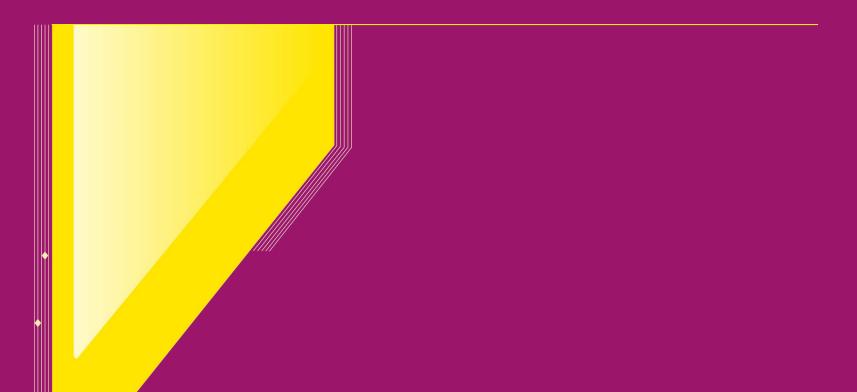
Supporting Health Charities

Organisational and Scientific Needs

costello

Executive Summary



Executive summary

The charity sector is facing a challenging environment, with **decreasing funding**, **rising costs**, **increasing demand**, and **heightened competition for resources**, all compounded by ongoing economic uncertainty, shifting political priorities, and global volatility. Consequently, there is a need **to understand what gaps charities face**, and their support needs.

This survey identified the **organisational**, **strategic**, **and scientific support needs** of **197 health-focused charities in the UK**, highlighting an urgent need for professional support in both core day-to-day and specialised organisational and scientific activities.

- Health charities are **purpose-led** and strong on vision and values, but they tend to be **weaker on operational strategy**, compared to UK charities as a whole.
- Volunteer engagement is a key strength with three volunteers on average for every one member of staff, however, investment in staff is a core challenge.
- Charities need wide-ranging organisational support, primarily in marketing and fundraising, technology and AI, and outreach. The competitive funding environment has made the need for support more crucial than ever before.
- The most urgent scientific support needs revolve around effectively **communicating information** to funders, patients, and the public. There is also high demand for **specialised support in evidence development and policy guidance.**
- Around two thirds of charities are looking for external support, but less than one in five are confident they know where to find it.
- 6 We estimate there is a **need for 23,000 additional skilled volunteers** to support health charities.

Health charities often need more than just money; they need professional advice and expertise to grow, support, and manage their work.

We urge businesses and professionals to step forward: share your skills and join the pro bono movement. By working together, we can help these charities achieve more and drive lasting improvements in health outcomes.

About the Survey



Introduction

Purpose

This survey was conducted by Costello Medical and Pilotlight to explore the organisational, strategic, and scientific needs of health-focused charities in the UK.

Through doing so, we aim to encourage future pro bono initiatives in the sector, so that charities can receive meaningful, impactful support.

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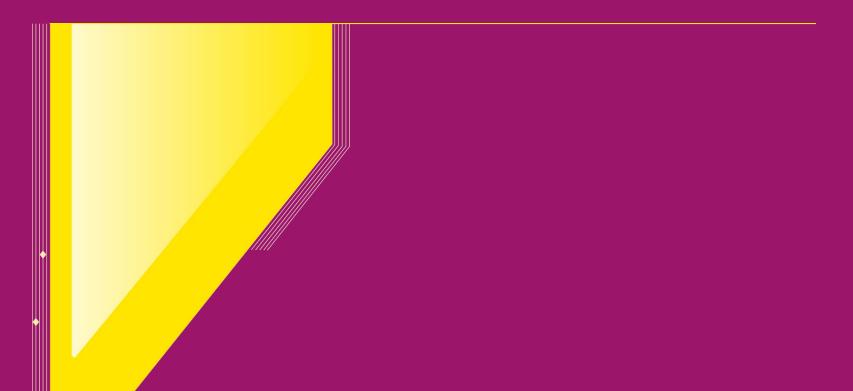
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Further information on our organisations, the survey methodology, and strengths and limitations can be found in the appendix of this report.

Appendix



Key Findings

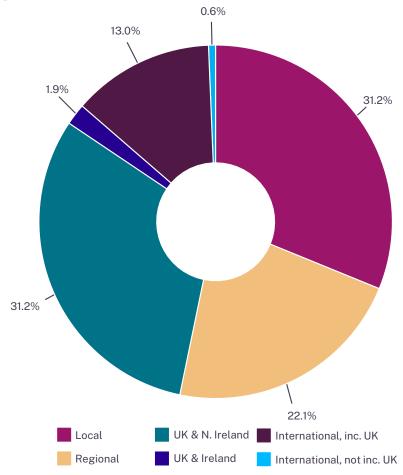


1. Profile of Respondents

197 organisations responded to the first survey exploring the support needs of the UK health charity sector^a



Regions of focus



Most respondents identified as charities (n=119)

Other organisation types included social enterprises (n=7), voluntary organisations (n=5), in addition to a community interest company, community group, and a not-for-profit limited company (all n=1).

Over 86% of respondents were UK-focussed

Of these respondents, 18% did not have a physical office.

A total of 82 respondents completed all survey sections

This was a long and comprehensive survey, and the number of responders tapered over the course of the questions as follows:

- Profile of respondents (n=134)
- Organisational needs (n=98)
- Scientific needs (n=85)
- Professional support needs (n=82)





Respondents ranged from small volunteer-run groups to large nationally recognised charities



The survey sample was skewed towards larger health charities^a

Compared with the UK health charity sector overall, the survey was overrepresented by large, medium, and small organisations.¹

The distribution of charity sizes was similar for the initial cohort (n=134) compared with the cohort of charities that completed the survey (n=82). No major or super major charities completed all questions in the survey.



Proportion of respondents and UK health charities (%)

60% of charities focussed on physical health

Of 169 responses, 102 were categorised under physical health. Within this group, the most common focus area was cancer (9%) followed by genetic disorders and rare diseases (8%). Other health areas included mental health (22%) and general health and wellbeing (17%).

Charities primarily supported individuals

Over 75% of respondents identified individuals impacted directly by the organisation's health focus as their primary beneficiary. This includes "patients or target group" and "patients' families/friends/caregivers".

Other primary beneficiaries included the general public (16%), healthcare system partners (5%), as well as healthcare and service providers (2%).



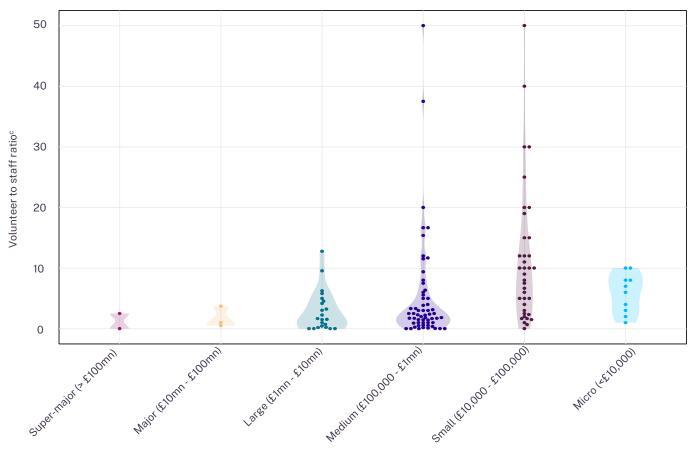


Organisational Needs

Volunteer engagement is a key strength: Respondents had an average of 3 volunteers for every 1 paid staff member^a



Proportion of volunteers to staff



The support provided by **volunteers** allows charities to extend beyond their **financial restrictions**, enabling them to **sustain operations** even during periods of **fundraising difficulty**.

This is particularly crucial for **fully volunteer-led (n=27) and smaller charities**, who tend to have **fewer paid staff** compared with larger organisations.

This high rates of volunteer participation may be driven by health charities' **strong engagement and outreach**, which was the most frequently reported organisational strength in this survey (n=64).

Organisation sized



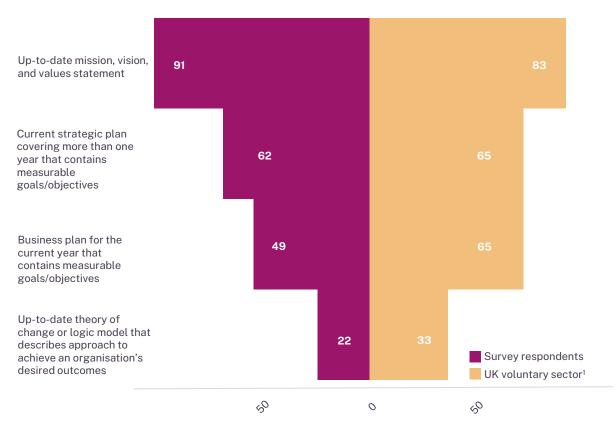


^aThe average was calculated by dividing the total number of paid staff by the total number of volunteers. This does not take into account organisations with no staff members (n=27). ^bThe *n* numbers reported indicate the total number of respondents, not the total number of responses, as some questions allowed multiple answers per respondent. ^cFor this figure, organisations reporting no paid staff were categorised as having one paid staff member to prevent calculation of infinite ratios. ^dData points across the x-axis have been presented to prevent overlap and the background shapes are illustrative. Horizontal variation does not signify any statistical changes.

Health charities are strong on vision and values, but weaker on operational strategy



Current use of strategic tools



Proportion of organisations with the stated strategic tools (%)

Compared to the voluntary sector average, more respondents reported having an **up-to-date mission**, **vision**, **and values statement**. Additionally, 68% rated purpose as their strongest quality, indicating that **health charities are primarily cause-led**.

However, health charities were **less likely** to have the **strategic tools needed for business and operational planning** compared with the voluntary sector average; fewer reported having a business plan, strategic plan, or theory of change. Moreover, **38% of respondents had no key performance indicators.**

These gaps were particularly evident among smaller organisations, with 79% of small and 92% of micro charities lacking a business plan, and 3% of small and 8% of micro charities reporting no strategic tools at all.

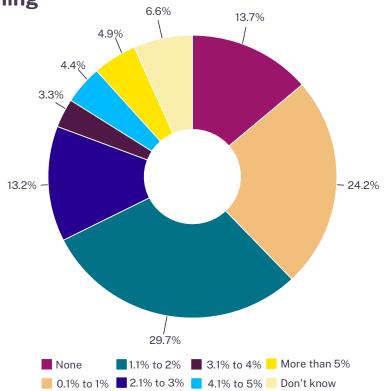
This highlights a clear opportunity for businesses to offer probono support that addresses the needs of charities.



Lack of investment in staff is a core challenge, with two-thirds of charities spending less than 2% on training



Proportion of annual expenditure invested in staff training



Across all respondents, 14% did not invest any of their annual expenditure on training. This lack of investment in staff development is systemic across the voluntary sector; indeed, a survey of the environmental charity sector found 57% spent less than or 2% of their annual expenditure on training.¹

Additionally, voluntary sector staff earn on average 7% less per hour than in other sectors, and struggle with inconsistent working conditions, resulting in staff recruitment and retention challenges.²⁻⁴ Together, these factors may limit health charities' ability to meet their strategic aims and maintain sustainable growth.

Unsurprisingly, 20 respondents identified **internal resources**, **capacity**, **and capabilities** as the **greatest challenge** facing health charities over the next five years.

^{1.} The organisational needs of charities and social enterprises in the UK working on climate and sustainability. Mila E., Ed M. Pilotlight. 2023; 2. Charity staff paid 7% less per hour on average than workers in the rest of the economy. PBE. 2022. Available at: https://pbe.co.uk/media_office/charity-staff-paid-7-less-per-hour-on-average-than-workers-in-the-rest-of-the-economy/; 3. Low pay, emotionally draining, limited career growth: Social service sector continues facing stereotypes. Clara L., Fabian K. CNA. 2023. Available at:



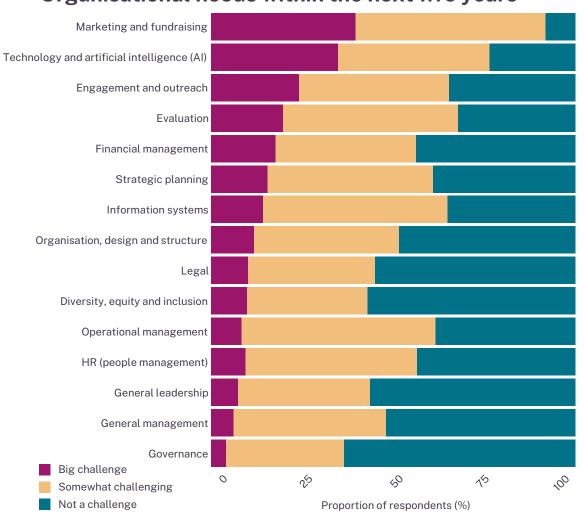


^aThe n numbers reported indicate the total number of respondents, not the total number of responses, as some questions allowed multiple answers per respondent.

Charities need wide-ranging support, primarily in marketing and fundraising, technology, and outreach



Organisational needs within the next five years



Marketing and fundraising was identified as an organisational development challenge by 90% of all respondents, with 41% considering it the most urgent challenge.

Technology and AI were identified as a challenge by 71% of respondents, especially in larger charities, which may reflect the growth in AI and tech-driven approaches in the workplace. Technology and AI can offer potential solutions to resource constraints by providing time-saving innovations – crucial for organisations with less staff or a high reliance on volunteers. Despite this, only 2 respondents identified technology and AI as an area of strength.

Although 62% of respondents report no governance challenges, Pilotlight's charity sector experience indicates that high quality **governance should be a priority**. It has been proven to improve organisational health over time and health charities' low prioritisation of governance perhaps raises a concern.

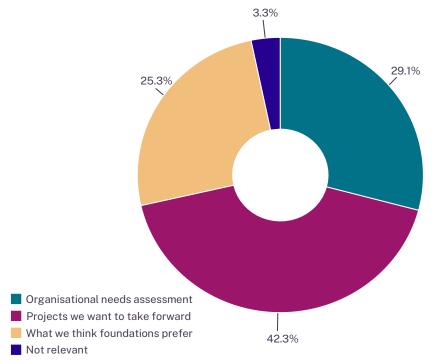
These areas offer valuable opportunities for businesses and professionals to share their expertise through skilled volunteering.



In a challenging funding environment, marketing and fundraising remains health charities' most urgent need



Approach to funding applications



Of the respondents that identified marketing and fundraising as their biggest need, 18 cited difficulties relating to the external funding environment as their rationale.

"Larger organisations are receiving all the grants and funding"

Cuts to public sector services and a reduction in public giving mean that access to funding is becoming increasingly competitive.^{1,2} Smaller charities noted particular challenges, sharing their experience of funders favouring larger, well-established organisations. Indeed, less than 1% of charities receive over 50% of sector income.^{3,4}

"The landscape for funding is constrained and return on applications for grant funding is low"

The current funding system is not suitable for meeting the needs of charities; an equal number of survey respondents reported applying for funding based on what they think funders prefer as those who apply based on their organisation's actual needs. Additionally, charities seek funding from a wide variety of sources, which could contribute to the burden of securing funding.

"We have huge waiting lists, don't know if funding will continue at the very last minute, and we are struggling to manage day-to-day demands"

For charities to survive in this challenging environment, guidance and support in their marketing and fundraising is more crucial than ever before.

^{1.} UK Giving Report 2025: Trends in Giving, CAF. Available at: https://www.cafonline.org/insights/research/uk-giving-report; 2. Government Aid Cuts Are Hitting Charities Hard – Why Reserves and Diversification Are More Critical Than Ever. BAnC Services. Available at: https://www.bancservices.co.uk/2025/03/21/government-aid-cuts-are-hitting-charities-hard-why-reserves-and-diversification-are-more-critical-than-ever/; 3. Small charities facing 'broken' funding systems. Civil Society. Available at: https://www.civilsociety.co.uk/news/small-charities-facing-broken-funding-systems-ncvo-report-warns.html; 4. Charities by income band. Register of Charities. Available at: https://register-of-charities.charitycommission.gov.uk/en/sector-data/charities-by-income-band; 5. The Road Ahead 2025. NCVO. Available at: https://www.ncvo.org.uk/news-and-insights/news-index/the-road-ahead-2025/challenges/





^aThe *n* numbers reported indicate the total number of respondents, not the total number of responses, as some questions allowed multiple answers per respondent.

Purpose underpins the resilience of health charities



Pillars of resilience: health charities



Pilotlight adapted a model of **charity resilience**, developed by Charities Aid Foundation, for inclusion in the survey. Responses to the self-assessment point to **purpose and leadership** being the key **strengths** and **pillars of resilience** across the health charity sector. This aligns with the prevalence of up-to-date mission, vision, and values statements amongst health charities.

Finance emerged as the **most significant self-identified weakness** among health charities, reflecting their expressed
need for enhanced support in marketing and fundraising.
Addressing this gap through targeted professional assistance
could strengthen charities' financial resilience, enabling them to
better serve their beneficiaries, advance their missions, and
protect their financial resources.

Additionally, low scores in **networking** and **awareness** indicate there are substantial opportunities for health charities to **expand their connections with professionals and organisations**. Facilitating these networks could encourage knowledge exchange, increase charities' visibility in relevant networks, and ultimately, improve organisational effectiveness.

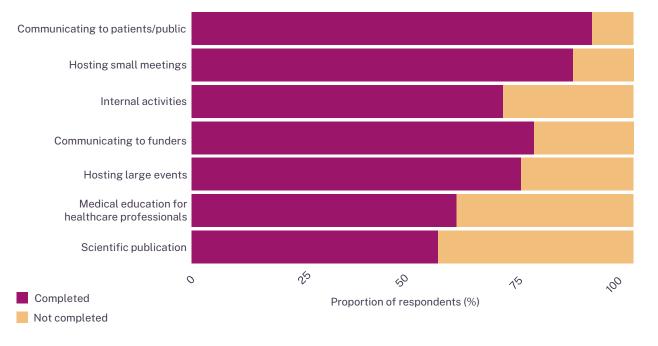


Scientific Needs

Communication is a key strength and essential for charities' role in support and education



Scientific communication activities completed in the last year^b



Scientific communication was identified as the area of expertise most valuable to health charities (approximately 60%), reflecting the central role of communication in driving their mission.

In the survey, **peer/patient support and advocacy** (45%), **and public awareness and education** (38%) were the most frequently reported activities by charities. These initiatives can be supported by a **variety of communication efforts** – including hosting events, engaging with key audiences, and publishing scientific materials. Survey results showed that such a range are commonly used.

Communicating with **patients and the public** was by far the most common activity, cited by 91% of respondents^b – this trend prevailed even for charities whose primary beneficiaries were not patients nor the public.

Organisational size also influenced communication focus; smaller charities typically prioritised direct, accessible outreach through patient and public engagement and small meetings, whilst larger charities expanded into formal scientific and educational channels, such as scientific publications and hosting large events.



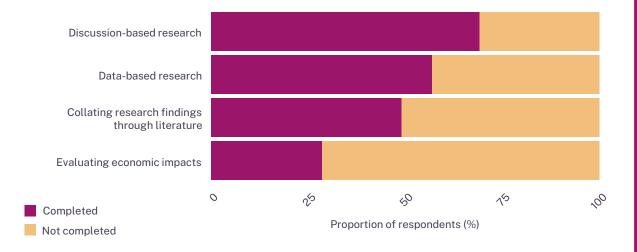
^aThe *n* numbers reported indicate the total number of respondents, not the total number of responses, as some questions allowed multiple answers per respondent.

bThe percentages in this figure exclude respondents who selected "not relevant."

Engagement with evidence generation activities varies, possibly reflecting differences in capacity and expertise



Evidence generation activities completed in the last year^b



Despite being the least frequently performed activity, evaluating economic impact was the third most cited scientific expertise need (see slide 21).

This demand may be driven by the competitive funding environment, which encourages charities to evaluate their economic impact, as this can be leveraged in funding applications. **Discussion-based research was the most commonly conducted evidence generation activity** (69% of respondents). This activity likely benefits from charities' strong communication, outreach, and engagement skills, as it requires access to relevant individuals and established trust.

In contrast, evidence generation methods that **require specialised and technical skills were conducted less frequently**. For instance, approximately 50% of respondents engaged in data collection and research synthesis. Further, economic evaluation – which requires health economics expertise and significant resources – was the least frequent activity, with only around 29% of charities completing this.

Notably, this was not the case for larger charities which tended to have broader experience across evidence generation activities. This is likely driven by their greater technical capacity and increased access to expertise through established networks, suggesting that resource and expertise limitations may act as barriers for charities seeking to undertake more complex evidence generation activities.



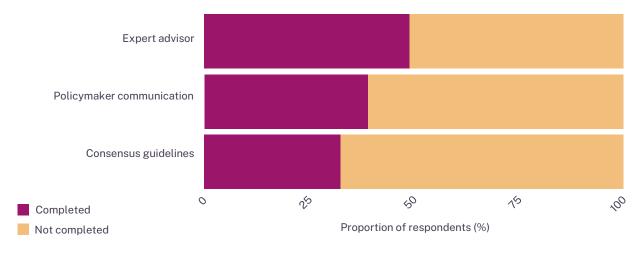
^aThe *n* numbers reported indicate the total number of respondents, not the total number of responses, as some questions allowed multiple answers per respondent.

bThe percentages in this figure exclude respondents who selected "not relevant."

Charities prioritise peer support and advocacy over policy engagement



Policy engagement activities completed in the last year^b



Charities' involvement in scientific activities is shaped not just by their skills and resources, but also by their **core mission and purpose**.

Consequently, the relatively low engagement in policy activities observed may reflect **policy work being a lower priority** for respondents relative to other scientific activities, rather than indicating a lack of capacity in this area.

While charities actively engage in peer and patient support and advocacy, **fewer than half** report involvement in policy engagement.

Among charities participating in policy engagement, there is a strong emphasis on **broad advocacy and engagement activities** – such as serving as expert advisors and interacting with policymakers. Activities that require specialised expertise and resources, such as developing or disseminating consensus guidelines^c, were less frequently completed.

This prioritisation indicates that charities of all sizes primarily focus their policy engagement on supporting their key roles – **providing direct support** and **raising awareness for beneficiaries** – with specialised policy development playing a less central role.

^aThe *n* numbers reported indicate the total number of respondents, not the total number of responses, as some questions allowed multiple answers per respondent. ^bThe percentages in this figure exclude respondents who selected "not relevant." ^cConsensus in scientific research refers to a general agreement amongst experts, achieved through structured consensus-building methods which typically assess the most relevant evidence on a particular subject. Consensus guidelines are developed as part of these consensus-building methods, and they are used for knowledge sharing and policy development.

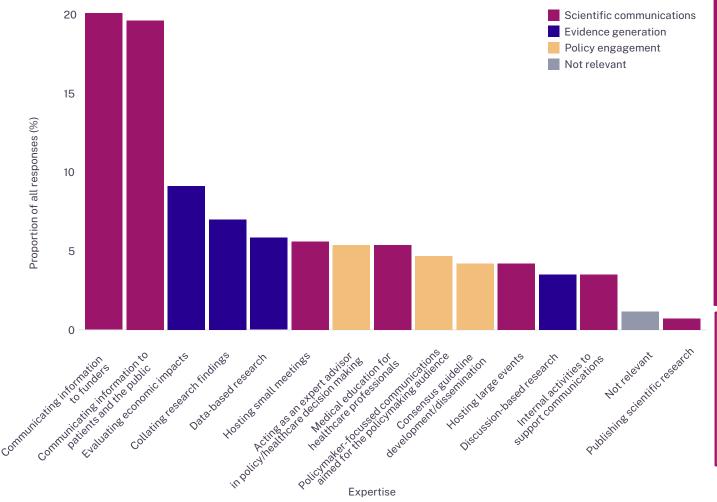




Health charity support needs are rooted in their core day-to-day activities



Scientific expertise activities of most value to health charities



Unquestionably, the most pressing scientific support needs were **communicating information to funders** and communicating information to patients and the public (approximately 20% of responses each).

This underscores the greatest support requirements for health charities are rooted in their core day-to-day activities; therefore, supporting these fundamental communication efforts is a priority.

Respondents also sought support with evidence development (25%) and policy (14%) activities.^b highlighting the importance of making a diverse range of skills and expertise available to charities to support their multifaceted activities.

Addressing the capacity and scientific expertise gaps that hinder health charities in these areas will enable them to **fulfil their primary role** of providing direct support and raising awareness for their beneficiaries. Ultimately, this will help them to maximise their impact and progress towards achieving their goals.



^aThe *n* numbers reported indicate the total number of respondents, not the total number of responses, as some questions allowed multiple answers per respondent.

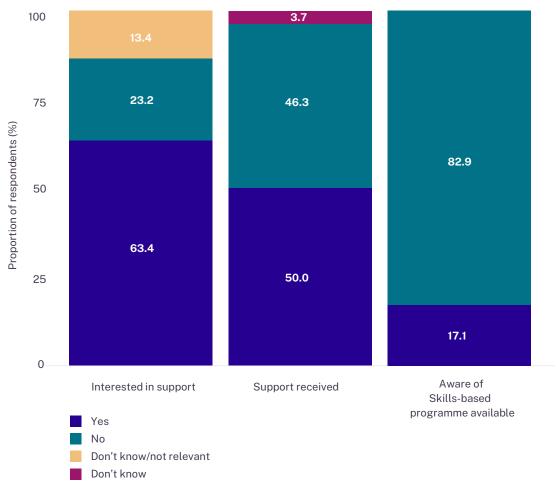
^bData refer to the sum of all scientific expertise activities in the evidence development and policy categories.

The Need for External Support

Health charities want support, but few know where to find it



The interest in, receipt of, and awareness of professional support



The survey results presented in this report demonstrate a crucial need for additional support within the health charity sector. Indeed, 63% of health charities are looking for professional support, but only 17% know where to find it.

Given the strong volunteer community and challenging funding environment, it is unsurprising that the **preferred support mechanisms were volunteering and pro bono consultancy (n=64)**.

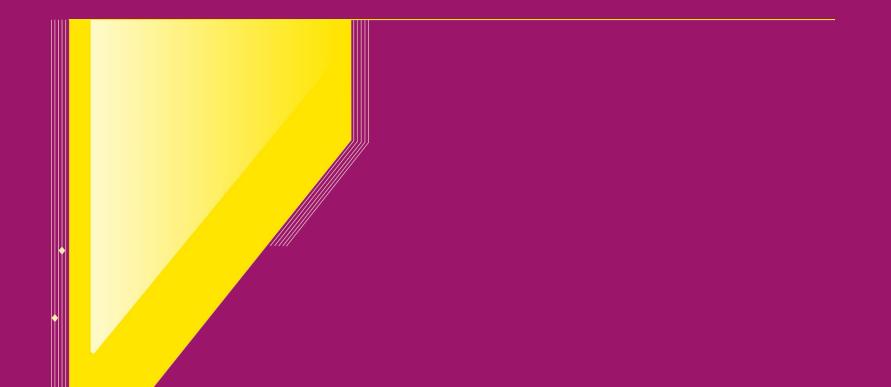
These results reveal a **significant gap and highlight the urgent need for increased awareness and improved access to professional support**. To bridge this gap and strengthen the health charity sector, we estimate the **need for approximately 23,000 additional skilled volunteers across the UK**.^b



^aThe *n* numbers reported indicate the total number of respondents, not the total number of responses, as some questions allowed multiple answers per respondent.

^bEstimated based on the frequency of support needs reported in survey responses and the number of health charities in the UK. Assumes one volunteer needed per support need.

Call to Action



Health charities urgently need professional support

Together, we can help empower health charities to achieve their goals and drive lasting improvements for the people and communities they support.

Health charities are driven by **purpose**, **vision**, **and values**. They play a vital role in the health sector, **delivering essential services** and **advocating for the people and communities** they serve. However, charities operate within a **challenging funding environment**, which can pose a barrier to fulfilling their goals and lead to **unmet support needs**.

These unmet needs are rooted in core day-to-day activities, such as communication, marketing, and fundraising. Many businesses, particularly business operational teams, possess skills and experience that could bridge the gaps these charities face in strategic planning, staff upskilling, technology, governance, and finance. Health charities' needs also extend to specialised scientific support, for example, in economic evaluation, policy work and scientific publications.

Bridging these gaps requires external support from skilled volunteers, with an estimated 23,000 volunteers needed nationwide.

We urge businesses and professionals to step forward and **join the pro bono movement** by:

- Sharing your professional skills through pro bono initiatives
- Upholding best practice principles for pro bono collaborations – <u>Pilotlight: Home</u> <u>Page</u>
- Advocating for pro bono within your network and inspiring others to seek out pro bono opportunities



Why participate in pro bono work?

Working with charities is **both professionally and personally rewarding**, offering individuals and organisations the chance to collaborate with passionate teams making a positive impact.

As an **individual**, you could benefit from participating in probono work by:

- 1. Contributing to organisations and **initiatives you care about**
- Working with people from different sectors and expanding your professional network
- 3. Developing and refining your skillset
- 4. Strengthening your portfolio with **real world**, **impactful results**
- 5. Boosting your CV and standing out to future employers

As an **organisation**, you could benefit from participating in probono work by:

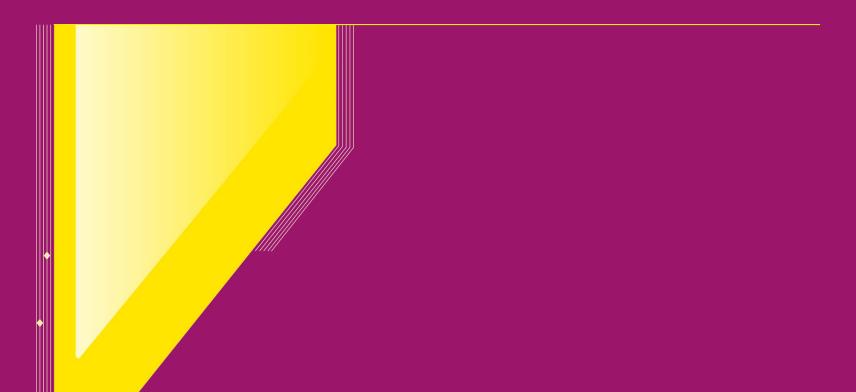
- Demonstrating genuine commitment to social responsibility
- 2. Build the **skills and competences** of your team at all levels
- 3. Diversifying your team's experience with **knowledge of new topics or project types**
- 4. Building a portfolio that **showcases your impact to clients** and partners
- 5. Strengthening your employer brand and **attracting top** talent

We welcome enquiries from businesses interested in joining the pro bono movement. To explore the various ways you can offer pro bono support or to seek advice, please contact partnerships@pilotlight.org.uk or Lucy Eddowes lucy.eddowes@costellomedical.com.

Thank you to all survey respondents for your invaluable participation in building the case for pro bono support for health charities. We also thank the following associations who generously shared our survey with their members:

Association of Medical Research Charities, Arthritis and Musculoskeletal Alliance, Beacon for Rare Diseases, Blood Cancer Alliance, Brain Tumour Alliance, Cancer 52, Hearing and Deafness Alliance, National Kidney Federation, National Voices, and Visionary

Appendix



Pilotlight and Costello Medical

Pilotlight^a

Pilotlight is where business expertise meets charity ambition. We connect people across sectors to create real-world learning, stronger organisations, and greater social impact.

https://www.pilotlight.org.uk/



Costello Medical

Costello Medical is a B Corp-certified scientific consultancy working across medical communications and health economics, with a long track record of providing pro bono work free-of-charge to charities in the healthcare sector.

https://www.costellomedical.com/



Methodology

Survey design	The survey, adapted from Pilotlight's established organisational capacity assessment, consisted of 40 questions. These explored respondents' organisational profiles, their current organisational and scientific strengths and challenges, and their experience and need for external support. A mix of open- and close-ended questions were included throughout the survey. Eligibility was limited to individuals representing UK-based charity organisations with a focus on health.			
Distribution	The survey was distributed across Pilotlight and Costello Medical's networks (via newsletters, emails, and social media), news outlets, and charity network organisations. Responses were collected between February and April 2025.			
Survey analysis	Quantitative data were summarised through descriptive statistics. Results are presented as the proportion of total survey responses received for each question. The 'n' number in the top right of each slide indicates the total number of respondents for the respective questions.			
	Free-text responses were analysed for content and reviewed for theme identification. Generative Artificial Intelligence (GenAI) was used to assist in identifying and grouping recurring themes. The frequency of the most notable themes are included in the results.			



Strengths

Targeted	la	nd	
actionab	le	insig	hts

The survey effectively identified the organisational, strategic, and scientific needs of health-focussed charities in the UK, providing crucial insights to inform and prioritise pro bono support offered by professional organisations. This helps to ensure future pro bono efforts are targeted towards areas of greatest impact and relevance for the health charity sector.

Tailored and tested questionnaire

By leveraging learnings from a previous survey that explored the organisational needs of charities and social enterprises in the UK working on climate and sustainability,¹ the questionnaire was tailored to ensure relevance for respondents. This approach enhanced the applicability of the findings and facilitated the generation of actionable insights.

Diverse respondents

The survey sample drew from a diverse pool of respondents, with charities ranging from small volunteer-run groups to large nationally recognised charities. This diversity enhances the generalisability of the results, making the identified needs and priorities applicable to a wide spectrum of health-focussed organisations across the UK.

Assessed needs by organisation size

The survey design allowed for exploration of how organisational challenges and priorities vary by size. This insight enables professional organisations to develop more targeted, effective pro bono support strategies that are tailored to the specific needs of different charities, increasing the likelihood of meaningful impact.



Limitations

Limited input from micro-organisations

The survey sample was skewed towards larger charities, with micro-organisations being notably underrepresented compared to the overall health charity sector. This may lead to findings that disproportionately reflect the perspectives and priorities of larger organisations, and the results might not fully capture the needs and challenges faced by smaller charities.

This is a common limitation of survey-based research, as micro-organisations often have limited capacity to participate or respond.

Completion bias and drop-off

The high drop-off rate may have introduced bias, as it likely resulted in over-representation of respondents with specific perspectives or interests. Additionally, this drop-off reduced the sample size for many questions, potentially compromising the representativeness of the findings.

The drop-off rate may be attributed to the survey's length, as it could have required more time to complete than participants had anticipated and were able to commit.

Sampling bias

The dissemination of the survey through Costello Medical and Pilotlight's networks could have introduced sampling bias. Organisations within these networks are potentially more aware of opportunities for receiving professional pro bono support in the health charity sector, or may have prior experience that influences their organisational, strategic, and scientific priorities. This may limit the extent to which the findings are representative of the wider sector.

Self-selection bias

Self-selection bias may have influenced the findings, as respondents who chose to complete the survey could have shared similar perspectives or experiences – particularly regarding engagement with pro bono professional support – that differed from those who did not respond. This may lead to an over- or under-estimation of challenges and professional support priorities within the sector.

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