

## Surveys on Business Ethics 2018

In this Briefing, the IBE highlights the findings of 9 pieces of research conducted throughout 2018 in the field of business ethics, commenting on common themes and emerging trends. It is published annually.

This briefing highlights the findings of a number of pieces of research conducted into business ethics in 2018. It is an update on the analyses carried out annually by the IBE, and covers 9 different surveys. The reports cover a broad range of business ethics topics such as mental health at work, modern slavery, fraud and corruption, as well as the public's opinion on business behaviour. Depending on the survey, respondents ranged from the general public to specific age groups as well as from all employees to senior executives only.

### 2018 Compliance Risk Study Comply & Demand

The full survey is available [here](#)

This Accenture report is based on a survey of 150 leading Compliance officers at banking, capital markets and insurance institutions globally. It provides an overview of the different strategies businesses are pursuing to deliver the capabilities that shape a compliance function fit for the future of financial services.<sup>1</sup>

This survey has been conducted every year since 2013. Since then, compliance functions have made a dramatic turn towards innovation-fuelled strategies in an era of

digital transformation. According to this year's study, around one in two organisations have between 50 and 299 employees who provide compliance support in the first line of defence.

In line with findings over the last four years, 89% of respondents indicated that investment in compliance will increase over the next two years. Also, more than 76% of respondents saw a gap between skills currently available and those required.

Surprisingly, only 7% of respondents viewed conduct risk among the top 3 most challenging risks to manage (down from 27% in 2017), while 31% saw data quality issues as a key barrier hindering organisations from delivering on its key mandates over the next three years.

Finally, the report gives insights into how organisations face the challenges of the future of compliance. While only 42% of respondents favoured building proprietary technology rather than leveraging third-party solutions, 50% said they intend to invest in technologies to leverage proven solutions and third-party investment in innovation.

#### Figure 1: Technology is outpacing talent in Compliance.

Source: 2018 Compliance Risk Study



<sup>1</sup> Although this survey focuses on issues specific to compliance, which primarily focuses on ensuring that organisations' conduct business in line with applicable legislation and regulation, many of the issues covered intersect and overlap with ethical issues. Ethics is a value-based approach and looks at how organisations take responsibility for their actions and build a corporate culture in which individuals "do the right thing" above and beyond the law. The IBE's [Ethics and Compliance Handbook](#) gives guidance on this topic.

## The Deloitte Millennial Survey 2018 Global survey on millennial's views on business

The full survey is available [here](#)

Deloitte's latest millennial survey is based on the views of 10,455 millennials from 36 countries. This age group includes individuals born between January 1983 and December 1994. All respondents have a higher-level educational qualification and work full-time in predominantly large, private-sector organisations.

This year's survey shows a dramatic, negative shift in millennial's feelings about business' motivations and ethics. Respondents are disappointed that business leaders' priorities do not seem to align with their own. However, where matches in priorities do exist, the perception is that those companies are more successful, have more stimulating work environments and do a better job of developing talent.

Only a minority now believes that corporations behave ethically (48% versus 65% last year) and that business leaders are committed to helping improve society (47% versus 62% in 2017). A majority of millennials in every market agree with the statement that businesses have no "ambition beyond wanting to make money."

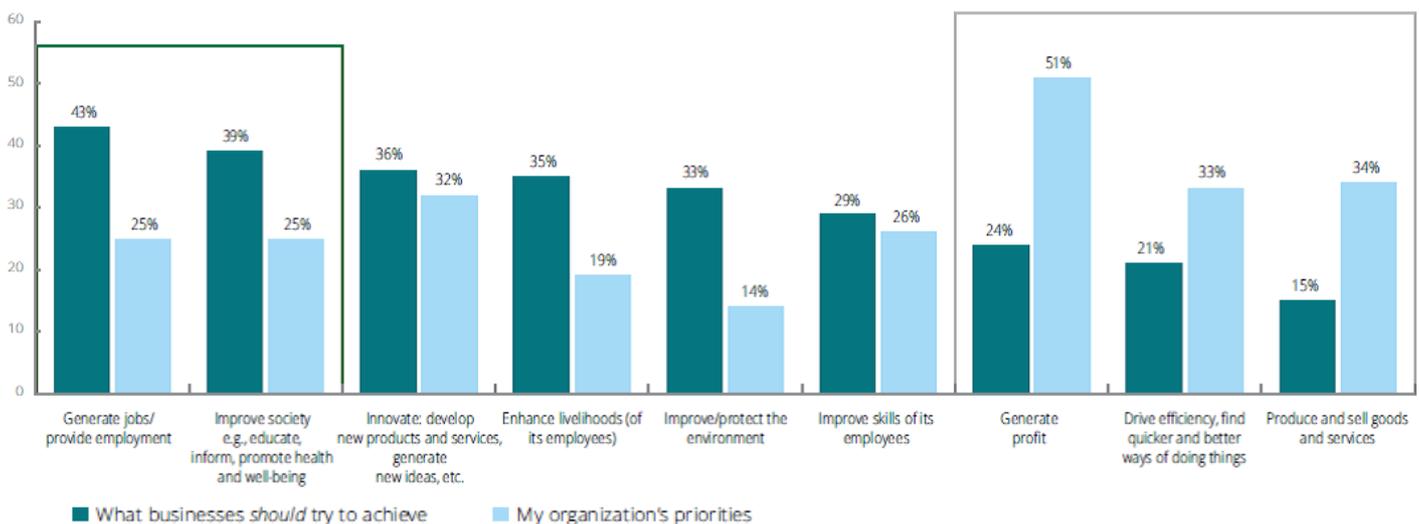
When asked whether particular groups were having a positive or negative impact on the world, millennials delivered a harsh assessment of both political and religious figures. The judgment of political leaders was particularly brutal, with only 19% of younger workers saying they make a positive impact, compared with 71% who thought that their impact was negative. Conversely, business leaders fare better, with 44% saying that they have a positive impact.

The recent rise of gig economy employment has seen large numbers of millennials leave full-time employment or supplement their income by taking on short-term contracts or freelance work. Therefore, respondents were asked whether they would consider taking on such roles either instead of, or in addition to, existing full-time employment. In both cases, a clear majority said they had already taken on such roles or would consider doing so while only 17% rejected the idea outright.

What is it about gig-based work that makes it so attractive to millennials? The short answer is the promise of, or need of, a higher income. More than 62% of those millennials who would consider gig employment cited "increased money/income" as an explanatory factor. Flexibility and freedom are important secondary factors.

**Figure 2: Which of the following words and phrases match your own belief as to what business should try to achieve? Select up to three.**

Source: *The Deloitte Millennial Survey 2018*



## Modern Slavery Reporting: Is There Evidence of Progress?

### Survey on the impact of the Modern Slavery Act 2015

The full survey is available [here](#)

Ergon, a specialist consultancy working on labour rights and human rights, conducted a study to understand how the corporate reporting requirements of the UK Modern Slavery Act 2015 (MSA) are applied in practice. The 2018 sample largely comprises companies that are UK headquartered (70%). The majority of these companies (52%) had a turnover of over £500m.

Although the guidelines suggest that modern slavery statements should at the latest be published within six months of the financial year's end, many companies in the 2018 sample did not appear to comply with this. This may be due to a lack of clarity in the legislation along with the non-binding nature of the guidelines, or a downward shift in momentum three years after the Modern Slavery Act's inception.

By focusing on the same companies that were sampled in April 2017, the companies which have produced an updated statement has been tracked in order to determine what has and has not changed.

Out of the 150 companies analysed in the previous report (April 2017), only 81 companies (or 54%) have produced

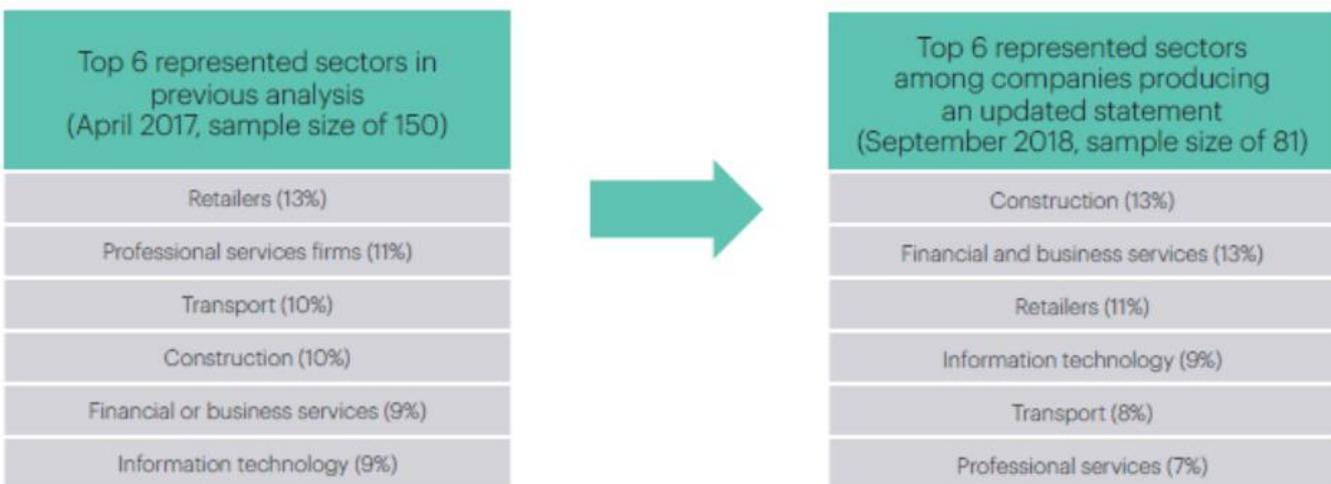
an updated statement. As there is currently no official monitoring or enforcement mechanism in place, companies that do not produce new statements face little by way of sanctions. Among these companies, 58% incorporated substantial changes, whereas a significant proportion (42%) made only minimal changes or no changes at all to their statements.

Of the statements which contained minimal changes, the most common updates were only minor alterations to language and some new information relating to financial turnover, number of employees, or changes in management. Furthermore, 12% of companies produced exactly the same statement as the previous year, changing only the date. This suggests that many companies are not applying a continuous improvement approach to developing reporting of their activities to counter modern slavery.

Another interesting finding is that while statements are getting longer, they are not necessarily becoming more informative. While not indicative of quality, statement length can sometimes offer an indication as to the level of effort being put into reporting and the scale of issues being covered. The report finds that compared to their last statement, the 81 companies that produced updated reports produced longer reports, with nearly 50% of them being over 1000 words long, up from 36% in the previous survey.

**Figure 3: Overview of top 6 sectors covered in 2018 compared with 2017**

Source: *Modern Slavery Reporting: Is There Evidence of Progress?*



Ergon’s analysis, however, suggests that the quality of reporting in terms of content, scope and detail has remained the same with no appreciable change in quality. This finding holds across nearly all the topics recommended to be covered in statements and is concerning if reporting is regarded as a true reflection of enhanced activity.

Over a quarter of companies (28%) did not have a link to their statement on the home page, and thus did not appear to be in compliance with the Act. This proportion has been roughly consistent across the four analyses they have conducted since 2016.

The review of business areas covered in statements reveals that companies continue to see modern slavery risks primarily in relation to supply chains and their direct employment and therefore focus their reporting on these two areas. Other parts of businesses (e.g. distribution), and contractors (e.g. catering and security) continue to be blind spots in many statements, with a majority of statements not covering these topics at all.

The results show that more detailed reporting of remediation actions is being taken when instances or indicators of modern slavery have been found. This is encouraging both from the point of view of transparency, but also because it shows that due diligence processes

are working. Remediation is often dealt with in the form of case studies. Since identified cases of modern slavery are few, and where they do occur, require sensitive and complex handling, providing case studies is an effective way to demonstrate actions.

Undoubtedly the escalation of modern slavery to a board level issue should be seen as one of the key impact of the MSA. Most statements in the 2018 sample were signed by either the chief executive (52%) or a director (30%). Approximately 12% were signed by some other senior executive, a board member, or a partner.

In total, 6% of statements were not clearly signed and therefore apparently non-compliant with the Act. This is a significant improvement from the last analysis which found that 21% of statements did not have a clear sign-off.

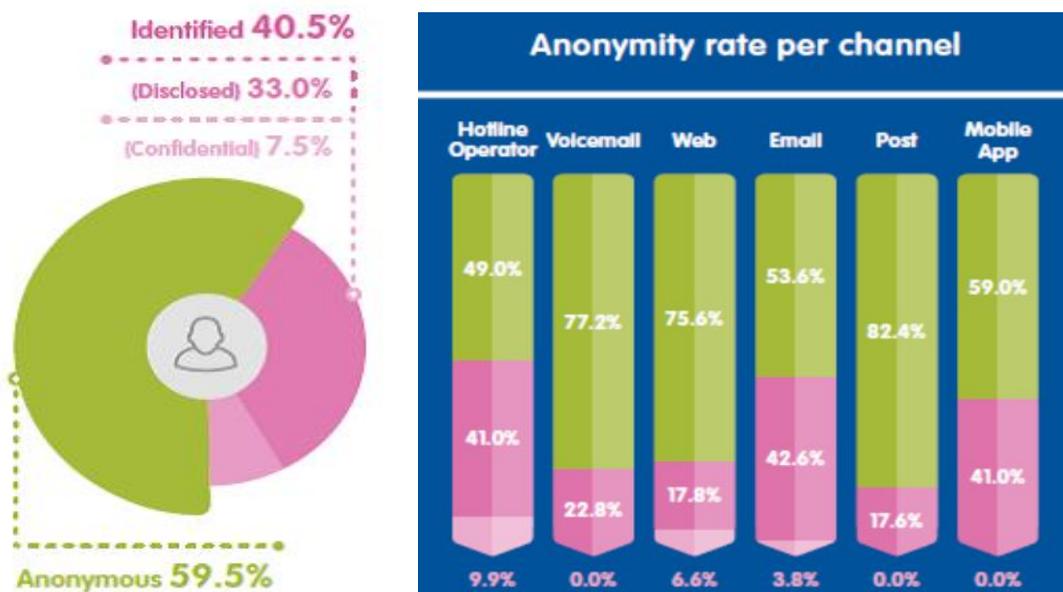
### Expolink Whistleblowing Benchmarking Report 2018 Findings of organisations using Expolink’s whistleblowing service

The full survey is available [here](#)

Data for Expolink’s 2018 benchmarking report was collected between 01 January and 31 December 2017. The findings of this survey reveal that the majority of organisations using Expolink’s service still use ‘report volume’ as a success indicator for their Speak Up system. While this is appropriate, less than 25% said that

**Figure 4: Overview of anonymity rate per channel**

Source: Expolink Whistleblowing Benchmarking Report 2018



they also used outcome-based measures, such as the proportion of substantiated reports or those resulting in corrective action to measure success.

The overall incidence rate of 2.5 reports per 1,000 employees represents a slight increase on last year's figure (2.1 reports).<sup>2</sup> This may be attributable to a number of factors influencing both organisational approach, and the behaviour of end users. With regard to the former, a larger proportion of organisations are now viewing their Speak Up programmes as intelligence sources, rather than a simple compliance requirement.

Anonymity rates continued to fall for this year. This hints at an increased willingness among employees to identify themselves when making a report, perhaps driven by a growing trust in the policies and procedures put in place to protect them. However, behind this sustained decline (from around 75% in 2009 to 59.5% in 2017) is a noticeable growth in reports submitted on a 'confidential' basis.

As in previous years, HR-related reports are the most common concerns raised across 11 of the top 13 industry sectors surveyed. Closer analysis of the 'Bullying, Discrimination or Harassment' category reveals an 89% annual increase in reports relating to sexual harassment

or sexual abuse. These findings support the view that high-profile media coverage of an issue can influence workplace Speak Up trends. This appears to have a close correlation with the #metoo movement, which began in October 2017.

The propensity of employees in certain sectors to favour one reporting channel over another is particularly obvious in this year's analysis, supporting the view that careful consideration must be given to employee circumstances when designing Speak Up mechanisms. Meanwhile, there is little obvious correlation between reporting channel and anonymity rate. This implies corporate cultures and environments have a significant bearing on a discloser's overall reporting preferences.

### EY 15<sup>th</sup> Global Fraud Survey: Integrity in the spotlight

#### Global survey on compliance and ethics

The full survey is available [here](#)

This survey contains insights from business leaders on the risks and challenges organisations face in fighting fraud and corruption in an era of significant technological advance. The survey also discusses how companies are addressing these risks through enhanced technologies and increased compliance efforts.

**Figure 5: Differences in perceptions of risk-based approaches to due diligence**

Source: EY 15<sup>th</sup> Global Fraud Survey: Integrity in the spotlight



<sup>2</sup> This figure only refers to the number of reports raised via Expolink's independent channels. As this figure excludes any internally-reported disclosures, it may be helpful to interpret this as the number of additional reports submitted per 1,000 employees (over and above internal reporting levels).

Between October 2017 and February 2018, 2,550 executives from 55 countries and territories were interviewed. The interviews show that fraud and corruption in business is not going away. The survey demonstrates that many businesses have reached a certain level of maturity in their compliance programmes, with the vast majority of executives interviewed aware of anti-corruption policies, procedures and intent from management.

It found that more than one-third of business leaders see fraud and corruption as one of their greatest risks. The scale of fraud and corruption remains significant and there has been no improvement in the results at a global level since 2012. More than 1 in 10 respondents were aware of significant fraud in their company in the last 2 years.

The propensity of respondents who would justify fraud to meet financial targets has also increased on a global level since 2016. Now, 12% of respondents would justify extending the monthly reporting period, 7% would backdate a contract and 7% would book revenues earlier than they should to meet financial targets.

Responses to this survey over the last eight years indicate that countries and organisations are moving too slowly to tackle corruption. In 2018, 38% of our respondents stated that bribery/corrupt practices happen widely in business in their country, with no improvement since this question was first asked in 2012 (also 38%).

The results also reveal that younger respondents are more likely to justify fraud or corruption to meet financial targets or help a business survive an economic downturn. With increased pressure for individuals and businesses to succeed, the problems of fraud and corruption do not appear to be going away.

In fact, respondents under the age of 35 were found to be more likely to justify fraud or corruption to meet financial targets or help a business survive an economic downturn, with 1 in 5 younger respondents justifying cash payments compared to 1 in 7 respondents over the age of 35. The results also show that under-35s would be more likely to act unethically to meet financial targets than older respondents.

The majority of respondents stated that management has introduced anti-corruption policies, whistleblowing hotlines and statements of ethics. However, there has not been a corresponding decrease in unethical conduct and business failures. Organisations need to focus their efforts on improving the effectiveness of these programmes by assessing the corporate culture, controls and governance from an integrity perspective, leveraging new technologies to provide better data insights.

Digital transformation also creates new risks. With ever expanding volumes of customer and employee data, proliferation of digital technologies will create more complexity for companies regarding data privacy, as well as robust new regulation in this area, companies will be challenged as never before by information governance.

Open and connected business models are likely to result in increased exposure to cyber threats and ransomware. In the last two years, cyber-attacks have been widespread and have included a global ransomware campaign that impacted over 45 countries.

It is therefore not surprising that 37% of respondents see cyber-attacks as one of the greatest risks to their business. The good news is that advances in technology, particularly in artificial intelligence, machine learning and automation, can be used to transform legal and compliance functions.

## **Mental Health at Work 2018 Report Seizing the momentum**

The full survey is available [here](#)

There is still a fundamental issue with the way that mental health is discussed in the workplace and in wider society. If someone is sick with influenza we say “they have flu”, never “they are flu”. The implication is that this is something from which they can recover and this type of language should also be used in connection with mental health problems.

One in three of the UK workforce have been formally diagnosed with a mental health condition at some point in their lifetime, most commonly depression or general anxiety. Six per cent of employees have been living with a formally diagnosed condition for more than 10 years, including depression, general anxiety, panic attacks and eating disorders.

Just 60% of employees feel their line manager is genuinely concerned for their wellbeing, although this is rising. 64% of managers admit putting the interests of their organisation above staff wellbeing at some point, and 12% say they do so every day. Lack of high-quality mental health training for line managers also continues to be an important issue.

Financial wellbeing is another pressing concern. Financial concerns have caused three-fifths of employees to experience a negative mental health symptom, including loss of sleep, stress, lack of concentration, and fatigue. This is most likely to affect younger employees, with stress being the most likely problem. In fact, 90% of younger employees say their mental health is affected by the cost of living.

The rise of gig economy employment, the increase in self-employment and temporary or zero hours contracts, the prevalence of in-work poverty and the uncertainty of Brexit, are all increasing the challenge of maintaining and improving employee mental health. As many as three in five employees (61%) have experienced mental health issues due to work or where work was a related factor.

The survey also shows that half of employees experiencing a mental health issue (49%) reported that there had been no resulting changes or actions taken (51% in 2017, 56% in 2016). However, where the

employee had disclosed to a line manager or human resources it was more likely that steps had been taken to support them. Positive or neutral actions were taken in 71% of cases after disclosure.

Being given support with their workload was the number one action that those experiencing a mental health issue would have appreciated (30%), followed by time spent working from home and periods of time off work.

Encouraging news from the survey findings is that all positive actions taken by employers were felt to have been beneficial. For example, 94% of employees who were offered flexible working found it to be helpful, 76% were signposted to information or advice elsewhere, and 74% were supported to change roles and responsibilities within their organisation.

If real change is going to take place, SMEs must accept that they also have a duty of care to support their employees' mental health and wellbeing. The survey consistently shows that support is more likely to be provided in larger organisations. Employees in large organisations were more likely to have received some mental health training (21%) than in small businesses (14%) or micro businesses (11%).

The proportion of employees who believe that their organisation does well in supporting those with mental

**Figure 6: Overview of key concerns raised by employees**

Source: *Mental Health at Work 2018 Report*



health issues is rising, but still stands at less than half (45%, up from 40% in 2016).

One quarter of employees said that they have approached someone else in the workplace because they were concerned about their mental health. This is higher among managers (32%) and women (27%). Relatively few of those who have experienced mental health issues involve anyone at work (30% now and 25% in 2016). Just 16% have disclosed it specifically to their manager or human resources.

Just over half (54%) feel comfortable talking generally about mental health issues in the workplace (50% in 2016) and only 44% would feel comfortable talking to their line manager about their own mental health. The survey shows that the main barrier is an unwillingness to 'make it formal' (32%), but the fear of negative consequences is also strong (27%) as is a belief that no support will be offered (28%).

## **Institute of Business Ethics (IBE) Ethics at Work UK 2018 Survey of UK employees**

The full survey is available [here](#)

The IBE has asked questions about employees' attitudes to ethics in their place of work every three years since 2005. This survey report presents results from the IBE's 2018 research into ethics at work in the UK (England, Scotland, Wales and Northern Ireland).

For one question, respondents were asked whether their organisation provides incentives to employees to encourage them to live up to the organisation's ethical standards. Less than a quarter (22%) of UK respondents say that their organisation provides these types of incentives, which is in line with the average across all European countries surveyed (23%).

Another question asked whether respondents had been aware of misconduct in their organisation over the previous 12 months. 24% of respondents said that they had. These respondents were also asked whether they raised – or decided to speak up about – any of their concerns internally, directly to management or using any of the mechanisms available in their organisation.

Two thirds (67%) of the UK employees who were aware of misconduct did so, compared to a European average of 54%. This represents a 12 percentage point increase compared to 2015, when only 55% of UK respondents who were aware of misconduct spoke up.

The two most common reasons given for not raising concerns remain in line with the 2015 results. Employees are still most concerned that speaking up will jeopardise their job or that correction would not be taken.

However, the number of employees who say that they did not speak up about misconduct at work because they did not know who to contact has increased significantly from 0% in 2015 to 10% in 2018.

Respondents who reported being aware of misconduct were also asked their satisfaction with having done so. Three fifths (59%) of UK respondents reported that they were satisfied with their organisation's response, which represents a significant improvement compared to 2015 (39%) and is higher than the European average of 51%.

The survey also shows that only 59% of employees in the UK believe that their organisation disciplines employees who violate their organisation's ethical standards. This result is, however, above the European average (53%).

This figure is of particular concern if read in parallel with the fact that, in 2018, employees in the UK appear to be less aware of each of the four building blocks of an ethics programme. This highlights that organisations might be failing to continuously communicate with employees about the tools available to support ethics at work.

This UK survey was one of 12 country surveys the IBE undertook in 2018. Reports on the other countries are available at [www.ibe.org.uk](http://www.ibe.org.uk).

## Institute of Business Ethics (IBE) Attitudes of the British Public to Business Ethics 2018

### Survey about perceptions of the British public on business ethics

The full survey is available [here](#)

For 15 years the Institute of Business Ethics has asked the British public about its views on how ethical they consider British business to be.

One of the key findings of this survey is that public trust in business is at its highest since the survey began in 2003, and 62% of the British public now perceive business to be behaving ethically. This significant increase might be the result of an increased perception of uncertainty with regards to the current political situation, particularly influenced by Brexit negotiations.

Another interesting finding is that environmental responsibility has significantly regained focus as an issue for the British public after falling sharply since 2008. The level recorded in this year's survey equals the level last recorded in 2009.

The increased media attention given to extreme weather and other consequences of pollution may help partly to explain this trend (e.g. the Blue Planet Effect). This trend may also be the result of a greater awareness of environmental challenges that in other countries in Europe has increasingly led voters to turn to green, or environmentally conscious, parties.

The issue of executive pay has seen significant movements over the last five years, and is now at its lowest level since the survey was launched 15 years ago, but remains the number one issue of concern for the British public.

The issue of work-home balance has slightly increased in prominence since 2017. Many organisations are actively trying to recruit and retain talent by offering employees flexible working arrangements. However, the prominence of this topic as an issue of concern suggests that members of the public may not yet be experiencing the benefits of this trend.

**Figure 7: Overview of issue concerns across the generations**

Source: IBE Attitudes of the British Public to Business Ethics 2018



It is also considered to be more of an issue for Millennials (18-34s) than Baby Boomers: it ranks second in the list of issues that concern them the most, whilst it ranks lower for Generation X-ers (35-54) and Baby Boomers (55+).

Millennials also show the most positive change in opinion of all the age groups about business behaviour. While 36% of Baby Boomers (55+) think business is behaving unethically, only 32% of Generation X-ers (35-54) and 24% of Millennials (18-34) feel the same way. In 2017, the picture was notably different for Millennials as 36% then thought British business was behaving unethically.

## Edelman Global Trust Barometer 2019 Global survey on trust

The full survey is available [here](#)

This year's Edelman Trust Barometer registered modest gains in people's trust in each of the four major societal institutions – government, business, media and NGOs – but no institution saw changes dramatic enough to change its standing.

Government and media remain distrusted by the general population, while among the informed public, trust in all four institutions rose by four points. Among the general population, gains were even smaller – a two-point increase for NGOs and three points for the remaining three institutions.

The more dramatic story of this year's survey results is that the world is now divided by trust. There is a 16-point gap between the more trusting informed public and the more sceptical mass population, marking a return to record highs of trust inequality, and the re-emergence of a true "mass-class" divide.

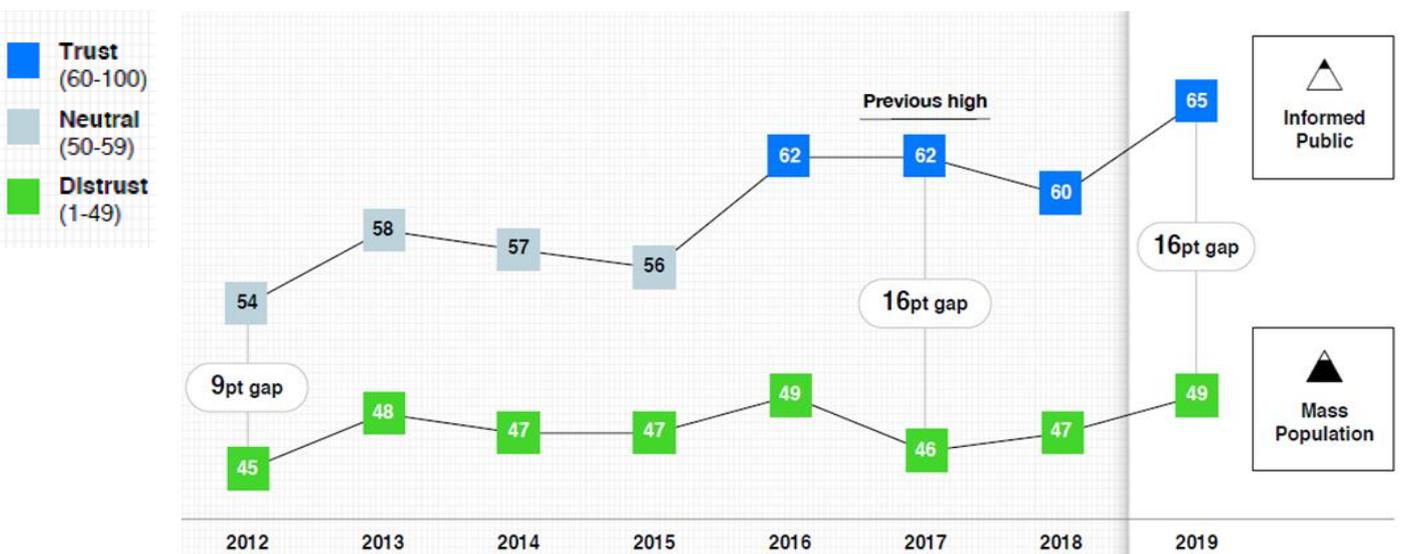
Despite the divergence in trust between the informed public and the wider population, the world is united on one front as they all share an urgent desire for change. Only one in five feels that the system is working for them, with nearly half of the mass population believing that the system is failing them.

According to the findings, 40% of respondents not only consume news more than once a week, but they also routinely share or post news content online. Despite people using tools available to them to educate themselves and amplify opinions and information, trust in social media as a source of information remains significantly lower than trust in traditional media sources in all regions of the world.

In 2018, the role of women in society was especially prominent with the #MeToo movement gathering huge momentum, stretching into almost every aspect of society, as well as numerous landmark events highlighting gender (in)equality. Against this backdrop, the survey evaluates the differences in trust between men and women.

**Figure 8: Trust inequality returns to record highs**

Source: Edelman Global Trust Barometer 2019



It does appear that, overall, women are less trusting than men. Women in the general population show distrust in 15 out of 27 markets, four more markets than men. Their trust scores in general are lower, notably in developed markets like the United States, Germany, Australia, Japan, France and Canada.

Of significance is the relative distrust that women have in business compared to men. Globally, the gap is seven points, but it stands at 15 points in the United States, and there are eight markets where the gap is greater than seven points.

This year's survey points to a surprisingly deep relationship between employees and employers. Employees are ready and willing to trust their employers, but the trust must be earned through more than 'business as usual'. 67% of respondents state that they would refuse to work for, or expect higher pay from, an organisation that did not share their values or provide the opportunity to address societal problems.

People are now bringing their call for change to the workplace. Trust in "My Employer" outranks trust in any single institution, with trust levels reported at 75 percent. This is a global phenomenon as in the vast majority of markets, trust in employers rose. In all markets, employers are trusted more than they are distrusted. Even for the more sceptical mass population who have lost faith in the system, trust in employers is high.

A closer examination of these results reveal that the majority are looking to their employer to provide certainty by acting as a trustworthy source of information on contentious societal issues. Further, what drives trust in employers is not simply operational excellence or decisions that would impact jobs. On the contrary, an organisation's contribution to society, its values and its vision for the future all outweigh operational decisions in terms of earning trust.

As people look for change, they are increasingly turning to CEOs to lead it – from positive change on prejudice and discrimination, to training for the jobs of tomorrow, to sexual harassment. As many as 76% of the respondents asked, stated that CEOs should take the lead on change, rather than waiting for government to impose it – an 11-point increase since last year.

## Conclusion

The surveys in this report indicate that the general public seems to think that businesses are behaving more ethically in some areas than in previous years.

*The Deloitte Millennial Survey 2018* found that when asked whether particular groups were having a positive or negative impact on the world, millennials delivered a harsh assessment of both political and religious figures. By contrast, business leaders do much better, with 44% saying that they have a positive impact. Similar sentiments are echoed in the *IBE Attitudes of the British Public to Business Ethics 2018* survey as public trust in business is at its highest since the survey began in 2003.

With less trust in the media and governments, people increasingly seem to be looking to alternative sources for political and social change. Businesses can fill this void, and the *Edelman Trust Barometer 2018* demonstrates this as trust in "My Employer" now outranks trust in any single institution.

It should, therefore, not go unnoticed that the public, especially younger generations, are evaluating businesses not only based on their financial success, but also to the extent that they behave as socially responsible actors. With the recent decline in trust in other institutions, private sector organisations are increasingly expected to become a force for social change.

While organisations acknowledge the importance of behaving ethically, too few seem to go beyond the legal requirements to be forces for good. According to *Ergon*, despite the Modern Slavery Act being introduced in 2015, there is still a long way to go before a sufficient quality of modern slavery reporting is achieved.

Finally, creating an ethics and compliance programme should be accompanied by specific training for employees. The surveys have shown that training, particularly on issues such as mental health and modern slavery is underdeveloped. Creating more training opportunities is essential if employers want employees to live up to their organisation's values.



*The IBE was established in 1986 to encourage high standards of business behaviour based on ethical values.*

**Our vision is to lead the dissemination of knowledge and good practice in business ethics.**

**We raise public awareness of the importance of doing business ethically, and collaborate with other UK and international organisations with interests and expertise in business ethics.**

**We help organisations to strengthen their ethics culture through effective and relevant ethics programmes.**

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