function of each advisory service branch committee would relate to detailed fund allocations within its own committee-area. And that the concluding annual function of each advisory service branch committee would relate to the checking, approval and notification, direct to its corresponding charity-bank branch, of nationally co-ordinated advisory service recommendations applicable to the total sum available for fund allocations through that particular charity-bank branch.

A1/34. To facilitate co-ordinated operation of the whole multicentral national advisory service, it is conceived that advisory service branch committees constitutionally could agree to follow harmonizing recommendations, received by them from advisory service co-ordination committees, regarding the exact amounts of charity-money to be available for detailed fund allocations through each individual advisory service branch committee.

A1/35. Assistance each year to achieve a national co-ordinative service agreement could be provided through the priority supply by each individual advisory service branch committee, to its nearest affiliated advisory service co-ordination committee, of all information considered relevant and necessary for the co-ordinative purpose.

A1/36. Prior to knowing the exact amount of charity-money available to it for detailed branch fund allocations, the members of some advisory service branch committees might consider it worthwhile, as a preliminary exercise, to assume a hypothetical sum available for detailed distribution through their advice, and on that basis to make provisional forecasts of the approximate detailed

fund allocations considered advisable should their adopted hypothesis prove approximately correct.[3] Co-ordination members of the association also might be consulted on this subject.

A1/37. Provisional forecasts would of course be liable to subsequent amendment in the light of new or additional information to be supplied later by potential recipient charities. Some amendments would also be required when the exact sum available for final allocation was known.

A1/38. Once co-ordinated annual agreement had been reached regarding the exact amount of charity-money available for detailed fund allocations by an advisory service branch committee, the main function of that committee could begin.

A1/39. In carrying out their detailed fund allocation work, each advisory service branch committee could give whatever advice it considered most appropriate, provided always that in giving its advice appropriate recognition and consideration would be given also to recommendations received by it from the relevant advisory service co-ordination committee. It is assumed that advisory service branch committees would consult with appropriate advisory service co-ordination committees prior to communication to charity-bank branches of their detailed fund allocation advice.

A1/40. As an additional function, if requested, members of advisory service branch committees serving smaller committee-areas might be willing to assist as advisers to advisory service national and regional branch committees. For this latter purpose the advisory service sub-regional or smaller branch committees could complete preliminary fund allocation advice sheets similar in design to those referred to in appendix two.

Fund Allocation Policy Considerations

A1/41. *Annual distribution dates and interim fund allocations.* It is envisaged that, with pre-planning and mutual co-operation, it should be feasible within nine months of the date of SUVOC's

[3] These provisional forecasts could be of assistance in operating the procedure for provisionally directed gifts, which was suggested in chapter twelve, ref. paras 12/25 to 12/30, p.113.

financial year-end to achieve satisfactory completion of the whole multicentral co-ordinated operation of the national advisory service. Thus if, for example, the assumed SUVOC financial year-end date be 5th April, it might be expected that the end of the calendar year, or thereabouts, would be the target final fund allocation date, i.e. the date for the annual distribution to potential recipient charities of final fund allocation payments made through charity-bank branches on the advice of advisory service branch committees.

A1/42. It might be advisory service policy to recommend to the charity-bank the making of interim fund allocations approximately six months before the target final fund allocation payments date, i.e. about three months following the SUVOC financial year-end. This period of three months following the year-end, prior to interim fund allocations, would allow reasonable time for donors and Donor Groups to decide the proportion of their total gifts which they wished to distribute themselves using charity vouchers.

A1/43. It could be agreed SUVOC policy that, following the expiration of the three month period, no further charity vouchers would normally be issued for distribution through Donor Groups in respect of the previous year, and that the balance of monies raised would thereafter be held by the charity-bank for interim and final fund allocations in accordance with the recommendations of the advisory service.

A1/44. After consultation with their nearest advisory service co-ordination committee, and to save administrative work, some advisory service branch committees might use a simple standard procedure to calculate the advisable amount of interim fund allocations to be distributed. For example, the interim allocation to an individual potential recipient charity could be a fraction of its general fund allocation the previous year. The term *general fund allocation* means excluding supplementary, special and exceptional capital project fund allocations, if any.

A1/45. *The role of the association.* Whilst it could be inadvisable for individual charities to be involved directly in detailed fund allocations, it would be desirable for the knowledge and experience

of members of the association to be fully utilized in the work of the advisory service.

A1/46. This knowledge and experience could be contributed partially through study by advisory service branch committees of the topeconomic development planning work of corresponding association branches. In addition, as has been stated, it is envisaged that advisory service recommendations could be given by association members in as much detail and with such publicity as was considered appropriate.

A1/47. If minimum publicity were to be requested, advisory service recommendations confidentially could be supplied through association members individually completing questionnaires on social priorities.[4]

A1/48. *Allocation review assessors.* In order to ensure both that operation of the advisory service did in fact meet with the general approval of members of the association, and that the fact of that approval was known to donors, it is suggested that the association's branches could be invited each year to nominate for appointment a select number of suitable and acceptable persons to serve as *advisory service allocation review assessors* or their equivalent.

A1/49. The exact number of allocation review assessors to be appointed in respect of any individual advisory service branch committee could be determined by the members of the individual advisory service branch committee concerned, who also annually could decide whether to accept for appointment as allocation review assessors all, or merely some, of the nominated individuals.

A1/50. The purpose of allocation review assessors could be to examine and constructively to comment, both to the advisory service and to their nominating body, on the work of advisory service branch committees and branch sub-committees, either before and/or after the work of the committee concerned had been reviewed by an advisory service co-ordination committee.

A1/51. It is envisaged that in time the function of allocation review assessors could widen and deepen within committee-areas into the function of mutually trusted and respected two-way liaison and

[4] Ref. paras 14/16 to 14/18, p.129, 130.

meditation between members of the association and of the advisory service.

A1/52. It is further assumed that the names of the appointed allocation review assessors would be published annually in suitable SUVOC literature, such as charity-directories, and that at national and regional levels allocation review assessors could co-operate together to provide the advisory service reconsideration procedure referred to below.

A1/53. *Advisory service reconsideration procedure.* Should a potential recipient charity within any committee-area desire further consideration of the amount of its fund allocation, it might be entitled constitutionally to request either directly or through its association branch that its fund allocation be reconsidered by an *advisory service review panel* to be formed by two or three allocation review assessors.

A1/54. It might be advisable under certain circumstances for some or all of the allocation review assessors invited to serve on this panel to be appointed from outside the committee-area concerned; but the important point would be clearly to establish the suitability and acceptability of the chosen allocation review assessors from the viewpoints of existing and potential donors, as well as from the viewpoints of the potential recipient charity and the advisory service branch committee.

A1/55. A duly appointed advisory service review panel could be entitled as follows:

i. to examine all relevant advisory service information taken into account by advisory service branch committees and sub-committees including, if considered necessary, advisory service information relating to other potential recipient charities.

ii. to meet representative members of the advisory service branch committee and sub-committees concerned.

iii. where appropriate, to make to the advisory service branch committee a specific recommendation for further fund allocation to benefit the particular potential recipient charity.

iv. to forward to the officers of the corresponding charity-bank branch a copy of any advisory service reconsideration procedure recommendation.

A1/56. On receipt from a review panel of a recommendation that the amount of fund allocation be increased, the advisory service branch committee could consider whether it wished to revise the advice it had previously given in respect of fund allocation to the potential recipient charity concerned.

A1/57. Equally, on receipt of their report from the review panel, the officers of the corresponding charity-bank branch could be authorised to accept or to reject that recommendation, but it is assumed that first they would consult with the advisory service branch committee.

A1/58. Should the advice of an advisory service branch committee be amended, following a recommendation from a review panel, it is assumed the officers of the charity-bank branch forthwith would make a further fund allocation payment. Such payment could be a charge against either the current year's SUVOC income or any balance which might have been carried forward from the previous year.

A1/59. In accordance with SUVOC proposal article two, no advisory service reconsideration procedure application could be given publicity which might inconvenience the potential recipient charity concerned unless such publicity had been initiated by the charity.

A1/60. Subject to this safeguard, it could be useful for charity-bank reports each year to contain quantified information, applicable to the corresponding advisory service branch committee, regarding both the number of advisory service reconsideration applications which had resulted in increased fund allocations and the total sum involved.

A1/61. Additional information also might be published on the number of cases, if any, where specific advisory service reconsideration procedure recommendations had not been supported by the advisory service branch committee, and on the resultant charity-bank decisions.

Phased Implementation Policies

A1/62. *One initial policy.* In some committee-areas there could be a gap of several years between the receipt of substantially increased free-will giving of monetary aid and the development, as planned, of widespread grassroots advisory service assistance. In all cases, however, there should be available some information on locality-relevant social needs and the annual accounts and reports of the potential recipient charities.

A1/63. Pending full development within their committee-areas of their planned grassroots advisory service organisations, some individual advisory service branch committees initially could choose to operate a relatively simple method of fund allocation, with the knowledge that in due course more detailed need-relevant advisory service consideration and advice could be supplied.

A1/64. One comparatively simple initial fund allocation policy could be an approach along the following lines. From the total sum available for detailed fund allocations within a committee-area, the advisory service branch committee provisionally might allocate one portion for *standard fund allocations* and one portion for *special fund allocations.*

A1/65. After inviting fund allocation applications and considering these in accordance with committee policy, the portion available for standard fund allocations could be distributed amongst all accepted applicant potential recipient charities on a standard basis, for example, as an approximately similar percentage of that charity's annual overheads or of its voluntary or subscription income. The portion available for special fund allocations discretionally could be distributed to assist the work of the foundation and/or to top-up standard fund allocations to particular potential recipient charities. This latter purpose could include not only potential recipient

charities serving special needs but also those whose socially desirable work was comparatively little known. In some areas, the initial policy might be to make only special fund allocations.

A1/66. *Co-operation with intermediary bodies.* Some local *Councils for Voluntary Service,* or their equivalent, could be willing from the outset to take a leading part in assisting the work of fund allocation. It is suggested this co-operation should be encouraged as it would allow advice and consultation about the allocation of funds to take place through existing established bodies.

A1/67. Whatever initial fund allocation procedures and policies were locally adopted, almost inevitably these would in due course be amended to meet changing circumstances, arising from the anticipated growth in payroll giving through the charity-bank, and consequently increased demands for local fund allocation services.

A1/68. For the reason stated the initial procedure here suggested, for co-operation with co-ordination or intermediary voluntary bodies in the task of fund allocation, is viewed, not as an alternative to the earlier suggested fund allocation advisory service, but simply as a beginning.

A1/69. This would be likely to lead in due course to the development of a somewhat different and more sophisticated fund allocation advisory service, which could continue to encourage maximum donor involvement and support.

A1/70. The following procedure for distributing funds, which has the author's full support, was recommended to him in a memorandum written by the Chief Executive of a local Council for Voluntary Service.[5] It is based on experience gained in Liverpool in advising local government on the distribution of Urban Aid Funds.

A1/71. For purposes of consistency in this book, the name SUVOC is here used in place of the name *United Way of Merseyside* which appeared in the memorandum.

[5] The memorandum quoted in para A1/72, was written in 1981 by Malcolm Payne, *Liverpool Council for Voluntary Service.*

A1/72. The suggested procedure for a number of *Councils for Voluntary Service*[6] (C.V.S.) to distribute funds from SUVOC, within a Metropolitan County, is as follows:

i. SUVOC would allocate relevant income to funds for each Metropolitan District and to a County-wide fund, and announce annually the sum for distribution in each fund.

ii. C.V.S. would publicise the proposed arrangements for distribution, and invite applications, offering a suggested format, but no application forms.

iii. C.V.S. would receive applications, and divide them into batches for each area.

iv. C.V.S. would call a public meeting in each area, to enable the election of an advisory committee from representatives of the organisations making application to the fund for that area, and the advisory committee would meet to place the applications in priority order, A (top priority), B, C, and D.

v. C.V.S. would call a subsequent public meeting with an independent chairman at which organisations not in the top priority group would be invited to put their case to the advisory committee for an improvement in their standing. The voting and discussion in the committee would be public; delegates from Donor Groups could hear the cases made, and see that the work of the committee was efficiently carried out.

vi. Applications in their priority groupings would be forwarded to local groups of delegates from Donor Groups to make the decisions, bearing in mind the priority accorded by the advisory group.

[6] Malcolm Payne envisaged the suggested service here outlined could be supplied through *Merseyside Council for Voluntary Service,* in co-operation with *Liverpool Council for Voluntary Service* (which had experience of this type of work and is the largest and longest established C.V.S. in Merseyside) and in association with all other interested local C.V.S's. in the area which were willing and able to assist.

vii. During the process no changes in the amount of money requested for particular purposes would be permitted; requests which seemed excessive for the purpose proposed would have less chance of success.

viii. C.V.S. would administer a technical committee to give advice on applications which required planning permission, architectural advice and other technical matters before the advisory committee did their work.

ix. When making applications, the organisation would be invited to nominate a representative, who would be their candidate in the election to the advisory committee, and who would be responsible for making their case at the second public meeting. Representatives elected to the advisory committee would not be permitted to vote on any projects that they were themselves connected with, and a list of these would be required after the election.

If they wished, advisory committees could devise and state a set of criteria on which they would make decisions, and this could also be sent to the delegates from Donor Groups making the final decisions for their assistance.

The constitution of advisory committees would be proposed by C.V.S. and would be subject to change by the initial public meeting.

x. By using this procedure, confidence in SUVOC's procedures by voluntary groups would be enhanced because they would be seen to permit democratic involvement.

From the point of view of donors and the public, the advisory committees would gain in stature because they would be comprised of people acceptable to others in their fields as members of the committee, and because the whole process could be seen in public. The advice could therefore be clearly respected.

The procedure of the meeting would allow people to state their case and see the grounds on which decisions were taken,

whilst avoiding unseemly wrangles between competing organisations.

And it would leave the final decisions with SUVOC donors.

A1/73. *Administration.* More detailed administrative suggestions on the operation of the advisory service are contained in appendix two.

APPENDIX TWO

Information for Advisory Service Committees

Fund Allocation Advice Sheets

A2/1. *Contributions towards expenses.* It has been suggested earlier that advisory service policy might be to provide charities without charge with a single source fund allocation facility, i.e. one fund allocation through one advisory service branch committee, in support of the whole of that charity's work.

A2/2. In addition to that facility it could be agreed that should a charity so wish, in return for a reasonable financial contribution towards consequent extra advisory service administration expenses, the charity could specify those of its individual branches and different activities which were to be regarded for advisory service purposes as separate potential recipient charities.

A2/3. In due course advisory service administration charges could be reduced or waived totally should it be considered that, if charities were more positively encouraged to provide detailed information regarding their various activities within different localities, the likely result could be increased public recognition of the value of the voluntary sector and consequent greater donor generosity towards it.

A2/4. *Annual advice sheets.* Basic information on financial distributions made to charities by the charity-bank could be stored by the charity-bank for advisory service purposes. It is envisaged that each year the charity-bank would produce locality-relevant *fund allocation annual advice sheets* (annual advice sheets) for use by each separate advisory service branch committee. Tables one and two in the previous appendix, on pages 148 and 150, and the further

tables in this appendix indicate in abridged form one possible way in which this information might be supplied.

A2/5. Annual advice sheets could be used by advisory service branch and co-ordination committees to advise on fund allocations towards potential recipient charities' normal annual expenditure. The possible additional use of preliminary advice sheets and special grant advice sheets is later referred to.

A2/6. In furtherance of the suggestion that every charity should be entitled to choose the fund allocation source from which funds could be received for each of its branches on account of each separate type of activity carried out in each branch, it is envisaged that two types of annual advice sheet would be required as follows:

i. *master annual advice sheets* (master sheets, see table three, on page 170): on these sheets the individual potential recipient charity's name could appear in, say, alphabetical sequence, thereafter to be entered:

— *main office information,* being a record of the financial distributions, including fund allocations, made during the year through the charity-bank to the main office (or main local office) of each potential recipient charity. For administrative economy, total donors' gifts through distributions of charity vouchers could be listed under main office information irrespective of whether some charity vouchers had been directly distributed to an individual branch or in support of a particular activity.

— *secondary information,* being locality-relevant information, relating to each different activity for which direct fund allocations had been requested by a named branch or section of a potential recipient charity. Should a potential recipient charity request simply a single block fund allocation, in respect of all branches and activities, the main location and main activity only of the potential recipient could be shown.

— *indirect distribution information*, below the name of each potential recipient charity, which was willing to serve as an "umbrella organisation", could be stated the names of those unregistered charities on whose behalf the potential recipient was willing so to serve.[1]

ii. *functional annual advice sheets* (functional sheets, see table four, on page 174): on this second type of annual advice sheet, the secondary information from the master sheets could be summarised by activities.

A2/7. The provision of two types of annual advice sheets would assist in the work of cross-referring between total fund allocations to individual potential recipient charities and total fund allocations in support of particular activities. Production of a second type of annual advice sheet could prove comparatively inexpensive as no additional computer input would be required.

A2/8. Annual advice sheets could include six interrelated financial information columns, based on the year-of-gifts[2], and a remarks column. The idea is for the first five of these columns in the case of branch committees (and six in the case of co-ordination committees) to contain information printed by the charity-bank. The tentative suggestion regarding the information to be supplied in these columns is as follows:

— *first column*, to list, for comparison purposes, the amounts of fund allocations made last year, in respect of the previous year's gifts, through that advisory service branch committee.

— *second column*, to list, for comparison purposes, the amounts of gift distributions by donors, i.e. the value of charity

[1] See Footnote 2, p.111, ref para 12/14, and sub-para A1/9ix, p.145. See also *tables three and four* following.

[2] Here, for advisory service purposes, the term *the current year* or *this year* refers to the SUVOC financial year in progress, *last year* refers to the financial year just ended, and *the previous year* refers to the financial year preceding *last year*. During *the current year* or *this year* the charity-bank would receive contributions from donors. It would not be until the following financial year that some of these gifts would be available for allocation through the advisory service by which time they would have become *last year's gifts*.

vouchers distributed by donors, relating to the previous year's gifts[3], which were recorded on last year's annual advice sheets in respect of the period from the beginning of that financial year up to the date when the annual advice sheets were prepared.

— *third column,* to list the remaining amounts of gift distributions by donors, relating to the previous year's gifts, which were made during last year between the date when that year's annual advice sheets were prepared and the date of the financial year-end.

— *fourth column,* to list the amounts of gift distributions by donors, relating to the last year's gifts, which had been made, in the current year, during the period between the beginning of the financial year and the date when the annual advice sheets were prepared.

— *fifth column,* to list the amounts of interim fund allocations, if any, relating to last year's gifts, which had been approved by that advisory service branch committee for distribution through the charity-bank during the current year.

— *sixth column* (to be completed by members of the committee in the case of advisory service branch committees), to list the amounts of final fund allocations advised by that branch committee for distribution at, say, the end or thereabouts of the current calendar year.

— *seventh column* (a remarks column), to be used to draw the attention of advisory service branch committees to relevant

[3] It has been assumed, for simplicity, that all gift distributions made by donors in the *last year* related to gifts which those donors had made to the charity-bank during *the previous year,* ref. Footnote 2 opposite. Should a situation arise where a significant number of donors made earlier distributions of gifts, colour or other distinctions could be made annually in the appearance of charity vouchers and an administrative system introduced to supply advisory service branch committees with the relevant information. This could be noted in the *Remarks Column* (seventh column) referred to later.

TABLE THREE *Simplified Abridged Specimen Of*

For Use by SUVOC Fund Allocation				
Names of Potential Recipients *Note 1*	Allocation Basis *Note 2*	Location *Note 3*	Activity *Note 4*	
Anyplace Assoc.*	BA	Downtown*	Youth Work*	
(Townlads)	UC	Downtown	Football	
Boys' Brigade	SA	Downtown*	Bn HQ, Youth*	
Boys' Brigade	SA	Downtown	1 Coy, Youth	
Boys' Brigade	SA	Overhill	4 Coy, Youth	
Boys' Brigade	SA	Riverside	2 Coy, Youth	
Boys' Brigade	SA	Sandybeach	3 Coy, Youth	
Children National	NR	London*	Youth Work*	
Community Assoc.	SA	Riverside*	Senior Citizens*	
Community Assoc.	SA	Riverside	Holidays Disabled	
Community Assoc.	SA	Sandybeach	Scout Troop	
Community Assoc.	SA	Sandybeach	Club, Disabled	
Community Assoc.	SA	Sandybeach	Youth Club	
County Old People	NA	Faraway*	Admin Office*	
County Old People	SA	Downtown	Senior Citizens'	
County Old People	SA	Riverside	Senior Citizens'	
XYZ Illness	GA	London*	Medical Research*	
XYZ Illness	SA	Sandybeach	New Research	

A Master Annual Advice Sheet *Key to Notes on next page*

Advisory Service Middletown Branch Committee

Previous Year's Gifts *Note 5*			Last Year's Gifts *Note 5 and 7*			Remarks *Note 10*
Total Allocations	Donors' prior to Allocation	Donors' post Allocations	Donors' to date	Interim Allocations	Final Allocations	
£	£	£	£	£	£	
				26,920	*92,000*	Amounts b/f from other sheets
2500	450	40	800	1000	*2,500*	£400 Townlads (nil prev. year)
—	—	—	—	—	—	
500	400	200	550	200	*500*	
300	—	—	—	120	*200*	
200	—	—	—	80	*200*	
200	—	—	—	80	*150*	
250	—	—	—	100	*180*	
—	500	100	1050	—	—	
650	800	250	1200	260	*600*	
250	—	—	—	100	*250*	
100	—	—	—	40	*100*	
150	—	—	—	60	*200*	
500	—	—	—	200	*400*	
1000	750	50	1100	400	*1,400*	
750	—	—	—	300	*520*	
250	—	—	—	100	*200*	
100	200	60	350	40	*100*	
—	—	—	—	—	*500*	
			Totals	**£30,000**	***£100,000***	*See Note 9.*

KEY TO NOTES ON

Re: Abridged Specimen Master

Note 1. ***Alphabetical List of Potential Recipients:*** on *master annual advice sheets* the names of potential recipient charities (other than unregistered charities) are listed alphabetically. An asterisk denotes an "umbrella organisation" which is conditionally willing to assist the unregistered charity(ies) whose name(s) are listed in parenthesis directly beneath.

Note 2. ***Allocation Basis:***

i. main office information

BA block allocation: denotes a request by a local potential recipient charity, serving solely within the advisory service branch committee-area, for one block fund allocation through its main office in respect of its total locations and activities.

GA general appeal: denotes a request for fund allocation to the main office of a potential recipient charity which provides services on a large region or nationwide basis, but which may or may not provide direct services within the boundaries of that committee-area. See *Note 2.i.a.* below.

NA neighbouring area: denotes a request for fund allocation to its main office from a potential recipient charity which also serves within one or more neighbouring advisory service branch committee-areas. No indication is given in the key whether the main office of the potential recipient charity is located within or outside the advisory service branch committee-area concerned. See *Note 2.i(a).* below.

NR no request: denotes that no funds are requested from that advisory service branch committee, probably because the charity has applied for fund allocations through a national or regional advisory service committee. The suggested purpose of this entry on fund allocation sheets is to provide an accounting reconciliation record, within the committee-area, of gifts made by donors through distributions of charity vouchers, i.e. of donors' distributions.

Note 2.i(a): GA and NA requests could be assumed to be for block allocations unless (as in Tables Three and Four) accompanying requests were made for separate allocations in respect of specified activities.

ii. secondary information

SA separate allocations: denotes a request by a potential recipient charity for separate fund allocations on behalf of each of its separately listed locations and activities operating within the advisory service branch committee-area.

TABLES THREE AND FOUR

and Functional Annual Advice Sheets

Note 2. (continued)

iii. indirect distribution information

UC unregistered charity: denotes that the information refers to an unregistered charity whose name is shown in parenthesis and on whose behalf the potential recipient named directly above is conditionally willing to serve as an "umbrella organisation".

iv. consolidated information for functional annual advice sheets

Summary: denotes consolidation of the fund allocations and donors' gifts, listed beneath, related to the activity stated.

Note 3. ***Location:*** an asterisk denotes the potential recipient's main office.

Note 4. ***Activity:*** an asterisk denotes the potential recipient's main activity.

Note 5. ***Year-of-Gifts:*** the attention of the reader is drawn to Footnotes 2 and 3 on pages 168 and 169, ref, para A2/8.

Note 6. ***Potential Recipients by Activities:*** on *functional annual advice sheets* the names of potential recipient charities are listed under locality-relevant participation in particular activities. An asterisk denotes an "umbrella organisation" which is conditionally willing to assist the unregistered charity(ies) whose name(s) are listed in parenthesis directly beneath.

Note 7. ***Interim and Final Allocations:*** last year's interim allocations have been calculated at 40% of the previous year's total allocations. Final allocation figures are shown in italics to denote that the figures have been entered by the committee.

Note 8. ***Activity Group Allocations:*** the total amounts of allocations and donors' gifts relating to each activity group are shown in bold type in parenthesis. The amounts are shown in parenthesis to indicate that the figures are duplicated by the secondary information beneath.

Note 9. ***Total Interim and Final Allocations:*** the Specimen of an Annual Financial Statement, table five, shows how the figures of £30,000 and £100,000 are calculated.

Note 10. ***Umbrella Organisations:*** the attention of the reader is drawn to Notes 1 and 6 and to Footnote 4, page 178, ref. para. A2/8.

TABLE FOUR *Simplified Abridged Specimen Of A*

For Use by SUVOC Fund Allocation			
Activity *Note 4*	Location *Note 3*	Allo-cation Basis *Note 2*	Potential Recipients by Activities *Note 6*
DISABLED	**All Areas**	**Summary**	**(as listed below)**
Club for Disabled	Sandybeach	SA	Community Assoc.
Holidays for Disabled	Riverside	SA	Community Assoc.
ELDERLY	**All Areas**	**Summary**	**(as listed below)**
Senior Citizens' Club	Downtown	SA	County Old People
Admin Office, Elderly*	Faraway*	NA	County Old People
Senior Citizens' Club*	Riverside*	SA	Community Assoc.
Senior Citizens' Club	Riverside	SA	County Old People
HEALTH	**All Areas**	**Summary**	**(as listed below)**
Medical Research*	London*	GA	XYZ Illness
New Research	Sandybeach	SA	XYZ Illness
YOUTH	**All Areas**	**Summary**	**(as listed below)**
Youth Work*	Downtown*	BA	Anyplace Assoc.*
Football	Downtown	UC	(Townlads)
Youth Bn. HQ.*	Downtown*	SA	Boys' Brigade
1 Company	Downtown	SA	Boys' Brigade
Youth Work*	London*	NR	Children National
4 Company	Overhill	SA	Boys' Brigade
2 Company	Riverside	SA	Boys' Brigade
3 Company	Sandybeach	SA	Boys' Brigade
Scout Troop	Sandybeach	SA	Community Assoc.
Youth Club	Sandybeach	SA	Community Assoc.

Functional Annual Advice Sheet *Key to Notes on preceding page*

Advisory Service Middletown Branch Committee

Previous Year's Gifts *Notes 5 and 8*			Last Year's Gifts *Notes 5, 7 and 8*			Remarks *Note 10*
Total Allo-cations	Donors' prior to Allo-cation	Donors' post Allo-cation	Donors to date	Interim Allo-cations	Final Allo-cations	
£	£	£	£	£26,920	*£92,000*	Amounts b/f from other sheets
(400)				**(160)**	**(450)**	
150	—	—	—	60	*200*	
250	—	—	—	100	*250*	
(2650)				**(1060)**	**(2720)**	
750	—	—	—	300	*520*	
1000	750	50	1100	400	*1400*	
650	800	250	1200	260	*600*	
250	—	—	—	100	*200*	
(100)				**(40)**	**(600)**	
100	200	60	350	40	*100*	
—	—	—	—	—	*500*	
(4550)				**(1820)**	**(4230)**	
2500	450	40	800	1000	*2500*	£400 C.V. Townlads (nil, previous year)
—	—	—	—	—	—	
500	400	200	550	200	*500*	
300	—	—	—	120	*200*	
—	500	100	1050	—	—	
200	—	—	—	80	*200*	
200	—	—	—	80	*150*	
250	—	—	—	100	*180*	
100	—	—	—	40	*100*	
500	—	—	—	200	*400*	
			Totals	**£30,000**	***£100,000***	*See Note 9.*

TABLE FIVE *Specimen Of An Annual*

For Use By SUVOC Fund Allocation Advisory

Receipts

Net contributions *Note 1.* . . . . . .
Tax recovered *Note 2.* . . . . . .

Gross contributions . . . . . .
Less administration charge, say 10% . . . .

Total available for distribution . . . . . .

Distributions

Voluntary distribution of 5%, *Note 3* . . . .
Donors' gifts through charity vouchers:
charity vouchers cashed by Charity-Bank
charity vouchers issued but not yet cashed
Interim fund allocations . . . . . .
Balance available for final fund allocations . . . .

Note 1. The net amount contributed would be approximately equivalent to weekly contributions of 15p net by 20,000 emloyees.

Note. 2. In this case it is assumed all contributions were tax recoverable payroll gifts.

Financial Statement by SUVOC Charity-Bank

Service Middletown Branch Committee

		Amount Raised	Amount Distributed
.. ..		£154,333	
.. ..		£69,000	
.. ..		£233,333	
.. ..		£23,333	
.. ..		£210,000	
.. ..			£10,500
	£60,000		
	£9,500		£69,500
.. ..			£30,000
.. ..			£100,000
		£210,000	**£210,000**

Note 3. It could be agreed SUVOC policy that, to recompense them for anticipated services and advice, and unless otherwise decided by donors or Donor Groups in respect of their own contributions, 5% would be annually distributed, mainly locally, between independent charities such as *Charities Aid Foundation, National Council for Voluntary Organisations and Local Councils for Voluntary Service* and their equivalent.

information[4]; in addition, the remarks column on integrated annual advice sheets could be used by advisory service co-ordination committees, as referred to below.

A2/9. *Advice sheets for use by co-ordination committees.* It is anticipated that *integrated master annual advice sheets* (integrated master sheets), relating to large charities, and *integrated functional annual advice sheets* (integrated functional sheets), relating to activities, could be prepared by the charity-bank for use by national and regional advisory service co-ordination committees.

A2/10. Here the sixth column could be completed by the charity-bank to list the provisionally determined advice of branch committees; this would leave the seventh column available for use by co-ordination committees to indicate exceptional variations from previous years' fund allocations or from established patterns of fund allocations.

A2/11. The co-ordinative purpose of integrated functional sheets could be to provide comparisons between the varying policies of branch committees in support of different activities.

A2/12. As earlier stated, the conceived function of the relevant co-ordination committee would be simply to ensure that the particular advisory service branch committee receiving advice be aware of the existence and relative significance of any observed variations, in case members of the branch committee concerned should choose to reconsider their previously determined fund allocation advice.

A2/13. Integrated national and regional master sheets could be used by co-ordination committees in consideration of the total fund allocations advised by branch committees for distribution to charities operating on a *national* or *regional* basis; these charities are referred to as *listed potential recipient charities.*

[4] For example, in the case of particularly generous donors' gifts, should a recipient charity, serving as an "umbrella organisation", report to an advisory service committee the total sum in donors' gifts it had distributed during the year to one or more unregistered charities, this information could be noted in the Remarks Column. The noting of that information could ensure that the advisory service committee would not underestimate the potential recipient's fund allocation requirements on grounds, which otherwise might occur, that the fund allocation advice sheets showed it had that year received particularly generous donors' gifts.

A2/14. In preparing integrated master sheets, for use by co-ordination committees, the following information could be entered by the charity-bank:

— *primary information*, being the grand total of donors' gifts and proposed fund allocations within the larger committee-area to be distributed to each listed potential recipient charity.[5]

— *secondary information*, being details of the total donors' gifts and proposed fund allocations within each smaller committee-area to be distributed to each listed potential recipient charity in support of particular activities.

— *miscellaneous information*, being integrated information, necessary for financial reconciliation purposes, relating to total donors' gifts and proposed fund allocations to all those local potential recipient charities, not operating on a national or regional basis, whose names would not be individually listed on integrated master sheets.

A2/15. *Preliminary advice sheets.* The suggested purposes of preliminary advice sheets could be three-fold:

i. to assist advisory service branch committees;

ii. to develop suitably widespread participation in the function of fund allocation;

iii. to evidence, on occasions, to fund allocation review assessors that due participation had in fact taken place.

A2/16. A preliminary advice sheet could be a type of question and answer form designed to obtain reliable grass-roots or expert

[5] The primary information financial grand totals, relating to total distributions to each listed potential recipient charity, could be printed in parenthesis, because these grand totals would be duplicated by the secondary information beneath. This procedure would be similar to the method suggested on functional advice sheets to show total donors' gifts and proposed fund allocations in support of particular activities. See *table four*, p.174.

detailed advice regarding the most appropriate amounts of fund allocations to be distributed either in support of particular locality-relevant activity-groupings or to one or more individual potential recipient charities in respect of one or more specific activities.

A2/17. Prior to their distribution, preliminary advice sheets could be prepared and edited, for the purposes referred to, by advisory service branch committee members or their authorised representatives. The sheets could be prepared on a standard advisory service form and list information similar in content to the branch committee's annual advice sheets, but related simply to those potential recipient charities and/or to those activities regarding which the advisory service branch committee sought specific fund allocation advice.

A2/18. Preliminary advice sheets could be distributed to members of an advisory service sub-committee and/or to one or more affiliated members who were able and willing to assist. In addition the sheets could be completed by representatives of some leading co-ordination voluntary organisations, who were willing to co-operate, and also, at times, by representatives of local government social service departments and/or of other statutory bodies[6]. On occasions, when a preliminary advice sheet was returned to an advisory service branch committee, a memorandum could be attached outlining the reasons for any particular advice given.

A2/19. Once branch sub-committees had completed and returned preliminary advice sheets, arrangements could be made on behalf of each branch committee for the total detailed information therein contained comprehensively to be presented for consideration by the members of the appropriate advisory service branch committee.

A2/20. This information could be listed both on *preliminary master advice sheets,* i.e. advice sheets primarily arranged by the identity of potential recipient charities, and on *preliminary functional advice sheets,* i.e. advice sheets primarily arranged by activities.

A2/21. Should preliminary advice relating to the same potential recipient charity have been obtained from more than one source, a

[6] Although some of the persons and bodies consulted might hesitate to offer advice on the amount to be distributed to a particular voluntary organisation, many would no doubt be willing to advise on the relative support which could be given to particular locality-relevant activity-groupings. See Footnote 12, p.247.

suitable procedure could be adopted to draw the branch committee's attention to the existence of this additional information.

A2/22. Preliminary advice sheets also could be of use in connection with the special grant advice sheets, referred to below.

A2/23. *Special grant advice sheets.* Production of this different type of advisory service information sheet could make it easier for advisory service branch committees to consider, separately from normal SUVOC fund allocations, both special appeal applications from potential recipient charities and provisional proposals by foundation trustees regarding topeconomic project grants.

A2/24. Special grant advice sheets would not always need to be prepared by the charity-bank, but it is envisaged that useful relevant information often might be available from that source and that for this reason the charity-bank frequently could be requested to assist in their preparation.

A2/25. The idea is that whatever relevant factual information it was feasible to obtain could be produced to assist the advisory service branch committee concerned.

A2/26. *Integrated special grant advice sheets.* Having provisionally determined its special grant advice, an advisory service branch committee could be expected to consult with its corresponding co-ordination committee. Such consultation would be particularly prudent in cases where a number of other advisory service branch committees also might wish to allocate funds for a similar purpose.

A2/27. It is anticipated that the charity-bank could supply advisory service co-ordination committees, on both a national and a regional basis, with updated integrated special grant advice sheets. These sheets could indicate, in relation both to individual potential recipient charities' applications and to foundation branch trustees' proposals, what the cumulative financial effect would be of implementation of all the provisionally determined special grant advice of every advisory service branch committee.

A2/28. If requested, further integrated special grant advice sheets could be prepared, with the possible assistance of the charity-bank, which could indicate what the overall effect would be if all advisory

service branch committees decided to reconsider in one or more particular directions their first provisionally determined advice.

Ancillary Information

A2/29. *Further charity-bank and statistical information.* The following are examples of additional potentially available background information some or all of which might be of use to members of advisory service branch committees:

i. extracts from locality-relevant government statistics regarding population, numbers employed, etc.

ii. charity-bank branch information regarding the magnitude of SUVOC giving in relation to population and/or numbers employed within the locality.

iii. information regarding the proportion of the total charity-bank branch gifts which were distributed as fund allocations through the corresponding advisory service branch committee, i.e. as distinct from donors' gifts distributed through charity vouchers.[7]

iv. advisory service information relating to other areas regarding proportional fund allocations in support of particular activities.

v. comparative information regarding the foregoing relating to previous years.

A2/30. *Other available information.* Further relevant information could be available, if required, to members of advisory service branch committees. Examples of potentially available information include the following:

i. *application forms for completion by charities requesting fund allocations:* written applications for fund allocations could be

[7] The basis of this information is shown listed in *tables three and four,* p.170-175.

useful in cases of special appeals and/or exceptional circumstances.

ii. *meetings with charities:* whilst members of advisory service branch committees hardly would have time annually to meet representatives from all potential recipient charities, occasional meetings could be useful particularly with reference to special appeals and/or exceptional circumstances.

iii. *advice from other committee-areas:* beyond receiving advice through co-ordination committees, as stated, members of advisory service branch committees could exchange useful policy advice with advisory service members working in other areas. For this purpose a National Federation of advisory service branch committees in due course might be formed.

APPENDIX THREE

SUVOC under U.K. Tax Legislation

Introduction

A3/1. *Developments.* This appendix was written at a time when the minimum covenant period had to be capable of exceeding six years, hence the term then used "seven year covenant". Under the *1980 Finance Act* the minimum covenant period was halved and it is now customary for charities to refer to the covenant period as four years.

A3/2. In 1982 the *Inland Revenue Claims Branch* approved a new type of *United Way Payroll Covenant* which has overcome many of the difficulties here referred to. This appendix is retained in the Second Edition of this book for reference purposes.

A3/3. *The common good.* Apart from the laws of nature, there are two kinds of law. There is the law imposed from above, possibly by force, without the consent of the governed. History provides examples of this kind of law which may be unjust, and therefore inevitably is doomed to be overthrown. The other kind of law is the one to which free men voluntarily subject themselves, because they see its inherent justice and profitability to the whole commune. This latter kind of law is the one we have in the United Kingdom.

A3/4. This does not mean that at all times the law is interpreted in the best interests of the common good, but it has never been suggested seriously that the object of the law is to create injustice or disparity of treatment for different sections of the community.

A3/5. The symbol of law, as of equity and of reason, is the balance or scales. This is expressed in the phrase "before the law", *before* here means in the presence of and subject to.

A3/6. The maintenance of a just and equitable balance between the various conflicting forces within the nation and beyond is a

supremely difficult task for any group of law makers; the problems scarcely are less for those responsible for administering and interpreting the law.

A3/7. It is recognized that politicians and the civil service are basically good men trying to deal with a near impossible problem, as a State, like a Leviathan, could make insatiable demands upon the public purse.

A3/8. A government hardly can do more than seek to maintain a just and lawful balance between public needs and those many other rightful needs of the private citizen as a free individual. It is a complicated task to maintain this equitable balance between what is sometimes jocularly described as "the bleeder and the bled".

A3/9. In recent years unfortunately, the need does not appear clearly to have been recognized of permitting charitable voluntary organisations to obtain adequate finance. No censure is attached to any specific individual responsible for our *Finance Acts,* or for the manner in which they are administered and interpreted. In fact the complexities are such that the individuals concerned have every thinking person's sympathy.

A3/10. It is however requested, for reasons later more fully stated, that those responsible may consider the underlying purpose of existing tax legislation relating to charitable giving in the U.K. And that they may ask themselves whether this legislation needs amendment or whether, in its present form, it may not now be administered and interpreted in a more liberal and sympathetic manner towards charitable voluntary organisations.

A3/11. The country cannot discard the concept of voluntary service and adequate free-will giving, nor can it treat as non-essential the many charitable voluntary organisations through which this service comes.

A3/12. The maintenance and improvement of national health increasingly will require the reciprocal provision of topeconomic services to and from the individual members of the various communities which interdependently constitute the complex society of our present day United Kingdom.

A3/13. No government believes itself capable, either financially or otherwise, of providing all essential topeconomic services to the satisfaction of the electorate, even if it should be desirous of so doing.

A3/14. *Discrimination against the lower income groups.* Freedom is a basic ideal in the democratic United Kingdom. Freedom to believe and freedom to choose are said to be the equal rights of all men and women — rich and poor alike.

A3/15. Has it ever been suggested that a rich man should have a greater fundamental right than a poor man to believe in the cause of voluntary service, and to give freely of his services and money for the benefit of others? Yet it has been said that there is one law for the rich and one for the poor.

A3/16. Most of us know the saying "time is money", and we know that money can be one of the fruits of energy expended in the time process. The man with money is sometimes regarded by society as analogous to those of the higher income groups, and the man with only energy to offer to the lower income groups.

A3/17. Using this analogy, we observe the man in the higher income group not only may give without taxation of his money to a charitable purpose; in addition, if he covenants to spread his gift so that it provides a stable income for a period of years[1] to the recipient charitable body, the State adds nearly half as much again to the value of his original gift in the form of rebated taxation.

A3/18. With the man in the lower income group, who may feel too insecure financially to undertake a legally enforceable commitment for a period of years, the State takes a very different view. If the man freely offers the yet unearned fruits of his labours, by authorizing a deduction from pay in favour of a charitable voluntary organisation, nothing is added to his gift. Far from it. From that which the man wishes to give, the State exacts tribute in the form of P.A.Y.E.

[1] As stated at the beginning of this appendix, in the *1980 Finance Act* the minimum covenant period was reduced to one which is capable of exceeding three years.

A3/19. Can it be said truly, therefore, that all men in the United Kingdom have equal freedom to support charitable voluntary organisations?

A3/20. *Government policy.* We may accept that, with regard to free-will giving, discrimination against the lower income groups does not reflect the national will, and that such discrimination is not a deliberate and conscious government policy.

A3/21. The question therefore arises, have we as a nation the energy and vision to encourage rich and poor alike to support charitable voluntary organisations?

A3/22. In the constantly changing world in which we live, it is a supremely difficult task for any government to maintain an ideal balance between, on the one hand, those needs of its citizens which can be provided for more effectively through charitable voluntary organisations and, on the other hand, those needs which are met better through statutory services.

A3/23. It means striking a balance between the two extremes of general social chaos and the single dead hand of an autocracy. No suggestion is offered where the balance should be struck, but could anyone suggest that it should not be somewhere between these two extremes?

A3/24. In the field of the voluntary social services, the positive governing concepts of those desirous of encouraging more of the nation's energies and money to flow into creative and useful occupations at present appears somewhat excessively to be inhibited by the necessary negative aspects of government concerned with prevention of tax avoidance. In so far as this inhibition stultifies further desirable development of the voluntary social services, the present situation may be viewed as counter-productive to national health.

A3/25. If it is agreed that the underlying purpose of tax legislation on charitable giving in the U.K. is to improve national health, it also may be agreed that now is an appropriate time for those responsible to consider afresh the value to the common good of existing Treasury rules and practices to implement the purposes of that tax legislation.

A3/26. The view may be held that, in implementation of an enlightened and sympathetic national policy towards the voluntary social services, the common good could be served well if charitable bodies were expected simply to satisfy an appropriate government department that all charity-money raised could and, in due course, would be used in furtherance of officially charitable topeconomic purposes.

A3/27. To provide an appropriate counter-balancing mediation protection for charitable bodies, against a conceivably over-zealous bureaucracy, special locality-relevant ombudsmen or arbitrators could be appointed. If desired, such appointments might be made after consultation with members either of the proposed topeconomic development association or, if recognized, of the spiritual social policy-complex of government.

A3/28. *Would new legislation be required?* In consideration of implementation of the suggestions later contained in this appendix, the question may arise whether or not new legislation would be required.

A3/29. The State already has such wide powers that it is conceivable fresh legislation might not be necessary. The view reasonably could be taken that this appendix simply suggests possible administrative procedures designed more effectively to achieve the purposes of existing law.

A3/30. In any case, is it asking too much for the Prime Minister, or the Chancellor of the Exchequer, to declare a policy on tax legislation with regard to charitable giving which could have the united support of all parties, in both Houses of Parliament?

A3/31. What assistance it would give, if that declaration could include overt support for the principles and ideals of SUVOC!

Considerations Regarding the Covenant Scheme

A3/32. *The present position.* Charitable voluntary organisations need regular income on which they can count for a number of years, if they are to have the security and stability necessary for both efficient operation and effective forward policy planning.

A3/33. Under present tax legislation, any individual or corporate tax-payer may covenant for a period of years[2] to support a charitable voluntary organisation, and thus enable that organisation to obtain a proportional rebate of tax paid. Subject to the reservations referred to following, with regard to individual giving, and to a later reservation, with regard to corporate giving, covenanted giving may be viewed as a useful and worthwhile method of encouraging planned giving.

A3/34. At present many charitable organisations rely heavily on the regular covenanted gifts which they receive and much valuable work has thus been financed. Meanwhile, covenanted giving does not appear to have caused undue administrative difficulties for the Inland Revenue.

A3/35. With regard to individual giving, the drawback to the present covenant scheme is that only a comparatively small percentage of the total working population in the U.K. choose to make gifts under deeds of covenant. The reasons for this are not hard to find. The minimum covenant period is a long time, and many tax-payers lack the financial security confidently to sign such a long term contract; some are wary of a legal document they do not understand clearly, and others do not fully appreciate the financial benefit to a charitable voluntary organisation of a covenanted gift.

A3/36. Furthermore, the present tendency is for appeals for individually covenanted gifts mainly to be directed to potential donors from the managerial and professional income groups. This is due partially to the relatively high administration costs which some charities have experienced in the past in handling small covenanted gifts.

A3/37. In any case however, irrespective of whatever reasons today may be put forward to explain the qualified success of the covenanted scheme, it is doubtful if anyone believes that more gifts are not made under deeds of covenant because the Great British tax-payers as a body prefer to pay taxes!

A3/38. *Conceivable future inconvenience for the Inland Revenue.* If, as a national movement, the proposed SUVOC charity-bank

[2] Para one of this appendix refers to the minimum length of the covenant period.

sought to operate the existing covenant scheme on behalf of ordinary weekly wage earners, conceivably undesirable administrative problems could be created for the Inland Revenue.

A3/39. A large and well administered charity-bank appeal organisation, geared to making the cause of increased free-will giving more meaningful, could expect to succeed in encouraging a significant percentage of the twenty-five million working population to enter into deeds of covenant. The charity-bank economically could administer a system to deal with many millions of deeds of covenant.

A3/40. If only ten per cent of the working population signed deeds of covenant, this would mean an additional two and a half million tax reclaim forms to be handled by the Inland Revenue each year. Even if special arrangements could be made with all the federated branches of the charity-bank for these forms to be handled on a staggered basis throughout the year (and this might not suit either the Inland Revenue or SUVOC) it would mean an average of 10,000 forms to be handled each day; double that number if 20% of the working population covenanted.

A3/41. If, as is possible, no satisfactory arrangements could be made for the staggering of dates, this could mean that all the tax reclaim forms descended upon the Inland Revenue within the course of a few days. Many hundreds of charity-bank branches and advisory service branch committees together with the potential recipient charitable voluntary organisations might observe, not unnaturally with interest, the ability and speed with which the Inland Revenue handled this sudden mass of additional work.

A3/42. Whatever their attitude might be to possible difficulties for the Inland Revenue, the appeal staff of the various charity-bank branches hardly could be expected to refrain from seeking all the covenanted gifts they could obtain. The tax advantage of covenanted gifts is a common theme in most appeal literature; and, quite apart from the direct financial benefit to be obtained from tax rebates on covenanted gifts, such a policy could benefit SUVOC in another way. Potential donors might feel that there is a basic

injustice in the present discrimination against the lower income man, and some might be motivated by principle to sign covenants.

Donors' Automatic Rebate of Tax

A3/43. *The DART idea.* Much government administration is based on the principles of a steady flow of work and income. P.A.Y.E. is one example.

A3/44. To facilitate the granting of tax rebates on ordinary wage earners' payroll giving, it is suggested that a suitable administrative procedure could be devised which would be able to avoid costly and cumbersome clerical procedures whilst, at the same time, retaining necessary Inland Revenue control. The term used to describe this suggested procedure is *"donors' automatic rebate of tax" (DART).*

A3/45. DART could be the counterpart to P.A.Y.E., with one important difference. Unlike the administration of P.A.Y.E., administration of DART by employers would be voluntary.

A3/46. The idea is that:

i. payroll giving for charitable purposes automatically could be tax-recoverable, without the necessity for individual employees to sign covenants.

ii. DART could be accounted for in a similar way to P.A.Y.E.

iii. a simple DART return would be completed annually by each participant employer, on account of all charitable giving by employees through individually authorised deductions from pay, i.e. payroll giving. This return could show each participant employee's name, the total annual gift, the rate of tax and the tax rebate claimed

A3/47. *Representative agents for DART.* In the United Kingdom the government might recognize every charity-bank branch as an acceptable representative agent for DART because it could fulfil suitable statutory qualifying conditions; these could include all or some of the following:

i. be registered as a *Common Good Fund*[3], or be a recognized charity-bank branch member of the proposed SUVOC hexic formation.

ii. be willing and able both to receive and to distribute charity-money on behalf of all charitable voluntary organisations and religious bodies in the U.K.

iii. be able to operate economically throughout the whole of the U.K., and to have an acceptable book-keeping system.

iv. be democratically constituted in accordance with approved SUVOC constitution or its equivalent.

A3/48. Representative agents for DART could receive from individual employers the suggested written undertakings with regard to DART which are later referred to as *DART agency covenants.* The DART agency covenant idea, or its equivalent, might be subject to certain Inland Revenue safeguards, for example:

i. no employer to be entitled to operate DART who failed reasonably to satisfy the Inland Revenue regarding his ability and commitment. As a matter of public policy the Inland Revenue could agree not to withhold permission to operate DART from the small firm or the self-employed on those grounds alone.

ii. authority for an employer to operate DART to be withdrawable at any time by the Inland Revenue subject, perhaps, to a right of appeal to their Commissioners or some other appropriate body.

iii. no individual employer to have more than one DART agency covenant in operation at any time. The term *individual*

[3] Under the terms of *The Charities Act 1960,* charities registered as *Common Good Funds* can be authorized with the approval of the Charity Commissioners to act as repositories of obsolete local and national charities and charitable trusts.

employer could be applied either to an individual branch of a larger company, able to produce separately accountable branch wage calculations, or to a combination of such branches.

A3/49. *DART agency covenants.* In recognition of the general need of charitable voluntary organisations for continuous income, with a stable growth potential geared to inflation, individual employers could be invited to sign DART agency covenant forms. These could be documents in which employers made solemn declarations of intent that, until further notice, they would: offer members of their staff deduction from pay or payroll giving facilities; operate DART through a particular representative agent for DART; promptly and accurately complete the annual DART returns.

A3/50. For administrative simplicity it might help if annual DART returns were forwarded by individual employers to the appropriate representative agent for DART, who then could claim the tax rebate from the Inland Revenue and accordingly credit the employees' Donor Group charity-bank account.

A3/51. Because circumstances could change rapidly for an employer, and in order to encourage widespread support for DART, the suggestion is that DART agency covenants could be accepted as being made in good faith but not legally enforceable, with the exception of suitable undertakings relating to indemnity and audit.

A3/52. For this latter purpose, employers could undertake to indemnify the Inland Revenue against loss of taxation arising from the inaccurate operation of DART, and at all reasonable times to permit duly authorized representatives of the Inland Revenue to have access to the firms' books to carry out spot check DART audits of individual pay records etc.

Corporate Giving and Covenants by Shareholders

A3/53. *Is it lawful for directors to give their shareholders' money to charity?* Directors have to bear in mind two considerations. Have

they the power to give money to charity? Can they obtain tax relief by so doing?[4]

i. *Have directors the power to give money to charity?* There is no general power to distribute the profits of a company to charity under the Companies' Act. There is therefore a possibility that such a distribution, made by the directors of a company on its behalf, might be regarded as null and void unless it was duly authorized under the Memorandum and Articles of Association of the company, or unless the directors had obtained a separate mandate from the shareholders.

Under certain circumstances therefore, the directors could be held personally responsible for refunding to a company money which they had distributed to charity on its behalf. It is extremely unlikely that they would ever be called upon to do so, as they would, in most cases, be deemed to have a general power to contribute to a reasonable extent, as being incidental to the objects of the company. Some companies specifically authorize the distribution of gifts to charity and in all cases the shareholders can give this power.

Even if the directors were in the position of having no express power, they could generally justify the distribution of a reasonable proportion of the profits (in relation to the company's capital employed or turnover) to outside charities if it could be established that these gifts were likely to: do the business some good from either a short term or a long term point of view; improve the relationship of the company with the public at large; have some advertising value.

ii. *Can they obtain tax relief by doing so?* In order to justify a payment to a charity as a business expense, which can be charged against the profits of a company before computing the taxation liability, the company must be able to show that

[4] The sub paras following are quoted from *Charitable Appeals And The Rotarian*, p.3. Published by Rotary Club of Liverpool, January 1961.

the payment was wholly and necessarily incurred for the efficient running of the company.

When gifts cannot be justified as a business expense, the company may covenant a sum of money and thus enable the charity to obtain taxation relief; but the amount covenanted must only be a reasonable amount, as it otherwise might be held to prejudice the rights of the debenture holders in the event of the company being wound up.

A3/54. *Attitude of the Inland Revenue.* Although, when computing a company's taxation liability, it may be held that all tax allowable disbursements must be in accordance with the purpose of its trade, profession or vocation, at no time does the law say, or even suggest, that all gifts to charitable voluntary organisations, unless made under deeds of covenant, will be added back before computing that company's taxation liability. However, in the past the law has been frequently interpreted in this restricted way due to the attitude of the Inland Revenue. [Since 1980, the position has somewhat improved[5]].

A3/55. Many tax inspectors would consider that, under normal circumstances, a company must enter into a deed of covenant, if it wishes its annual payments to a charitable voluntary organisation to be allowed for tax. The tax inspectors may point out that, when corporation tax was introduced, a clause in the finance bill specifically stated that gifts made under deeds of covenant would be treated as a corporation tax allowable expense. Other non-covenanted gifts may be regarded by a tax inspector as prima facie cases of tax evasion, or tax avoidance, and the company be requested to justify why such gifts should be treated as corporation tax allowable expenses.

A3/56. In other words, when corporation tax was introduced, and indeed prior to that date, the law rightly recognized the need for charitable voluntary organisations to obtain a stable income from companies. It therefore was made clear to companies that no

[5] Gifts to charitable bodies after 31st March 1980 are deductible under general rules of business expenses (i.e. requiring the outlay to be wholly and exclusively for purposes of the trade etc.). Ref. Clause 52, *Finance* (No. 2). *Bill 1980.*

questions would be raised by tax inspectors, in the case of adoption of the covenanted gift scheme procedure, although questions regarding the justification of making certain charitable gifts might be raised in other cases.

A3/57. The view sometimes may be taken that it is the duty of the Inland Revenue lawfully to obtain maximum revenue.

A3/58. If there is a desire to discourage gifts to charitable voluntary organisations, the Inland Revenue may disallow a gift *unless* the company is able to satisfy the tax inspector that the gift is being wholly and exclusively laid out or expended in furtherance of that company's lawful purpose. The onus thus falls upon the company to justify its actions, and to explain fully to the particular tax inspector the envisaged purposes of the company's representatives.

A3/59. Few companies might consider it a profitable use of time or money to appeal against an inspector's decision to disallow a charitable gift, with due regard to the maintenance of harmonious relations with the tax inspector.

A3/60. *Covenants by companies.* Valuable to charities though it is, the covenanted gift scheme appeals to the generosity of merely a limited number of potential donor companies.

A3/61. Companies frequently tend to view the future with caution and are unwilling to sign legally enforceable covenants for lengthy periods, the inflationary possibilities during these periods being of concern both to donors and to recipients. Thus the nation's voluntary social services suffer for want of an additional alternative scheme which might be more readily acceptable to certain types of donor companies.

A3/62. Precise figures are not available on the percentage of total corporate giving made under deeds of covenant, but fund organisers report that many companies, particularly private ones, prefer instead to make probably tax-allowable charitable gifts in the form of goods, tombola prizes, programme advertising, etc. These latter gifts, which may not be treated as charitable gifts in a company's

published accounts, are frequently not as useful to the recipient charity as would be a cash contribution of similar value.

A3/63. There may be less reluctance for companies to make capital gifts through deeds of covenant, particularly in cases where the size of the tax saving is significant; it is questionable however if the primary purpose of the covenant scheme was to encourage the payment of capital gifts by instalments.

A3/64. *Mandates from shareholders.* In interpretation of existing legislation the Inland Revenue might properly consider that any company lawfully could make *reasonable* contributions to charitable voluntary organisations without necessarily entering into deeds of covenant. Such contributions could be regarded as legitimate tax allowable expenses in accordance with the principles of reciprocal social responsibility, and in recognition of the view that a socially healthy community environment is likely to benefit companies operating therein.

A3/65. The question of whether it is lawful for directors to give their shareholders' money to charity may depend upon the authority vested in them by their Articles of Association and by their shareholders.

A3/66. Some directors already may have a mandate to support charitable voluntary organisations, others may lack such a mandate. However, legal questions apart, as a matter of public policy directors could consider obtaining periodically, say every seven years, from their shareholders reaffirmation of their mandate to contribute towards the work of charitable voluntary organisations. Such reaffirmation could be termed *a mandate covenant.*

A3/67. The purpose of a mandate covenant could be to demonstrate the donor's intent, by means of shareholder approved planned giving, to provide charitable voluntary organisations with a continuous income with a stable growth potential geared to inflation.

A3/68. Whilst directors lawfully need not require to obtain a mandate covenant, the obtaining of such shareholder approval could create a better orientation to the needs of charitable voluntary

organisations, with fuller realization that, although an individual company might benefit over a short term by making no contribution towards the work of the voluntary social services, both the company and the community generally would be poorer if charitable voluntary organisations ceased to exist.

APPENDIX FOUR

The "Workpower" Idea

Introduction

A4/1. *SUVOC co-operation.* As stated in Chapter Eleven, Workpower could be formed to operate in close association with SUVOC Voluntary Service Agency on a basis where little or no distinction be recognized between voluntary service by officially unemployed persons and voluntary service by other members of society.

A4/2. *Group-needs of the officially-unemployed.* The large numbers of unemployed are grouped together at present under a purely negative category. The bonding together of large numbers of people, with no positive direction, means the agglutination of large amounts of energy with no positive outlet.

A4/3. What history shows of large energy masses, without appropriate control, is that they tend to be unstable and therefore potentially socially dangerous. But, if it be recognized that the merely negative governmental definition of "the unemployed" can be converted by a change of attitude into a positive definition covering the same mass, then the negative dangerous aspect of such power might receive a new orientation and a consciousness that "official unemployment" does not necessarily mean de-humanisation and a falling-out of the productive social context of "the unemployed".

A4/4. Energy cannot do nothing, and large masses of energy, if not given appropriate productive outlets, tend ultimately to express themselves in destructive ways.

A4/5. "Workpower" offers a positive category under which the "officially unemployed" can retain their human dignity and constructive directionality. Workpower members would be then in

no danger of falling out of sympathy with their own trade unions and so disintegrating into disorientated chaotic groups.

A4/6. The Workpower idea advocates recognition of the "officially unemployed" as having a "unity of situation" of a not merely negative significance, and as constituting the occasion of a call to serious consideration of what constitutes the significance of human beings as such within the body of society at large.

A4/7. Adequate financial payments by society to the unemployed in respect of their temporary non-productive activity may alleviate the economic hardship of their situation, but the removal of such hardship by itself does not eliminate the distinction, with its consequent alienation, between those able positively to contribute their energy to the well-being of the socio-communal situation and those whose potential energy contribution is officially rejected.

A4/8. Some relief from this sense of alienation may be found outlet in pleasure orientated inactivity or light unproductive energy usages and a feeling that work is something to be avoided if one is "not a mug". But few, if any, unemployed can reconcile their own natural desire for personal significance and self-respect with a role in society which is capable of definition as exclusively that of a consumer of the work of others, i.e. a merely parasitic role.

A4/9. The one thing that we do not desire to see is that the "officially unemployed' shall be allowed to fall into the condition of that magnificent horse Boxer in George Orwell's *Animal Farm*. The unhappy agglutination of masses of "officially unemployed" constitutes a sufficiently distressing possibility as to provoke energetic response from any socially alert intelligence.

A4/10. *The concept.* Whilst unemployment exists, the Workpower idea offers a concept which can help some of the persons most concerned, together with the community at large.

A4/11. Briefly this concept is that unemployed persons voluntarily could be engaged in seeking out and finding work that needs to be done, which would not otherwise be done, and which thus could provide the individuals concerned with a means of healthy productive self-occupation whilst officially unemployed.

A4/12. Furthermore, operation of the Workpower idea offers a means whereby officially unemployed voluntary workers could receive some tangible recognition or "fringe benefits" without prejudice to individual rights to unemployment and social security benefits.

A4/13. The term *officially unemployed* refers to the situation of persons, over school leaving age and not yet eligible for the old age pension, who *desire but are unable to obtain* suitable paid employment.

A4/14. The term *work* refers to any form of physical or intellectual activity engaged in for the purpose of accomplishing a desired end. Thus work may be conceived as activities which are either *mere survival work,* being activities one would not do if one did not have to, or *developmental work,* being activities one will do even if one does not have to because that work produces the appropriate environmental changes for the furtherance of more significant and abundant life.

A4/15. From the above definitions it logically follows that, whilst a man economically may be deprived of suitable paid employment and thus be "officially unemployed", no normal healthy man can direct his energies into a topeconomically functionless state.

A4/16. *The early "Workpower" experiment.* The term *Workpower* was used in 1972 to describe one short very small scale pilot experiment in one Community Council[1] area of Liverpool, when an Unemployed Voluntary Workers' Centre was formed for the voluntary carrying out of public and charitable works.

A4/17. The experiment was terminated after a few months for administrative reasons and because there was no active democratically constituted community association council which could incorporate the organisers of Workpower. Other initial problems were the threefold lack of general management

[1] *Abercromby Community Council,* Liverpool. The reader may be interested to learn this experiment was first named *Workforce* and the name was later modified to *Workpower.* Some members of the Community Council found the former name rather "frightening", as it conjured into their minds the thought of the *Unarmed Forces of the Unemployed.*

experience, work priorities and outside political resolution to assist Workpower.

A4/18. These initial problems were due partly to the relative newness of the Workpower idea and to its very small scale early operation. There may also at the time have been some doubt in case Workpower might develop into a body which encouraged the officially unemployed "to cheat the taxpayer". Adequate safeguards in this direction were to be provided through personally answerable Workpower officers.

A4/19. The notes contained in this appendix were written by the author prior to the 1972 Workpower pilot experiment. The stimulus to write these notes was provided partly by the environmental conditions in the immediate area where the author worked. These conditions included severe planning blight, vandalism and high unemployment. In addition the author was stimulated in his own line of thinking by the following two published articles:

i. "The truth of the matter is that, while the country faces a quite new unemployment problem, it is going about tackling it in just the old traditional ways . . . The traditional machinery of central and local government can do no more than make a small dent on the problem. Perhaps what we want is a Job Corps, armed with money and power to get on with things."[2]

ii. "A recent survey carried out by the Liverpool University Settlement in conjunction with local unemployed people into unemployment in the Park Lane area of Liverpool 1 produced some startling facts. One in three of the adult male population (over 18 years) was found to be unemployed. One in five of the female population in the same age group and over one third of the 15-18 age group were in a similar situation. In other words, the percentage of unemployed people in the district is way above the oft quoted figures for Liverpool or Merseyside.

[2] *The Sunday Times* of November 28th 1971.

> Merseyside will certainly obtain more jobs if the Government pumps in millions of pounds in development aid — but will they be the jobs which you or I would fancy doing; would they be organised in the way which you or I would accept? If the answer is no, then we on Merseyside and in our own districts of Liverpool have a great deal of rethinking to do. Let unemployment be the spur to this rethinking . . . Two unemployed youths stated 'Anyone who looks around Liverpool can see there is plenty to be done, and if someone would provide the money to pay us, there are plenty of people who could do it'."[3]

A4/20. Whilst sharing sympathy with the views expressed in the two quoted articles, which emphasize the need for a new approach to the problem of unemployment, the author advocates the development of Workpower along somewhat different lines.

Basic Propositions

A4/21. *State, community and individual needs.* The unemployed man like every other human being is an energy system which must work at something simply because, as we have earlier observed, energy cannot do nothing.

A4/22. If human energies are not given an outlet to work at increased interfunction then they will find an outlet in anti-function. A brick may be laid to build a wall or idly tossed through a shop window.

A4/23. *Socio-economic needs.* It could happen that a high level of unemployment will for some time be experienced both on Merseyside and in the country as a whole.

A4/24. The problem of continued unemployment gives rise to probable long term socio-economic problems, which cannot satisfactorily be alleviated by a national government simply creating more vacancies in the social, civil and military services.

[3] *Castle Street Circular* No. 48 dated Oct/Nov 1971, published by Liverpool Council of Social Service, now known as Liverpool Council for Voluntary Service. In 1981, the Toxteth riots occurred on the fringe of the Park Lane area of Liverpool 1.

A4/25. To find peaceful and constructive solutions to the problems created by high unemployment is one of the prime tasks of any government, never more obviously so urgent as today.

A4/26. *Personal activity needs.* Unemployment is a personal psychosomatic dynamic activity problem, or a general human problem, at least as much as it is a social and economic problem.

A4/27. In addition to an economic need for sufficient money reasonably to satisfy his material requirements, the average healthy man also naturally possesses a deep felt need purposefully to use his energy in finding interest and significance through personally worthwhile work or developmental endeavour. This means that, although a man in receipt of certain social security benefits may be regarded by national government as "officially unemployed", that man himself still may require the personal opportunity voluntarily to involve his energy and skill in the production of worthwhile significant change to the community environment in which he lives or works.

A4/28. However, in order to experience the personal satisfaction he requires, the "officially unemployed" man naturally will want to feel that he is not "being taken advantage of" and that his effort is valued by the community. For the realization of this satisfaction some reward or tangible recognition is at least desirable, if not essential.

A4/29. *Socio-governmental needs.* In consideration of the three aforementioned needs, it can be seen that there is a need for maximum co-operation between the twin functions of national and local governments.

A4/30. National government has the means to provide unemployment and social security benefits, subsidies to certain businesses and funds for the maintenance of law and order; but it is local people who know local needs.

Suggested Purposes of Workpower

A4/31. *Trade unions and government. No activity of Workpower should in any way alter the agreements between trades unions and government.*

A4/32. *Members of Workpower could honour their committal to their trade unions and policies, thus making impossible any misdirection of their activities.*

A4/33. *Constitutional considerations.* The term *Workpower Centre* is here used to describe a meeting place where "officially unemployed" persons would meet with the intention of undertaking useful work in the public sector of the community, where for valid economic reasons it is recognized by responsible leaders of trade unions and other bodies such work would not otherwise be performed.

A4/34. If thought desirable by those concerned, the terms "*work in the public sector of the community*" or "*community public sector work*" may be defined as community work financed out of national or local *taxation-money* and/or out of *charity-money,* i.e. money which may be received only by organisations which are legally regarded as charitable.

A4/35. Subject to interpretation of existing legislation as applicable to the term "for the common good", both by responsible officials in the Departments of Employment and of Health and Social Security and by responsible Workpower officers, it is envisaged that, without prejudice to their existing scales of unemployment and social security benefits, Workpower members could receive tangible recognitions as tokens of appreciation for voluntary services rendered.

A4/36. Such recognitions, sometimes termed *fringe benefits,* might take the form of reasonably goodwilled allowances for travelling, working clothes, tools, meals and other out of pocket expenses.

A4/37. If administratively preferable, in the first place these allowances might be given by the appreciative public sector body concerned to the Workpower officers who then at their discretion could distribute these allowances to the individual Workpower members concerned, less suitable deductions to cover the Centre's overheads.

A4/38. It reasonably might be considered in the public interest for individual Workpower members not to be held personally accountable to national government for benefits received through

Workpower membership. No contractural liability need exist between a Workpower Centre and its individual members, other perhaps than through some prudent insurance policy against accidents and third party claims, provided that the Workpower officers were accountable for their actions to a responsible executive council which could contain representatives of national and local governments.

A4/39. *Services to members.* Workpower Centres could provide the following services to members:

i. *a recruitment centre,* for the engagement upon a voluntary basis of "officially unemployed" voluntary workers.

ii. *a members' information centre,* on desirable work in the community public sector, together with such further information as individual Workpower members might request be recorded regarding their own personal interests and skills and the types of work for which they would be most ready to volunteer.

iii. *social and recreational facilities,* for members, which reasonably could be supported out of Workpower funds.

iv. *special recognition for leadership,* which could be given to members serving practically as leading members.

The term *leading member* here refers to a Workpower member who successfully has co-ordinated the activities of a group of members and who personally accepted responsibility for the satisfactory completion of the particular portion of community public sector work undertaken by that group. This special recognition could take the form of eligibility for appointment to serve on the "leading members' representatives' council", referred to later.

Note: the suggested personal responsibility by individual leading members could not of course be binding should paid

employment be obtained but, as earlier stated, it is desirable that minimal distinction be recognized between voluntary service rendered by officially unemployed persons and by other members of society. It is therefore envisaged in certain cases that Workpower leading membership might continue after paid employment was obtained.

v. *a leading members' representatives' council,* which could be formed to assist leading members to orientate and manage the affairs of the centre for the benefit of members and of the community as a whole.

Note: the leading members' representatives' council might appoint representatives to serve on the executive council of a local *Social Security Advancement Association,* or its equivalent, the opportunity for the development of which is later referred to.

vi. *gifts of tangible recognition,* which could be received by Workpower officers for apportionment at their discretion to Workpower members, such gifts being contributed by community public sector bodies as tokens of appreciation for voluntary services rendered.

vii. *detailed accounts,* suitably maintained and audited, regarding the income and expenditure of the Centre.

Such accounts could serve not only to satisfy persons interested in the Centre's administration; they also could provide adequate information to ensure preservation of individual Workpower members' existing rights to unemployment and social security benefits.

viii. *new opportunities for personal orientation,* which could be available to members who chose to adopt for themselves a Workpower Centre membership rule such as the following: *no member ever shall be expected to volunteer for any type of work which does not appear to that member to offer him the personal interest, significance and satisfaction he desires.*

A4/40. *Socio-governmental services.* Workpower Centres could provide the following services to local and national governments and to society as a whole:

i. *constructive and other environmental improvement work,* which could be carried out on many projects where for economic reasons work is at present deferred.

ii. *opportunity for the development of a multicentral federation of Social Security Advancement Associations,* or their equivalent, which in due course could seek to achieve more positive co-operation in the field of social security between national and local governments for the benefit of society as a whole.

Membership of these different locality-significant associations could include, amongst others, a suitable number of representatives of all or some of the following bodies: the Departments of Health and Social Security, of Employment and of the Environment; the local authority; trade unions; local community association councils; the university; churches and other "officially charitable" bodies.

The co-ordinative purposes of a local Social Security Advancement Association could be very much wider than the Workpower purposes here suggested.

A4/41. *The role of a Social Security Advancement Association.* If a local Social Security Advancement Association, or its equivalent, was to be formed it could have, amongst other branches, both an executive council which was interested in Workpower and a community public sector works department:

i. *an executive council,* could consider policy matters relating to Workpower activities and exercise supervisory financial control over a possibly large number of different Workpower Centres.

This financial control might be exercised in the first place through the appointment of a responsible treasurer whose salary could be paid by the executive council.

It is envisaged that in due course Workpower Centres' officers could be directly responsible to and be appointed by the executive council, although initially these appointments might be made by other bodies such as community association councils or local authorities.

ii. *a community public sector works department* could assist Workpower Centres to find work in the community public sector and advise generally on work priorities. Further, if considered desirable by those concerned, the department could:

a. co-operate closely regarding certain work with those Workpower Centres which were willing to accept its direction. In appropriate cases the community public sector works department might agree both to accept some managerial and technical responsibility for the public sector work to be performed and/or to provide financial assistance.

b. offer, where practical, quantifiable financial guidance to community public sector bodies on possible Workpower appreciation which reasonably and properly might be shown in respect of particular Workpower Centres, all relevant factors to receive appropriate consideration.

Assistance to Develop Workpower and Benefits

A4/42. *Community association council services.* On a locality-relevant basis community and neighbourhood association councils could assist development of the Workpower idea in a number of ways. These could include:

i. *initial sponsorship of the Workpower idea,* which might occur through the passing and communication of a formal resolution of approval for the operation of Workpower and/or through the appointment, relevant to a particular area, of Workpower officers.

ii. *consideration of possible Workpower projects,* with a view to the community association council making recommendations to suitable persons that particular community public sector work be made the reponsibility of Workpower.

Note: in this direction shop stewards and trade union leaders also might offer assistance, as later referred to.

A4/43. *Local Employment Committees.* Within any Local Employment Committee-area, where unemployment is a problem, Local Employment Committees — consisting of representatives of employers, trade unions and the Department of Employment[4] — could be willing to assist development of Workpower, with constructive advice to Workpower Centres' officers and through participation in the development of Social Security Advancement Associations.

A4/44. Initially this Employment Committee assistance might be given through the passing of a suitably worded Committee Resolution expressing approval of the Workpower idea and willingness to co-operate with other appropriate bodies in the formation of one or more local Social Security Advancement Associations, or their equivalent.

A4/45. *SUVOC Topeconomic Development Association.* Branches of the topeconomic development association and/or local Councils for Voluntary Service could be willing to offer two-way information and liaison services between Workpower and local charities regarding suitable work opportunities for Workpower members.

A4/46. *Trade union attitudes and reciprocal assistance.* Subject to necessary safeguards for paid workers, as earlier referred to[5], it is

[4] This was the constitution of *Local Employment Committees* prior to the creation in 1974 of the *Manpower Services Commission.*

[5] Ref. paras 11/7 to 11/9, page 106.

anticipated that the Workpower idea, or its equivalent, could receive good-willed approval from those progressive trade union members who today recognise:

i. that "government", meaning effective reciprocal control, and the trade union movement are not effectively separable;

ii. that, because a national solution to the problems of unemployment requires those problems to be solved locally, the time has now come for locally responsible trade union leaders to co-operate with all other interested involved members of their local communities to develop fuller provisions for the needs of the unemployed;

iii. that, by definition, development of fuller provisions for the needs of the unemployed includes recognition both of the individual and group needs of unemployed persons, and of the needs of society as a whole in relation to the problems of unemployment.

A4/47. Trade unions, either through the previously suggested *Shop Stewards and Trade Union Leaders Branch of SUVOC Confederation* or through some other local association, could provide the following services towards development of Workpower:

i. *leading assistance* in indicating possible Workpower projects.

ii. *good-willed constructive consultation* with community association councils and other interested bodies regarding Workpower matters generally.

Such consultation might include advice, in the light of all relevant circumstances, to responsible Workpower officers on suitable amounts of money, or other tangible tokens of appreciation, which reasonably might be given in recognition of particular services rendered by individual Workpower

members. Furthermore shop stewards and trade union leaders might serve as Workpower officers.

A4/48. Possible benefits to trade unions, which might arise through development of the Workpower idea, could include:

i. *increased finance:* in appreciation of the possible assistance and constructive consultation, referred to in the previous paragraph, Workpower officers might wish to make financial contributions to local trade unions funds. Such finance might be distributed to participating trade unions or be used generally for trade unions' purposes within the area.

Unless otherwise decided, it is assumed Workpower officers would make payments to particular trade unions in accordance with the personally expressed wishes of individual Workpower members.

ii. *improved public relations:* trade union co-operation with other interested bodies, in the local development of Workpower, could foster within that area the public relational image of a socially responsible trade union movement and of steadily improving industrial relations. In time this could lead to reduced local unemployment.

iii. *a "Trade Union of the Officially Unemployed":* ultimately an aspect of Workpower could be constructively to develop the equivalent of a *"Trade Union of the Officially Unemployed"*, with directly affiliated and non-competing membership by this union with all the Workpower sponsoring trade unions.

A4/49. *Governmental policy considerations.* In consideration of governmental policy with regard to Workpower the following factors may be noted:

i. *non-gainful (i.e. non-monetary) employment:* if advisable in particular cases no money whatever need be given to

Workpower members. Instead the local Workpower Centre could convert any money it received into commodities.

An appropriate recognition approximation reward policy might be adopted within the Centre to provide some "commodity appreciation recognition" related to individual work, but not necessarily so.

ii. *an appropriate recognition approximation reward policy:* in its dealings with a local Workpower Centre, the government authorities could choose to view any amount of money received by that Centre in relation to the actual benefits known to have been supplied to the public sector of the community by that Workpower Centre's members.

In respect of an appropriate recognition approximation reward policy, co-operation within a local Social Security Advancement Association, or its equivalent, could serve adequately to safeguard the public interest.

iii. *an additional viable source of finance for local government:* successful development of the Workpower idea could be equivalent to national government providing local government with an additional viable source of finance.

iv. *more equitable assistance for development areas:* in addition to a high level of unemployment some development areas have relatively high ratios of sub-standard housing and poor health facilities etc. Thus their financial needs are greater.

If the value of some of the public work performed by Workpower were to be regarded by national government *as if* the work had been paid for in full by the local authority, this could increase that local authority's entitlement to national government grant aid.

APPENDIX FIVE

A Wider Policy Consideration

Meta-enterprise

A5/1. *The concept of a meta-enterprise development body.* It is conceived that at some stage in the future, and distinct from the work of implementation of the SUVOC proposal, a number of leading members of SUVOC Confederation could decide to initiate the formation of a separate non-SUVOC body with a somewhat different membership structure to that suggested for the confederation.

A5/2. The main purposes of this suggested separate body could be twofold:

i. to be generally available at appropriate times to consider and to promote throughout the country further desirable need-relevant socio-economic, topeconomic and environmental developments.

ii. to bring into a structure of general responsibility the majority of organisations in the public and private sectors supplying commodities and services.

Subject to the tempi of developmental change, this body could aim multicentrally to function as a policy-complex of government which would be both independent from and related to Parliament and other locality-significant policy ratification bodies.

In this new body the social contract might find its organised expression.

To be governable, there must be organisation, as well as the opportunity for individual personal expression.

A5/3. It would be advisable for some distinctive new name to be used to affirm the commodity and services basis of this suggested separate body and, at the same time, to challenge some of the ill-defined concepts and inertias underlying the present emotive terms used to describe industrial and commercial enterprise. For these purposes one possible initial name might reflect the concept of *meta-enterprise* development.

A5/4. The term *meta* is used to imply an attitude determined by the necessary evolutionary changes that must occur in time, through and beyond the present situation. Thus after the outmoded image of nineteenth century laissez-faire "*private enterprise*" we have "*meta-enterprise*", that is enterprise that looks beyond merely the private benefit of an individual or group, and beyond the merely present generation.

A5/5. *Meta-enterprise* designates that form of enterprise which seeks to develop amongst its members a continuous consciousness of the effect of its activities upon the community at large, and an awareness that its members' activities must give rise to a communal developmental resultant affecting future communities of mankind.

A5/6. Although the term "meta-enterprise" is not yet in current use, today an increasing number of industrial and commercial concerns in the public and private sectors can be viewed as meta-enterprise concerns, in so far as those responsible for their management consciously view their purposes in meta-enterprise terms, as defined.

A5/7. *A possible constitution.* If, in association with phased implementation of the SUVOC proposal, it should be decided to establish a body concerned with meta-enterprise development, or its equivalent, a suitable body might be incorporated through the initiative of certain leading members of SUVOC Confederation, who thus could be authorized to appoint the first officers of that body and to determine its initial policy.

A5/8. One possible membership policy could be to recognize two groups of members of the meta-enterprise development body — "corporate members" and "association members" — with each

group of members being entitled to appoint an appropriate number of officers. Initial implementation of this membership policy might be along lines such as the following:

i. *a corporate member* could be any industrial or commercial commodity and/or services supply organisation, or professional partnership, which designated its purpose as meta-enterprise, or the equivalent, and which made application to the officers of the meta-enterprise development body for registration as a corporate-member.

   Subject to the foregoing, such application could be accepted by the officers of the appropriate locality-relevant branch of the meta-enterprise development body whether or not the applicant corporate member *publicly* supported meta-enterprise.

ii. *an association member* could be any recognised group or association which made application to the officers of the meta-enterprise development body for registration as an association member.

   At the discretion of the officers of the appropriate branch such application could be accepted if the applicant was able clearly to demonstrate practical support for meta-enterprise development.

   One early association member could be SUVOC Confederation; other association members could be some of the *non-corporate constituent-members*[1] of SUVOC Confederation. As earlier stated, SUVOC constituent-membership could be freely open by invitation to every influential or potentially influential co-ordination institution or movement in the United Kingdom which approved the SUVOC idea. Amongst other bodies these could include

[1] The terms *non-corporate constituent-members* here refers to all SUVOC constituent members, other than those industrial and commercial organisations and professional partnerships which could be eligible to apply for registration as corporate members of the meta-enterprise devlopment body, ref the previous sub. para. i.

professional institutions, trade unions, trade assocations, chambers of commerce and industry, religious bodies, voluntary organisations and government departments.

A Commodity and Services Policy Complex

A5/9. *Development policies.* Consideration of possible financial policies and specific purposes of the suggested meta-enterprise development body is not part of the SUVOC proposal. Suffice it to say that, with particular and limited attainable objectives, practical and useful policies and purposes could be developed.

A5/10. Looking ahead, there is scope for the ultimate acceptance of this suggested meta-enterprise development body, or its equivalent, into an effective commodity and services policy complex of government. In the early stages such a body conceivably might function as the equivalent of a meta-enterprise orientated federation of statutorily recognized topeconomic planning councils.

APPENDIX SIX

Background to the United Way Pilot Operation

An Explanatory Note

A6/1. *The relation with SUVOC.* This appendix consists of a paper providing background information on a SUVOC-type pilot operation with the name *United Way of Merseyside,* hereafter referred to as the pilot operation.

A6/2. In 1982, the pilot operation's *National Division* financed the formation of a separate independent U.K. national charity with the registered legal name *United Way*[1]; this new national charity was also granted official permission to refer to itself by the name *United Way of Great Britain.* This paper was circulated on a limited basis prior to *United Way,* the U.K. national charity, receiving charity registration.

A6/3. As stated earlier[2], *The SUVOC Application* refers to the role of the voluntary sector as a whole and how its different aspects may be harmoniously interrelated within our national community.

A6/4. The charity *United Way* has been formed as an organisation which it is conceived will be able to support implementation of *The SUVOC Application,* or its equivalent, by supplying within the United Kingdom essential payroll giving and gift distribution services which are not already generally available through other established bodies.

Introduction

A6/5. *The United Way movement.* United Ways and their equivalents serve in different ways in many countries. The

[1] Ref. the Footnote page ix. [2] Ref. page xi.

movement is most successful in North America. There it operates more than 2,000 different local campaigns, communicates on nationwide as well as local media, recruits large numbers of volunteers and serves the specific needs of each local community.

A6/6. In 1981, United Way of America raised $1.68 billion, and United Way of Canada $102 million. Approximately 63% of these total amounts came through payroll giving.

A6/7. *Payroll giving.* Payroll giving means individually authorised charitable deductions from employees' pay.

A6/8. At this stage, payroll giving is thought to contribute little more than one tenth of one percent of the total voluntary income of U.K. charities. For 1980 this was estimated at just over £1 billion.[3].

A6/9. The Inland Revenue have granted the pilot operation a valuable policy dispensation for the operation of payroll covenants which dispenses with the requirement for individual tax recovery certificates (Forms R.185).

A6/10. *The United Way minute idea.* The phase "United Way Minute", *used by the pilot operation,* means a gift of one minute's basic pay per working day, calculated by reference to a simple table. Based on a five day forty hour week, for an employee earning between £85 and £95 a week, one United Way Minute represents a net gift of 14p a week, or, after tax recovery, approximately 20p a week or just over £10 a year. Contributions increase annually by a net 2p a week for each £10 a week increase in basic pay.

A6/11. To simplify administration, the United Way Minute calculation may be based on the average basic pay for a defined Work Group, e.g. a local authority school caretaker, with all donors within the employer's workforce contributing at the same rate for each United Way Minute.

A6/12. A further simplification is that it is not necessary for a payroll covenant, otherwise termed a tax recovery assent form, to be signed every four years. In 1982 the Inland Revenue approved wording of a United Way Minute Payroll Covenant, for use by the pilot operation, which can continue until cessation of employment

[3] *Charity Statistics 1980/81* compiled by *Charities Aid Foundation.*

or until the covenantor ceases to pay income tax or until for good and sufficient reason United Way of Merseyside releases the covenantor from the deed. Potential covenantors do not find this wording too daunting once it is understood the employer makes deductions from pay at the request of the employees.[4]

A6/13. *Looking forward.* The lessons learnt by the pilot operation in the last five years offer cautious grounds for optimism. With the right backing and support, it is believed United Way payroll giving for charitable purposes in general could be developed within the U.K. on a basis which should significantly exceed £50 million. £50 million was the approximate amount which in 1980 U.K. charities received through corporate giving.[5]

A6/14. A further indirect benefit of more widespread payroll giving to the voluntary sector would be increased public awareness of the value of the voluntary sector. This changed attitude would be likely to encourage people to adopt more positive attitudes of local community self-help.

A United Way Appropriate to the U.K.

A6/15. *The aim.* The pilot operation began with two local special limitations, relating to donors' rights and fund allocations, as explained in footnotes six and seven on the next page.

A6/16. The aim of the pilot operation has been to raise and to distribute tax-recoverable payroll and other gifts to benefit ALL charitable bodies — serving within the individual contributor's local area — and ANY other charitable purposes — national or local — which contributors and local citizen committees chose to support.

A6/17. It has been the essence of the pilot operation's approach that:

[4] It is generally understood that, in accordance with the *Truck Acts*, the employer must cease deductions if so requested by the employee.

[5] *Charity Statistics 1980/81* compiled by *Charities Aid Foundation.*

i. donors' rights[6]*:*
donors within Donor Groups would have the right, should they so desire, to distribute their own gifts to their chosen charities;

ii. fund allocations[7]*:*
remaining gifts, not directly distributed by donors, should be allocated annually through local committees;

iii. national charities:
each local committee could, should it see fit, voluntarily transfer a proper proportion of contributions to a central fund for independent fund allocations to specified groups of national charities;

iv. independence of charities:
charitable bodies which receive United Way monetary aid should remain fully independent and free to appeal for other funds in whatever manner they decide.

A6/18. *A donors' agency service complementary to Charities Aid Foundation.* In no other country where United Way operates is there a successful charity-bank-type organisation equivalent to *Charities Aid Foundation* (C.A.F.) which is understood to be uniquely British. This is in part due to the British system of covenanted giving.

A6/19. The basis of C.A.F.'s service is the administration of discretionary covenants[8]. This entails recovery of tax on the net

[6] This facility for full donors' directive rights did not become operative until 1st August 1982, in respect of gifts made after that date. This was due to the constitutional development and policy recommendation, referred to on page 230.

[7] Arising from the past constitutional rights of its original member charities, and reference the previous footnote, it may be towards the end of 1985, in respect of the financial year 1st August 1984 to 31st July 1985, before the pilot operation is in a position fully to promote its general fund allocation policies.

[8] On 23rd February 1921, the first "trial" discretionary Deed of Covenant in the United Kingdom was signed by Hugh Rathbone, a Liverpool merchant, with *The Liverpool Central Relief and Charity Organisation,* which was assisted by *L.C.S.S.* It proved to be an historic step. See p. 46, *The Liverpool Council of Social Service: 1909-1959,* by H. R. Poole.

amounts of charitable contributions contributed under deeds of covenant and the distribution of the gross amounts of gifts in accordance with the instructions of individual donors.

A6/20. Subject to the distinctions referred to following, the United Way pilot operation approach has been based more upon the C.A.F. type of service than upon that of United Ways in North America.

A6/21. The pilot operation's aim has been to develop a payroll-giving service for the ordinary weekly and monthly paid worker which was as far as practical complementary to, but not a duplication of, the non-payroll-discretionary-covenanted-giving service supplied by C.A.F. to corporate and higher income group individual donors.

A6/22. The main distinctions between the C.A.F. service and that which the pilot operation has aimed to supply are:

i. *Donor Groups:*
for administrative economy, the pilot operation's office records, of contributions received through payroll giving, have been maintained as far as possible in accounts relating to groups of employee donors, termed Donor Groups.

Note: this has included necessary records, for *Inland Revenue* purposes, relating to individuals' contributions through covenanted payroll gifts. Employers have assisted in the provision of this latter information.

ii. *annual distributions of all gifts:*
the pilot operation has annually distributed, through fund allocations, all gifts which have not been directly distributed by donors themselves, or by their representatives, to charities of their own choice.[9]

[9] *Note:* the pilot operation's policy has been that, unless representatives of Donor Groups requested otherwise, contributions received from within each Metropolitan Borough would be credited to a separately designated *United Way of Merseyside Fund for that Local Area.* Donor Groups, who preferred, could have their contributions credited to a *Merseyside Fund,* for distribution on a country-wide basis, or shared in whatever proportions they wished between two or more *Local Area Funds.* See also para. A7/35i, p. 251.

A6/23. A further transitional distinction between the C.A.F. service and that which the pilot operation has aimed to supply is referred to in the next paragraph.

A6/24. *What the United Way pilot operation was not.* It is important to clarify what, until the time of writing, the pilot operation was not:

i. *it was not a fully working model for United Way (U.K.):* the United Way pilot operation was unable, during its first five years operation, constitutionally to offer community-wide payroll giving and gift distribution services. This was because the first charges on its income were preferred distributions to a group of original member charities.[10]

ii. *it was not modelled on the American United Ways:* however, there is much to learn from North America, where United Ways are moving towards policies of supporting more agencies and of allowing greater donor participation than hitherto in gift distributions.

At the same time, there are historical and current differences between the American and British attitudes to local community self-help.

A6/25. *Background to the growth of United Ways in North America.* The growth of the United Way movement in North America has been based, in part, on three approaches:

i. *as a community response to competing appeals:* the founders of the united-campaign-idea asked potential donors to give one contribution that would be divided up amongst the many appealing charities. This one-gift-for-all concept spread rapidly from community to community, and led to the formation of large numbers of independent Local Community Chests, War Funds and Local United Funds.

[10] See Footnotes 6 and 7 on page 221.

Since 1972 most, if not all, of the Local Community Chests and similar bodies have adopted the United Way name[11].

ii. *community fiscal and programme accountability:*
as United Ways developed more systematic methods of raising and distributing contributions, they refined a citizens' budget review process, for agency fiscal-and-programme-accountability, and adopted sets of standards for agencies to meet before receiving funding.

Thus, in the U.S., United Ways' responsibilities broadened to include community planning, management assistance, public relations, government relations, etc. It is understood these latter responsibilities were undertaken because, unlike the U.K., there is in the U.S. an absence of effective intermediary organisations able to undertake the work.

iii. *immunity rule:*
in order to participate in United Way (or community chest, etc.) distributions, agencies in the past had to agree not to compete with United Way type fund raising in the workplace or amongst corporate donors; in return local United Way type bodies undertook responsibility for fund raising on the agencies' behalf.

Inflation and changing social circumstances have caused some erosion of this policy in practice, although theoretically

[11] *People and Events, a History of the United Way,* published in 1977 by *United Way of America,* states: "United Way's history [in North America] falls naturally into two phases. From 1887 to 1970, it developed community by community; [in 1957, 2042 campaigns raised $422 million]. Local programmes developed separately and independently; the national organisation was simply a service centre. Then, in 1970, local United Ways came together to form a truly national movement".

People and Events also states p.16, 20, the first United Appeal for Funds, launched in Denver in 1887, was based on the central collection plan of *Liverpool Central Relief Society,* formed in 1863. This latter body ceased to operate, after seventy years, in 1933.

It may be of interest to the reader that, in 1909, the Secretary of the renamed *Liverpool Central Relief and Charity Organisation Society* drafted the constitution of *Liverpool Council of Social Aid* which first met on 17th May, 1909; from 1913, it operated independently from L.C.R.C.O. This was the third Council of Social Welfare to be formed in the U.K. The first, *Hampstead Council of Social Welfare,* held its first meeting in January 1908; the second one in Stepney did not prosper. Ref. p.7, 8, 19, 90. *The Liverpool Council of Social Service* by H. R. Poole.

it is still basic to the philosophy of United Ways in North America.

A6/26. Today, United Ways in North America accept that in a democracy one cannot stop people raising money, and that Local United Ways will never eliminate or replace all other appeals for philanthropy. It is also recognised that many agencies do not share the same goals and objectives as United Ways in North America, nor do they wish to participate in the community fiscal-and-programme-accountability process which is inherent in the United Way systems in that continent.

A6/27. Evidence of United Ways' development to meet changing times and changing needs is the *Donor Option programme;* this was introduced in 1982, by *United Way of America,* to facilitate gift designations by donors to charities of their choice[12].

A6/28. *The common basis United Way approach.* The basis of the United Way approach within the U.S., which it is conceived could be applicable also within the U.K., is as follows:

i. *the goal is to provide service to people:*
United Way is not a fund raising agency, is it a service vehicle. The service is to raise funds efficiently and to distribute them effectively.

ii. *community development:*
United Way provides people with an opportunity to participate in the life of their local community and to become effectively involved in its well-being in a way which they cannot do solely through elected government.

iii. *a unique service:*
United Ways are effective and strong because their unique payroll giving service is community-wide.

iv. *a stimulus to higher corporate giving:*
corporate giving in the U.S. is relatively higher than in the

[12] The *Donor Option programme* introduced was not the same as the system of Donors' Directive Rights outlined in chapter nine. See Footnote 1, page 74.

U.K. One reason for this is that many companies tend to supplement the payroll gifts of their employees. Within the U.K. it is envisaged such corporate giving to United Way would be made through *Charities Aid Foundation.*

A6/29. *Message and support from United Way International.* United Way International, which operates in association with the International Council on United Fund Raising, is a world-wide movement whose purpose is to increase the ability of nations to develop their voluntary charitable capacity to the fullest. Every national United Way movement independently promotes free-will giving within the community under the conditions most appropriate to that country.

A6/30. In 1981 United Way International made a generous financial gift, renewable for a further two years, to the pilot operation's National Division, to assist the independent development of United Way in the United Kingdom. In making the first gift their President, Bill Aramony, wrote:

> *"My Board is happy to provide this assistance because we consider your work to be of international significance. It is our belief that the new paths of donor-participation you are developing in Great Britain will be followed in the years to come by many other nations."*

A6/31. *Donors' rights in the U.K.* It is the pilot operation's experience that potential donors through payroll giving have prejudices and suspicions as well as preferences. The key to the overcoming of donor resistance is a policy which recognises the right for donors and Donor Group representatives to distribute their own gifts.

A6/32. The concept of donors' directive rights offers the following benefits:

i. *donors' attitudes:*
it reinforces donors' confidence in their preferences and largely overcomes their prejudices and uneasiness.

ii. provision of payroll giving facilities:
it makes requests for the provision of payroll giving facilities acceptable in principle to managements and trade unions who do not want to "take sides", so to speak, as to which charities should be supported.

iii. gift distribution administration:
due to modern technology, it is now economically feasible to provide donors' gift distribution facilities; such administrative facilities already exist through *Charities Aid Foundation.*

iv. allocations through local committees:
the likely effect of full donors' directive rights will be to increase substantially the total amount of donor generosity, only a portion of which will be directly distributed by donors.

This will mean that a substantial amount of the payroll gifts raised can be available for fund allocations by methods acceptable to the donors concerned, e.g. local citizens' committees.

A6/33. *Reasons for support by trade unions.* As stated in chapter nine, it is recognised that a major factor in the development of United Way is the attitude of the trade union movement which represents a substantial number of the existing and potential donors.

A6/34. Trade unions support the concept of donors' directive rights because these rights are implicit in trade union principles — that is workers' abilities to respond intelligently to social needs — and because they offer a means of demonstrating the virtues of social co-operation.

A6/35. *Reasons for support by managements.* There is no doubt that human beings feel better if they are helpful to each other. For this reason, a labour force where management and workers are consciously co-operating to further the well-being of their community is likely to be a more productive labour force than otherwise.

A6/36. This obvious fact is one reason why enlightened managements at all levels are expected to welcome the emergence of the United Way movement in the United Kingdom.

The History of the Pilot Operation

A6/37. *United Voluntary Organisations.* United Voluntary Organisations, Liverpool, (UVO), as the pilot operation was originally known, started in Liverpool in 1952 on the initiative of the then Head Office of a major bank, which was aware of the serious financial plight of many voluntary organisations in the city, particularly, at that time, youth clubs.

A6/38. Previously, attempts had been made to form an American type community chest[13], but this idea was rejected by the local charities who were unwilling to give up their independence. Rather than do nothing, it was decided to develop payroll giving by asking for one old penny a week. The initial appeal was based on a Round Robin with the message "A Penny A Week Is All I Seek".

A6/39. UVO developed relatively rapidly in the early years and, by 1965, was raising £25,000. One of the messages used to develop this payroll giving was the not wholly accurate idea that UVO would cut out the need for flag days. Disappointment that flag days appeared to continue as before led to some criticism of UVO for not doing better.

A6/40. Between 1965 and 1975 UVO's income rose by a further £10,000. This increase was helped by the introduction of decimalisation and the opportunity this provided to substitute contributions of One New Penny in place of the original contributions of One Old Penny. To this day, a number of contributions are still for One New Penny a week, and a way has yet to be found of effectively contacting these donors to request them to increase their contributions.

A6/41. Originally, and probably largely informally, UVO developed by a system of contracting in. In some cases a rubber stamp was used on the wage envelope to inform contributors that their pay was one penny less than the amount shown on their pay slip, because the

[13] *Ref. p. 46, 90, The Liverpool Council of Social Service: 1909-1959,* by H. R. Poole.

individual had agreed to contribute to UVO. This gave a tangible recognition to the donor and naturally helped to stimulate increased giving.

A6/42. A further important factor, in the early development of UVO, was the very close support the idea received from managements at the most senior level. This management interest and backing encouraged the co-operation of managements at all levels. From the outset, trade unions expressed full support.

A6/43. Following the initial development in Liverpool, neighbouring UVOs were started in Wirral, St. Helens and Manchester, but these were not very successful. Manchester discontinued active operations some years ago, when it was raising about £5,000, but much of this sum was absorbed by expenses. St. Helens raised a little more than Manchester and a local trust paid the administration costs. UVO Wirral merged with UVO Liverpool in 1976 to form United Way of Merseyside. At that time UVO Wirral was raising £3,500.

A6/44. The result of the limited success of the UVO movement led some managements to state that UVO should never have been started or that "it won't work". An increasing emphasis on watching overheads led many companies to express the view that the requested deduction of One Penny a Week was too small to cover expenses. In short, after a twenty year period, there was a general feeling that the UVO idea had not proved a success.

A6/45. *The formation of the pilot operation.* The author's involvement with UVO grew out of his interest in the Local Trade Advisory Council for Industrial and Commercial National Savings on which he served for 25 years. The promotion of Industrial and Commercial National Savings was successful where there were interested National Savings Group representatives in the firms. The question arose "Would it be possible to develop comparable Donor Group representatives for payroll giving?"

A6/46. In 1975, as explained in the Introduction, the author became chairman of the UVO Executive Committee on the understanding that the name would be modified to "Society of United Voluntary Organisations within Community", abbreviated

to "SUVOC", and the constitution changed. At that time the Chief Charity Commissioner arranged for the author to be introduced to representatives of *United Way International*, and Dick Livingston Booth, the then Director of Charities Aid Foundation, invited him to join the board of *Interphil*[14] with whom United Way International had connections. He also visited United Way of America.

A6/47. The UVO Executive Committee, on which a number of trade unions were represented, fully supported the proposed reconstitution of UVO, but this proposal was rejected by the charities who until that date had received the whole of the income.[15] In the end, after more than a year's delay, a compromise arrangement was made and in 1977 UVO became United Way of Merseyside. It was agreed that the original member charities would be constitutionally entitled to receive preferred distributions (inflation adjusted), and that these distributions would continue for a minimum period of five years and thereafter until otherwise decided.

A6/48. *A constitutional development and policy recommendation.* At the pilot operation's Delegates' Assembly Meeting in 1981, it was resolved that constitutional entitlements to preferred distributions would discontinue after the end of July 1982, but the recommendation was approved that for a further two years the fund allocation policy on Merseyside could be especially favourable to the original member charities.

[14] "*Interphil*", meaning "international philanthropy", is the abbreviated title of the *International Standing Conference on Philanthropy*, which was founded in 1969. Dick Livingston Booth became its third President.

[15] The recommendation made to its Charities' Council, by the UVO Executive Committee, was for UVO to transfer responsibility for fund raising through payroll giving to a new charitable body, to be formed for the purpose, which would have been controlled by elected Donors' Representatives and used the *SUVOC* name.

This new *Donor Agency* would have undertaken: first, to have encouraged support for the original UVO member charities; second, that all gifts raised by it within the boundaries of Liverpool, other than those distributed directly by donors to charities of their own choice, would have been transferred to UVO for independent general fund allocations. These allocations would have been subject to the original UVO charities receiving preferred distributions (inflation adjusted).

The UVO Charities' Council rejected this proposal, to grant donors' directive rights, largely because it was erroneously feared that donors would show preference to national charities rather than local charities.

A6/49. This constitutional development meant that the pilot operation would be able to provide full donors' directive rights. However, because of the policy recommendation, it might not be able to develop immediately the local involvement in local fund allocations which could create considerable opportunities for donor participation and interest in its work. This created interest will undoubtedly be the key generally to substantially increased free-will giving.

A6/50. *Contributions to C.A.F., N.C.V.O., and Local C.V.Ss.* At the 1981 Delegates' Assembly Meeting it was also agreed to co-operate with the national development. A provisional intention was expressed, subject to general approval by other members of *United Way,* the national body, that Charities Aid Foundation, the National Council for Voluntary Organisations and local Councils for Voluntary Service, and their equivalent, should between them share *five per cent* of gifts to recompense them for anticipated services and advice. This payment would be waived, if donors objected. Appendix seven gives further information on this subject.

A6/51. *The successes.* In its first five years, the pilot operation's annual income, which came mainly through payroll giving, increased substantially. However, during this period a major factor, and an increasing problem, were closures and redundancies. Every year a large number of contributors were lost.

A6/52. The successes, during the first five year period, were:

i. *acceptance by donors:*
the individual donor when approached on a person to person basis thoroughly accepted the pilot operation's objectives. It was found that between 60% and 100% of individuals approached were willing and ready to sign an authority for a payroll deduction. The personal approach seemed to be necessary.

ii. *donors' directive rights:*
this is obviously a most important facility to offer, whether it is used or not.

iii. recruitment of new starters:
the best allies were found to be recruitment officers, but there was a marked absence during the period of recruitment by Merseyside employers.

iv. tax recovery:
the payroll covenant was developed. This is an important facility, not least, because tax recovery answers the objections of donors who say they already have periodic staff collections.

v. trade unions approval:
shop stewards generally have approved of the pilot operation and wished it well.

vi. low administration expenses:
each year at least 90% of contributions received were distributed. For 1980,1981 and 1982, there was no deduction for administration, 100% of contributions were distributed.

vii. financial incentives for charities:
a Shared Payroll Covenant financial incentive scheme was developed, for the benefit of local and national charities which promoted United Way payroll giving.

Provision was made to distribute gifts raised equally between the participant charities responsible for obtaining the signed tax recovery assent forms and Local Fund Allocation Committees.

viii. local United Way Funds:
arrangements were made for the pilot operation to serve as the administrator for separately accountable Local United Way Funds to be designated with the names of recognised local government areas[16].

A6/53. *The difficulties.* These were:

i. communication:
indirect communications had limited success. Frequently the pilot operation had to rely solely on the written word.

[16] See Footnote 9, page 222.

ii. media-publicity:
the media publicity was inadequate. This occurred for two reasons: first, due to inability to obtain much publicity without funds which were not available for the purpose; second, due to the constitutional reasons earlier stated, the pilot operation was unable to offer the service which it had set out to offer, namely, community-wide gift distributions with donors' directive rights.

iii. managements:
managements, particularly at senior level, were highly preoccupied with other matters.

iv. trade unions' priorities:
many trade unions tended to be as hard worked as managements and the pilot operation was not high on their list of priorities. However, as reported following, encouraging levels of co-operation can be achieved in what might seem to some an impossible situation, for example, within a multi-union company.

Common Sense at Work

A6/54. Trade Union Members support. In 1982, a Trade Union Branch Official[17] addressed the pilot operation's Fifth Delegates' Assembly Meeting. He stated:

> "When I was asked for a title I suggested *'Common Sense at Work'* for two reasons:
>
> *firstly,* to me the United Way concept is simply common sense at work;
>
> *secondly,* to report a factual experience of common sense actually at work, that is, in the workplace itself.

[17] Eddie Kirkpatrick, *Society of Graphical and Allied Trades, SOGAT,* speaking at Town Hall, Liverpool, on 18th October 1982.

In developing the principle of Donor Groups having the right to distribute their donations to a charity of their choosing, a number of anxieties — I put it no stronger than that — have been expressed to me:

i. that Donor Group rights would produce arguments within the group;

ii. that Donor Group distribution would result in some of the less popular charities losing out financially.

Thankfully, I can report from my own experience that there is no foundation to either of these anxieties. On the contrary, all the signs are that Donor Group distribution will create more awareness of the needs of all charities and that Donor Group distribution will certainly lead to an increase in the number of donors.

Also, from my own experience, I have found that an awful lot of people were put off the idea of United Way because they had no control over which charity received donations. Rightly or wrongly, a lot of people are suspicious that charitable gifts may not be used for the purpose for which they have been given. Removal of that suspicion, via Donor Group distribution, should greatly increase donors' generosity.

It is the hope of United Way to be able to produce a model set of proposals that can be followed by any given Donor Group.

Having already mentioned some of the anxieties that have been expressed about Donor Groups operating their own distribution of funds, it stands to reason that any attempt to produce a working model must make allowance for certain important factors within a Donor Group:

i. the Donor Group might be very large, 1,000 members for instance;

ii. the Donor Group might cover various types of employees — management, clerical and production;

iii. the Donor Group might have a built in history of animosity within the group itself;

iv. within the Donor Group there might be a strained relationship between the workforce and the company management.

It would be pleasant to pretend that none of these elements exist — but they do — and any Donor Group distribution model must be constructed with all of them in mind.

My own industrial background is the printing industry and, in particular, newspapers. Whilst I will not admit that the printing industry has all the qualities I have just mentioned, I will express the view that, if a set of proposals can function successfully in the printing industry — then they can function successfully anywhere.

The Donor Group I have been working with could, and hopefully will, contain close to 1,000 members. There are seven Trade Unions involved and the Trade Union presence within the company is very strong indeed.

A meeting of all the Trade Union Representatives was arranged with a view to constructing a procedure for distributing their group's donation, which was likely to be in excess of £4,000 for the year.

After a couple of brief comments by myself, I was involved in a conversation that I can only describe as heart-warming, because I was hearing speaker after speaker state the pitfalls that should be avoided. Everyone present agreed that none of the present industrial procedures they operate could, or should, be used to determine the Donor Group's distribution,

and that a completely separate and non-partisan body should have this responsibility.

The Representatives did not need me to tell them about popular and non-popular charities — they were telling me.

They did not need me to tell them that steps had to be taken to ensure that one charity may, by accident, receive too much, whilst an equally deserving charity might receive too little.

They told me about the degree of responsibility needed to determine which charities the group should support.

The conclusions of this Trade Union Representatives meeting were that I should recruit and advise a small committee involving all the departments and the management. The aims of the committee would be as follows:

i. to formulate a constitutional procedure for the distribution of the Donor Group's contributions.

ii. to increase the number of donors by personal approaches and use of the United Way film.

iii. to increase the value of the present donors' contributions to United Way.

iv. and most important — to become confident in recognising the different charities' needs which will lead to the Donor Group naming its own charities as recipients of United Way charity vouchers.

The Representatives also confirmed that, in the meantime, they were quite happy for United Way to determine the distribution of the Donor Group contributions.

That group of Trade Union representatives can be classed as a group that has a traditionally strained relationship. Nevertheless, they are capable of setting aside all the feelings that would make co-operation within the group difficult.

I suggest to you that charitable giving can unite any group irrespective of relationships within the group.

I also believe that Donor Group rights will result in a major increase in United Way's income."

The Future

A6/55. *The Merseyside scene.* During the five year period of the pilot operation Merseyside had high unemployment, particularly in pockets of Liverpool. Most companies' problem was survival. The spectre of unemployment and non-recruitment created obvious difficulties.

A6/56. *The increases.* The increases achieved were due mainly either to the action of recruitment officers in their places of work or, and more productive, a person to person contact in canteens or at meetings.

A6/57. *Trust the donors.* The author believes most sincerely that payroll giving can be successfully developed. The key will be to let the donors do what they want to do with their gifts. If donors are trusted to act sensibly with their own gifts, it is believed many donors will respond by trusting the Local Fund Allocation Committees to distribute their gifts on their behalf, and that the net result will be very considerably increased payroll giving.

A6/58. *Tax recovery and recruitment.* The facility for tax recovery is a valuable added inducement and most people are prepared to sign a payroll covenant. In fact, it seems comparatively easy to obtain signatures if individual approaches are made, particularly if trade union representatives have been consulted beforehand.

A6/59. However, with a number of important exceptions, until the 1982 constitutional change the pilot operation found it difficult to recruit other people able to obtain signatures on its behalf.

A6/60. It is believed that, in the future, this recruitment can and will be successfully achieved.

APPENDIX SEVEN

Why and How to Develop a United Way Fund for your Local Area

Introduction

A7/1. *A consultative paper.* This supplementary abbreviated background paper, which awakened interest in the feasibility of the possible development of *United Way* within the U.K., was written in 1981 and circulated on a limited basis, for information and consultation purposes, with the Notice referred to below. The paper was written using the present tense; in view of its relevance this wording has been retained.

A7/2. The Notice attached to the original paper explained that *United Way* was not at that time a registered charity able to receive charitable gifts. *Note:* in 1982 *United Way* became a company limited by guarantee, the initial members were Peter Jay[1] and the author; charity registration was granted that October.

A7/3. *What is United Way?* United Way is a charity formed to operate within Great Britain and Northern Ireland. It raises and distributes tax-recoverable payroll and other gifts to benefit ALL charitable bodies — serving within the individual contributor's local area — and ANY other charitable purposes — national or local — which contributors and local citizen committees choose to support.

A7/4. The United Way service is economically supplied on a locally accountable basis in co-operation with *Charities Aid Foundation,*

[1] "The Welfare State was founded with four basic aims: *i.* to meet individual needs; *ii.* to achieve a greater degree of equality; *iii.* to provide a basic safety net; *iv.* to give individuals a greater degree of autonomy. Now the debate we should be having is how various elements of the Welfare State have or have not achieved their aims." Peter Jay, speaking as Chairman of *National Council for Voluntary Organisations,* at the Annual Meeting of *Merseyside Council for Voluntary Service,* 30th September 1982.

the *National Council for Voluntary Organisations* and Local Councils for Voluntary Service and their equivalent. United Way does not duplicate the work of any of these bodies.

A7/5. *The purpose of the paper.* This paper first briefly indicates the case and need for United Way and its development and service. It then suggests how, in simple stages, interested persons may co-operate with others to develop separately accountable United Way Funds for their Local Areas.

The Case for United Way

A7/6. *The advantages of the United Way approach.* The United Way approach is recognised to be an efficient and effective way to raise large amounts of free-will giving for charitable purposes and to ensure accountability in how funds are distributed to meet specific national and local community needs.

A7/7. Within the U.K. the advantages of the United Way approach are as follows:

i. *accounts for local areas:*
it maintains and publishes annual accounts by local government areas for each Local United Way Fund; the accounts show the gifts received within each local government area, the administration expenses incurred and the total amount available for distribution. Consolidated information is supplied on the distributions made.

ii. *all charities supported:*
it offers support to all charitable agencies on a basis whereby recipient charities remain fully independent and free to appeal for other funds in whatever manner they decide.

iii. *community-wide involvement:*
it involves large numbers of community citizens who give monetary aid and voluntary services to help meet the needs of the people in their community.

iv. *donors' directive rights:*
it provides donors' directive rights for payroll giving contributors; with the co-operation of volunteer donor

representatives within the firms concerned, individual donors have the right each year either personally to direct distribution of their gifts to their own chosen charities or, if they prefer, to direct gifts in association with a local group of their fellow workers termed a "Donor Group".

v. *dues to intermediary charitable bodies*[2]:
it co-operates with, and finances with donors' agreement, those intermediary charitable bodies, such as Councils for Voluntary Service and their equivalent, which supply services of benefit to all voluntary organisations in their areas; in return for voluntarily distributed contributions termed "dues", these charities give United Way valuable information, fund allocation advice and other services and thus help to reduce administration expenses.

vi. *financial incentives for charities*[3]:
it administers financial incentive schemes for the benefit of local and national charities which promote United Way payroll giving; with the agreement of donors, participant charities annually receive a substantial proportion of the total sum which each participant is credited by the United Way office with having raised that year.

vii. *fund allocations:*
it responds to local community needs through Local Fund Allocation Committees of volunteers which include Donor Group representatives; these local citizen committees annually distribute the balance of funds raised within the area which have not been distributed by donors directly, or through dues or direct financial incentives for charities. Each local committee may, if it sees fit, voluntarily transfer a proper proportion of contributions to a central fund for independent fund allocations to specified groups of national charities.

[2] Ref. para A6/50, p.231, and para A7/26 following.

[3] Ref. sub-para A6/52 vii, p.232.

viii. information services:
it assists in the publication of Local Voluntary Sector Directories and in the supply of other comprehensive information on the work of voluntary organisations. The privacy and independence of individual organisations is respected.

ix. low administration costs:
it operates with very low administration costs and aims to distribute at least 90% of all gifts received; these low administration costs are achieved by strict economy, earned interest, contributions of services and monetary aid received for the purpose and the pooling of overhead expenses through a regional centre concept.

x. reduces fund raising solicitations:
it reduces multiple fund raising solicitations of employees in factories, offices and other places of work; this occurs because United Way payroll giving, with its facilities for donors' directive rights, has more widespread appeal than payroll giving solicitations in support of the work of one individual charity.

xi. tax recovery:
it recovers income tax on covenanted payroll and other contributions and credits tax recovered to the appropriate Local United Way Fund accounts.

xii. unpaid voluntary workers:
it recruits and trains voluntary workers upon whose valuable free-will giving of services United Way largely depends.

Why United Way is Needed

A7/8. *The voluntary sector.* The term the voluntary sector refers to all organisations and bodies legally regarded as charitable. The voluntary sector is sometimes referred to as the independent or

third sector — third after business and government — and as the private non-profit sector, or for short simply non-profit sector.

A7/9. Organisations legally regarded as charitable may refer to themselves as voluntary organisations, registered charities, unregistered charities, charitable agencies, or simply as charities or agencies.

A7/10. The income of the voluntary sector is falling in real terms. Today, in the face of inflation, recession, cut-backs in central and local government expenditure and rising demand for services, every charitable voluntary organisation in the U.K. faces one thing in common — the threat of immediate or impending financial and social crisis.

A7/11. Whatever the colour of a government may be, and no matter how good its welfare services, there will always be a need for independent local initiatives to meet local community problems. Voluntary effort is fundamental to the health of a democratic society.

A7/12. An official report[4] has described the special contributions made by the voluntary sector as:

- providing services which are complementary, additional or alternative to statutory services, such as homes and day centres for the elderly, children's homes, housing associations, advice centres, residential care, meals on wheels, and visiting schemes.

- responding to new needs and pioneering services, which may later become incorporated in the welfare state, such as family planning and, more recently, refuges for battered wives.

- acting as a pressure group to bring about changes in policies, e.g. the work of the National Council for Civil Liberties, the Child Poverty Action Group, the Disablement Income Group and Friends of the Earth.

[4] *The Future of Voluntary Organisations,* p.23 and 43. Report of the Wolfenden Committee, published 1978.

— reinforcing the extensive, informal caring arrangements of families and neighbours through such activities as Good Neighbour schemes[5], and through mutual-aid organisations, such as Gingerbread.

— acting as the sole providing agent of services in some places, as, for example, in the provision of youth clubs, advice and information centres, and pre-school playgroups.

A7/13. *The size of Britain's voluntary sector.* The voluntary sector is of much greater size, strength and diversity than is generally recognised. Not counting churches, which number about 50,000, there are approximately 200,000 different charitable voluntary organisations in Britain[6].

A7/14. Each year about five million people undertake voluntary work of some sort, doing roughly sixteen million hours work a week. The voluntary contribution is at least equal in terms of man hours to that of all paid staff in local authority social services departments[7].

A7/15. The annual income in 1980 of the voluntary sector — excluding some education and religious establishments and housing associations — was estimated to have exceeded £2.64 billion, with voluntary income totalling £1.06 billion[8]. Until recently the figure of voluntary income approximately equalled the dividends paid by all British companies[9].

A7/16. Approximately 50% of the overall income of Britain's charities is raised through fees, charges, investments, interest and

[5] For example, the Good Neighbour scheme operated by *Age Concern (Liverpool)*, on behalf of Liverpool City Council Social Services Dept.

[6] The exact numbers are not known. The attention of the reader is drawn to the footnote on p.143 ref. para A1/7.

[7] Ref. p.35, 36. *The Future of Voluntary Organisations.* Report of the Wolfenden Committee 1978.

[8] *Charity Statistics 1980/81* compiled by *Charities Aid Foundation.*

[9] Ref. p.5. *Charity Statistics 78/79* "National Income and Expenditure, 1967-1977, published by the Central Statistical Office, records that total company dividends on

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rent, 10% from central and local government grants, 10% from legacies, 10% from trusts, 2% from company giving and 18% from individual giving.[10]

A7/17. *The payroll giving potential.* At present, as stated in the previous appendix, charitable giving through payroll deductions is thought to contribute little more than one tenth of one percent of the total voluntary income of the voluntary sector.

A7/18. It is this virtually new untapped source of free-will giving for charitable purposes which United Way primarily aims to develop.

United Way's Development and Service

A7/19. *The formation of United Way.* A separate charity has been formed to operate nationally with the name *United Way.* The purpose of this new national charity is to benefit the country's voluntary sector as a whole through further development of payroll and other giving, with donor and locally directed gift distributions.

A7/20. United Way is controlled by a Council of unpaid members, the majority of whom support the work of Regional Centres. A few members may serve as Governors in recognition of their willingness and ability to contribute special assistance and advice.

A7/21. *The role of the United Way National Office.* In addition to supplying general administration services the role of the United Way National Office is as follows:

i. *approaches to large employers:*
it encourages large employers, with operations nation-wide, to supply their employees on request with United Way payroll giving facilities.

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ordinary shares are approximately £2,300 million. In this edition of *Charity Statistics* we show that a conservative figure for the total income of charity is £1,965 million. To say that the income of charity approximates to the dividends paid by all British companies is to make a statement that many will find startling and even incredible. But charity in this country is not just a shilling in a rattle-box, a summer fete, or a fashionable premiere — it is, by any financial standards, a very significant operation indeed." *J. D. Livingston Booth, O.B.E., M.A., Director, Charities Aid Foundation.*

[10] *Charity Statistics 1980/81* compiled by *Charities Aid Foundation.*

ii. clearing house facility:
it administers a payroll giving clearing house facility, for use by employers operating in different locations who pay wages from a central office, and who prefer to send one consolidated payroll contributions' cheque to the United Way office for subsequent distribution by it to the different Local United Way Funds concerned.

iii. communications:
it provides general publicity and assistance in communicating the United Way message.

iv. staffing:
it employs and trains suitable personnel to develop United Way's work both nationally and through Regional Centres.

A7/22. *The role of Regional Centres.* The role of Regional Centres is to co-operate with Local United Way Fund Advisory Committees to achieve the following desired benefits:

i. case statements:
the development of public relations case statements, related to specific human care needs within each particular community and explaining why people should give that year.

ii. fund raising:
the development of a substantial fresh source of finance, mainly through payroll giving, to benefit charitable voluntary organisations in general.

iii. economy:
the development of economy in campaign and administration costs through the recruitment of volunteers and the pooling of overhead expenses.

iv. local autonomy regarding distributions:
the development of local decision making by donors and

volunteers in the distribution of funds raised within each local area.

A7/23. A later section of this paper suggests stages in the development of Local United Way Funds.

A7/24. *National and local dues.* As earlier indicated, United Way aims to strengthen the independent financial status of those intermediary charitable bodies which supply services of benefit — not only to United Way — but to all voluntary organisations in their areas. It is United Way policy, for general purposes of economy, not to duplicate the work of these bodies.

A7/25. Each year, from the total amounts raised by each Local United Way Fund, United Way will voluntarily transfer up to two percent as "national dues" and three percent as "local dues". These transfers will be made unless otherwise resolved by United Way's Members' Council or requested by a Local United Way Fund Advisory Committee (or a County Area Advisory Committee) with regard to local dues in its area or by individual donors or Donor Groups with regard to their own contributions[11].

A7/26. National and local dues will be distributed, after due consultation, between the following bodies:

i. *Charities Aid Foundation:*
this eminently respected and highly efficient national body helps to reduce United Way's gift distribution expenses by supplying computorised services related to the administration of United Way Charity Vouchers. In the future further computerised services may be supplied.

ii. *National Council for Voluntary Organisations:*
this well established National Council helps to reduce United Way's administration expenses by supplying support, publicity, co-ordination of fund allocation advice on behalf of national charities[12] and comprehensive information services

[11] Table Five, p.176, illustrates how distributions of "dues" might be shown in the *Annual Financial Statements of SUVOC Charity Bank Branches.*

[12] It is emphasised that NCVO's role could be simply to *co-ordinate* the provision of

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regarding the capacity of the voluntary sector to meet the human care needs of the community; all these services are of value to Local United Way Fund Advisory Committees and, amongst other benefits, reduce the need for United Way to finance costly research projects.

iii. Local Councils for Voluntary Service:
most, if not all, of these local Councils (including County Area Councils) and equivalent bodies are in a position to help to reduce United Way's administration expenses by supplying similar assistance[13], related to local and county areas, to that which the National Council for Voluntary Organisations can supply on a national basis.

The United Way Pilot Operation

A7/27. *Gift distribution by donors.* As earlier stated, donors' directive rights means providing donors with opportunities to distribute their gifts to their own chosen charities. Gift distributions are made through use of United Way Charity Vouchers which donors hand direct to the recipient charities. Recipient charities cash their vouchers through the United Way Office which operates in close association with Charities Aid Foundation.

A7/28. The fact that individual donors have a constitutional right, if they wish to exercise it, of personally distributing gifts to their own chosen charities is a very important provision as it stimulates increased giving and generates a sense of personal social responsea-bility.

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fund allocation advice. It could be recognised generally that: "The lead which intermediary bodies can legitimately give relates as much to spreading knowledge and information through their networks about the plans and interests of voluntary organisations, so that there is a self-regulatory element in the competition for funds . . . It would be improper for any intermediary body alone to determine whether an independent voluntary organisation should or should not receive funds from a third party . . . Reported by *National Council of Social Service.*" See p.86, 87, *The Government and the Voluntary Sector,* published by The Voluntary Services Unit, Home Office London, 1981.

[13] The attention of the reader is drawn to the suggested procedure for a number of *Councils for Voluntary Service* to facilitate distributions of funds within a Metropolitan County. Ref. para A1/72, p.163.

A7/29. The pilot operation reports that it is not uncommon, after careful consideration, for members of a Shop Stewards' Committee to request the Local Fund Allocation Advisory Committee to distribute the whole of that Donor Group's gifts through general fund allocation and at the same time for them to express appreciation, renewed goodwill and support for the work.

A7/30. *The experience of the pilot operation.* The experience of the United Way pilot operation in relation to donors indicates:

i. responsible gift directions by donors:
the donors' directive rights facility is used responsibly and conscientiously by workers' representatives. In practice, individual donors have not pressed to exercise their gift direction rights singly; these are then operated on their behalf by Shop Stewards' Welfare Committees or Works or Departmental Committees, all of whom consult with donors.

ii. voluntary support for fund allocations:
it is likely that — even though granted full donors' directive rights — large numbers of donors will respond positively to a request from Local United Way Fund Advisory Committees that a proportion, say, one half, of total contributions raised within that locality voluntarily be left available for general fund allocations.

iii. the key to increased giving:
the key to realization of the very substantial amounts in payroll giving now potentially available lies in achievement of the following:

- the full enfranchisement of donors, i.e. the granting of 100% donors' directive rights.
- the provision of simply administered tax recovery facilities on payroll giving.
- the management of an economical operation, this requires low (desirably nil) deduction from payroll gifts to cover administration expenses.

A7/31. As earlier stated, United Way is basically a volunteer organisation. It operates and communicates its message through voluntary workers within Donor Groups and with the assistance of other voluntary workers in the area.

A7/32. *Composite tax recovery on payroll giving.* Appreciative though United Way is for the policy dispensation granted by the Inland Revenue, for the operation of payroll covenants, at the present time the procedures necessary to recover tax involve considerable administrative work to all concerned — including in all probability to the Inland Revenue. United Way would welcome a more simplified procedure, such as operates with Building Societies, who receive composite tax recovery calculated at 25% in lieu of the normal tax recovery rate of 30%.

A7/33. Administration considerations apart, in days of recession and high unemployment, composite tax recovery arrangements would remove the uncertainty felt by some tax paying contributors — such as married women working part time — as to whether their total family income over the next four years would remain high enough to make them liable to pay income tax[14].

Stages in the Development of a Local United Way Fund

A7/34. Here it is suggested how, in simple stages, interested persons may co-operate with others to develop separately accountable United Way Funds for their Local Areas.

A7/35. *Stage One — individual consultation.* Contact ten or more representatives of voluntary organisations, trade unions, managements and/or potential donors within your local community area and consider:

i. the area:

could your community area boundary be regarded as identical to that of the immediate local government area?

This policy is generally advisable for United Way development and distribution purposes. Where two-tier local

[14] Subsequent to the writing of these references to Composite Tax Recovery, the *Inland Revenue Claims Branch* in 1982 approved fresh wording for a United Way Payroll Covenant which has overcome some of the problems referred to above. Ref. para A6/12, p.219.

government exists, it is likely that in due course a County or equivalent Larger Area United Way Fund will also be developed. With the agreement of the donors concerned, a proportion of the annual gifts received by the Larger Area Fund may be transferred for charitable distribution through appropriate Local Area Fund Committees.

Note: every firm's Donor Group representative has the right to instruct the United Way office into which Local United Way Fund the Donor Group's contributions shall be credited. If preferred, the contributions can be proportionately divided between several Local United Way Funds. Every Donor Group also of course has the right to decide what proportion of its total annual gifts it wishes directly to distribute to charities of its own choice.

ii. the need:
would your community's well-being be improved given increased monetary aid for your local voluntary sector?

You may know of quantifiable examples of desirable local human care services which might be delivered to meet the needs of the community.

iii. the potential:
what amounts of free-will giving of monetary aid could be raised within your community? In making these decisions you should use whatever information is available on giving-potential in your area.

To simplify this forecast it may be assumed that a tax recoverable payroll gift of one minute's pay per working day represents an annual gift per contributor of approximately £10[15].

iv. Councils for Voluntary Service:
could some or all of the Councils for Voluntary Service and/or equivalent intermediary bodies within your local community

[15] Subsequent inflation would in due course require this figure to be adjusted.

area be interested in co-operating to develop a Local United Way Fund?

As earlier stated, it is recommended that, with the agreement of Local United Way Fund Advisory Committees and the donors concerned, United Way voluntarily contributes between these bodies (including county area bodies) "local dues" equal to three percent of total contributions; it is also recommended that up to two percent "national dues" be contributed.

v. consultation with United Way:
might it assist your considerations to invite a United Way representative to join you at a meeting?

Further information and literature are available on request from the United Way Office.

vi. leading citizens' support:
could you and your colleagues enlist the interest and support of some leading citizens — including desirably some trade union representatives — who would be willing to attend an Open Meeting and to express approval in principle for the formation of a separately accountable Local United Way Fund for your area?

Should sufficient brief information be made available, including desirably a viewing of the seven minute United Way film, your Local Authority may express the above approval and agree to call an Open Meeting.

A7/36. *Stage Two — Open Meeting and formation.* The following is one method which may be used to proceed from the individual consultation stage to formation:

i. the Open Meeting:
invitations to be represented at an Open Meeting could be sent to some local voluntary organisations, also, if thought fit, to some local firms with a request for both management

and trade union representation. The purposes of the Open Meeting could be:

- to receive brief reports on the operation of the United Way movement in the U.K. and to view the United Way film.
- to consider and, if thought fit, to express approval for the development of a Local (or County Area) United Way Fund.
- to elect a Steering Committee. *Note:* it may be necessary, as a first step, to recruit a small nominating committee of two or three influential individuals to recruit members of the Steering Committee.

ii. the Steering Committee and the Local Committee:
the members of this committee could be authorised as follows:

- to recruit an individual to serve as the Local United Way Fund Appeal Chairman, or Campaign Chairman, for the first year whom it is hoped would provide United Way appeal staff with leading introductions to volunteers and supporters. If necessary this key appointment could be made by the nominating committee.
- to appoint the First Local United Way Fund Advisory Committee, to be termed *the Local Committee.*

  It could be accepted that this Committee would extend membership to representatives of Firms' United Way Donor Groups, who could assist in the recruitment of appeal volunteers. And that each year, after the usual local consultation with community members in accordance with United Way policy, United Way would accept the Committee's advice on how best to distribute those funds raised within the locality which had not been distributed by individual donors or Donor Groups using United Way Charity Vouchers.

A7/37. *Stage Three — the local fund raising campaign and accounting.* United Way will organise local fund raising in co-

operation with the Campaign Chairman for the year and volunteers recruited with the assistance of the Local Committee. It is emphasised that the role of these volunteers is of vital importance.

A7/38. United Way will open a separate receiving bank account in the name of the Local United Way Fund into which all contributions received from the Local Area will be credited[16]. Regular progress reports will be supplied to the Campaign Chairman on the progress of the appeal.

A7/39. In addition United Way will undertake to account separately for, and to use as closely as practicable within the local area, all special gifts received towards United Way's promotional and campaign work. Such special gifts can be of immense value.

A7/40. *Stage Four — the distribution of gifts.* United Way will account separately, by Donor Groups, for gifts directly distributed by donors and Donor Groups using United Way Charity Vouchers. The Local United Way Fund Advisory Committee will annually be supplied with a summary of all relevant information and a report on the exact balance of money available for distribution through local general fund allocations.

A7/41. *Future policy — the meaning of United Way.* United Way operates democratically, through donors' directive rights, on the basis of voluntary co-operation for the common good. As earlier stated, the aim is to develop:

- a substantial fresh source of finance to benefit charitable voluntary organisations in general.
- economy in campaign and administration costs through the pooling of overhead expenses.
- local decision making by donors and volunteers in the distribution of funds raised within each Local Area.

A7/42. Because the basis is *voluntary* co-operation, it follows that any democratically constituted Local United Way Fund could, if considered more beneficial, become an independent registered

[16] This is subject to the right of each Donor Group to instruct the United Way Office into which Local United Way Fund the Donor Group's contributions shall be credited. Ref. para A7/35i, p.251. See also Footnote 9, p.222.

charity. Its nominee could be invited to serve on a United Way Regional Centre Advisory Council, which could assist it economically to supply a gift distribution service similar to that of other Local United Way Funds.

A7/43. An independently constituted Fund could be authorised to use the United Way Logo and Helping Hand Symbol, in the internationally agreed manner, on the understanding it would voluntarily contribute a fair proportion of national dues to cover services supplied to it by United Way — including publicity expenses.

A7/44. At this stage, in the interests of the movement as a whole, it is requested that Local United Way Fund Advisory Committees look favourably on the policy outlined in Stages Two to Four of full voluntary co-operation for the common good.

UNITED WE STAND

APPENDIX EIGHT

The United Way Symbol

A8/1. The name UNITED WAY began to be adopted in 1970. With the new name came the need for a common logo[1].

A8/2. In designing the United Way Logo Symbol[2], Mr. Saul Bass incorporated elements vital to United Way.

A8/3. Because United Way's work is based on meeting needs of all people, he based his design on the figure representing the universal symbol of mankind.

A8/4. Next, he cradled this Symbol in a Helping Hand. The hand represents services and programmes that uplift mankind. To complete the message he added the sun-like rainbow growing out of the helping hand.

A8/5. As the rainbow, in a fusing of nature's elements, achieves unity from variety — so does the United Way, in a blending of human diversity, create harmony and unity of purpose.

A8/6. The rainbow symbolises the hope of a better life possible through United Way.

A8/7. The United Way Symbol is becoming increasingly well known overseas, particularly throughout North America, where United Way's *work* — people helping people — regularly receives

[1] At one time more than 130 different names and logos were in use by the *Local Community Chests*, and similar bodies, in North America. The diversity was confusing.

[2] The Logo Symbol was created in 1972 for *United Way of America* and *United Way International*. In 1981, the symbol was adopted by the *International Council on United Fund Raising*.

extensive publicity, frequently without charge, on both national and local television channels.

A8/8. Within the United Kingdom, with national malaise exacerbated by negatively orientated industrial, political and socio-governmental problems, the greatest need is to discover a way of attaining unity of purpose.

A8/9. *The SUVOC Application* advocates the provision of workers' payroll giving, supported by *United Way,* as a manifestation of the will to the unity essential to the solution of all national problems.

A8/10. The projected *SUVOC Application* offers the means, through associated bodies, of co-ordinated beneficial activities.

IT'S

OUR WAY

YOUR WAY

THEIR WAY

'United Way'

PART SIX

REFERENCES

Glossary

government (meaning "effective reciprocal control").
The performance of the whole interfunctionally-related community-state government complex, in practical implementation of agreed government policy.

integrated accounts (SUVOC).
Refers to the combination through mutually convenient cross-referring, for particular locality-relevant and/or need-relevant purposes, of the accounts of different independent charities.

meta-orientation.
An attitude determined by the necessary evolutionary changes that must occur in the time process.

meta-enterprise.
Enterprise which seeks to develop amongst its members a continuous consciousness of the effect of its activities upon the community at large, and an awareness that its members' activities must give rise to a communal developmental resultant affecting future communities of mankind.

Although the term "meta-enterprise" is not yet in current use, today an increasing number of industrial and commercial concerns in the public and private sectors can be viewed as meta-enterprise concerns, in so far as those responsible for their management consciously look beyond merely the private benefit of an individual or group and beyond the merely present generation.

metasociety.
A society which becomes conscious of the necessity, not merely of creating the pre-conditions of its own well-being, survival and immediate development, but also of not destroying the

preconditions of the survival and further development of future generations.

need-relevant.
Refers to the whole relevant situation, and therefore includes that which is need-determined and that which is need-relative.

A *need-determined* act is one the end or goal of which is wholly conditioned by its initiating need; a *need-relative* act is an act, not immediately conditioned by a particular need, but by some other fact related to that need elsewhere and/or elsewhen.

response-ability.
Individual actual response capacity which is self-determined, and distinct from *responsibility* which may be conferred on persons from outside and possibly without their assent or co-operation.

A man is *responsible* when he knows he is liable to be called to account for his actions and punished where these merit punishment; he is *response-able* when he knows himself to be an adequately self-determining being.

By definition response-ability is self-determined because one cannot confer upon a being from outside, and without its co-operation, a capacity not proper to it.

socio-governmental parity.
"From each according to appropriate need-relevant response-ability to each according to adequate need-relevant utilization capacity".

topeconomy.
Derived from *topos,* a place, and *economia,* good household management, the concept of topeconomy is the economy of specific areas and places in which *bank-account-profit* is distinguished from wider *socially-functioning-profit.* The former profit is the figures entered in an account which might give pleasure to someone reading a bank account, whereas the socially-functioning-profit is the actual concrete increase in social health and viability or in "the quality of life".

The essence of topeconomy is: where local intelligences, supplied with appropriate information, can better handle local affairs they should be allowed to do so; the converse also applies.

topeconomic health.
Refers to the quality of life or to social, economic and personal health within a specific area or place, large or small.

topeconomic development.
Refers to improvement in topeconomic health. At heart *topeconomic development* means the socially-functioning-profitable inner personal development of the individuals within the community.

Whilst committee work, co-ordination, co-operation and social planning are essential parts of topeconomic development, they may be regarded simply as necessary preconditions for the main purpose of creating an environment conducive to the healthy growth of every human personality.

Many social workers believe that voluntary co-operation and effort is the key to topeconomic development, or its equivalent, as it encourages the creative participation of the volunteer, a participation which matures and develops the whole person.

topeconomic development planning policy.
By definition, this policy requires more than simply to effect a desirable balance between the quantifiable needs in each community and the available resources. The essence of topeconomy is that it is qualitive as well as quantitive in character.

Local appreciation of whether or not any particular project is likely to improve the quality of life naturally could determine the quantity of that community's response in the form of free-will giving of services and monetary aid. Thus topeconomic development planning policy would need to be sensitive and enlightened to achieve within the area sufficient public interest, feeling of participation and good-will to generate the desired community response.

topeconomic development plan.

A plan designed to help the individual members of communities themselves to develop their valuable potentialities, by assisting them to develop positive mental attitudes of self-help and involvement in worthwhile community creation and development activities. These activities include not only caring for the unfortunate, but also dealing with existing and emergent social needs within the whole situation, including those social needs which arise in whole or in part as a result of a local community's reciprocal interrelationships with other areas.

A topeconomic development plan also could be expected to have appropriate regard to the known democratic wishes and to the foreseeable emotional reactions of a community to particular needs, even if different social priorities otherwise might have been agreed.

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Fred Clement Freeman FBIM, JP, a Liverpool businessman, deeply concerned with the social problems in the Liverpool City Area, saw the potential of the general application to the principles of charitable payroll giving for the voluntary sector as a whole of the National Savings movement idea.

For 25 years he served on the Liverpool Trade Advisory Council for Industrial and Commercial National Savings, representing retail stores. In the main store of his group, Freemans (Liverpool) Ltd., employing 500 staff, he worked in close contact with staff and customers from 20,000 homes. During his twenty years as a Liverpool magistrate he was closely involved with several well known voluntary organisations.

This book explains in depth why and how to develop substantial widespread payroll giving, with donors' directive rights, to benefit all voluntary organisations and bodies in the U.K. legally regarded as charitable.

The first edition was written in 1975, prior to the formation in 1977 of the United Way of Great Britain Pilot Operation, started in Merseyside. This second edition, issued after five years operational experience in Merseyside, provides basic information on the opportunity for further development of United Way payroll giving within the United Kingdom.

For the reader's convenience a comprehensive Index is provided making possible easy reference to its contents.

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