## Strategy Workshops: Agenda

<table>
<thead>
<tr>
<th>TOPIC</th>
<th>TIME</th>
<th>FORUM</th>
<th>LEAD</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Mini Fair on Case for Change</strong></td>
<td>15 mins</td>
<td>Full Group</td>
<td>Working Team</td>
</tr>
<tr>
<td><strong>Why are we here?</strong></td>
<td></td>
<td></td>
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<tr>
<td>• Recap on context</td>
<td>15 mins</td>
<td>Full Group</td>
<td>Anita</td>
</tr>
<tr>
<td>• Recap on case for change</td>
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<tr>
<td><strong>An emerging shared vision</strong></td>
<td></td>
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<tr>
<td>• Share methodology</td>
<td>15 mins</td>
<td>Full Group</td>
<td>Angela / Fazlin</td>
</tr>
<tr>
<td>• Share work in progress shared vision</td>
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<tr>
<td><strong>Break-out: What’s your perspective on the shared vision</strong></td>
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<tr>
<td>• Individual reflection (What do you like / Don’t like / What is missing)</td>
<td>30 mins</td>
<td>Sub-Group</td>
<td>Facilitators</td>
</tr>
<tr>
<td>• Share reflections with the sub-group</td>
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<tr>
<td>• Distill into themes (dis)agreement</td>
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<tr>
<td><strong>Coffee (&amp; Mini Fair on case for change)</strong></td>
<td>15 mins</td>
<td>Full Group</td>
<td>Working Team</td>
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<tr>
<td><strong>Break-out: Imperatives to achieve the shared vision</strong></td>
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<tr>
<td>• Each sub-group to cover one-two of six pillars of the vision</td>
<td>45 mins</td>
<td>Sub-Group</td>
<td>Facilitators</td>
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<tr>
<td>• Brainstorm for imperatives (building on 2016 Summit Output)</td>
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<tr>
<td><strong>Gathering all thoughts</strong></td>
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<tr>
<td>• Share key themes of (dis)agreement on shared vision</td>
<td>30 mins</td>
<td>Full Group</td>
<td>NCSS Leaders</td>
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<tr>
<td>• Share summary of imperatives for shared vision pillars</td>
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<tr>
<td><strong>Closing</strong></td>
<td>15 mins</td>
<td>Full Group</td>
<td>Chia Lin / Anita</td>
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</table>
DEMAND

Social needs will increase and become more complex, driven by socio-economic trends and increasing needs complexity

Demand increases as society continues to change at high pace...

Growing Population

<table>
<thead>
<tr>
<th>Year</th>
<th>Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>4.0M</td>
</tr>
<tr>
<td>2015</td>
<td>5.5M</td>
</tr>
<tr>
<td>2030E</td>
<td>6.9M</td>
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</tbody>
</table>

Ageing Population

<table>
<thead>
<tr>
<th>Year</th>
<th>Senior Support Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>9 : 1</td>
</tr>
<tr>
<td>2015</td>
<td>5.7 : 1</td>
</tr>
<tr>
<td>2030E</td>
<td>2.1 : 1</td>
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<tr>
<td>2030E</td>
<td>2.1 : 1</td>
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High & Rising Inequality

<table>
<thead>
<tr>
<th>Year</th>
<th>Gini Coefficient</th>
</tr>
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<tbody>
<tr>
<td>2000</td>
<td>0.44</td>
</tr>
<tr>
<td>2015</td>
<td>0.46</td>
</tr>
<tr>
<td>2030E</td>
<td>?</td>
</tr>
</tbody>
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Rising Unemployment

<table>
<thead>
<tr>
<th>Year</th>
<th>Unemployment (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>2.7%</td>
</tr>
<tr>
<td>2015</td>
<td>1.9%</td>
</tr>
<tr>
<td>2030E</td>
<td>2.4%</td>
</tr>
</tbody>
</table>

More Diverse Population Mix

<table>
<thead>
<tr>
<th>Year</th>
<th>Singaporeans &amp; PRs as % of population</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>81%</td>
</tr>
<tr>
<td>2015</td>
<td>71%</td>
</tr>
<tr>
<td>2030E</td>
<td>?%</td>
</tr>
</tbody>
</table>

Smaller Households

<table>
<thead>
<tr>
<th>Year</th>
<th>Average household size (no. of people)</th>
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<tbody>
<tr>
<td>2000</td>
<td>3.7</td>
</tr>
<tr>
<td>2015</td>
<td>3.4</td>
</tr>
<tr>
<td>2030E</td>
<td>?</td>
</tr>
</tbody>
</table>

In addition, needs are likely to become more complex difficult to address

Service development & delivery do not take a holistic view of client needs. Interface between clients & services can be improved.

High Concentration Of Resources

- 2,180 charities
- 87% Receipts amount
- $14.6B
- 7% # of charities

Reduced Cognitive Bandwidth For People With Needs

- Avg Singaporean IQ: 103pt
- Avg Singaporean in financial distress: 90pt
- Decline: 13pt

Example:

"Policies and services aimed at helping the poor should factor in the weight that poverty has on a person's cognitive function." Eldar Shafir, Professor of Psychology & Public Affairs, Princeton University

Many Programs & Organizations Make Interface Complex For Clients

Singapore Social Service Landscape

- (#) = Number of programs
- Disability Services (88)
- CHAS Clinics (585)
- Eldercare Services (121)
- Family Services (47)
- Childcare and Student Care Services (1,654)

Social Service Offices Help Clients Navigate The Interface

- Limited Visibility On Service Delivery From Client Perspective

Organizations Working In Silos

- % respondents who believe that social service organizations are successful or very successful (N=356)
- 39% Referring clients to other VWOs or community agencies to meet their other needs
- 27% Collaborating with external partners to make projects happen

How can we increase transparency?

Limited Visibility On Service Delivery From Client Perspective

Sources:
- Commissioner of Charities Annual Reports
- NCSS Sector Consultation Study 2016 Focus Group Discussion
COMMUNITY

Community and Clients can be more actively engaged and empowered to help identify and solve social needs

Community resources seem to be under-mobilized

Generosity Score


#1: Myanmar
#2: Thailand
#3: Indonesia

#13: Australia
#18: Malaysia
#22: Hong Kong
#33: Singapore

Donated Money

CAF World Giving Index 2015, Rankings: N=145

#1: Myanmar
#2: Thailand
#3: Malta

#7: Australia
#11: Hong Kong
#17: Malaysia
#18: Singapore

Volunteered Time

CAF World Giving Index 2015, Rankings: N=145

#1: Myanmar
#2: Sri Lanka
#3: Liberia

#12: Australia
#17: Malaysia
#42: Singapore
#90: Hong Kong

Volunteer rates below international benchmarks

Volunteerism Rates*

% of population who had performed volunteer work for an organization (formal volunteering) at least once in the previous 12 months

18% 17% 25% 31% 37% 42% 44%

Australia

GDP/ Capita
WGI: Helped a Stranger
WGI: Donate $
WGI: Volunteered Time
WGI: Community Safety Net
WHI: Social Support
WHI: Generosity

Malaysia

GDP/ Capita
WGI: Helped a Stranger
WGI: Donate $
WGI: Volunteered Time
WGI: Community Safety Net
WHI: Social Support
WHI: Generosity

Hong Kong

GDP/ Capita
WGI: Helped a Stranger
WGI: Donate $
WGI: Volunteered Time
WGI: Community Safety Net
WHI: Social Support
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Singapore

GDP/ Capita
WGI: Helped a Stranger
WGI: Donate $
WGI: Volunteered Time
WGI: Community Safety Net
WHI: Social Support
WHI: Generosity

Note: Each bar on the scale represents 20% of countries on the index; the bigger the area, the better performing the country is

*2014 data for all countries except Hong Kong and Canada, which are 2013 data
Sources: Department of Statistics Singapore; NVPC survey; MCYS; Australia Bureau of Statistics; US Bureau of Labor Statistics; UK Institute for Volunteering Research; Statistics Canada; Giving in the Netherlands Report

Indicates headroom for improvement

Markets with similar wealth score better on social metrics

Australia

Volunteered Time

Malaysia

Volunteered Time

Hong Kong

Volunteered Time

Singapore

Volunteered Time

Note: Each bar on the scale represents 20% of countries on the index; the bigger the area, the better performing the country is
Scarcity calls for diversification of resource providers and more systemic impact measurement of impact

Significantly more resources were made available over the last decade

<table>
<thead>
<tr>
<th>Government</th>
<th>Education</th>
<th>Healthcare</th>
<th>Community Dev’T*</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.5X</td>
<td>1.5X</td>
<td>4X</td>
<td>3.4X</td>
</tr>
<tr>
<td>$7.9B</td>
<td>$2.3B</td>
<td>$9.2B</td>
<td>$1.4B</td>
</tr>
</tbody>
</table>

Public

<table>
<thead>
<tr>
<th>Public</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.8X</td>
</tr>
<tr>
<td>$0.8B</td>
</tr>
</tbody>
</table>

Slowing GDP Growth

Annualized real GDP growth (%)

- 1985-2000: 7.6%
- 2000-2015: 5.2%
- 2015-2030E: 2.7%

Stagnant Rates Of Volunteerism

Volunteerism rate in SG (%)

- 2005: 15%
- 2010: 23%
- 2014: 18%

Government reliance can raise concerns over affordability

Sigma: Ministry of Finance Singapore Analysis of Revenue and Expenditure; Commissioner of Charities Annual Reports; Euromonitor; NVPC Individual Giving Survey 2014; Australian Charities Report 2014; NCVO UK Charity Sector
International Benchmarks Show That ‘Talent’ Is The Key Area To Prioritize

Average Rating on a scale of 5 = Strongly Agree to 1 = Strongly Disagree for a series of questions

- Strong (4.0)
- Weak (2.0)

Top Quartile Global Non-Profit Organizations (Bridgespan database), N=598
Singapore NPOs, N=39

Sector finds it hard to attract and retain top talent

Low Awareness And Low Application Vs. Other Social Sectors

NCSS Sector Brand Project, Project Beneficiary Survey 2016 % of respondents who are aware and % who apply

- Awareness
- Application

SOCIAL SERVICE Health care Education

SOCIAL SERVICE Health care Education

33% 28% 27% 25% 21%

Serving clients HUMAN CAPITAL Organizational capability Sustainable funding Innovative culture

Human Capital Is A Top Concern For Many Social Service Organizations

% respondents who believe that social service organizations are successful or very successful (N=356)

Three Strategic Thrusts Considered To Step-change Manpower Deployment

Desired outcome
A impactful sector that can continue meeting beneficiaries’ needs effectively

Thrust 1
Greater emphasis on service delivery impact

Thrust 2
Doing better at resource optimisation

Thrust 3
Bringing out the best in people

Planning for leadership succession
Developing leadership & management capability

Only 16% of respondents believe they are successful in planning for leadership succession

Sources: NCSS Sector Consultation Study 2016; NCSS Sector Brand Project 2016; Bain and Company 2014 Survey on Non Profits in Singapore; Bridgespan; NCSS/MSF Manpower study

By Sebastien Lamy and Usman Akhtar

Unlocking the power of Singapore’s nonprofits

A new study finds that, as Singapore’s nonprofits expand, they are learning to tackle the challenges that hinder their ability to serve more people in need.

By Sebastien Lamy and Usman Akhtar

TALENT
Talent attraction, retention and management professionalism need to be enhanced to increase effectiveness of ecosystem
Innovation in the social service sector lags other sectors, industries and countries

In general, Singapore has a vibrant scene of “ground up” entrepreneurship...

One Of The Most Innovative Countries

Global Innovation Index (N=128)

#1: Switzerland
#2: Sweden
#3: UK
#4: USA
#6: Singapore
#11: South Korea
#14: Hong Kong
#19: Australia
#35: Malaysia

One Of The Best Places To Be A Social Entrepreneur

Thomson Reuters Foundation (N=44)

#1: USA
#2: Canada
#3: UK
#4: Singapore
#7: South Korea
#8: Hong Kong
#9: Malaysia
#26: Australia

Rapid Rise In Social Enterprises

Number of members in raiSE

2009
2014

100
300

How Wii exercise can keep elderly moving and help those most prone to falling

- Using a Nintendo Wii Fit can help elderly people avoid falling over
- The games console simulates sports such as tennis, bowling and boxing
- Uses 30% less energy than physio treatment, but improves balance

Adoption of technology in the social service sector is lagging others

STAGE 1:

- Construction
- Mining
- Oil & Gas
- Utilities
- Pharma
- Manufacturing
- Consumer products
- Healthcare
- Motor
- Transport
- Logistics
- Education
- Hotels
- Airlines
- Autos
- Banking
- Retail
- Telco
- Tech
- Media

STAGE 2:

Innovation in Social Services

DEGREE OF DIGITAL DISRUPTION

21% of respondents believe they are successful in adopting an innovative culture

Lack Of An Innovation Culture Is A Top Concern For Many Organizations

% respondents who believe that social service organizations are successful or very successful (N=356)

33%
28%
27%
25%
21%

21% of respondents believe they are successful in adopting an innovative culture

Sources: NCSS Sector Consultation Study 2016; Thomson Reuters Foundation, Global Innovation Index; Bain Experience Center; various online news articles