

Responding to a Changing Sector

Understanding Need

Measuring Impact

Delivering Change

About this Report



As an occupational charity with a near 200-year history we need to understand and respond to the sector as it changes and evolves. We know that the sector will continue to change over the coming years, but for us to be effective in our support we wanted to hear from our beneficiaries and stakeholders. This report summarises the outcomes of an engagement programme that took the views of more than 100 people from across our own team, our Trustees, industry stakeholders, and our beneficiaries. We will use the findings to ensure that our approach, support, and commitment remains focused on those most at need now and in the future.

Neil Lovell
CEO, The Printing Charity

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Introduction

In the UK the print sector and its allied trades employ 116,000 people and has a turnover of £13.8bn*. The sector has seen much change over the years, with many traditional ways of working seeing rapid evolution that, at times, has resulted in significant impact on the wider print workforce. The UK economy and the print sector are expected to see further change in the future, the impact of Brexit, continuing changes to how the industry operates, and innovation across the sector are all forecast to create a period of dynamic adaptation.



Against this backdrop sits The Printing Charity. Founded in 1827 it is the second oldest occupational charity in the country. With that history comes tradition and a sense of purpose, a responsibility to support and impact positively on those working towards, within or retired from the print industries. The print sector today is very different from when the charity formed and it will continue to change. The question this report looks at is how, in the context of all that, does an occupational charity continue to have a positive impact while remaining relevant to the people, the skills, and the industries it is there to champion?

Through consultation, those with a connection to the charity as a beneficiary or stakeholder have given their views on current and future need, where efforts to support and champion should be directed, and ultimately what The Printing Charity needs to do to ensure an ongoing and increasing positive outcome for the sector and its employees.

*Source: BPIF, 2016



Residents and apprentices at Beaverbrook House



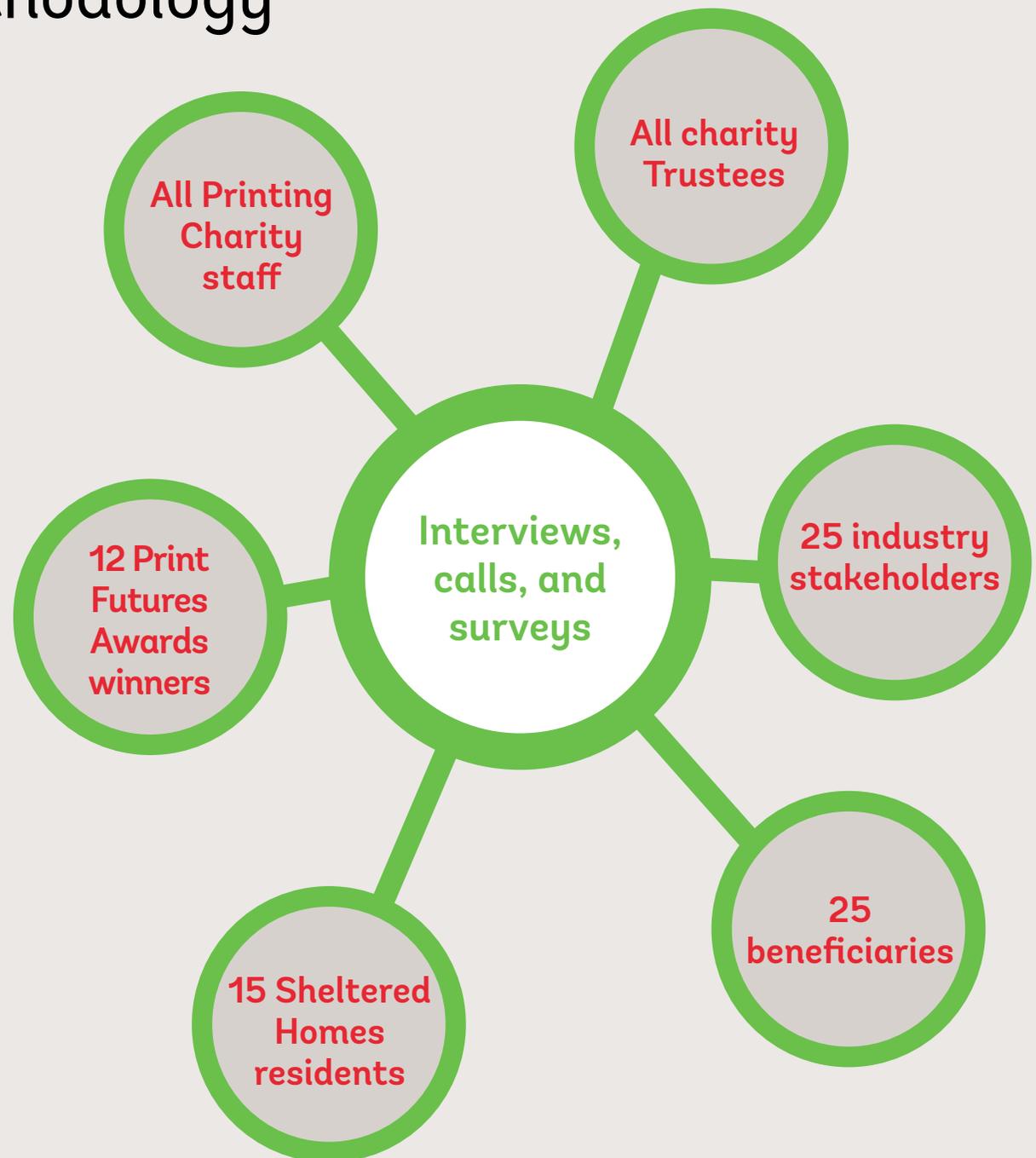
A Print Futures Awards recipient

Project Overview & Methodology

A range of processes were used to research and analyse the views of many stakeholders and beneficiaries. Predominantly, a combination of interviewee-led, semi-structured interviews, and surveys were utilised to provide a wide-ranging primary data set. Through analysis this information offered and suggested insights and trends that could be used to provide direction to the following question points:

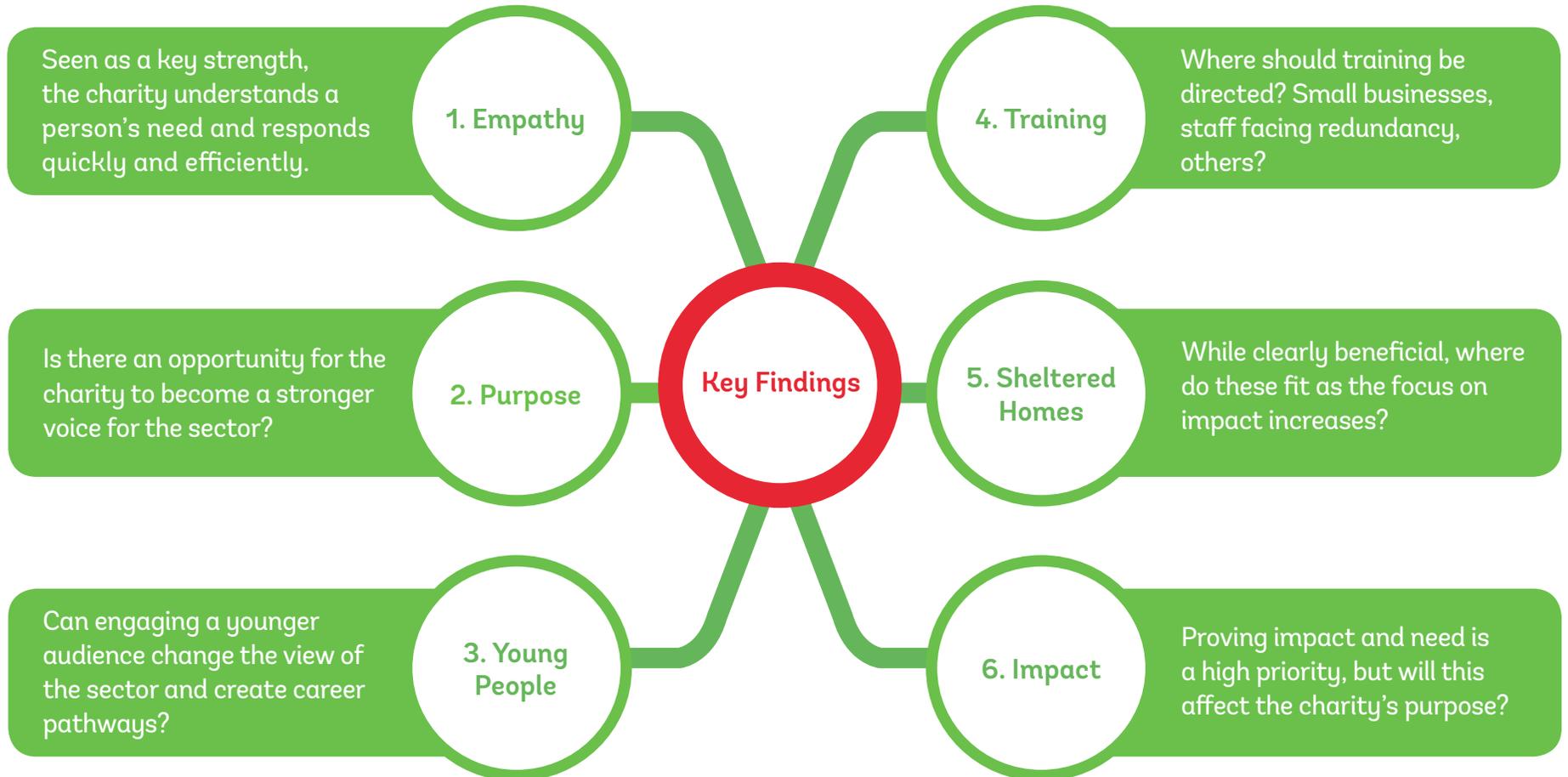
- What impact do current practices and initiatives offer to those involved?
- Where are the opportunities that will enable the charity to provide more meaningful support to those in need?
- What are the challenges that need solving to ensure that people facing crisis receive the help they require?
- How do we ensure that what we do remains relevant to the print sector and young people over the coming years?

Our approach was to establish a dialogue with each responder, ensuring that they were comfortable with discussing topics openly. As a result, all responses have been anonymised. Statistics have been used to identify trends, with quotes only used to support or evidence specific themes.



Key Findings

The headline findings from the research phase are presented below. These cover aspects where those involved referenced good practice by the charity, but also a number of points of consideration regarding future direction and focus.



The Printing Charity's Staff

The team behind The Printing Charity have a great knowledge and practical experience of how the charity functions and how support is required and received by beneficiaries with varying needs. Through a series of interviews with all staff, we looked to gauge their thoughts on current successes, what will continue to be important to the charity, and what challenges and opportunities the future will bring. This is what they told us:

A garden area at one of our Sheltered Homes

Current successes.

- Empathetic relationships and a deep understanding of our beneficiaries.
- Clear and efficient processes that enable us to react quickly as need arises.
- Growth of the Print Futures Awards, reaching more people and with more partners.

What is important to us.

- Establishing a clear and easily understood purpose for the organisation.
- Improving the impact we have – more meaningful support, more evidence.
- keeping the person central as needs change.

What the future will bring.

- Increasing the reach and strength of the charity's messaging.
- Strengthening on the ground provision - staff, volunteer, and partner networks.
- Changes to sector and employment profiles will increase welfare need.
- As the demographic profile of the sector changes, our approach needs to reflect, if not drive, this shift.

The Printing Charity's Staff: what matters

Purpose

- Internally the view is that the organisation's purpose is clear and that this provides direction and focus to the charity's ongoing delivery.
- It was suggested that providing a simple, clear message to external partners may help increase reach.

The Individual

- All staff talked about the unique focus on knowing the beneficiary, ensuring empathy and a deep understanding of their circumstances and needs.
- It was also seen as important to provide support without creating dependency.

Summary of staff responses

Growth

- There was a real focus on reaching people in a meaningful way.
- All understood clearly the real need that people were facing, but recognised that engaging beneficiaries remains one of the biggest challenges.

Delivery

- Staff welcomed a hands-on approach, both to engaging beneficiaries and to building networks that would extend reach.
- Looking at a regional approach and mirroring the partnership focus of the Print Futures Awards were seen as effective.



A Sheltered Home resident



The Printing Charity's Trustees

All charity Trustees were interviewed. We wanted to understand the issues that were important to each Trustee so used unstructured interviews to enable the conversation to flow, covering a wide range of topics, and to a level of detail that each Trustee thought necessary.

The Printing Charity's Trustees: what matters



Resident and apprentice event at Beaverbrook House

Current successes

- Delivery of Welfare and Print Futures Awards and education programmes.
- Growth in Alumni and Industry connections.
- Experience and ability of the charity's team.

What is important?

- Establishing a clearer (yet simple) purpose for the charity.
- Ensuring that current criteria are correct and aligned with purpose.
- Thinking about and adopting innovation across the organisation.

Summary of Trustee responses

Sector horizon scanning

- Consolidation will continue with significant impact on operations and people.
- Workforce profiles will change, employee needs will increase and wellbeing will become more important.
- Ensuring the charity is relevant to sector now and in the future is critically important.

The role of The Printing Charity

- Do we become a stronger voice highlighting the changes and opportunities that the sector provides?
- Promote a clear people purpose; attracting, retaining, and retraining staff, and supporting those in need.
- Doing more, starting now, reaching more people and with more impact as need increases.

Industry Stakeholders

Stakeholders from across the print and allied trades were identified. Through a series of face-to-face interviews, telephone interviews or surveys, they were given the opportunity to provide their thoughts on a number of key issues affecting the sector and its employees now and in the future.



PACKAGING

PUBLISHING

PRINT

PAPER



What we asked

Their relationship with The Printing Charity

The charity's current strengths and successes

How the industry will identify challenges over the next 20 years

The role of The Printing Charity now and as the sector changes



Contact with The Printing Charity



While the Print Futures Awards are the primary method of engaging stakeholders, dialogue is then expanded to include all other aspects of charity work.

Stakeholder commitment



“

An occupational charity should focus on the need, not solving the problem in advance.

”

Stakeholders: what is important



Stakeholders: what matters



Purpose

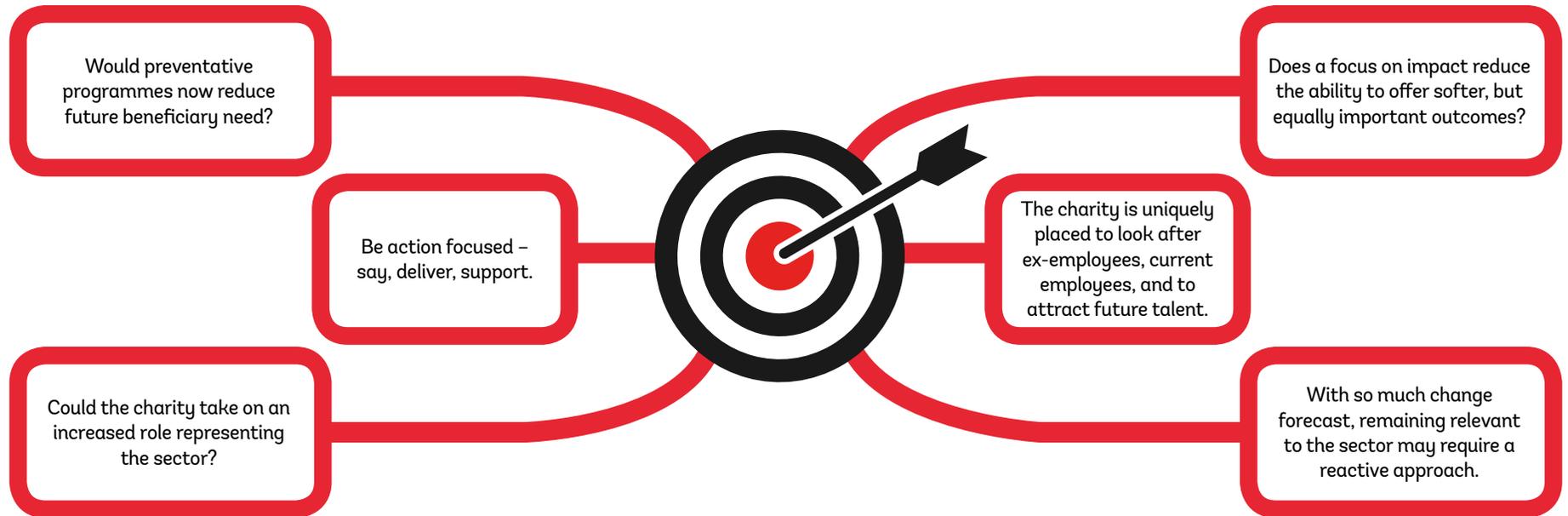
A clear split between those that see an opportunity for a strong **people-focused voice** within the sector, and those that know more about the role of an occupational charity. Nevertheless, it cannot be ignored that so many organisations want someone to champion the sector – through think tanks, forums, research, and driving forward partnerships. With change predicted this role needs to be equally focused on supporting **experienced workers** through transition and **drawing new people** to the sector. The charity needs to ensure its message and **purpose is clear and relevant** across the sector.



Changing sector

Consolidation will continue, bigger firms will absorb or close SMEs, while at the other end niche and boutique operators will increase. Innovation will affect processes and online ordering will become more prevalent. All of which will **reduce workforce** numbers. It will see many staff falling under the watch of larger firms with HR and occupational health departments, but it will also see an increase in freelance workers and those working for smaller firms with potentially lower levels of training and support. **Skill sets will change**, with a need to attract generalists and specialists to a sector they may not consider.

Stakeholders: the challenges ahead



Perception of industry

“As Tesco proved, there’s more than trolleys and checkouts. The print sector needs to do the same.” The future is likely to mean that current employees will need to **retrain**, while a new generation with **non-traditional** skills will be recruited to manage a cleaner service and to facilitate more integrated services. Diversity and inclusivity will need championing. Current and ex-workers should be given the chance to use their expertise to inspire and educate. Overall, “someone needs to position the industry as a clean, skilled trade, a home for all qualifications”.



An increasing need

It is clear that the industry is expecting change. The need to retrain will create uncertainty and potentially a reduction in wages and living standards. Redundancies across a 50+ workforce may result in high levels of unemployment. Greater use of freelance and contract workers could mean future pension crises. The fear of administration may prohibit small and medium firms asking for help. Issues of wellbeing may become more recognised in a more open workplace. Innovation and change must be positioned positively, while the negative aspects associated must be mitigated – but now or in the future?

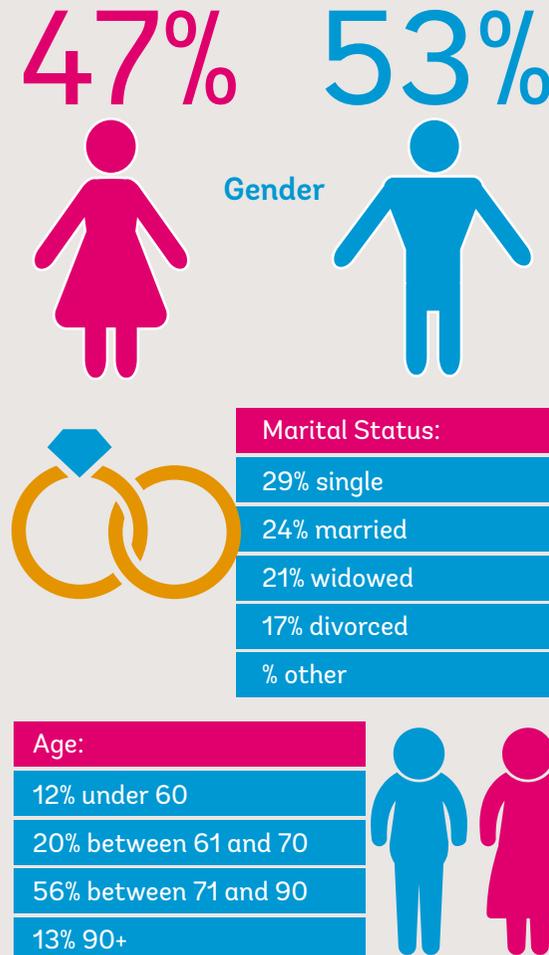
Beneficiary Grants and Support

To gauge the benefit and impact achieved through welfare support, including one-off and regular grants, support with training, or information and advice around redundancy issues, phone interviews were conducted with 20 beneficiaries. The results of these interviews are displayed below.

Grant Giving

Support is provided to anyone with a three-year connection to the print and allied trades, who meet certain criteria around financial or social need. The sector connection can be through direct employment themselves or the current or previous employment of a relative. Applicants are required to provide the charity with information regarding their situation as well as the purpose of the grant. Applications are invited from individuals for a range of purposes – one-off financial assistance, regular financial assistance, industry relevant training, and non-industry training due to redundancy. In the case of one-off and regular grants, applicants can request support with care costs, home improvements, mobility aids, and other everyday items that many of us take for granted.

The Beneficiaries



Application Process

63% of beneficiaries completed the form themselves.

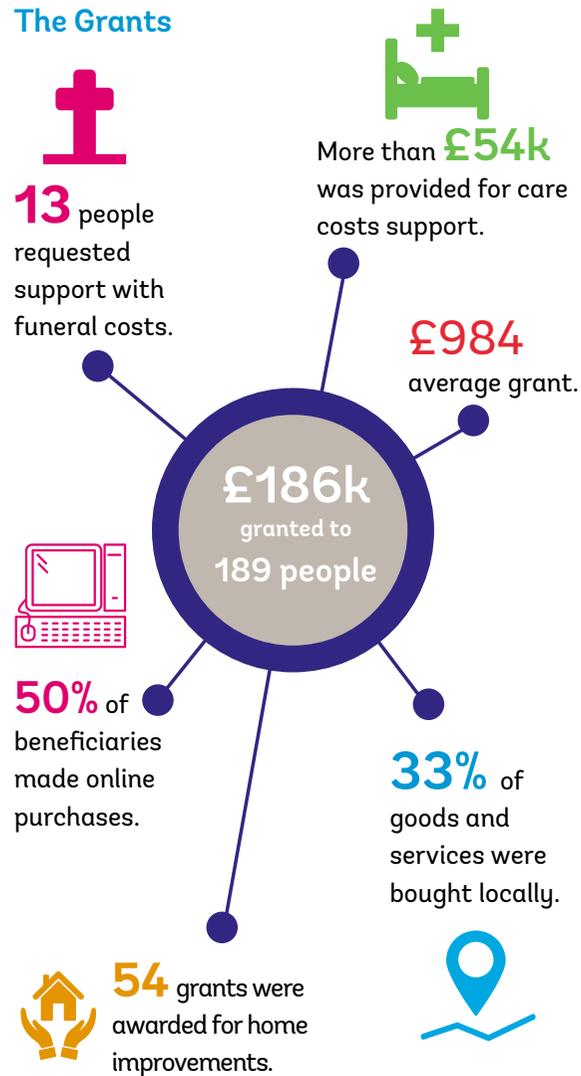
16% asked a family or friend to help.

21% used a referring agent.

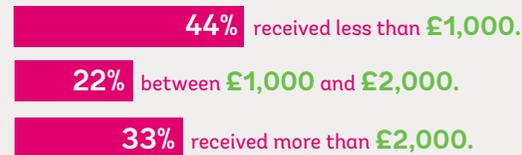
16% said it took less than a month to receive the funds.

95% of beneficiaries rated the application process as 5 out of 5.

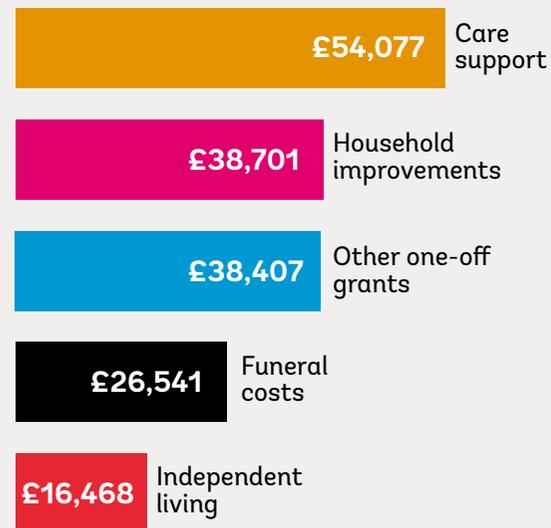
The Grants



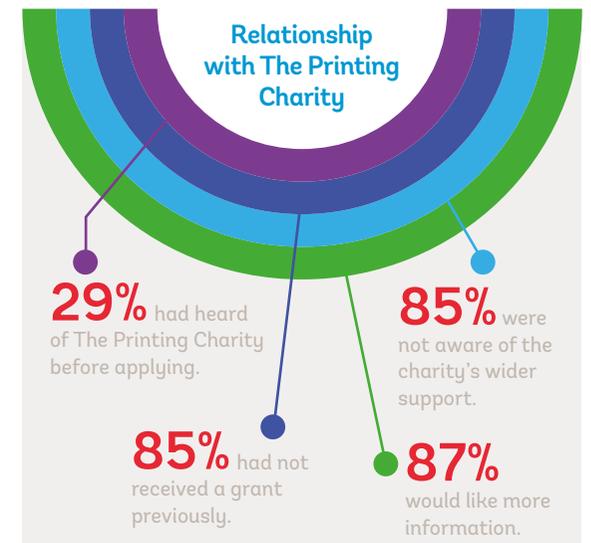
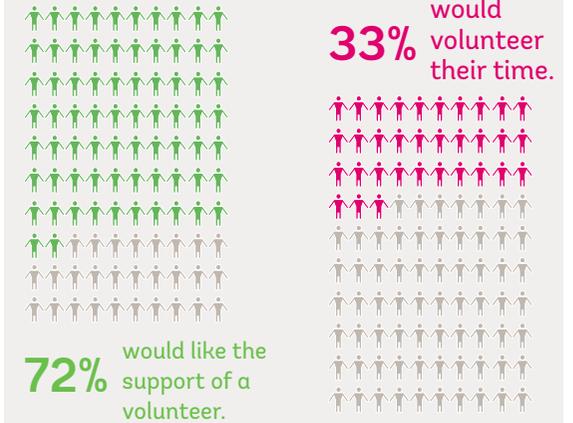
How much did people receive?



Top five Grant Uses By Value

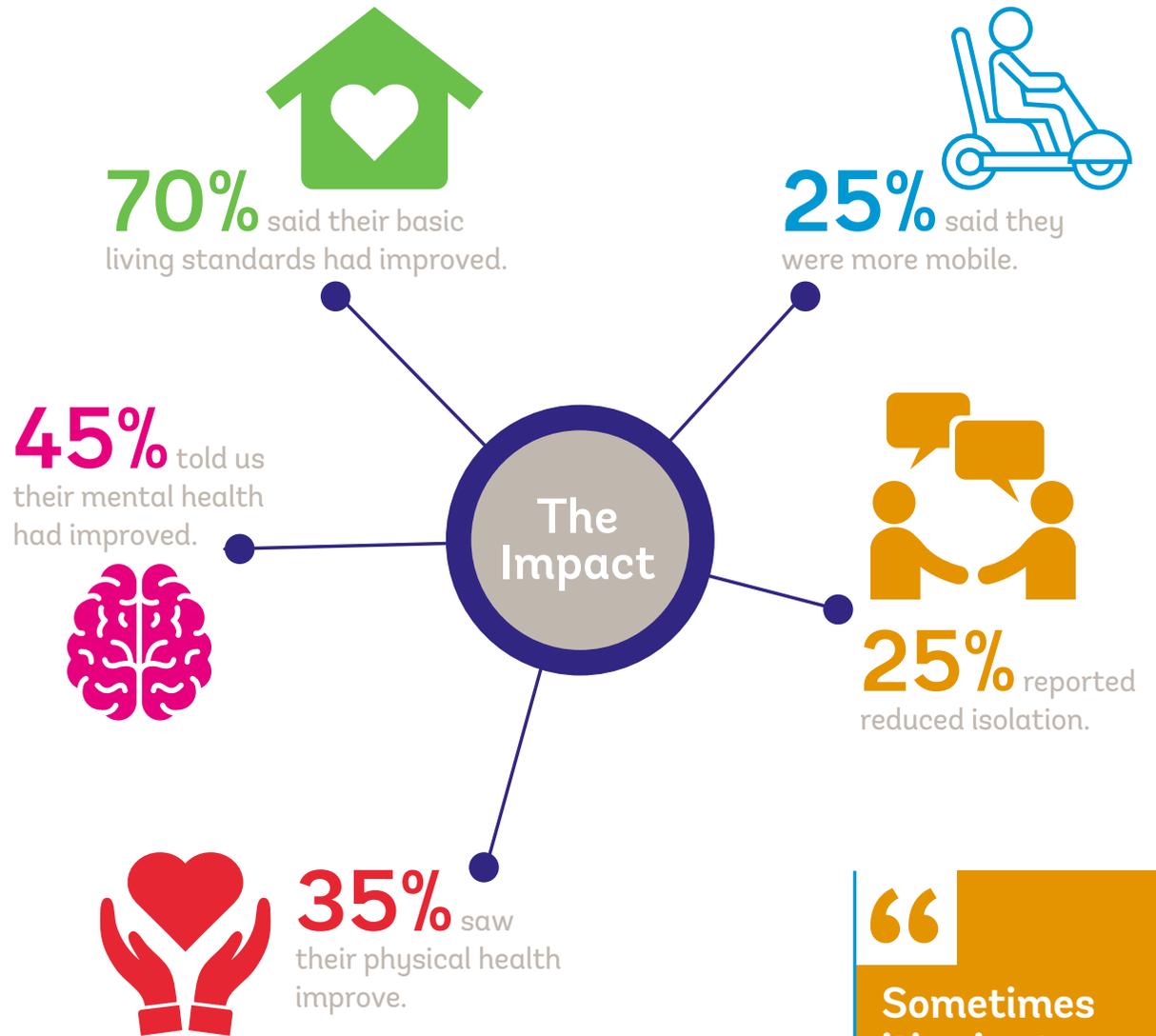


Volunteering



The Impact of Our Grants

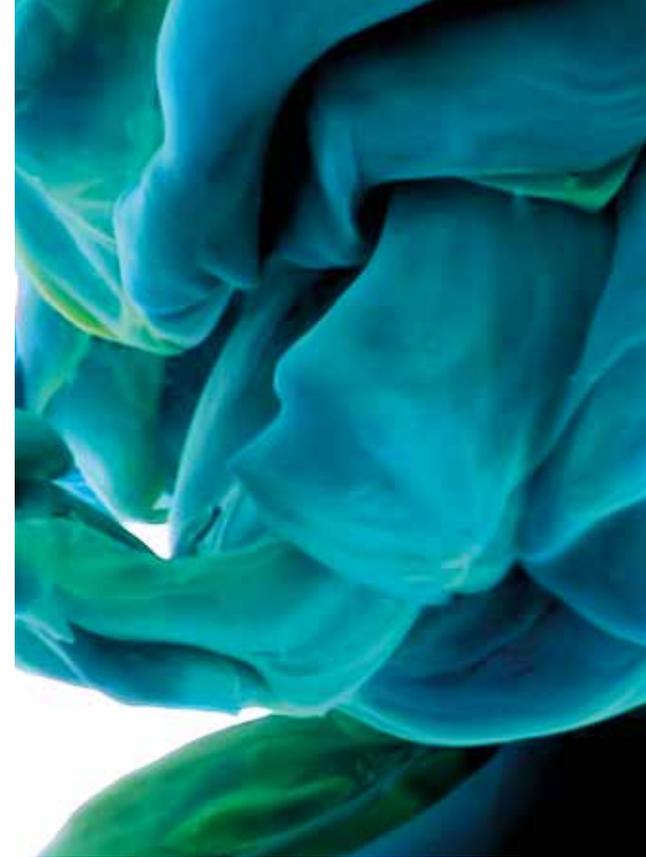
A Sheltered Home resident



“
Sometimes
it’s nice to
have hot
food.”



Afternoon tea at one of our Sheltered Homes



“

On issues of contact, application process, and quality of service The Printing Charity was rated at five out of five by 90-95% of beneficiaries.

”



Sheltered Homes

Interviews were completed with 15 residents from across the two Sheltered Homes*. To encourage an open dialogue the interviews were semi-structured, booked in advance, and undertaken within the residents own apartments. The outcomes of these interviews are presented below.

Sheltered Accommodation

The Printing Charity operates two purpose-built Sheltered Homes, Beaverbrook House in Bletchley and Southwood Court in Basildon. The homes provide 72 independent living apartments for people aged 60 or over, who have worked in the industry and are now retired, or have a direct connection to the industry through a relative. Residents live independently but benefit from the use of shared facilities and know that support is on hand should they need it.

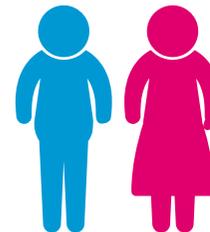
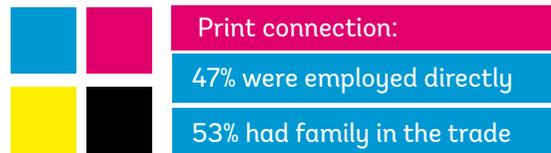
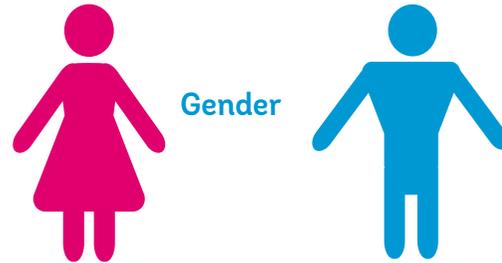
“

My son found Beaverbrook when out walking the dog... and went straight in to meet the manager.

”

The Residents

66% 34%



Their Residency



40% have been on-site for less than a year.

33% between 1 and 10 years

26% have lived there for 11 years or more.

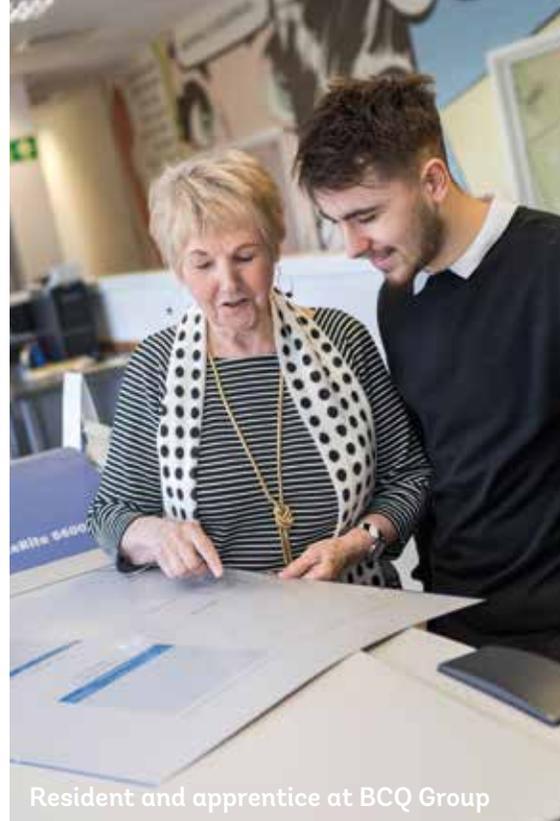
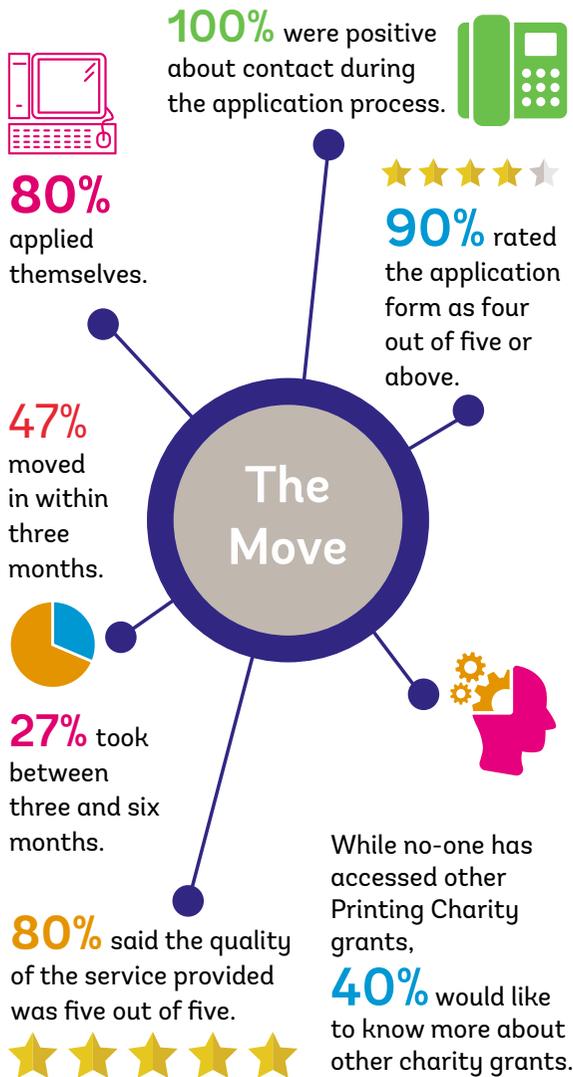


87% lived nearby previously.

47% knew of the homes before moving in.

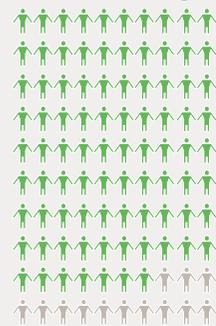


*data presented reflects those interviewed, and not all residents.



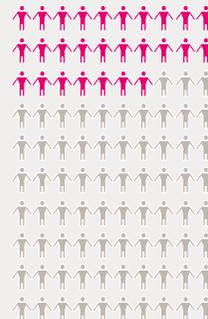
Resident and apprentice at BCQ Group

Volunteering



87% would welcome the support of a volunteer.

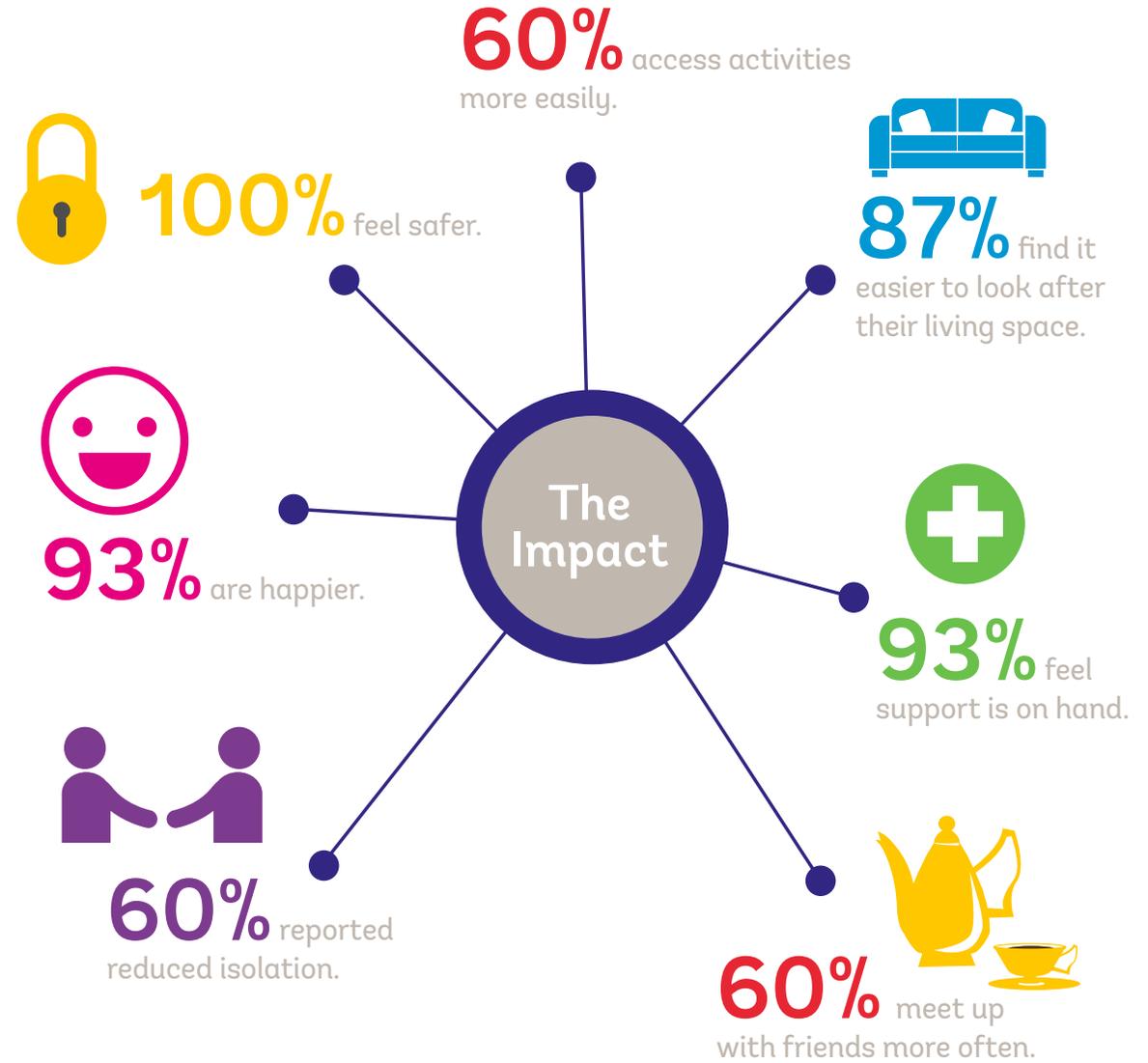
27% of residents already act as a volunteer for their neighbours.



What the residents said...



The Impact Seen by Residents





“

It took me about six months to settle after leaving our family home of 50 years.

Resident at
Beaverbrook

”



A resident at one of our Sheltered Homes

The Print Futures Awards

Surveys were sent to a selection of recent winners. In total 12 previous recipients of the Awards were identified, with six of them completing and returning the set of questions. Our aim was to gather their feedback on their Award experience, the difference it has made to them, and what further support may benefit future Awards winners.

The Awards

The grant programme is open to UK residents aged 18-30, who are working within or studying towards the print and allied trades. The maximum award is £1,500 and can be used to support existing studies, for training courses, or other initiatives that help develop workplace skills. Applicants are also invited to join the Print Futures Awards Alumni group, enabling previous winners to network as their careers progress, and to let us know how they have used their grant and the impact it has had.

At the time of application

Age

17% are under 20.

33% are between 21 and 25.

50% are between 26 and 30.

Gender

67%



33%



Employment status



67% were working full-time in the print sector.

33% were studying at FE or HE.

17% were looking for a new opportunity.

About the Awards



66% of applicants heard about the Awards from a teacher or employer.



100% said this was their first application.

The Process

67% said the form was about right.

33% that it was straightforward to complete.

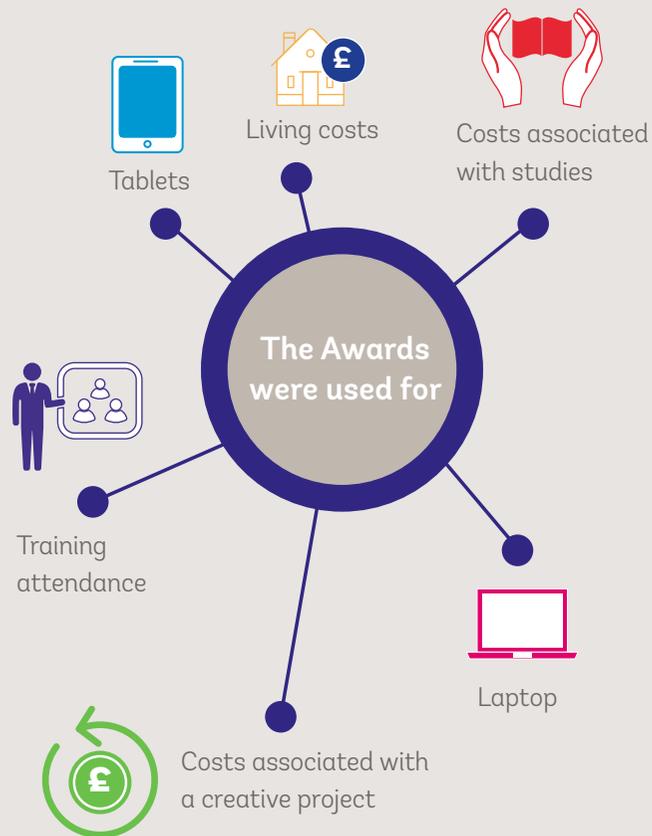


50% said the interview was really good, the others said it was ok.

The Award

The size of the Award ranged from

£750 to **£1,500**



Of those that attended the celebration event:

67% **thought** that the event showed them the **variety** of roles available in the sector.

50% said the event **demonstrated** how a **shared vision** can bring the **industry together**.

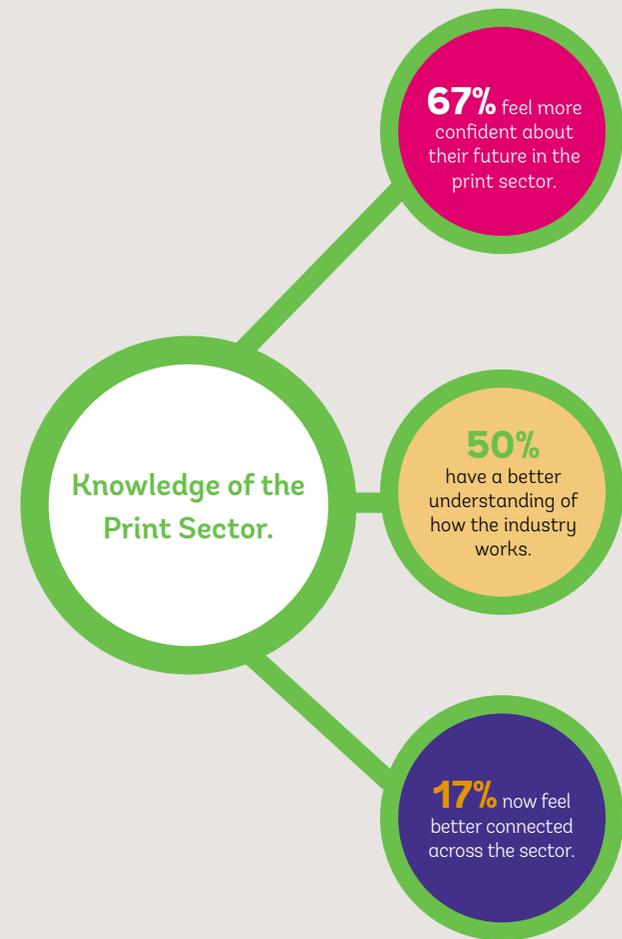
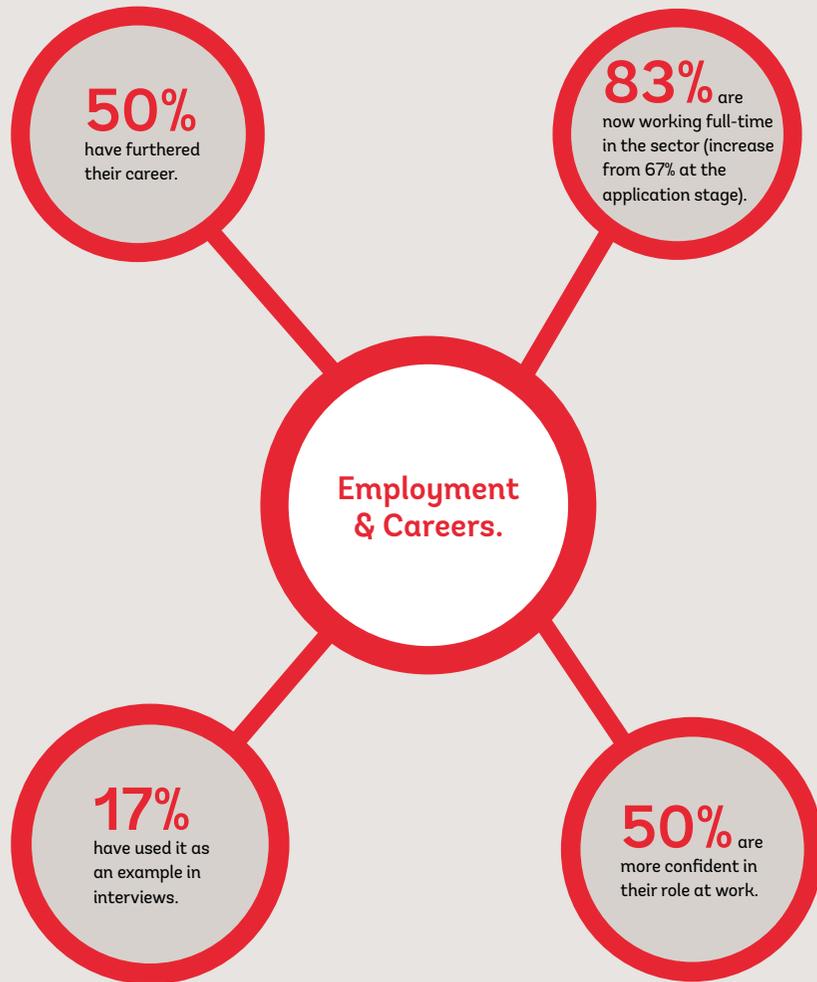
33% now **feel** more **confident** about their **careers**.

33% **enjoyed** the opportunity to **talk** to other **winners**.

17% met **new people** from the **sector**.



The Impact of the Award



Education and Partnerships

Our approach to education has grown from historically providing an education to the children of printers to industry-wide initiatives that provide a clear pathway into employment and career development opportunities for young people already working in the sector.

We believe in giving practical experience to young people joining the sector, which provides the skills and experiences to develop a successful career. One of the ways we do this is through design competitions with live briefs, for example, partnering with London College of Communications to design our Annual Report.

Pathways to print

We work with the industry to increase awareness of career choices across print, paper, packaging, and publishing. Our aim is to support those working towards the sector, helping them connect with the trade and those working within it. We promote routes that include both the highly technical and highly creative and offer support to people at college and university as well as people interested in apprenticeships or who want to train for a specific role.

Working in partnership

Alongside our own Print Futures Awards, we are funding partners of the Queen's Bindery Apprenticeship Scheme, the Stationers' Foundation Postgraduate Bursary Scheme, the Journalism Diversity Fund, and the Stationers' Company Shine School Media Awards. Our industry-specific partnerships include working with print employers, the British Printing Industries Federation (BPIF) and Unite the Union developing the new print apprenticeship standards, as well as supporting the Papermaking Apprenticeship Programme.



Print Futures Awards winners



Residents with BCQ Group apprentices



Our Impact

As part of our work, we looked at the difference our support makes to the beneficiaries we support. We wanted to present this simply and effectively, without making too many assumptions about the longer term benefit that an intervention may have.

We looked at three broad areas of intervention – Grants, Homes, and Print Futures Awards. We identified four key areas of need for each of these, for example, within Grants we provide both one-off and regular support for those in need, grants for people looking to get back into work after redundancy, as well as support for unexpected events that create acute financial need. We then applied to this the feedback and

data provided by the beneficiary interviews, both in terms of the need they present and the impact that our support has had. For each of these, we then looked at a few simple indicators that begin to identify the potential impact that these interventions may have, for example, a reduction in GP appointments resulting from improved health or reduced income support from helping someone return to work more quickly.

We will continue to explore the impact of our operations and consider how various assumptive models that attempt to gauge a wider social value or return on investment may be applied in the future. At this stage we recognise both the need to better quantify the impact that we have and, as a sector, to better understand the longer term benefits that these can provide. In 2018 we will implement additional data collection activities with our beneficiaries to support the development of this.

Over the following pages we have set out a summary of how our interventions make a difference to each of those involved.

Grants

Providing grants and support to those in financial or social need

PEOPLE FOCUSED – OUR NEEDS ASSESSMENT INVOLVES THE INDIVIDUAL IN DETERMINING THE SUPPORT THEY NEED.

One-Off

We provide grants for those with real financial need.

Low income can affect health – 35% of recipients say health has improved.

GP appointment can cost £94 and A&E attendance and admittance can cost £1,997.

Regular

Through regular grants we support those at risk of poverty.

Debt can affect mental health – 45% of recipients report improved wellbeing.

Typical mental health treatments cost between £1,200 and £4,500 annually.

Back to work

We fund job search and CV writing for people made redundant or at risk of redundancy.

Redundancy unemployment can last 12 months.

Shortening unemployment can save the state £2k per month.

Acute need

Our grants can cover costs like funerals and care at home.

Unforeseen debt can lead to mental health issues.

Six months of mental health issues can increase risk of stroke by 50%.

REVIEW

Homes
Providing sheltered accommodation that improves the lives of ex-prisoners

PEOPLE FOCUSED – OUR NEEDS ASSESSMENT INVOLVES THE INDIVIDUAL IN DETERMINING THE SUPPORT THEY NEED.

Healthy Living

Our homes encourage healthier lifestyle choices.

60% of residents eat more healthily and attend events more often.

Malnutrition can increase GP visits by 62% and hospital admissions by 85%.

Supported

On-site support and well-equipped apartments create a comfortable environment.

93% feel supported, 87% find it easy to look after their apartment.

Since reductions in warden services, 49% of people struggle to keep their apartments clean.

Quality of Life

Our homes provide a safe and happy environment for our residents.

100% feel safer, 93% are happier living here.

Following reduced warden services, 66% of UK residents don't feel as safe.

Volunteers

Our residents act as volunteers and support each other.

27% of residents already act as volunteers.

Offering two hours' support a week is equal to £68,739 over a year.

REVIEW

Education
Supporting education and training across the sector

PEOPLE FOCUSED – OUR NEEDS ASSESSMENT INVOLVES THE INDIVIDUAL IN DETERMINING THE SUPPORT THEY NEED.

Skills & Qualification

Our grants enable individuals to improve their skill set.

50% of Awards winners say it has secured an improved qualification.

NVQ L2 boosts annual earning by £1k, a degree by almost £3.5k.

Career Progression

We support improved career pathways.

50% say it has already helped further their career.

39% of skilled vacancies remain unfilled due to a lack of candidates.

Access to employment

We aim to make the transition into work easier.

16% of applicants who were in education are now employed full-time.

Quickening entry to employment can save the state £1.2k per month.

Alumni

Connecting young people to industry through networking.

94% of women rate mentoring as most important to development.

Only 32% of UK employers offer a mentoring programme.

REVIEW

Summary

This summary provides a reflection on the findings and the outcomes of the various conversations held with staff, stakeholders, and beneficiaries of The Printing Charity over the course of this project.

The dialogue with the charity's staff and Trustees painted a very clear picture of both current performance and future opportunity. Across both groups there is a noticeable passion to support the industry and its most important asset – the 116,000 people currently employed, as well as the thousands of ex- and future employees. All were acutely aware of the challenges facing the charity and the sector; how to maintain contact with ex-employees, the need to support workers as the industry continues to change and consolidate, and the importance of attracting new and fresh talent to a sector very different from what it was just a few years ago.

Feedback from industry stakeholders built upon these key points. Of critical importance was refreshing the perception of the sector in a way that attracts the individuals that bring with them the skills the industry needs to innovate and evolve. At the same time all were acutely aware of what ongoing change will mean for those already working within print and the impact that redundancy or changing employment will bring. The need to understand and champion a host of people issues was a consistent theme – issues of gender and ethnicity within the sector, perceptions around mental health, supporting freelancers, while not losing focus on supporting current and ex-workers in social and financial need.

After speaking to a range of grant recipients, residents at the sheltered homes, or winners of the Print Futures Awards, it is extremely clear that the need and impact of the intervention is high. The grants are incredibly important to those receiving

them, from life changing interventions that put food on the table, keep the heating on or the simple things that make life just that little more comfortable like a friendly voice at the end of a phone.

The Sheltered Homes provide a safe and secure environment where residents can maintain and often rebuild their lives. At the time of moving in many are recently bereaved and all are able to demonstrate a clear social or financial need.

The opportunity provided to Print Futures Awards winners is broad, from obvious benefits in terms of qualifications and access to employment opportunities to the additional contacts and sector insights that become accessible through the judging and Awards process.

While these impacts are clear we also looked at issues around calculating and understanding the social value of these interventions. It posed a difficult question for us. While many interventions would be rated highly in such assessments, for example, supporting older people living with long-term medical issues, there are many others that would not 'rate' so highly on such a scale but arguably have a significant personal value. The example above around food on the table or the older person who could purchase new spectacles, while unlikely to generate a high social return on investment, do link directly back to the charity's aim to tackle poverty and provide dignity. While deeper impact assessment is considered, it is important to not lose these softer outcomes.

We highlighted a number of key findings earlier in this report so feel it is only right to close on these points.

Empathy: incredibly clear that the deep understanding of the individual is what makes the charity's interventions so impactful.

Accessibility: the charity's core message is "here to help". It is clear that being accessible is an important aspect and ways to be more accessible would be valued.

Purpose: the opportunity to inform and influence the industry over the coming years needs careful consideration.

Young People: with a need for new talent, can the charity help create those pathways into the sector for a younger generation?

Training: as the sector changes, the need for training will increase, not only for those working in smaller businesses, but also those affected by redundancy where a new sector role will not exist locally.

Sheltered Homes: hugely beneficial to residents, but can innovation improve social connections and increase the use of these centres by local people in need?

Impact: a layered approach to impact assessment would enable the charity to measure those high outcome interventions, as well as the softer, more personal outcomes that are equally important

The Printing Charity finds itself in a unique position. A clear, near 200-year history provides a sense of purpose that many other organisations do not have. The remit to look to across history, current workers, and future industry employees is also unusual. The changing face of the sector provides opportunities to build upon the role and purpose of an occupational charity, but in a way that is both relevant and very much required. In many ways this report has only scratched the surface of what is a very dynamic organisation taking a leading role within a dynamic sector.

The Printing Charity – our approach

What has been clear throughout this research programme has been the importance of innovation and the dynamic nature of our sector. New ways of working will continue to transform our sector, improving client relationships, developing new products and services, changing the way our people work, and embracing new technologies.

These changes will also affect many people currently working within the sector and we need to understand these issues and respond to them now and in the future. It is why it's so important that we welcome innovation into our operations too. We need to find new ways to reach retired print workers and their families, support current employees through a period of change, and help position the sector as a great place to work for future generations.

Our plans continue to evolve but we have set out a few key aims that reflect what we have found through this research programme.

Our Organisation

To be a truly effective, modern, occupational charity we must inspire sector-wide collaboration, support yet understand innovation, and maintain a clear people focus.

Stakeholder Partnerships

We will continue to build effective industry partnerships that enable us to support current workers, engage ex-employees, and champion those programmes that bring new people into print.

Welfare

Our welfare interventions will be focused on those that are in need. Whether that is supporting print workers through periods of change or being there when needed in retirement.

Connectivity

In an ever more connected world it is too easy to lose track of those without that support. It is why we will offer befriending support for older people, and look at new innovative ways of engaging current and ex-print workers who are in need of our help.

Education

We want to expand our education programmes, our Print Futures Awards, to reach more people and to help position the industry as vibrant, welcoming, and as a rewarding career choice.

Services

Our services are driven by the needs of the people we help. As their needs change we will continue to adapt our interventions to make sure they are effective, timely, and ultimately achieve the outcome that they want.

Impact

We will implement new monitoring procedures that enable more data to be captured. This data will improve our processes, ensure that benefit is being achieved, and enable us to create advocacy amongst stakeholders and partners.



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