

2024 State of BC's  
Non-Profit Sector

# Under Pressure

June 2024





## Land Acknowledgement

We gratefully acknowledge that Vantage Point's office is located on the unceded, traditional, ancestral territories of the Coast Salish People, including the Skwxwú7mesh (Squamish), x̣m̄əθkʷəȳəm (Musqueam), and sə́lilwətaʔ (Tsleil-Waututh) Nations. The work that we do, and that of the partners of this report, spans across the lands of 203 distinct First Nations in British Columbia. We are grateful for the opportunity to live, work, and convene on these lands, most of which are unceded, meaning the land was never formally surrendered by First Nations through treaties or other agreements. Unceded lands still rightfully belong to the Nations who have stewarded them since time immemorial.





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# About this Report

This report is the fourth installment in a series initiated by a partnership between Vantage Point, the Vancouver Foundation, the Victoria Foundation, and the City of Vancouver in 2020. United Way British Columbia and Vancity Community Foundation subsequently joined the collaboration. Our first two reports, *No Immunity* (2020)<sup>1</sup>, and *Unravelling* (2021)<sup>2</sup>, were published during the COVID-19 pandemic, both outlining the pandemic's impact on non-profits across BC. These reports contributed to key non-profit sector advancements, such as the creation of the Recovery and Resiliency Fund<sup>3</sup> through a historic \$30M investment from the Province of BC for organizations disproportionately affected by the pandemic in 2022.

As the BC context evolved and we entered an endemic stage of the pandemic, the third report *Safety Net* (2023)<sup>4</sup> focused its analysis on disaggregated data and equity while providing a snapshot of trends, challenges, opportunities, and successes for non-profits in our province. The findings reflected that there were signs of stabilization, and feelings of hope and motivation within the sector. However, the report also underlined the significant pressures the sector continued to face, and the increased community need for services.

After the release of the 2023 report, Vantage Point focused its efforts on sharing the data across the province, presenting findings to varied audiences including to government, funders, and non-profits. Many non-profits in BC have used the data from these reports to support grant applications, advocate for additional core and administrative funding support, and educate supporters to better understand the realities of the sector.

1 Vantage Point, "No Immunity: The Impact of COVID-19 on Our Sector", May 13, 2020, <https://thevantagepoint.ca/blog/no-immunity-the-impacts-of-covid-19-on-our-sector/>.

2 Vantage Point, "Unravelling: Non-Profits, COVID-19, & the Fabric of BC Communities", February 8, 2021, <https://thevantagepoint.ca/blog/unravelling/>.

3 BC Gov News, "Recovery and Resiliency Fund provides new support for B.C.'s non-profit sector", accessed on January 10, 2024, <https://news.gov.bc.ca/releases/2022SDPR0015-000420>.

4 Vantage Point, "2023 State of BC's Non-Profit Sector: Safety Net", accessed May 23, 2023, <https://thevantagepoint.ca/blog/safety-net-state-of-sector-report/>.

For this year's State of the Sector Survey, our intention was both to check-in with the non-profit sector around various trends while also probing deeper into the underlying challenges highlighted in the last report. Our commitment remains to provide consistent, high-quality data, crucial to understanding the non-profit sector in BC, and equipping funders, policy makers, and other sector stakeholders with relevant data to make informed decisions and better support the current needs of BC's non-profit sector. Equally important is to support non-profits across BC to come together to highlight their realities and enhance their ability to advocate for what they need to succeed.



## About Vantage Point

Vantage Point's vision is an inclusive community, where non-profits can achieve their fullest potential and drive sustainable change throughout the province and beyond.

Our mission is to promote connected communities by nurturing a strong non-profit sector. We achieve this by delivering high-quality training, resources, and advocacy that builds connection, creativity, and impact in the sector.

Vantage Point is a British Columbia non-profit that serves other BC non-profits. We convene, connect, and equip leaders to lift organizational capacity and elevate the non-profit sector. We provide training and support in areas of governance, leadership, human resources, strategic planning, and other key topics that support non-profits to achieve greater impact. Vantage Point plays an important role in lifting and amplifying the strengths of this dynamic, resilient, and innovative sector. By identifying the sector's strengths and challenges through research, and engaging in collaborations and government relations, Vantage Point has emerged as a relevant voice for the sector in recent years.

You are invited to utilize, adapt, and further develop this material for non-commercial purposes, provided that proper attribution is given to Vantage Point and the collaborating organizations listed on the "Project Partners" page. Any modifications made to the content must be clearly indicated.



## Acknowledgements

We extend our sincere gratitude to all respondents of the survey and to those who encouraged participation within their networks. We recognize that while non-profits face and overcome hurdles every day, the sector remains steadfast and continues to provide vital services, programs and supports to communities across the province. Despite operating in less resilient times, the sector's participation in the survey is yet another demonstration of the generosity and community-minded spirit that makes this sector indispensable.

Vantage Point would like to thank our partners for their collaboration on this project, providing funding and distribution support, and invaluable feedback and guidance in survey design and analysis—shaping the emerging themes reflected in this report.

## Project Partners



Vancouver Foundation harnesses the gifts of energy, ideas, time, and money to make meaningful and lasting impacts in communities. Our vision is healthy, vibrant, equitable, and inclusive communities.

[www.vancouverfoundation.ca](http://www.vancouverfoundation.ca)



The City of Vancouver acknowledges that it is situated on the unceded traditional territories of the xʷməθkʷəy̓əm (Musqueam Indian Band), Skwxwú7mesh (Squamish Nation), and səlilwətaʔ (Tsleil-Waututh Nation). Vancouver is one of the world's most vibrant, diverse and liveable cities. The City's mission is to create a great city of communities that cares about our people, our environment and our opportunities to live, work and prosper. Together, with our partners, the City of Vancouver works to create equitable, safe, welcoming and healthy communities where all people can thrive.

[www.vancouver.ca](http://www.vancouver.ca)



**VICTORIA FOUNDATION**

The Victoria Foundation connects people who care with causes that matter. Since 1936, we have been working in collaboration to strengthen community wellbeing by investing in people, opportunities, and solutions.

[www.victoriafoundation.bc.ca](http://www.victoriafoundation.bc.ca)



**Community Foundation**

Vancity Community Foundation is a public charity established by Vancity Credit Union in 1989. We help communities thrive and prosper by using and leveraging financial tools and providing direct support to community organizations in innovative ways to address systemic poverty and to support financial resilience and affordability, while working to embed principles of anti-racism, climate resilience and Reconciliation.

[www.vancitycommunityfoundation.ca](http://www.vancitycommunityfoundation.ca)



**United Way  
British Columbia**

Working with communities in BC's North, Interior, Lower Mainland, Central and Northern Vancouver Island, we are united for people in need. Together we serve residents and organizations through the collaborative creation and support of healthy, caring, inclusive communities.

<https://uwbc.ca/>





# Executive Summary

In British Columbia (BC), there are approximately 33,019 non-profit organizations<sup>5</sup>, including community<sup>6</sup>, business<sup>7</sup>, and government non-profits<sup>8</sup>. Together, they represent 360,000 jobs<sup>9</sup> and contributed approximately \$30 billion to BC's economy in 2022<sup>10</sup>. This same year the community non-profit sector employed 92,000 workers<sup>11</sup> and contributed approximately \$4.87 billion to BC's GDP<sup>12</sup>. Focusing on the community non-profit sector specifically, this report is a snapshot of challenges and opportunities facing non-profit organizations in BC from early 2024.

Non-profits are indispensable now more than ever, as British Columbians and the government increasingly depend on the sector to deliver essential services in various capacities. The sector bridges the gaps within the public

5 Government of BC, "OrgBook BC", accessed on June 3, 2024, [https://orgbook.gov.bc.ca/search?q&category%3Aentity\\_type=S&credential\\_type\\_id=1&inactive=false&page=1](https://orgbook.gov.bc.ca/search?q&category%3Aentity_type=S&credential_type_id=1&inactive=false&page=1)

6 Community non-profits include organizations that provide services such as community food services, community housing, emergency relief, religious organizations, advocacy, and sports and recreation. These organizations are not heavily influenced by the government and provide goods and services to households for free or at minimal cost.

7 Business non-profits include organizations such as chambers of commerce, business associations, protection services, and condominium associations. These organizations do not fall under the direct control of the government, offer goods and services at low cost, and are constrained in their ability to redistribute any surplus they may generate. In standard macroeconomic measures, they are classified into the business sector.

8 Government non-profits include hospitals, universities, and colleges. These organizations are self-governing and exist independently of the government but are heavily influenced by it. They are classified as part of the government sector by conventional macroeconomic measures.

9 Statistics Canada, "Table 36-10-0617-01 Employment in non-profit institutions by sub-sector (x 1,000)", accessed on May 24, 2024, <https://doi.org/10.25318/3610061701-eng>

10 Statistics Canada, "Table 36-10-0614-01 Gross domestic product (GDP) and income of non-profit institutions by activity (x 1,000,000)", accessed on May 24, 2024, <https://doi.org/10.25318/3610061401-eng>

11 Statistics Canada, "Table 36-10-0617-01 Employment in non-profit institutions by sub-sector (x 1,000)", accessed on May 24, 2024, <https://doi.org/10.25318/3610061701-eng>

12 Statistics Canada, "Table 36-10-0614-01 Gross domestic product (GDP) and income of non-profit institutions by activity (x 1,000,000)", accessed on May 24, 2024, <https://doi.org/10.25318/3610061401-eng>

support system by providing access to critical programs, activities, and supports to meet surging demand.

Our findings indicate that the sector is operating in extremely difficult times, with feelings of being overwhelmed, stretched, underfunded, challenged, uncertain, and concerned. In contrast, feelings of optimism, hope, and a sense of being needed now more than ever to promote equitable and thriving communities were also expressed. As the sector continues to evolve, our report, **Under Pressure**, provides a snapshot of and insights into the state of the sector in British Columbia through the following two themes:

## Theme 1: Less resilient times

Non-profits in BC continue to combat soaring expenses as costs rise and revenue streams remain fixed. Over the last 12 months, the sector reported all revenue sources to be decreasing, except for revenue from government sources, which has remained stable. This year also revealed increasing expenses on salaries and benefits, programs, services and activities, and general administration, as opposed to 2023 *Safety Net* findings, when the sector reported more stability. Non-profits are incurring significantly higher expenses on insurance, supplies, utilities, employee benefits, technology, and other essential items, which has resulted in reduced funding available for programming. Moreover, the sector survey also revealed the impact of rising inflation and climate change on operating costs. As charitable donations decline<sup>13</sup> across the country, and most notably in rural communities in BC, there is immense pressure on non-profits to reduce programming, diversify funding sources, or close their doors. Nearly 50% of our survey respondents reported being aware of at least one to five non-profits that had closed their doors in the previous 12 months.

13 CanadaHelps, "2024 The Giving Report: From Disconnection to Collective Action", accessed on April 22, 2024, <https://www.canadahelps.org/en/the-giving-report/>.



## Theme 2: Overburdened

Our findings reveal that the non-profit sector in BC is grappling with skyrocketing demand for services and supports from clients and communities, while its capacity to deliver programs and services has remained the same. Additionally, volunteerism, crucial to the sustainability of non-profits has not recovered from pre-COVID-19 levels within the sector. Our survey sought to understand the reasons behind the increasing demand, which include population growth, inflation, and concerns around mental health, food security, housing, healthcare, climate change and the impact of the pandemic. In responding to community needs, the sector has become overburdened, as evidenced by staff burnout, high staff turnover, and the necessity to offer higher wages and salaries to retain staff, often stretching available funding.

While considering the successes, pressures, and challenges the sector reports experiencing this year, we have made the following recommendations to all levels of government, funders, and sector stakeholders and partners. We hope that collaboratively, we can move forward to address:

- 1. Sustainability of the sector workforce** through:
  - Establishment of a collaborative working group that includes representatives from the sector, government agencies, funders, and other key sector stakeholders to create a non-profit labour force strategy.
- 2. Funding reforms**, specifically asking funders to:
  - Implement a flexible administrative fee of up to 30%, empowering grant recipients to determine the specific percentage required.
  - Offer multi-year funding agreements that are embedded with inflationary increases.
  - Establish a formal funders collaborative to advocate for and implement funding reforms, share trust-based practices, and collectively address the funding challenges within BC's non-profit sector.
- 3. Nurturing a collaborative ecosystem** within BC's non-profit sector that:
  - Facilitates Cross-Sector Partnerships
  - Establishes Information-Sharing Platforms
  - Coordinates Training and Development
  - Aligns Data Collection Efforts





# Reading this Report

## Survey Overview

Our State of the Sector Survey was circulated in early in 2024, from February 6th to March 8th, and received 558<sup>14</sup> valid responses across the non-profit sector in British Columbia. The survey was widely circulated throughout the province through various channels, including social media, email blasts, networking events, and word of mouth.

The State of the Sector Survey contained four sections<sup>15</sup>:

1. **Section 1:** Comparisons between pre-COVID-19 operations and present day.
2. **Section 2:** Respondents' experiences of the past 12 months (February 2023 to February 2024) and expectations heading into the next 12 months.

<sup>14</sup> Overall, our survey received 669 responses with 558 valid responses. Remaining 111 responses were left blank.

<sup>15</sup> For full list of questions, see Appendix B.

3. **Section 3:** Organizational characteristics.
4. **Section 4:** Deep dive into underlying challenges identified in the *Safety Net* report.

## Respondents Overview

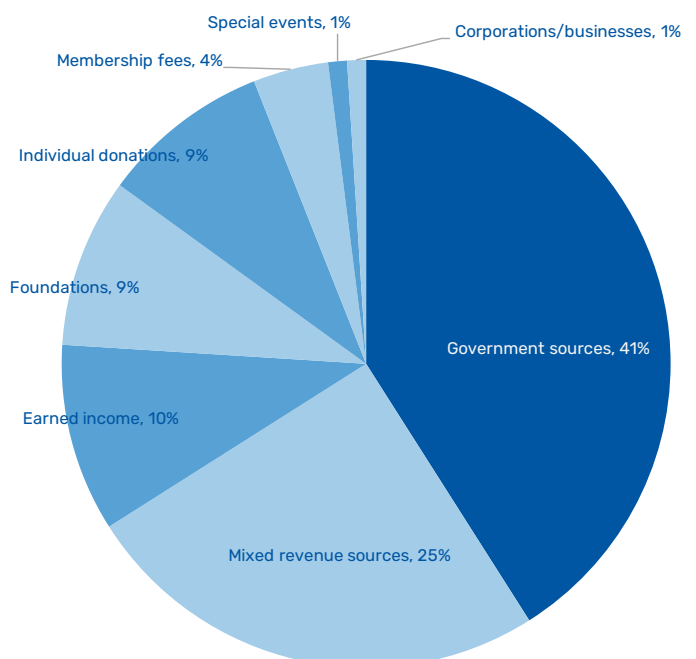
Our understanding of the survey respondents is based upon Section 3, which pertains to organizational characteristics. The number of respondents in this section ranged from 477 to 482, due to some respondents choosing to skip certain questions. The descriptions in this overview are expressed as percentages of the total number of respondents for each question.

Of the respondents, 71% are registered charities, with the majority being community organizations and in the social services subsector. More than half of these charities are also registered non-profits. Only 6% of respondents were business serving non-profit organizations, and 1.5% were quasi-governmental non-profit organizations.

Similar to previous reports, the majority of subsector representation is from social services, which accounts for 41% of respondents, followed by arts, culture, heritage, and tourism (15%), health (10%), education and research (6%), and environment (6%).

We asked respondents to tell us about their operating budgets over the last 12 months: 22% reported operating budgets of \$1M - \$2.9M, followed by 16% with budgets of \$0 - \$99,999, and an additional 16% with budgets between \$500,000 - \$999,999. Only 7% of organizations reported having budgets above \$10M.

**Graph 1.** Primary source of revenue for respondents





Respondents reported the government to be the primary source of revenue (41%), followed by mixed revenue (25%), earned income (10%), and foundations (9%).

34% of organizations indicated they serve a rural, geographically remote, northern, or small community<sup>16</sup> and 17% of those rural serving organizations are completely volunteer driven.

In terms of geographic representation, 22% of respondents indicated they have a province-wide focus, and 8% have a pan-Canadian focus. 17% of respondents focus on the City of Vancouver, 14% on Greater Victoria and the Southern Gulf Islands, and another 7-8% focus on other areas within Metro Vancouver and the Nanaimo regional district. By grouping respondent locations into provincial health authority regions, we discovered that 40% indicated they focus on the Fraser Health region, 38% on the Vancouver Island Health region, 37% on the Vancouver Coastal Health region, 30% on the Interior Health region, and 9% on the Northern Health region<sup>17</sup>. These groupings and their related response rates can be found in Appendix A.4 (Note: respondents were not required to disclose a geographic focus).

When respondents were asked to indicate the focus of their organization's programs, services, or activities, 22% reported they serve the general public with no specific demographic focus, while other organizations reported primarily serving<sup>18</sup>:

1. Adults **(48%)**
2. Seniors **(40%)**
3. Youth **(39%)**
4. Children **(32%)**
5. Families **(31%)**
6. People experiencing poverty or with low income **(26%)**

Overall, the majority of survey respondents were not organizations that are led-by and serve a specific equity-denied group<sup>19</sup>. However, 124 respondents identified their organizations as both led-by and serve the follow-

ing specific equity-denied groups:

1. Racialized/people of color **(24%)**
2. Indigenous peoples **(23%)**
3. Women **(19%)**
4. LGBTQIA+ **(18.5%)**
5. Immigrants and newcomers **(15%)**
6. People with disabilities **(14.5%)**

## Summary Trends

This report presents summary trends determined by weighted averages and percentage response rates. These are provided for the various components of six major parameters reported on, which are:

1. Revenues
2. Expenses
3. Program and service delivery
4. Human resources
5. Central operations
6. Governance

### Understanding summary trends by weighted averages

In the survey, from questions 4 to 7, and 25 to 26, respondents were asked to choose a trend for each component within the six major parameters. The trend options were: Increasing, Staying about the same, Decreasing, Not relevant, and Not sure.

Weighted averages were used for this scales-based analysis by assigning each option a numerical value or weight (5 = Increasing, 4 = Staying about the same, 3 = Decreasing, 2 = Not relevant, and 1 = Not sure). The average was then calculated for each component, producing a number that indicates, on average, the overall response trend. This average number identifies the summary trend among all respondents. If the calculated average is close to two options (e.g. between 4.45 to 4.5), the trend is expressed as a range between those two options (e.g. staying about the same to increasing). The interpretation and sense-making of these summary trends were informed by referencing the qualitative responses collected from the open-ended questions.

<sup>16</sup> Rural/small communities are those with a population of fewer than 20,000 people.

<sup>17</sup> As this was a multiple-choice question, these respondents may have selected multiple geographic regions of focus (thus the total response rate adds up to more than 100%).

<sup>18</sup> Respondents could choose to report that they serve more than one demographic category, thus the percentages exceed 100%.

<sup>19</sup> Equity-denied group means people who share an identity that have been historically and/or currently marginalized, discriminated against, or disadvantaged.



## Disaggregated Data Analysis

Under each identified theme, a comprehensive analysis of sector trends was conducted.

As our survey also gathered data pertaining to organizational characteristics, the report attempts to provide a disaggregated analysis of responses that explores emerging trends to highlight crucial obstacles unique to area, sub-sector, and demographic group served. Each parameter has been thoroughly analyzed through the following lens: 1) organizations serving rural communities versus urban areas, 2) differences between five subsectors, including social services; arts, culture, heritage, and tourism; sports, recreation and social clubs; law, advocacy, and politics; and environment, and 3) demographic groups served, such as people experiencing mental health challenges and/or mental illness, and/or with experience of domestic or sexualized violence, and/or Black people.

## Setting the Tone

The survey began by asking respondents to 'share three words describing how your organization is doing or feeling now' at the start of 2024. This question helped establish the report's overarching tone and contributed toward identifying themes and guiding the analysis of the gathered data. Generally, non-profits are feeling the pressure of operating in less resilient times, as they are overwhelmed by the need to stretch their capacity to meet the ongoing needs of the communities they serve. In terms of word frequency, respondents described their experiences through words such as 'overwhelmed,' 'underfunded,' 'challenged,' 'uncertain,' and 'concerned' (see Table 1). Compared to the *Safety Net* findings, more organizations this year expressed feelings of being stretched, tired, burnt out, underfunded, anxious and challenged.

Conversely, the sector remains hopeful, optimistic, excited, growing, and needed now more than ever to promote more equitable and thriving communities. The word 'stable' did not appear frequently this year, unlike last year, which indicates increasing uncertainty around sustainability. Additionally, this year, the word 'busy' was one of the most frequently shared words (see Table 2), reflecting increased community needs and service demands faced by non-profit organizations in BC.

Guided by these word responses, our analysis sought to understand why organizations are feeling overwhelmed, tired, stretched, busy, and uncertain—even as they are feeling hopeful and excited.

Descriptive Words	Count
Overwhelmed	<b>79</b>
(Top related words: Stretched, tired, stressed, struggling, burnt out, exhausted, overworked)	<b>200</b>
Underfunded	<b>44</b>
(Top related words: funding, under-resourced)	<b>36</b>
Challenged	<b>31</b>
Uncertain	<b>27</b>
(Top related word: unsure)	<b>4</b>
Concerned	<b>22</b>
(Top related words: cautious, worried, nervous, anxious)	<b>70</b>

**Table 1.** Words most frequently shared, conveying feelings of operating in lesser resilient times. *\*For the reader's purpose, the word "overwhelmed" was the most frequently used word for which the count was 79. Other top related words listed (excluding overwhelmed) had a count of 200 altogether.*

Descriptive Words	Count
Hopeful	<b>108</b>
Top related words: optimistic, positive	<b>103</b>
Busy	<b>55</b>
Excited	<b>40</b>
Growing	<b>22</b>
Needed	<b>21</b>
(Top related words: community, driven, focused, committed)	<b>39</b>

**Table 2.** Words most frequently shared, conveying feelings of hope and being needed. *\*For the reader's purpose, the word "hopeful" was the most frequently used word for which the count was 108. Other top related words (excluding hopeful) had a count of 103 altogether.*



Q2. Share three words to describe how your organization is feeling right now.



**Image:** Word cloud of top responses using word frequency as weight. Bigger words in the cloud appear more frequently as compared to smaller words.

# In-Depth Data Insights

## Theme 1: Less resilient times

Through two previous State of the Sector Surveys, our findings have revealed that non-profits are combating soaring expenses and costs that are outpacing revenues. In 2024, decreasing trends have been observed across most revenue sources, including earned income, individual donations, membership fees, special events, and corporate contributions. Revenue from government sources has remained stable for 34% of respondents and has decreased for nearly 27%<sup>20</sup>.

“  
 ... in the wake of relief  
 funding, we’ve seen  
 government [funding] sources  
 either flatline or decrease.”

These findings align with the decreasing trend in overall charitable donations across Canada. Data collected a decade ago shows that 82% of Canadians contributed to a charitable organization, but according to a recent CanadaHelps’ donor and climate survey, that figure has dropped to 60% in 2023<sup>21</sup>.

20 Number of respondents for this parameter i.e., revenue were 520.

21 CanadaHelps, “2024 The Giving Report: From Disconnection to Collec-

tion is one of the major underlying factors behind increasing costs for non-profits. Recently, the Charity Insights Canada Project highlighted a persistent trend where salaries are consistently the most impacted by inflation rates – 60% of organizations reported impacts in 2023<sup>22</sup>. This number increased to 69% in 2024<sup>23</sup>. Non-profits are spending significantly more on wages and employee benefits, but also on insurance, supplies, utilities, technology, etc., all leading to reduced funds available for programming.

Understandably, the donation pool is also impacted by inflation as people’s willingness to donate is often correlated with their income<sup>24</sup>. Since consumers feel the decrease in their purchasing power, they are less likely to donate, resulting in reduced overall funding.

As the cost of living rises, the situation is further aggravated with funding not being indexed to inflation. Close to 80% of organizations serving urban areas have re-

22 Charity Insights Canada Project | Project Canada Perspectives, “Weekly Report #15: Inflation”, accessed on April 28, 2024, <https://www.canadahelps.org/en/the-giving-report/>.

23 Charity Insights Canada Project | Project Canada Perspectives, “Weekly Results #2.2: Impact of Current Economic Trends”, accessed on April 28, 2024 <https://carletonu.yul1.qualtrics.com/reports/RC/public/Y2FybGV0b251LTU0MDA5ZjhkMTA4MDUzMDAwO-DA4YzE2Z1VUI85enhKcHR6aDB1N3ZjYTE=>.

24 Imagine Canada, “Forced to do more with less: The impact of inflation on charities and nonprofits”, accessed on May 6, 2024, <https://www.imaginecanada.ca/en/360/forced-to-do-more-with-less-impact-inflation-charities-and-nonprofits>.



“

Inflation has meant that all basic costs have **gone up significantly** - overhead costs, shipping, merchandise, supplies, wages - but funders are not increasing funding amounts, so we are spending more of our operational funds on basics and staffing, leaving less for our mandate.

ported spending more on salaries and benefits for staff in the last 12 months. Efforts to retain staff in the sector **“...have led to much higher salaries and benefits that have not coincided with increases in funding - meaning that original project budgets need to be stretched further [and] program budgets written 2-3 years ago are irrelevant now.”** Consequently, multi-year funding contributions that have not accounted for inflationary pressures are diminishing in value over time.

“

[We received a] lack of cost-of-living increases in operational level[s] of funding with both the provincial and city funders. Therefore, our **funding is decreasing every year...**

As a result, the sector continues to struggle with numerous constraints. With a shrinking donation pool and an increasing number of organizations competing for donations, the sector has become increasingly competitive for donor dollars. In the words of one survey respondent, **“... there is significantly more demand on foundation grants, making it challenging for us to be successful on all our applications due to the volume of applications received by foundations”.** This creates increased pressure on non-profits to reduce programming, diversify funding sources, or close their doors.

Every organization has operating costs to meet, including rent or debt financing for physical premises, maintenance and repairs, office supplies, administration, insurance, accounting, marketing, utilities, salaries, and informa-

tion technology such as equipment, software, internet services, and IT security. The sector struggles to update outdated technology, which takes staff time away from primary duties. Less efficient use of staff time can impact the delivery of service contracts, impede opportunities for employee upskilling, and lead to high rates of staff burnout and turnover. Non-profits also find it difficult to invest in board development and strategic planning, and to increase capacity in other ways that allows for the sustainable delivery and improvement of programs<sup>25</sup>.

With the increasing number of extreme climate events such as floods, droughts, heat waves and forest fires, respondents indicated increasing operating costs to match. Nearly 21% of respondents<sup>26</sup> revealed spending increasing amounts of resources on addressing climate change impacts on their organization and/or the communities they serve. A few examples include increasing expenses on food, snow removal, repairs to damaged infrastructure, and electricity for heating and cooling of office and programming spaces.

“

[We had] **increased costs for heating and cooling, extreme weather events causing weather damage to building, infrastructure and systems.**

The sector faces numerous challenges with its relationship to funders. The current funding landscape lacks much needed flexibility in allowing non-profits to allocate resources to core costs associated with delivering services and supports to the community. As a result, the sector is often left to fend for itself to cover crucial overheads, and upon its failure to do so, the communities in need experience decreased services.

“

Last year we had a good number of grants but several of them would not cover core **staff costs or administrative costs... it just bleeds our organization dry.**

25 Imagine Canada. "Comparison of costs typically covered by project-based funding and actual core operating costs for nonprofits (non-exhaustive)", accessed on May 1, 2024, [https://www.linkedin.com/posts/Imagine-Canada\\_comparison-of-costs-typically-covered-by-activity-7079106397405073409-9mYT/](https://www.linkedin.com/posts/Imagine-Canada_comparison-of-costs-typically-covered-by-activity-7079106397405073409-9mYT/)

26 Number of respondents for this parameter i.e., human resources were 508.



Government only funds typically 10% of overhead. Our costs are around 15% (in order to be able to function at a level where we can have **continuous improvement** that is measurable).

Extensive reporting to funders places administrative demand on non-profits, and our survey found that time spent reporting to both government and non-government funders is increasing for 54% of organizations<sup>27</sup>. This is in addition to submitting grant proposals or other funding applications. Without the ability to allocate a percentage of donor and funder contributions to administration, fund-raising, governance, and other essential operational expenses, most charities would struggle to sustain their operations effectively<sup>28</sup>. Alarming,ly, about 50% of our survey respondents reported to be aware of at least one to five non-profit(s) that have closed their doors in the previous 12 months.

Finally, short funding cycles are another challenge for non-profits. As government contracts are often only one year in duration, the sector experiences the **“... stress of not knowing if we will get funding each year to keep our contract workers [and] to keep up with the demands of our clients.”** For the sector, it implies that organizations suffer from uncertainty and are unable to offer long-term staff positions or engage in effective operational planning.

<sup>27</sup> Number of respondents for this parameter i.e., central operations were 337.

<sup>28</sup> Canadian Charity Law, “How Much Should A Canadian Charity Spend on Overhead such as Fundraising and Administration”, accessed on April 14, 2024, [https://www.canadiancharitylaw.ca/blog/how\\_much\\_should\\_canadian\\_charity\\_spend\\_on\\_overhead/](https://www.canadiancharitylaw.ca/blog/how_much_should_canadian_charity_spend_on_overhead/).

## A. Revenue Trends

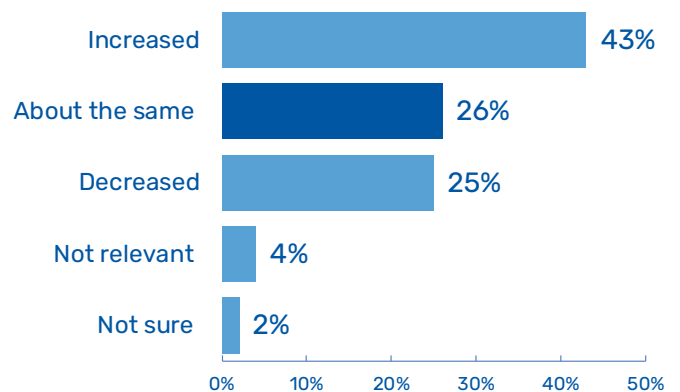
On average, 35% of respondents<sup>29</sup> reported that their overall revenues stayed the same over the last 12 months. This finding aligns with last year, as only revenue from government sources has stayed about the same whereas revenue from earned income, foundations, membership fees, special events, and corporations/businesses have been decreasing. Data could also indicate that stability of overall revenues may be reflective of stability in revenue from government sources which is a primary revenue source for 41% of respondents. Further, revenue from individual donations ranges between decreasing to staying about the same. In comparison to the *Safety Net* findings, revenue from individual donations in the last 12 months.

<sup>29</sup> Number of respondents for this parameter i.e., revenue were 520.

### How to read the bar charts

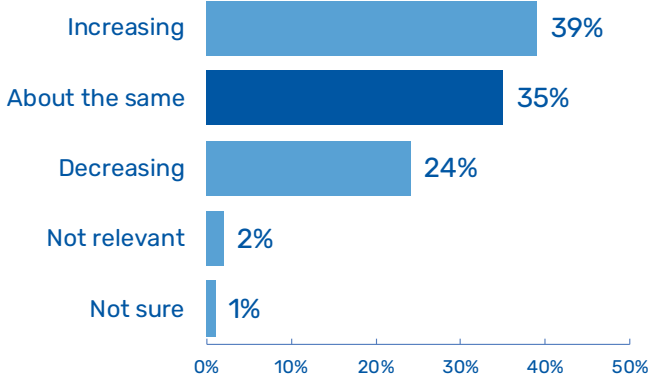
The summary trend by weighted average is highlighted as the bar in dark blue. Where the summary trend is expressed as ranging between one trend to another (e.g. staying about the same to increasing), it means that the weighted average score is too close to either weighted bucket to be differentiated as trending more strongly one way versus the other; these trends are indicated by two bars highlighted in dark blue. The number of respondents for the parameters range differently.

**Graph 2.** Trends for actual revenue from pre-COVID-19 until now

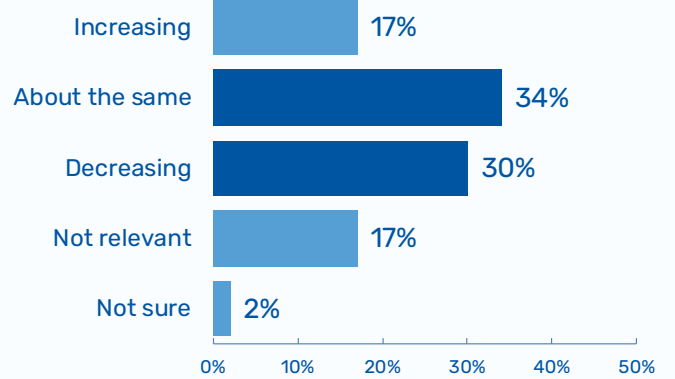




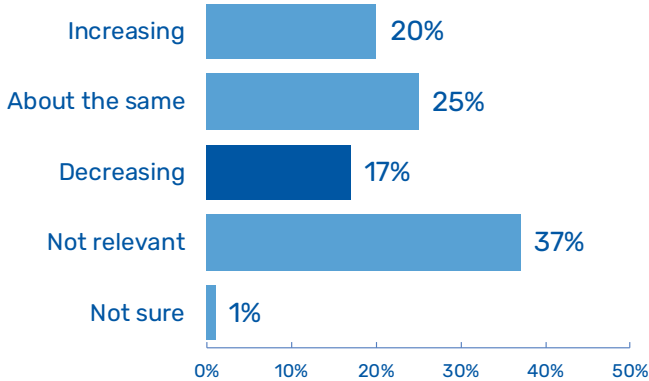
**A.1. Overall revenues**



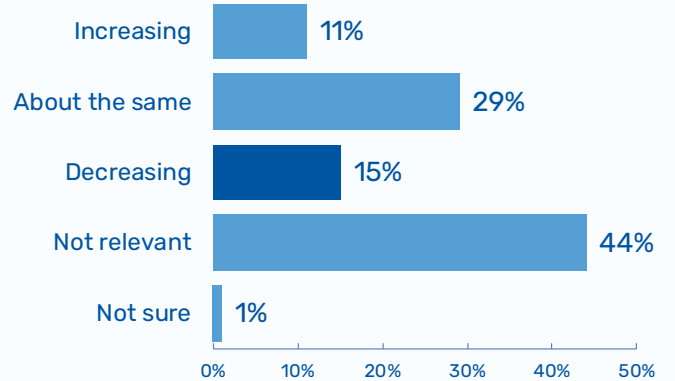
**A.5. Revenue from individual donations**



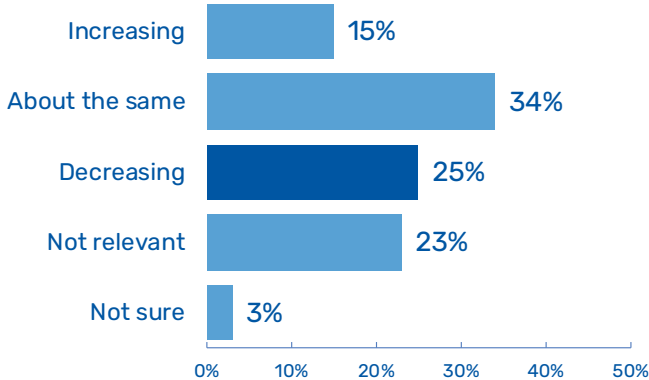
**A.2. Revenue from earned income**



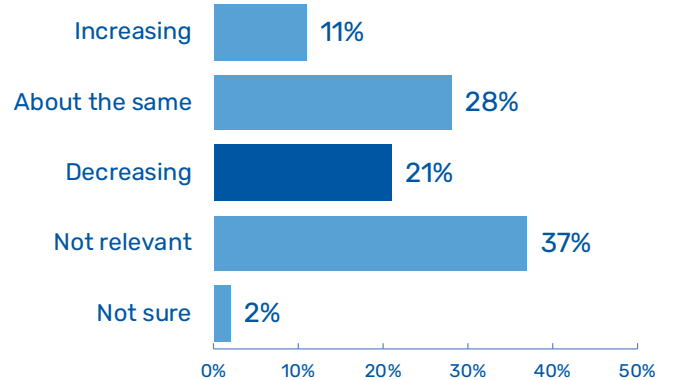
**A.6. Revenue from membership fees**



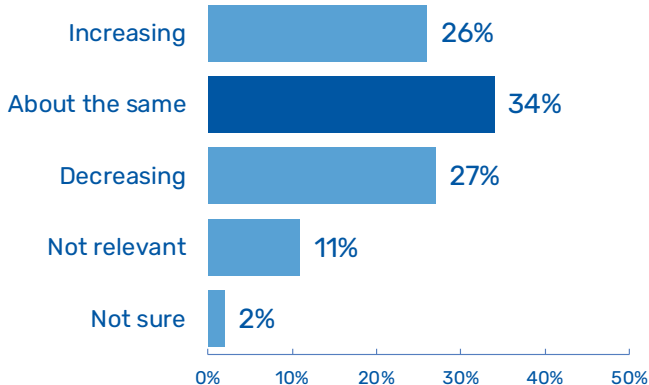
**A.3. Revenue from foundations**



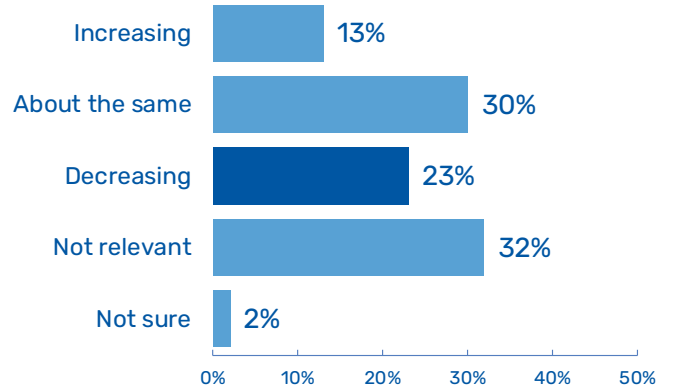
**A.7. Revenue from special events**



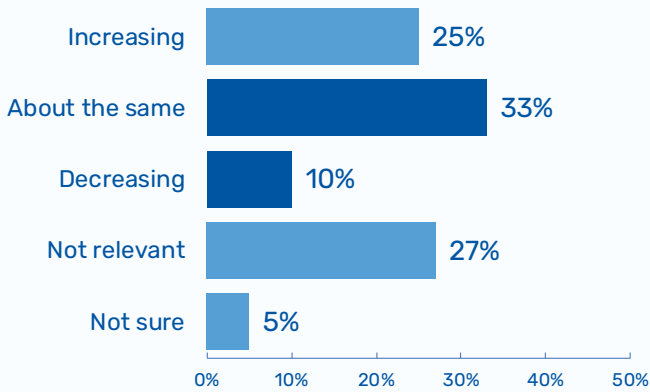
**A.4. Revenue from government sources**



**A.8. Revenue from corporations/businesses**



**A.9. Accessing financial reserves**



Sub-component	Summary Trend
Overall revenues	About the same
Revenue from earned income (e.g., sales of goods and services)	↓ Decreasing
Revenue from foundations	↓ Decreasing
Revenue from government sources	About the same
Revenue from individual donations	Decreasing to staying about the same
Revenue from membership fees	↓ Decreasing
Revenue from special events	↓ Decreasing
Revenue from corporations/businesses	↓ Decreasing
Accessing financial reserves	Decreasing to staying about the same

**Table 3:** Actual Revenue Summary Trends by Weighted Average

## B. Expense Trends

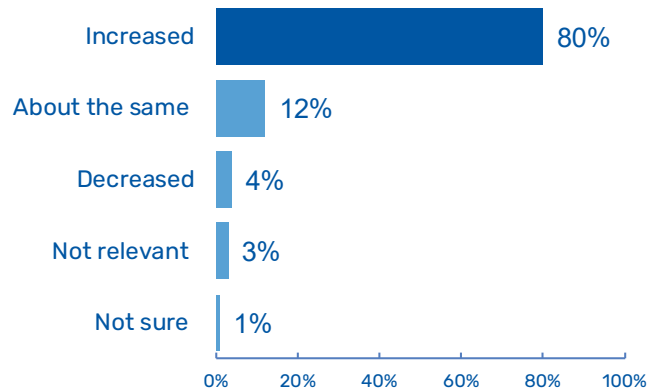
A whopping 84% of respondents<sup>30</sup> reported that their overall expenses have been increasing over the last 12 months, which indicates that organizations in the sector are struggling with reduced or stable funding as costs to operate are rising. Moreover, 80% of organizations also reported increasing expenses from pre-COVID-19 until now (see Graph 3).

In the *Safety Net* Report, expenses on salaries and benefits, programs, services, and activities and general administration ranged between staying the same to increasing which is contrary to this year’s findings where respondents have indicated an increasing trend only. Nearly 75% of respondents this year reported an increase in spending on salaries and benefits, 66% reported an increase in spending on programs, services, and activities and 68% of respondents indicated increased spending on general administration.

Other summary trends have indicated expenses have stabilized this year for office space, programming space, investments in diversity, equity, inclusion, belonging, and accessibility and in decolonization and reconciliation. In the *Safety Net* report, these ranged between staying about the same to increasing.

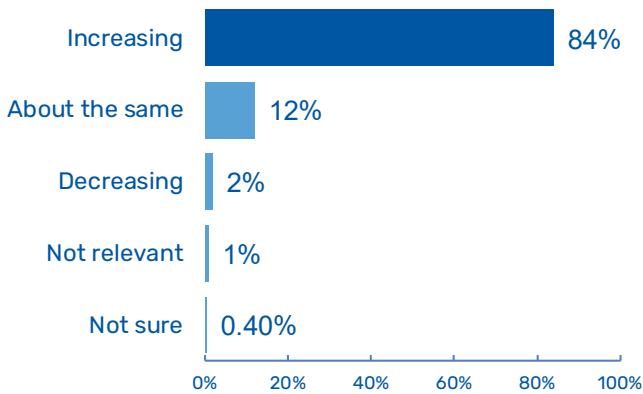
<sup>30</sup> Number of respondents for this parameter i.e., expenses were 521.

**Graph 3.** Trends for actual expenses from pre-COVID-19 until now.

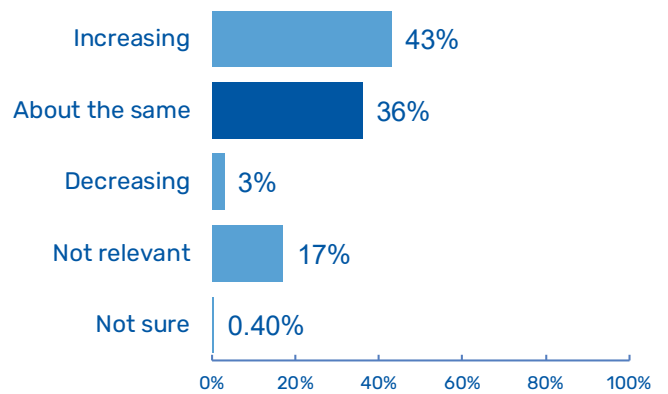




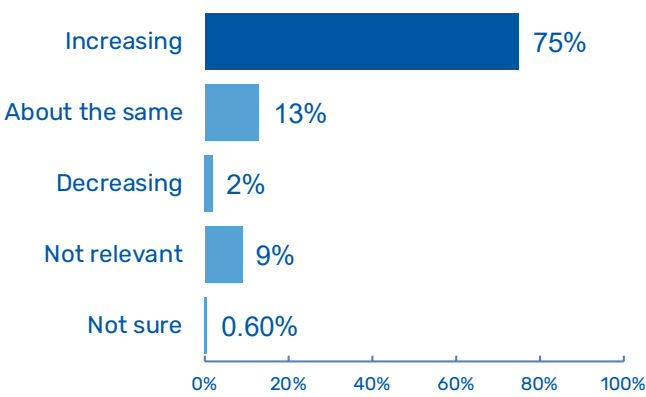
**B.1. Overall expenses**



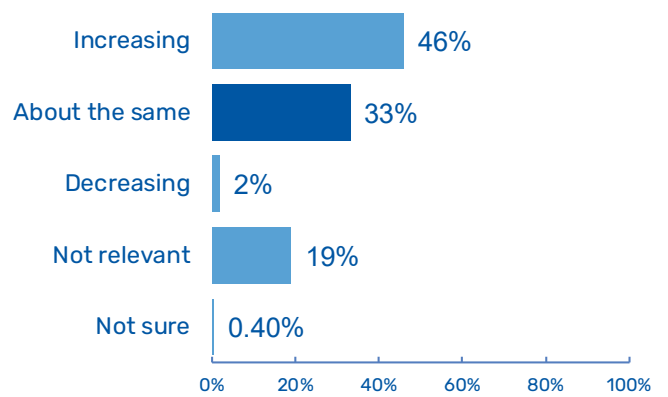
**B.5. Office space expenses**



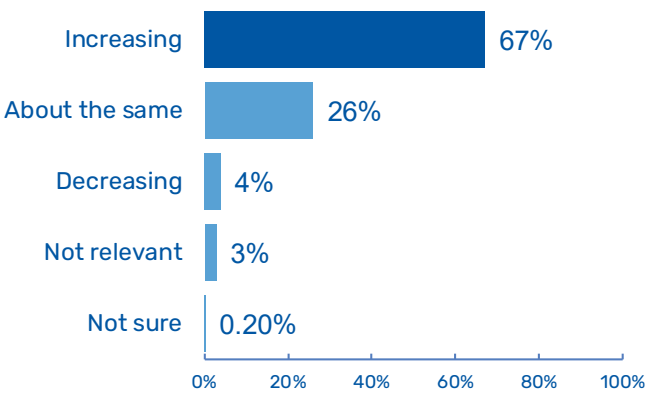
**B.2. Salaries and benefits**



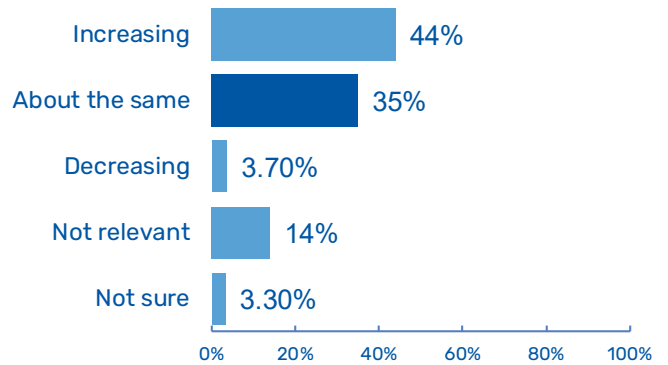
**B.6. Programming space expenses**



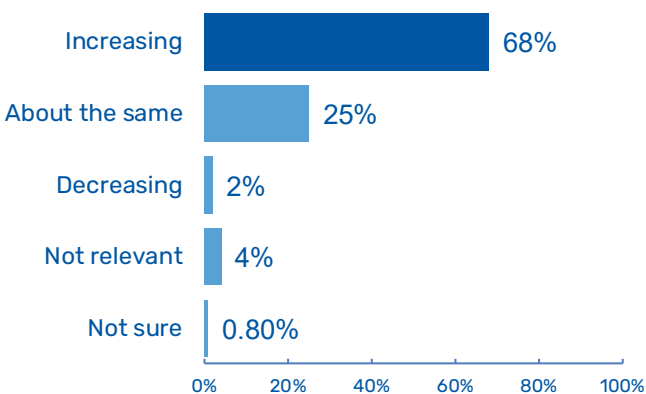
**B.3. Programs, services, and activities**



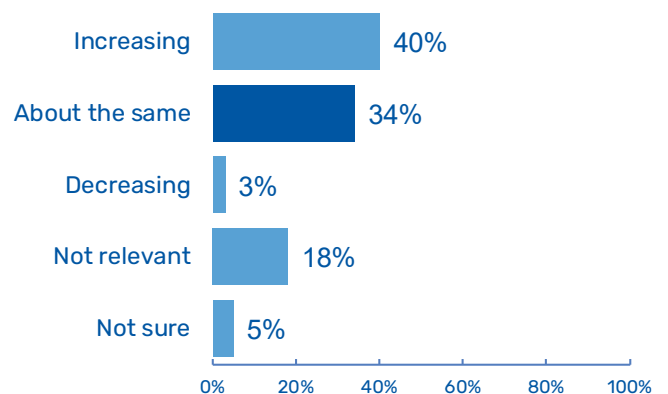
**B.7. Investments in diversity, equity, inclusion, belonging, accessibility**



**B.4. General administration costs**



**B.8. Investments in decolonization and reconciliation**



Sub-component	Summary Trend
Overall expenses	↑ Increasing
Salaries and benefits	↑ Increasing
Programs, services, and activities	↑ Increasing
General administration costs	↑ Increasing
Office space expenses	About the same
Programming space expenses	About the same
Investments in diversity, equity, inclusion, belonging, accessibility	About the same
Investments in decolonization and reconciliation	About the same

**Table 4:** Actual Expenses Summary Trends by Weighted Average

## C. Central Operations Trends

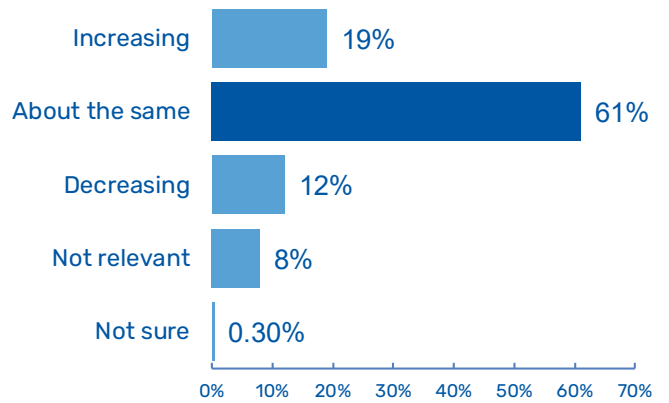
In terms of central operations, respondents<sup>31</sup> reported having about the same amount of capacity to operate (i.e., physical space, resources spent on marketing and communications, conducting internal meetings, and procuring supply and services), even as demand for services and support from community is increasing overall.

Similar to our findings from 2021 and 2023, 59% of organizations reported spending increasing amounts of time and/or money on information technology and 34% reported spending about the same amount in the last 12 months. Another 54% indicated they are spending increasing amounts of time reporting to funders, governments etc. about their activities. Clearly, **“...government red tape is a major part of the problem and compliance is time consuming.”**

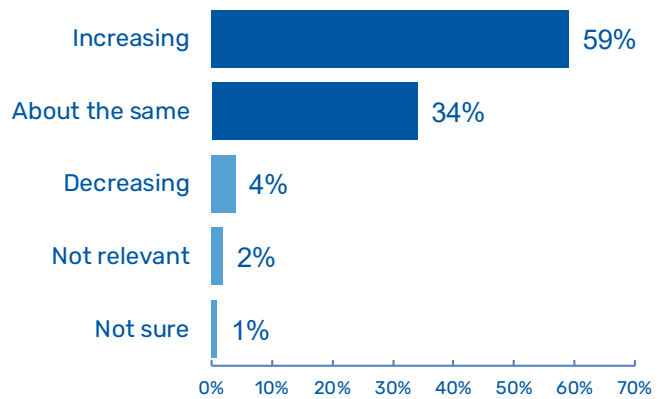
<sup>31</sup> Number of respondents for this parameter i.e., central operations were 337.

## Trends for central operations in the last 12 months

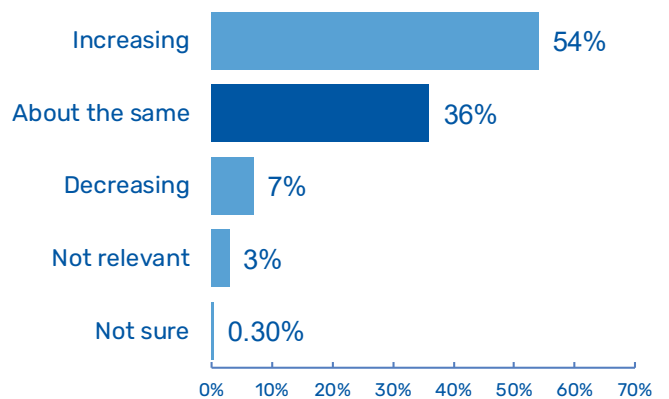
**C.1.** Amount of physical space to host our central operations



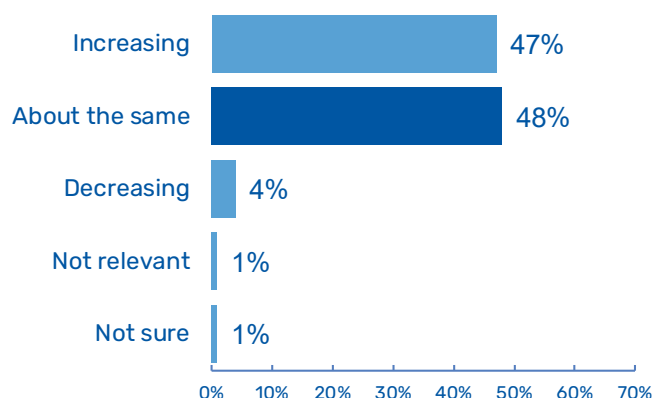
**C.2.** Resources (time or money) spent on IT



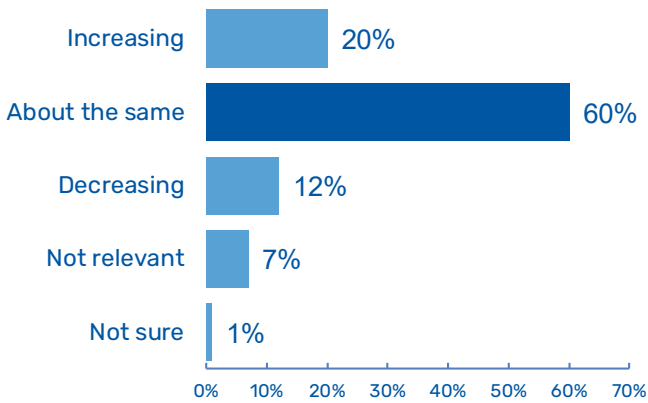
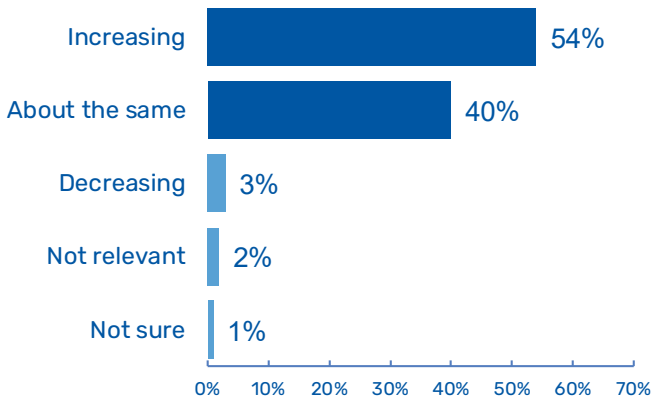
**C.3.** Resources (time or money) spent on marketing and communications



**C.4.** Conducting our central operations (e.g. internal meetings and work)





**C.5. Ability to procure supplies and services****C.6. Time spent on reporting to funders, governments etc. about our activities**

Sub-component	Summary Trend
Amount of physical space to host our central operations	About the same
Resources (time or money) spent on IT	Increasing to staying about the same
Resources (time or money) spent on marketing and communications	About the same
Conducting our central operations (e.g. internal meetings and work)	About the same
Ability to procure supplies and services	About the same
Time spent on reporting to funders, governments etc. about our activities	Increasing to staying about the same

**Table 5:** Central Operations Summary Trend by Weighted Average

## Theme 2: Overburdened

British Columbians depend on non-profits more than ever to access a variety of services, programs, and supports. The non-profit sector service usage and demand is at an all-time high, with two in ten Canadians using charitable services to meet essential needs in 2023, according to an Ipsos survey commissioned by CanadaHelps<sup>32</sup>. In a December 2023 public opinion poll commissioned by Imagine Canada and BMO, 17% of respondents indicated that they had personally engaged the services of a charity or non-profit to soften the impact associated with inflation and a higher cost of living. This has nearly doubled from 9% a year earlier<sup>33</sup>. However, most charities are unable to meet current levels of demand<sup>34</sup>. Clearly, the sector is experiencing a mismatch between community needs and the capacity to meet those needs.

In alignment with this data, we heard similar concerns from the non-profit sector in BC. Nearly 76% of survey respondents<sup>35</sup> reported experiencing increasing demand for services and supports from clients and communities, while their capacity to respond to the demand has stayed about the same for 39% of respondents and decreased for 31%. In comparing trends from our Safety Net findings, we saw no variation in this parameter, which indicates that the sector continues to deplete itself to keep pace with increasing demands. It is imperative to pause and consider that while BC's non-profits appear to be stable in capacity, the sector is stretched to its limits.

So why are the sector's demands for services and supports on the rise?

<sup>32</sup> Ipsos, "Two in 10 (20%) Canadians are currently using charitable services to meet their essential needs e.g Food, Shelter, Clothing", accessed on April 10, 2024, <https://www.ipsos.com/en-ca/two-in-10-canadians-are-currently-using-charitable-services-to-meet-their-essential-needs>.

<sup>33</sup> Imagine Canada, "What trends will impact charities and nonprofits in the first quarter of 2024?", accessed on April 15, 2024, <https://www.imaginecanada.ca/en/360/what-trends-will-impact-charities-and-nonprofits-in-the-first-quarter-of-2024>.

<sup>34</sup> CanadaHelps, "2024 The Giving Report: From Disconnection to Collective Action", accessed on April 22, 2024, <https://www.canadahelps.org/en/the-giving-report/>.

<sup>35</sup> Number of respondents for this parameter i.e., delivery of programs, services, and activities were 508.

Firstly, from our survey, we heard that there is an increasing need to serve community members as **"... population has grown exponentially, and infrastructure has not kept up, the need for our services continues to grow as people in general are under greater stresses and are experiencing mental health crises."** The sector also reported struggling with increased demand for food banks, low-cost housing, literacy services, supports to newcomers and refugees, shelters for people facing homelessness, support for mental health, and medical and clinical support.

Secondly, climate change has acted as a catalyst in increasing demand pressures on the sector as well. Due to extreme weather events, there has been an increase in need for supports and services, from cooling and heating centres to emergency spaces such as evacuation centres, necessitating emergency plans and increased response and preparedness from non-profits in the sector.

**"We ended up becoming an emergency evacuation centre because of the wildfires. This is expected to continue into the future."**

Thirdly, inflation is a persistent factor that has increased financial pressure on people with low incomes as well as families, which in turn increases demand for low-cost services provided by non-profits. There is ongoing response to community needs from the sector, wherein **"... we currently subsidize many of our programs because that is what our market can fare. We cannot increase our fees because many of our stakeholders cannot afford to participate if there is no subsidy."**

Lastly, with mental health concerns, food insecurity, social isolation, and homelessness on the rise, the impact of the COVID-19 pandemic is still being felt within the sector. Approximately 57% of respondents<sup>36</sup> indicated an increase in their delivery of programs, services, and activities as compared to pre-COVID-19 times.

With the rising demand for services, non-profits face the dual challenge of meeting community needs while striving to be sustainable amidst challenging circumstances. Coping with heavy workloads, staff turnover, under-staffed teams, restricted budgets, and an inability to offer com-

**"Post COVID, we continue to see an increased demand for our services as we work in the mental health field. We are constantly looking for new ways to offer increased supports and services."**

petitive wages, the well-being of a non-profit is likely to be compromised with the increasing needs of communities.

While employment within a non-profit is often fulfilling, there is a high risk of burnout and negative mental health impacts due to the nature of the work and increasing workloads. The sector reports that **"... increased demand for services has taxed our volunteers and staff."**

**"... increased mental health challenges have been huge for staff, including me as CEO. I believe the pandemic and demands on my sector have burnt me and some of my team out."**

Increased demands also lead to staff burnout and turnover: **"... unprecedented and constant hiring/training is weighing heavily on the organization. We cannot pay adequately to support the workforce and people leave. The nature of work is also emotionally taxing, and people burn out."**

Moreover, the sector is also experiencing a changing volunteer landscape post-COVID-19. With aging volunteers, and rising burnout levels, volunteer involvement has also reduced within the sector. As a result, nearly 41% of respondents have indicated spending an increasing amount of time and money on recruitment and retention of volunteers.

The sector has also identified significant skill gaps within its workforce, exacerbated by challenges in recruiting from a limited pool of skilled workers<sup>37</sup>. In a recent Canadian Survey of Business Conditions (CSBC), only 41% of non-profit employers reported that their employees pos-

<sup>36</sup> A total of 548 organizations answered this question.

<sup>37</sup> Imagine Canada, "What trends will impact charities and nonprofits in the first quarter of 2024?", accessed on April 15, 2024, <https://www.imaginecanada.ca/en/360/what-trends-will-impact-charities-and-nonprofits-in-the-first-quarter-of-2024>.



sess all the skills needed by the organization, compared to 63% of government employers and 42% of business employers. Our survey respondents reported that, “... **finding qualified staff is so hard right now - we have had the most difficult time finding employees and retaining them despite paying reasonable rates.**”

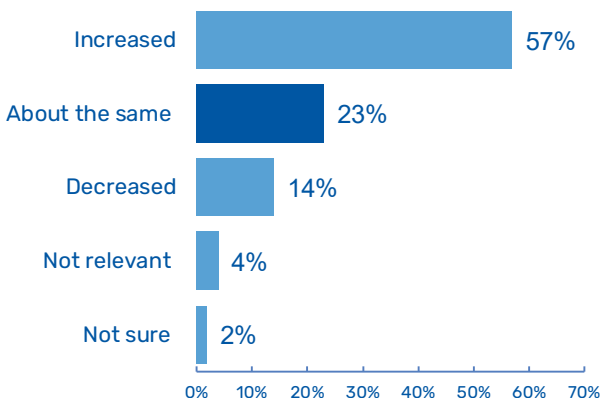
This finding can be interpreted in two ways. Firstly, the sector consistently loses workers to government and business employers, so it is not surprising that it is hiring from a less experience, less skilled labour pool. Secondly, prevailing public perceptions about the sector such as lower wages, scarce benefits, job insecurity, and lack of opportunities for career advancement deterred skilled workers from seeking employment in the sector. Unfortunately, many of these challenges are a result of a restrictive funding environment that does not prioritize core investments in workforce upskilling and/or reskilling.

## D. Program and Service Delivery Trends

On average, 50% of respondents<sup>38</sup> reported that their overall ability to deliver on their mission has stayed about the same in the last 12 months. However, 76% of respondents reported increasing demand for services and support from clients and communities while capacity to deliver has been reported to be staying about the same for only 39%. Clearly the sector is being depleted through reduced revenues, increasing expenses, and limited capacity to meet increasing needs of the communities they serve.

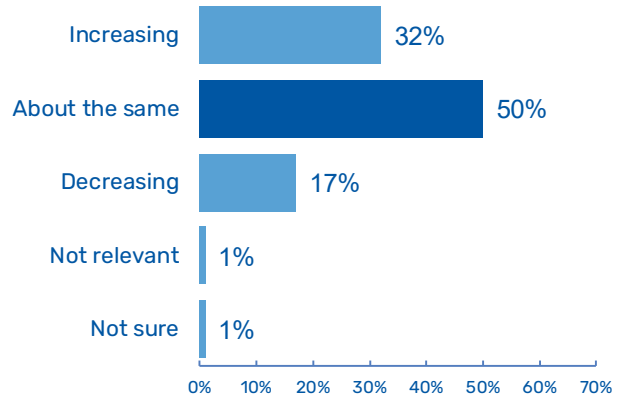
<sup>38</sup> Number of respondents for this parameter i.e., delivery of programs, services, and activities were 508.

**Graph 4.** Trends on delivery of programs, services, or activities from pre-COVID-19 until now.

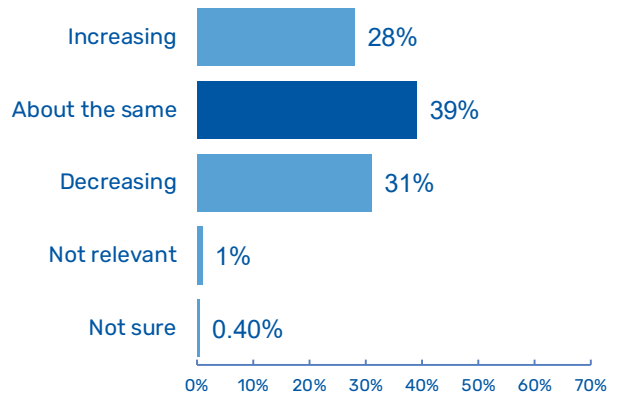


## Trends for delivery of programs, services, or activities in the last 12 months

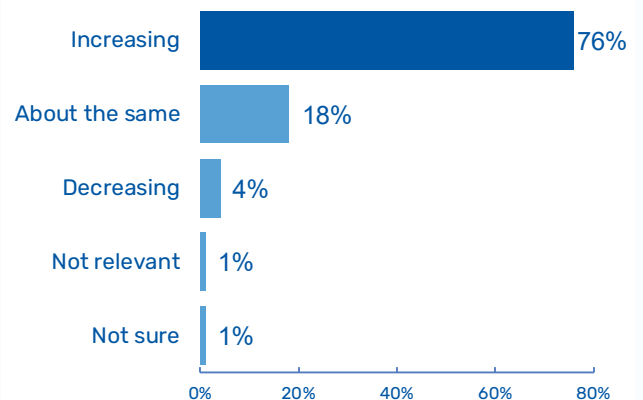
**D.1.** Overall ability to deliver on our mission



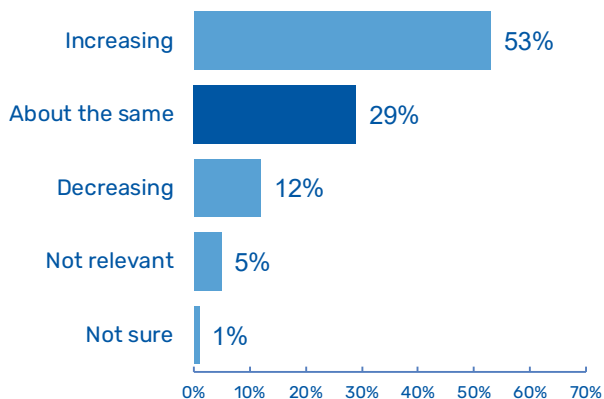
**D.2.** Capacity to deliver our programs, services, or activities



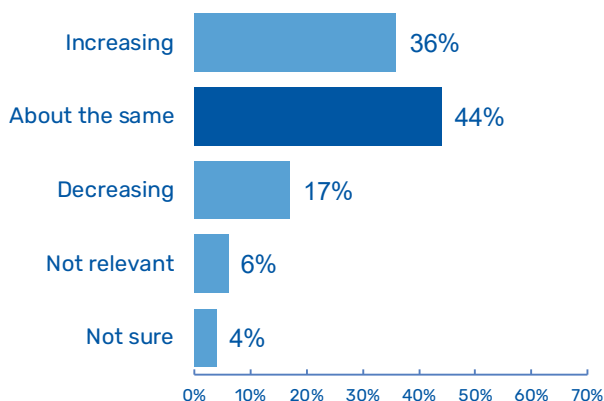
**D.3.** Overall demand for services/support from clients and communities



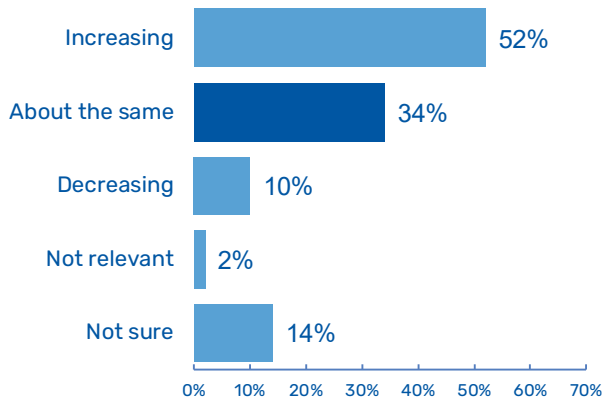
**D.4. Focus on offering new programs, services, or activities**



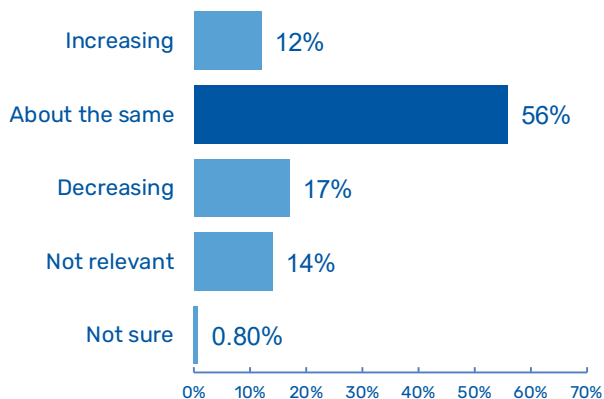
**D.5. Resources (time or money) spent on evaluation**



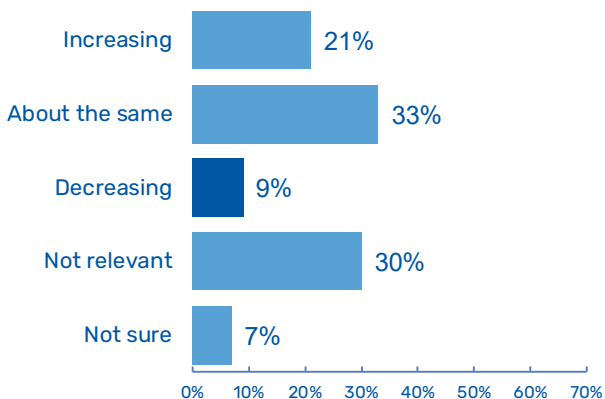
**D.6. Resources (time or money) spent on outreach, relationships, and partnerships**



**D.7. Amount of physical space available to deliver our programs, services, and activities**



**D.8. Resources (time or money) spent on addressing climate change impacts on your organization and/or communities you serve**



Sub-component	Summary Trend
Overall ability to deliver on our mission	About the same
Capacity to deliver our programs, services, or activities	About the same
Overall demand for services/ support from clients and communities	↑ Increasing
Focus on offering new programs, services, and activities	About the same
Resources (time or money) spent on evaluation	About the same
Resources (time or money) spent on outreach, relationships, and partnership	About the same
Amount of physical space available to deliver our programs, services, and activities	About the same
Resources (time or money) spent on addressing climate change impacts on your organization and/or communities you serve	↓ Decreasing

**Table 6:** Program and Service Delivery Summary Trends by Weighted Average



## E. Human Resources Trends

Overall, 68% of respondents<sup>39</sup> reported increasing levels of wages and salaries for staff, similar to our finding last year. This trend reflects the undertones of rising cost of living and burnout among staff and volunteers, which organizations in the sector attempt to address by increasing wages and salaries with limited funding from which to draw from. Clearly, the inability to offer a competitive and/or living wage often results in significant staff turnover in a sector that is trying to keep up with increasing demand for its services.

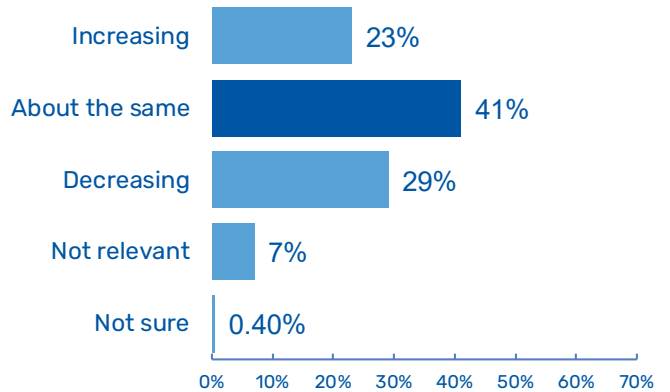
While 41% of respondents reported stable volunteer involvement, another 29% indicated decreasing levels, which reflects the changing volunteer landscape being experienced by the sector. In terms of benefits offered to staff, overall, 47% of organizations reported offering the same level of benefits while overall revenues remained, on average, the same. Respondents also reported that the number of full-time staff, part-time, temporary, contract, and seasonal staff stayed about the same in the last 12 months. This demonstrates that reduced funding restricts the sector in hiring more staff even as demand for services is on the rise. Often charities and non-profits also manage underfunding by reconfiguring staffing levels as this is one of the few areas where the budgets are flexible. This is done by laying off core staff or hiring staff on contract so their employment can be terminated when funding ends or during a funding gap<sup>40</sup>.

<sup>39</sup> Number of respondents for this parameter i.e., human resources were 508.

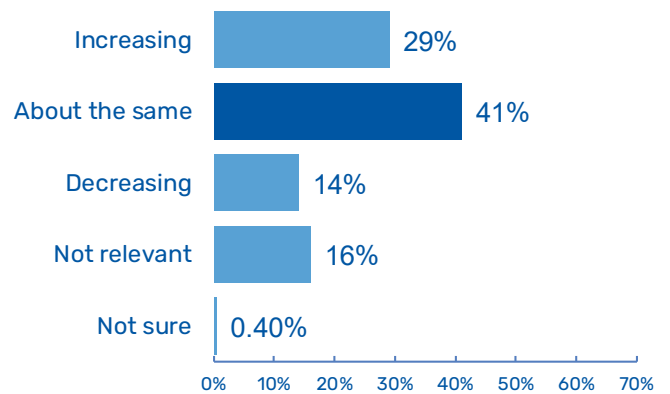
<sup>40</sup> Imagine Canada, "Core Funding: Supporting nonprofit missions, resilience and impact", accessed on May 2, 2024, <https://www.imaginecanada.ca/sites/default/files/core-funding-brief.pdf>.

### Trends for human resources in the last 12 months

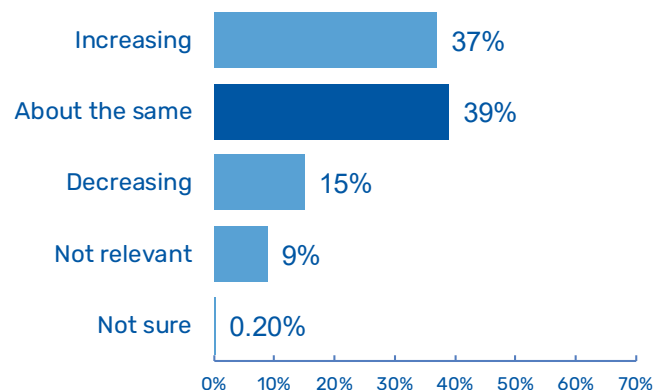
E.1. Level of volunteer involvement



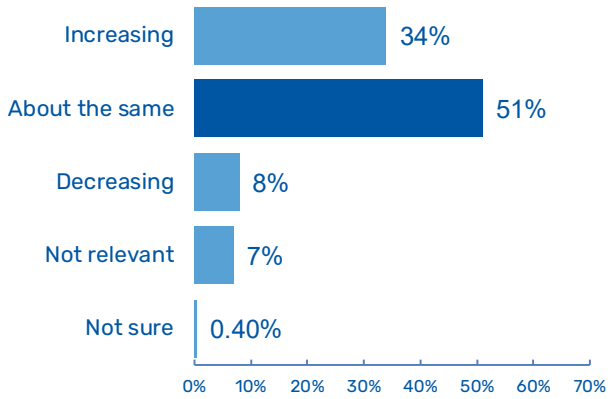
E.2. Number of full-time staff



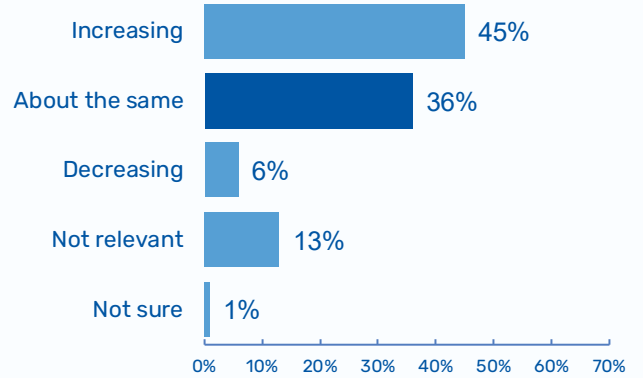
E.3. Number of part-time, temporary, contract, or seasonal staff



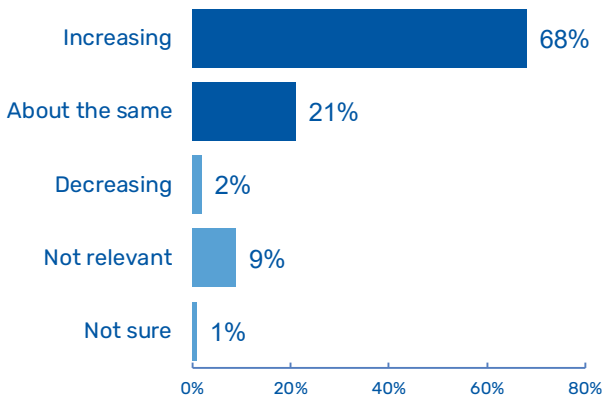
**E.4. Staff hours**



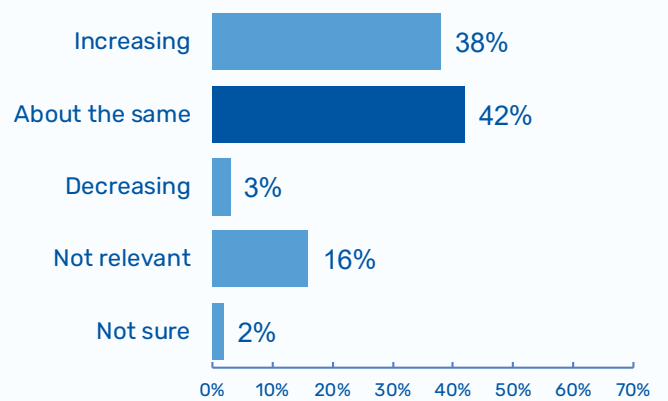
**E.8. Resources (time or money) spent on recruitment and retention of staff**



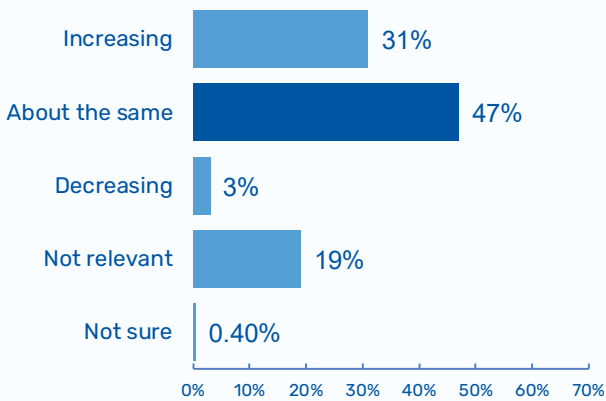
**E.5. Levels of wages/salaries offered to staff**



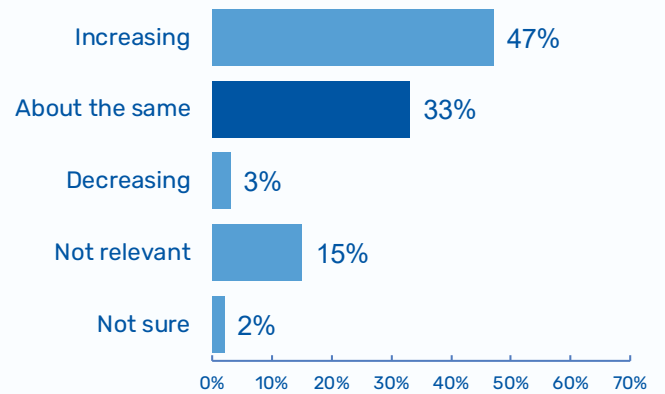
**E.9. Staff absences/use of sick leave**



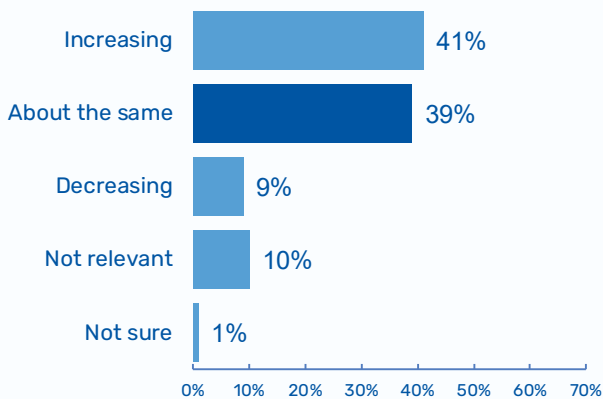
**E.6. Level of benefits offered to staff**



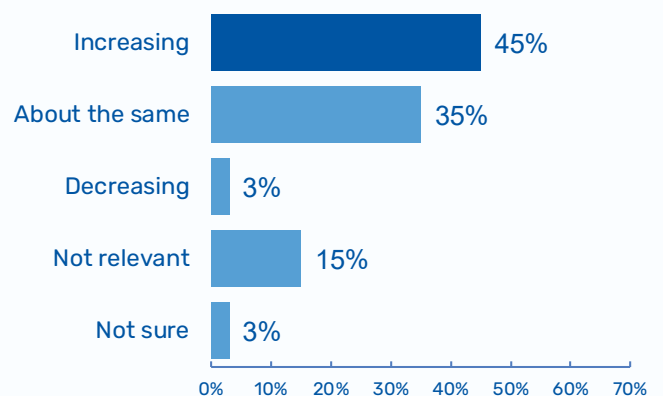
**E.10. Resources (time or money) spent on developing HR-related policies (e.g., sick leave, work from home)**



**E.7. Resources (time or money) spent on recruitment and retention of volunteers**

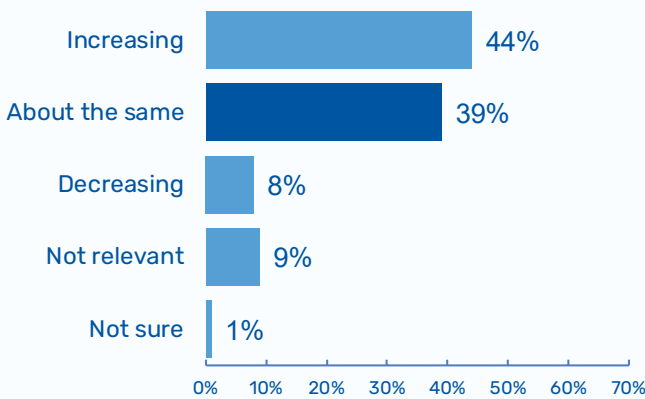


**E.11 Resources (time or money) spent on HR issues related to staff mental health and wellbeing**





**E.12.** Resources (time or money) spent on training and professional development



Sub-component	Summary Trend
Level of volunteer involvement	About the same
Number of full-time staff	About the same
Number of part-time, temporary, contract, or seasonal staff	About the same
Staff hours (i.e., average hours worked per staff member)	About the same
Levels of wages/salaries offered to staff	Increasing to staying about the same
Level of benefits offered to staff	About the same
Resources (time or money) spent on recruitment and retention of volunteers	About the same
Resources (time or money) spent on recruitment and retention of staff	About the same
Staff absences/use of sick leave	About the same
Resources (time or money) spent on developing HR-related policies (e.g., sick leave, work from home)	About the same
Resources (time or money) spent on HR issues related to staff mental health and wellbeing	About the same
Resources (time or money) spent on training and professional development	About the same

**Table 7:** Human Resource Summary Trend by Weighted Average

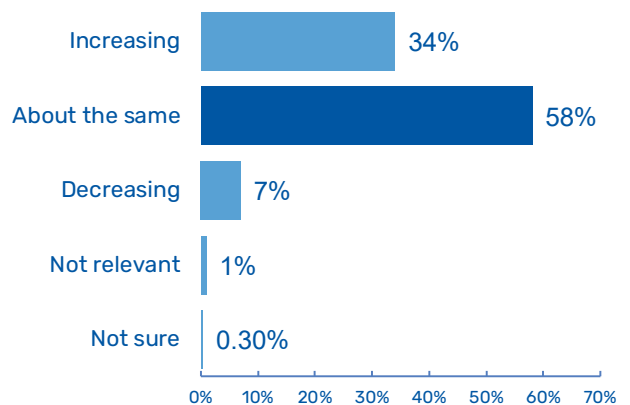
## F. Governance Trends

It appears that there is some stabilization happening around people in leadership roles reflecting the communities they serve, resources spent on governance structure or board processes, and strategic/scenario planning. However, our data also tells us that 56% of respondents reported increasing amounts of resources being spent on strategic/scenario planning and 35% reported the amounts to be stable<sup>41</sup>. Compared to *Safety Net* findings, respondents reported spending same amount of resources in the last 12 months on managing conflict, crisis management and building relationships among or between the board and executive director.

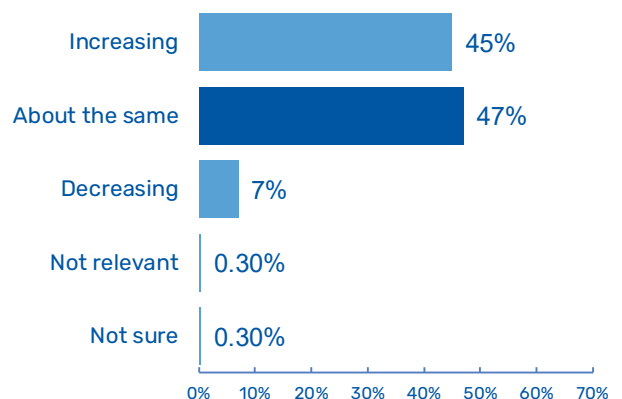
<sup>41</sup> Number of respondents for this parameter i.e., governance were 337.

### Trends for governance in the last 12 months

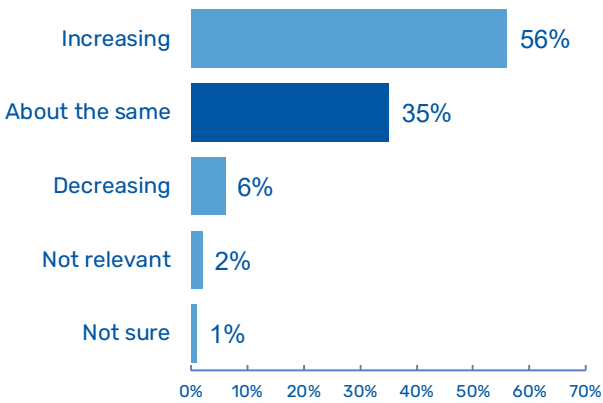
**F.1.** How well the identities of people in leadership roles (board, management) reflect the communities you serve



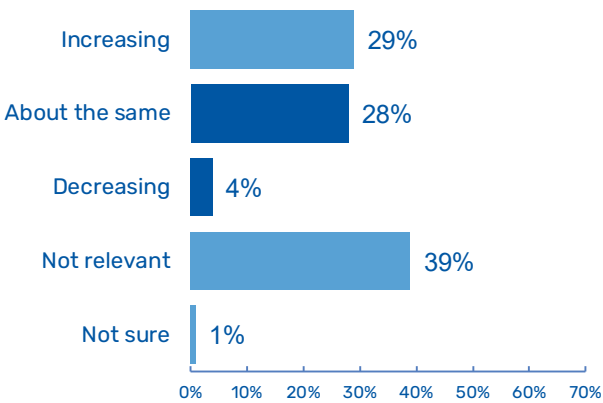
**F.2.** Resources (time or money) spent on governance structure or board processes



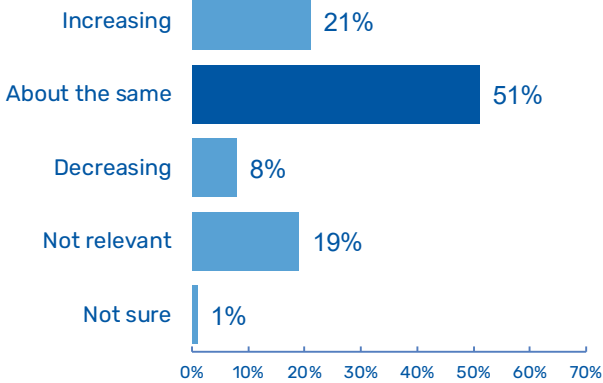
**F.3. Resources (time or money) spent on strategic/scenario planning**



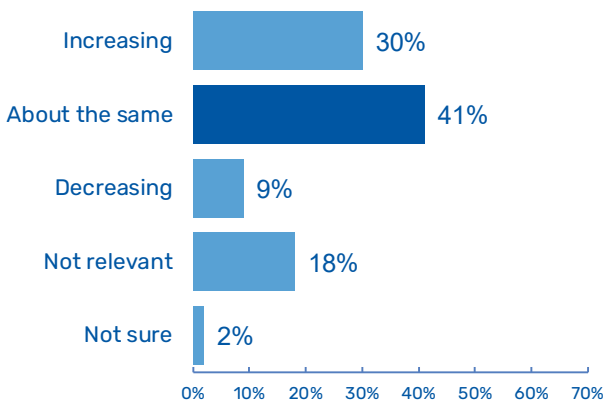
**F.4. Resources (time or money) spent considering merging/strategic alliances with another organization**



**F.5. Resources (time or money) spent managing conflict or building relationships among the board, or between the board and executive director**



**F.6. Resources (time or money) spent on crisis management**



Sub-component	Summary Trend
How well the identities of people in leadership roles (board, management) reflect the communities you serve	About the same
Resources (time or money) spent on governance structure or board processes	About the same
Resources (time or money) spent on strategic/scenario planning	About the same
Resources (time or money) spent considering merging/strategic alliances with another organization	Decreasing to staying about the same
Resources (time or money) spent managing conflict or building relationships among the board, or between the board and executive director	About the same
Resources (time or money) spent on crisis management	About the same

**Table 8:** Governance Summary Trend by Weighted Average

# Disaggregated Analysis:

Trends across rural vs. urban-serving organizations, subsectors, and demographic groups served.

## Rural vs Urban Trends

When comparing rural versus urban respondents, we find that trends differ in all but one parameter: delivery of programs, services, and activities (see Table 9). 36% of organizations in urban areas reported stable revenues from individual donations as compared to organizations serving

rural areas, which reported donations to be decreasing to staying about the same. In comparison to the *Safety Net* findings, however, this revenue source has become more stable for rural serving organizations in the last year. While overall expenses, expenses on programs, services and activities, and general administration are rising for both, organizations serving urban areas reported increasing expenses on salaries and benefits, as compared to organizations serving rural communities.

Again, in comparison to *Safety Net's* findings, this trend has shifted from being stable to ranging between stable and increasing for organizations serving rural communities, reflecting the impact of rising cost of living now reaching smaller communities in the last 12 months. In terms of operations and governance, nearly 54% to 59% of organizations serving urban areas reported increasing amounts of resources being spent on information technology and strategic/scenario planning, as compared to organizations serving rural areas.

Parameter	Sub-component	Rural serving	Urban serving
Revenues	Revenues from individual donations	Decreasing to staying about the same	About the Same
	Revenue from foundations	↓ Decreasing	↓ Decreasing
Expenses	Overall expenses	↑ Increasing	↑ Increasing
	Salaries and benefits	Increasing to staying about the same	↑ Increasing
Delivery of programs, services, and activities	Capacity to deliver our programs, services, or activities	About the same	About the same
	Overall demand for services/support from clients and communities	↑ Increasing	↑ Increasing
Central operations	Resources (time or money) spent on IT	About the same	↑ Increasing
	Time spent on reporting to funders, governments etc. about our activities	Increasing to staying about the same	Increasing to staying about the same
Human resources	Level of volunteer involvement	About the Same	About the Same
	Levels of wages and salaries offered to staff	About the Same	↑ Increasing
Governance	Resources (time or money) spent on strategic/scenario planning	About the Same	Increasing to staying about the same

**Table 9.** Trends for rural and urban serving organizations in the last 12 months

= Trending differently from summary trend



## Subsector Trends

The following trends within specific subsectors emerged prominently during our disaggregated data analysis:

**1. Social services** - Organizations belonging to social services<sup>42</sup> reported stable revenues specifically from foundations and government sources. While revenues remain stagnant, 82% of respondents within the subsector reported increasing expenses on salaries and benefits, and 66% reported spending increasing amounts of time and money on information technology.

**2. Arts, culture, heritage, and tourism** - Contrary to the summary trends, nearly 51% of organizations belonging to the arts, culture, heritage, and tourism subsector<sup>43</sup> reported decreasing revenue from government sources, and 39% reported stable revenues from foundations. 35% of this subsector also reported stable overall demand for services and supports from the clients and communities they serve, while salaries and benefits rose. In terms of governance, 63% of the sector reported spending increasing resources on strategic/scenario planning.

Parameter	Sub-component	Social Services	Arts, culture, heritage, and tourism	Sports, recreation, and other social clubs	Law, advocacy, and politics	Environment
Revenues	Revenues from individual donations	About the same	Decreasing to staying about the same	↓ Decreasing	↓ Decreasing	↓ Decreasing
	Revenue from foundations	Decreasing to staying about the same	Decreasing to staying about the same	↓ Decreasing	About the Same	About the Same
	Revenue from government sources	About the Same	Decreasing to staying about the same	About the Same	↓ Decreasing	About the Same
Expenses	Salaries and benefits	↑ Increasing	↑ Increasing	About the Same	↑ Increasing	Increasing to staying about the same
	General administration costs	↑ Increasing	↑ Increasing	About the Same	↑ Increasing	Increasing to staying about the same
Delivery of programs, services, and activities	Capacity to deliver our programs, services, or activities	About the Same	About the same	About the Same	About the Same	About the Same
	Overall demand for services/support from clients and communities	↑ Increasing	About the same	↑ Increasing	↑ Increasing	↑ Increasing
Central operations	Resources (time or money) spent on IT	↑ Increasing	About the same	About the Same	About the Same	About the Same
	Time spent on reporting to funders, governments etc. about our activities	↑ Increasing	About the same	About the Same	About the Same	About the Same
Human resources	Number of full-time staff	About the Same	About the Same	↓ Decreasing	About the Same	About the Same
	Levels of wages and salaries offered to staff	↑ Increasing	About the same	About the Same	About the Same	↑ Increasing
Governance	Resources (time or money) spent on strategic/scenario planning	About the Same	↑ Increasing	About the Same	About the Same	↑ Increasing

**Table 10.** Trends for subsectors in the last 12 months

■ = Trending differently from summary trend

42 A total of 194 organizations reported to belong to the social services subsector

43 A total of 72 organizations reported to belong to the arts, culture, heritage, and tourism subsector.

- 3. Sports, recreation, and other social clubs** - Of all the subsectors, 13% of organizations belonging to the sports, recreation, and other social clubs subsector<sup>44</sup> reported a decreasing trend in the number of full-time staff hired, which may be associated with the fact that 21% of the subsector reported spending the same amount on salaries and benefits, as well as general administration costs (33%), in the previous 12 months.
- 4. Law, advocacy, and politics** - While the summary trend for overall revenues remains stable, 55% of organizations<sup>45</sup> belonging to this subsector notably reported decreasing overall revenues<sup>46</sup>, as expenses on salaries and benefits increased for 82% of respondents. Moreover, 64% of respondents revealed decreasing revenues from individual donations, as well as from government sources (36%).
- 5. Environment** - Particularly for organizations within the environment subsector<sup>47</sup>, 60% to 67% reported spending increasing amount of time and/or money on marketing and communications, conducting central operations, reporting to funders, governments, and strategic/scenario planning.

## Demographic Group Trends

Demographic groups most served by respondents—such as adults, seniors, youth, children, families, and people experiencing poverty or with low income—are experiencing overall trends that align with the summary trends of stable revenues, increasing expenses, and soaring demand for services and support. In the remainder, organizations serving the following demographic groups in particular have stood out:

- 1. People experiencing mental health challenges and/or mental illness**<sup>48</sup> - Organizations serving this demographic trended differently for issues related to recruitment and retention than organizations focusing on other demographics. Nearly 83% of organiza-

tions serving this demographic group indicated an increase in the level of wages and salaries offered to staff, despite with individual donations decreasing. 52% to 67% reported an increase in staff absences, time and/or money spent on recruitment and retention of staff, and HR issues related to staff mental health and wellbeing.

- 2. People experiencing or with experience of domestic or sexualized violence**<sup>49</sup> - Despite challenges with human resources, nearly 82% of respondents serving this demographic group indicated an increase in the level of wages and salaries offered to staff, and 55% to 73% reported increasing amounts of resources being spent on recruitment and retention of staff and the development of HR-related policies. Increasing expenses on office space, programming space and investments in decolonization and reconciliation were also reported by respondents, ranging between 68% and 82%.
- 3. Black people and/or African Diaspora**<sup>50</sup> - With increasing wages and salaries, organizations serving this demographic group have reported some unique trends from other groups. For 58% to 67% of respondents, increasing resources were spent on governance such as governance structure or board processes, strategic/scenario planning, and managing conflict or building relationships with other organizations.

Overall the survey found that time or money spent on marketing and communications stayed about the same for the non-profit sector. However, organizations serving Black people and/or African diaspora (75%), newcomers, immigrants, or refugees (69%), and people with experience of (or experiencing) sex work (67%), and chronic illness or a long-term condition (72%) reported spending increased time or money on marketing and communication<sup>51</sup>.

44 A total of 24 organizations reported to belong to sports, recreation and other social clubs.

45 A total of 11 organizations reported to belong to the law, advocacy, and politics subsector.

46 Although this subsector only represents 2.30% of respondents, organizations having similar response rates and belonging to subsectors such as religion and faith groups (1.67%), business associations (3.55%), international (1.25%), and grantmaking and fundraising (3.13%), have reported to experience stable overall revenues.

47 A total of 29 organizations reported to belong to the environment subsector.

48 A total of 46 organizations reported to serve this demographic group.


49 A total of 22 organizations reported to serve this demographic group.

50 A total of 15 organizations reported to serve this demographic group.

51 See Appendix A.1 for response rates.

Parameter	Sub-component	People experiencing mental health challenges and/or mental illness	People experiencing or with experience of domestic or sexualized violence	Black people and/or African Diaspora
Revenues	Revenues from individual donations	↓ Decreasing	↓ Decreasing	About the same
Expenses	Salaries and benefits	↑ Increasing	↑ Increasing	↑ Increasing
Delivery of programs, services, and activities	Capacity to deliver our programs, services, or activities	About the same	About the same	About the same
	Overall demand for services/support from clients and communities	↑ Increasing	↑ Increasing	↑ Increasing
Central operations	Time or money spent on marketing and communications	About the same	↑ Increasing	↑ Increasing
Human resources	Staff absences/use of sick leave	↑ Increasing	About the Same	About the Same
	Resources (time or money) spent on recruitment and retention of staff	About the Same	Increasing to staying about the same	About the Same
	Resources (time or money) spent on HR issues related to staff mental health and wellbeing	Increasing to staying about the same	↑ Increasing	About the Same
Governance	Resources (time or money) spent on governance structure or board processes	About the Same	Increasing to staying about the same	↑ Increasing
	Resources (time or money) spent managing conflict or building relationships among the board, or between the board and executive director	About the Same	About the Same	↑ Increasing

**Table 11.** Trends for demographic groups being served in the last 12 months

 = Trending differently from summary trend



# Recommendations

While British Columbia's non-profits operate in a time of uncertainty, the sector continues to be the heart of our communities, and support for this sector is essential. Recently, the Province of BC recognized the non-profit sector as an important partner in its delivery of key community services, through the declaration of a BC Non-Profit Day<sup>52</sup>, the initiation of the Recovery and Resiliency Fund, and investments into ongoing programs and services<sup>53</sup>. With this increasing recognition comes a curiosity to better understand the emerging needs of the sector.

In this year's State of the Sector Survey, we asked organizations to consider the successes and challenges they have experienced so far, and to highlight resources, information, or support they may need from all levels of government. The responses received were aligned with this year's emergent trends and condensed into priorities for the sector. Our recommendations from the data include:

## Sustainable Sector Workforce

The sector grapples with complex decision-making regarding compensation and optimal use of revenue to deliver services, activities, and support. Operating against a backdrop of escalating costs, expenses related to staff wages are steadily increasing within the sector. The inability of organizations to offer competitive wages places a financial strain on staff, leading to feelings of undervaluation and exacerbating recruitment and retention challenges. This imbalance between cost of living and wages also detracts from the sector's attractiveness to a talented and skilled workforce. Additionally, volunteerism, crucial to non-profits' effective delivery of services and programs, has not recovered from pre-COVID-19 levels within the sector. Low levels of volunteer engagement across Canada have been exacerbated by aging volunteers and a shifting volunteer recruitment landscape: **"Volunteers are aging out and younger generations don't seem to hold the same commitment to volunteering. After COVID volunteers seem to value their leisure**

52 While British Columbia's non-profits operate in a time of uncertainty, the sector continues to be the heart of our communities, and support for this sector is essential. Recently, the Province of BC recognized the non-profit sector as an important partner in its delivery of key community services, through the declaration of a BC Non-Profit Day<sup>51</sup>, the initiation of the Recovery and Resiliency Fund, and investments into ongoing programs and services<sup>52</sup>. With this increasing recognition comes a curiosity to better understand the emerging needs of the sector.

53 BC Gov News, "Recovery and Resiliency Fund provides new support for B.C.'s non-profit sector", accessed on January 10, 2024, <https://news.gov.bc.ca/releases/2022SDPR0015-000420>.

**time more [...] With the current cost of living many volunteers are looking for paid work!"**

Developing a labour force strategy that includes a volunteer revitalization plan and reassessing funding to accommodate rising staff wages and ensure a living wage is crucial for retaining, attracting, and properly valuing the sector's workforce, thereby ensuring its sustainability. With support for enhanced volunteer engagement and compensation/compensation planning, the sector can offer a competitive work environment that includes flexible work arrangements, enhanced health insurance coverage, retirement savings programs or pensions, sufficient paid time off, and additionally benefits such as peer-to-peer mentoring, employee discounts, recognition programs, and educational and training opportunities<sup>54</sup>. Currently, many non-profits report losing skilled workers to other sectors and jobs offering higher pay and security: **"[There needs to be] recognition of the need to pay staff market value - our biggest competitor is our funder (staff moving to government jobs for higher pay)."**

The non-profit sector in British Columbia is a significant contributor to the province's economy, generating billions of dollars in economic activity annually. Notably, its workforce is predominantly comprised of women. In response to a 17% gender pay gap identified by Statistics Canada in 2023<sup>55</sup>, British Columbia enacted the Pay Transparency Act. While smaller non-profits in BC are exempt from submitting pay transparency reports, implementing a non-profit labour force strategy would strengthen employment for women in non-profits large and small and significantly contribute to addressing overall gender pay inequity within the province.

**To create a non-profit labour force strategy and address sector workforce sustainability, we recommend the establishment of a collaborative working group that includes representatives from the sector, government agencies, funders, and other key sector stakeholders. By working together, we can create a more equitable and sustainable labour force that continues to provide vital services and programs to British Columbians.**

54 Scion Executive Search (SES), "The Role of Compensation in Attracting Top Talent in the Nonprofit Sector", accessed on May 23, 2024, <https://scionexecutive-search.com/compensation-attracting-top-talent-nonprofit-sector/>

55 Statistics Canada, "Table 14-10-0417-01 Employee wages by occupation, annual", accessed on June 3, 2024, <https://doi.org/10.25318/1410041701-eng>

## Funding Reforms

The Community Foundations of Canada defines trust-based philanthropy as an approach that addresses the inherent power imbalances between funders, non-profits, and the communities they serve<sup>56</sup>. Trust-based philanthropic and granting practices include multi-year unrestricted funding, simplified and streamlined paperwork and reporting, funder transparency and responsiveness, timely transfer of funds, and non-monetary support. These practices can increase the responsiveness of the sector to emergent needs and enhance the efficacy and impact of services and programs.

With the sector experiencing rising overall expenses, non-profit organizations need flexible, unrestricted financial support now more than ever. In the current funding milieu, the sector struggles to cover costs associated with day-to-day operations through program or project-based funding—the percentage of administrative fees allowed from each grant varies between 5-12%. Additionally, grantees are often restricted from adjusting project spending as needs arise over the term of the grant. Flexibility in funding contracts can significantly alleviate these challenges. By expanding the percentage of administrative fees that non-profits can claim per grant, organizations would have greater capacity to cover essential operational expenses such as rent, utilities, salaries, and technology upgrades. Furthermore, less restrictive granting criteria or engaging grant recipients in the design of the grant call can increase the success of funded programs and projects. **Consistent with our previous recommendations, we call on all funders to implement a flexible administrative fee of up to 30%, empowering grant recipients to determine the specific percentage required.**

In the voices of the sector:

“  
[We need] greater recognition of the level of and need to **cover operating expenses** – either by increasing admin fees or by allowing for core administrative costs to be added to project budgets.

56 Community Foundations of Canada – The Learning Institute, “Fact Sheet: Trust Based Philanthropy”, accessed on May 30, 2024, [https://community-foundations.ca/wp-content/uploads/2021/10/Fact-Sheet\\_-\\_Trust-Based-Philanthropy.pdf](https://community-foundations.ca/wp-content/uploads/2021/10/Fact-Sheet_-_Trust-Based-Philanthropy.pdf)

“  
Flexibility on how the **terms of contracts** is met [is needed]. We often cannot hire staff with the arbitrary credentials our provincial contracts mandate, which means the roles just go unfilled and our waitlist grows.

Currently, short-term funding cycles have damaging consequences on the sector's ability to offer higher wages and benefits and longer employment contracts. In soliciting grant applications, funders often seek new project proposals instead of offering multi-year funding to sustainably support existing programs that have proven efficacy. For communities, unstable funding increases the probability that vital services and supports will not be accessible when needed. Additionally, inflation reduces the loss in real value of multi-year contributions. **Our recommendation is for funders to offer multi-year funding agreements that are embedded with inflationary increases.**

Trust-based funding practices and processes can mitigate the rising grant reporting administrative burden currently faced by the sector, allowing non-profits to focus on serving their communities, exploring new funding streams, innovating solutions, and engaging in long-term planning. While it is crucial for funders to continue to learn about the needs and issues of the non-profits and communities they support, a trust-based approach to grant reporting provides equity to grant recipients and establishes a reciprocal relationship of mutual learning. There are many funders who have adopted successful trust-based practices in BC. **We recommend establishing a formal funders collaborative to advocate for and implement funding reforms, share trust-based practices, and collectively address the funding challenges within BC's non-profit sector.**

In the voices of the sector:

“  
We need **multi-year funding** that truly meets the increased costs of running a non-profit in an urban area (rent, salaries, benefits, utilities, transportation, childcare...etc).

## Ecosystem of Collaboration

Despite the non-collaborative environment often engendered by funding competitions, non-profits in BC have found different ways to work together through community coalitions, roundtables, action teams, and advocacy networks to address local, regional, or sub-sector specific issues. Through our survey, we heard the need to nurture an ecosystem of collaboration and identified some opportunities for the sector to continue to work together to benefit all non-profits.

An ecosystem of collaboration for the non-profit sector must include non-profits forming partnerships across different subsectors, with diverse government ministries, funders, and the private sector. Through these partnerships, non-profits can coordinate, reduce redundancy and duplication, maximize impact, leverage relationships, provide mutual support, and optimize costs through pooling of resources and services. Administrative templates, for example, can be shared through “...**a common bank of canned HR policy and templates that could be accessed by NGOs, and they can customize for their needs.**” Similarly, non-profits can benefit from shared training opportunities, financial or business planning support, or access to information technology. More than one respondent spoke about burgeoning organizations leveraging the expertise of established organizations. Another aspect would be to collaborate on data collection to avoid duplication of data, improve quality of data, and enable enhanced data analysis and policy recommendations.

### Recommendations for nurturing a collaborative ecosystem within BC's non-profit sector:

- 1. Facilitate Cross-Sector Partnerships:** Support non-profits to form partnerships across different subsectors, with diverse government ministries, funders, and the private sector.
- 2. Establish Information-Sharing Platforms:** Create online platforms or hubs where non-profits can share resources, best practices, and templates.
- 3. Coordinate Training and Development:** Organize free or low-cost joint training sessions, workshops, or seminars on topics that are relevant to all non-profits.
- 4. Align Data Collection Efforts:** Support the development of common metrics, data pooling, and the standardization of data collection tools.

In the voices of the sector:

“

Our government can create and introduce NFP in the same ecosystem to each other and encourage them to create [a] joint RFP or proposal, so each NFP can **use their strength** to help the clients who need help.

“

[We'd like the opportunity to] **facilitate a meeting** of groups such as ours. Regionally, we could learn so much from each other! Maybe even have "outing days" when we go to other groups' areas to give them a hand.

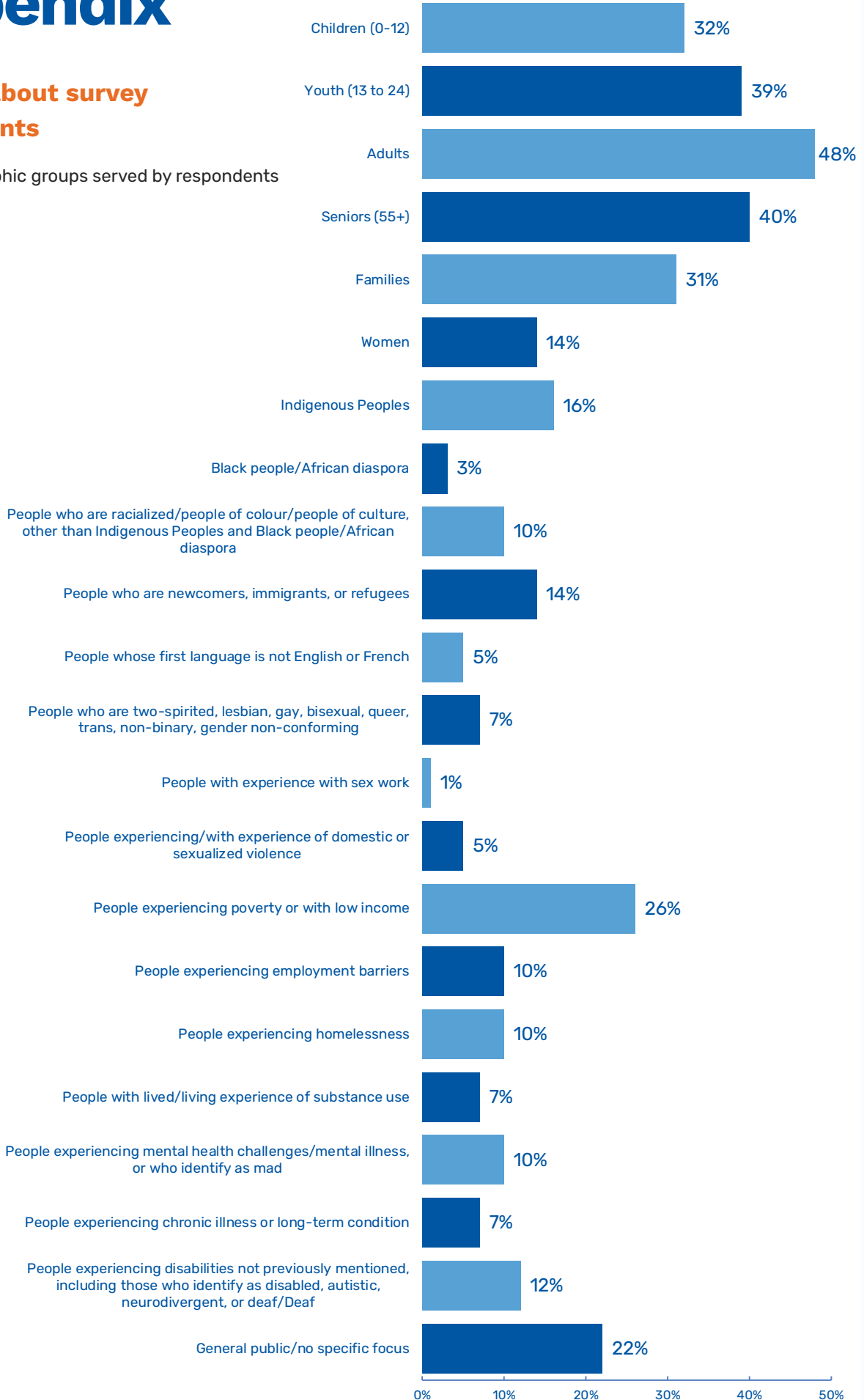
By implementing these recommendations, the non-profit sector in BC can enhance its collaborative efforts, ultimately leading to greater collective impact and strength.



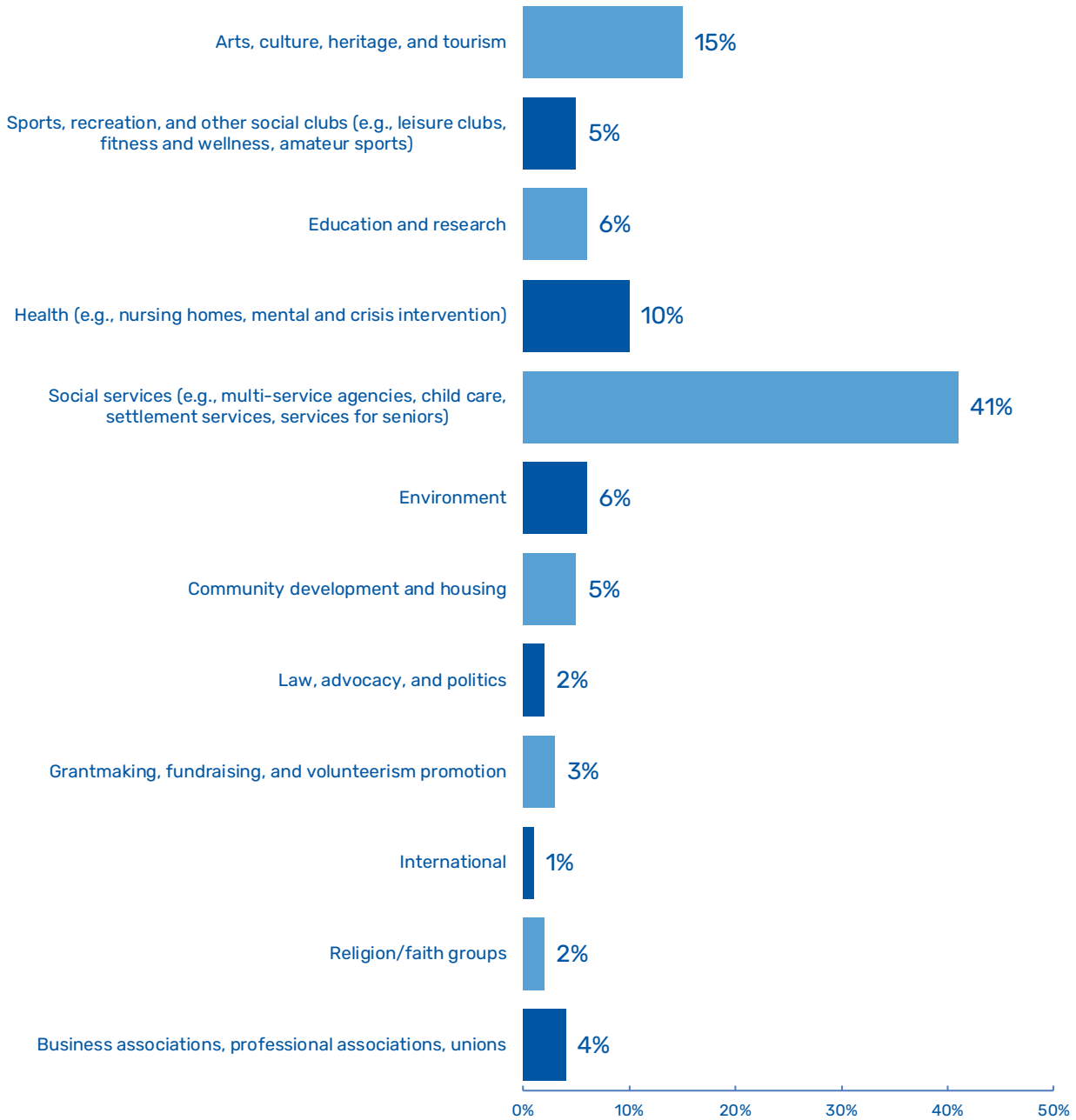
# Appendix

## A. More about survey respondents

### A.1. Demographic groups served by respondents

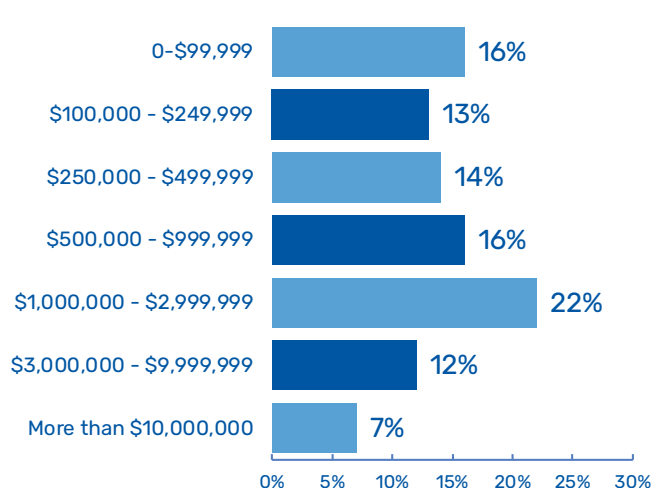


**A.2. Subsectors represented among respondents**



**A.3. Current Annual Operating Budgets**

Out of 479 respondents, nearly 60% of organizations have an operating budget under \$1M. A little shy from a quarter had budgets between \$1M to \$2.9M, and remaining organizations have operating budgets of \$3M and above.



**A.4. Geographic Focus and Response Rates Grouped by Health Authority Regions in BC**

**Fraser Health Authority**

Regional District	Response rate	Number of responses
Metro Vancouver—Burnaby, New Westminster	8.16%	39
Metro Vancouver—Coquitlam, Port Coquitlam, Port Moody	7.2%	34
Metro Vancouver—Surrey, White Rock	6.9%	33
Fraser Valley Regional District	5.65%	27
Metro Vancouver—Langley	4.39%	21
Metro Vancouver—Pitt Meadows, Maple Ridge	3.97%	19
Metro Vancouver—Tsawwassen, Delta, Tsawwassen First Nation	3.56%	17

**Vancouver Island Health Authority**

Regional District	Response rate	Number of responses
Capital Regional District—Greater Victoria and Southern Gulf Islands	14.02%	67
Nanaimo Regional District	7.11%	34
Comox Valley Regional District	5.02%	24
Cowichan Valley Regional District	4.39%	21
Strathcona Regional District	3.56%	17
Alberni-Clayoquot Regional District	2.72%	13
Mount Waddington Regional District	1.67%	8

**Vancouver Coastal Health Authority**

Regional District	Response rate	Number of responses
Metro Vancouver—Vancouver	16.95%	81
Metro Vancouver—Richmond	6.69%	32
Metro Vancouver—North Shore and Bowen Island	6.49%	31
Squamish-Lillooet Regional District	2.30%	11
Sunshine Coast Regional District	2.09%	10
Central Coast Regional District	1.26%	6
qathet Regional District	1.05%	5

**Interior Health Authority**

Regional District	Response rate	Number of responses
Columbia Shuswap Regional District	5.65%	27
Thompson-Nicola Regional District	4.18%	20
Central Okanagan Regional District	3.97%	19
Okanagan-Similkameen Regional District	3.56%	17
North Okanagan Regional District	3.56%	17
Cariboo Regional District	2.72%	13
Central Kootenay Regional District	2.09%	10
Kootenay Boundary Regional District	2.09%	10
East Kootenay Regional District	1.88%	9



## Northern Health Authority

Regional District	Response rate	Number of responses
Bulkley-Nechako Regional District	2.3%	11
Fraser-Fort George Regional District	2.93%	14
Peace River Regional District	1.46%	7
Northern Rockies Regional Municipality	0.84%	4
Kitimat-Stikine Regional District	0.63%	3
North Coast Regional District	0.63%	3
Stikine Region	0.21%	1

## B. Survey Questions

Questions		Response Options
1	<p>This survey is designed to have one response per organization and should be completed by the CEO/Executive Director of the organization or someone tasked by the CEO/Executive Director.</p> <p>I confirm that I am the designated person from my organization to complete this survey.</p> <ol style="list-style-type: none"> <li>Yes</li> <li>No</li> </ol> <p><b>Number of respondents = 669</b></p>	Radio buttons
2	<p>Share three words that describe how your organization is feeling right now.</p> <p><b>Number of respondents = 560</b></p> <p><b>SECTION 1</b></p> <p>The following section asks about comparisons between pre-COVID-19 operations and present day. This is meant to be a gut check. We do not expect you to look up specific numbers.</p>	3 short text boxes  Preface text
3	<p>Please answer the following to the best of your knowledge:</p> <ol style="list-style-type: none"> <li>How has your actual revenue changed from pre-COVID-19 (2019) until now?</li> <li>How have your actual expenses changed from pre-COVID-19 (2019) until now?</li> <li>How has the delivery of your programs, services, or activities changed from pre-COVID-19 (2019) until now?</li> </ol> <p><b>Number of respondents = 548</b></p>	Radio button matrix (increased, stayed about the same, decreased, not relevant, not sure)

Questions		Response Options
	<p><b>SECTION 2</b></p> <p>Consider what you know about the past 12 months, and what you expect heading into the next 12 months. This is meant to be a gut check. We do not expect you to look up specific numbers.</p>	Preface text
4	<p>Over the last 12 months, what are the overall trends in your actual revenues?</p> <ol style="list-style-type: none"> <li>1. Overall revenues</li> <li>2. Revenue from earned income (e.g., sales of goods and services)</li> <li>3. Revenue from foundations</li> <li>4. Revenue from government sources</li> <li>5. Revenue from individual donations</li> <li>6. Revenue from membership fees</li> <li>7. Revenue from special events</li> <li>8. Revenue from corporations/businesses</li> <li>9. Accessing financial reserves</li> <li>10. Other (please specify): _____</li> </ol> <p><b>Number of respondents = 520</b></p>	Radio button matrix (increasing, staying about the same, decreasing, not relevant, not sure)
5	<p>Over the last 12 months, what are the overall trends in your actual expenses?</p> <ol style="list-style-type: none"> <li>1. Overall expenses</li> <li>2. Salaries and benefits</li> <li>3. Programs, services, and activities</li> <li>4. General administration costs</li> <li>5. Office space expenses</li> <li>6. Programming space expenses</li> <li>7. Investments in diversity, equity, inclusion, belonging, accessibility</li> <li>8. 8.Investments in decolonization and reconciliation</li> </ol> <p><b>Number of respondents = 521</b></p>	Radio button matrix (increasing, staying about the same, decreasing, not relevant, not sure)

Questions		Response Options
6	<p>Over the last 12 months, what are the overall trends in your delivery of programs, services, or activities?</p> <ol style="list-style-type: none"> <li>Overall ability to deliver on our mission</li> <li>Capacity to deliver our programs, services, or activities</li> <li>Overall demand for services/support from clients and communities</li> <li>Focus on offering new programs, services or activities</li> <li>Resources (time or money) spent on evaluation</li> <li>Resources (time or money) spent on outreach, relationships, and partnership</li> <li>Amount of physical space available to deliver our programs, services, and activities</li> <li>Resources (time or money) spent on addressing climate change impacts on your organization and/or communities you serve</li> </ol> <p><b>Number of respondents = 508</b></p>	Radio button matrix (increasing, staying about the same, decreasing, not relevant, not sure)
7	<p>Over the last 12 months, what are the overall trends in your human resources?</p> <ol style="list-style-type: none"> <li>Level of volunteer involvement</li> <li>Number of full-time staff</li> <li>Number of part-time, temporary, contract, or seasonal staff</li> <li>Staff hours (i.e., average hours worked per staff member)</li> <li>Levels of wages/salaries offered to staff</li> <li>Level of benefits offered to staff</li> <li>Resources (time or money) spent on recruitment and retention of volunteers</li> <li>Resources (time or money) spent on recruitment and retention of staff</li> <li>Staff absences/use of sick leave</li> <li>Resources (time or money) spent on developing HR-related policies (e.g., sick leave, work from home)</li> <li>Resources (time or money) spent on HR issues related to staff mental health and wellbeing</li> <li>Resources (time or money) spent on training and professional development</li> </ol> <p><b>Number of respondents = 508</b></p>	Radio button matrix (increasing, staying about the same, decreasing, not relevant, not sure)



Questions		Response Options
8	<p>How many non-profits are you aware of that dissolved in the last 12 months?</p> <ol style="list-style-type: none"> <li>1. None</li> <li>2. 1 to 5</li> <li>3. 6 to 10</li> <li>4. 11 or more</li> </ol> <p><b>Number of respondents = 506</b></p>	Radio buttons
9	<p>How has climate change impacted your organization's ability to carry out its mission?</p> <p><b>Number of respondents = 255</b></p>	Open text box
10	<p>What successes, priorities and supports are you grateful for, or are making you stronger? What is helping you thrive?</p> <p><b>Number of respondents = 457</b></p>	Open text box
11	<p>Looking ahead from now into the next 12 months, what concerns/challenges are top of mind?</p> <p><b>Number of respondents = 471</b></p>	Open text box
12	<p>Consider the successes, and challenges you shared above. What resources, information, or support does your organization need from all levels of government?</p> <p><b>Number of respondents = 455</b></p> <p><b>SECTION 3</b></p> <p>This section focuses on the types of organizations that have responded to this survey. We ask these questions so that:</p> <ul style="list-style-type: none"> <li>• We can promote the survey to types of organizations that we have not heard from</li> <li>• We can disaggregate survey results to see if different types of organizations are experiencing different trends.</li> </ul>	Preface text
13	<p>What is the current legal status of your overall organization (check all that apply):</p> <ol style="list-style-type: none"> <li>1. Unincorporated grassroots or community group (not a registered organization)</li> <li>2. Registered charity (have charitable tax status with the CRA)</li> <li>3. Registered non-profit (e.g., under BC Societies Act or federal Not-for-profit Corporations Act)</li> <li>4. Non-profit co-operative (under provincial or federal legislation)</li> <li>5. Project under an umbrella/host organization, charitable platform, or fiscal agent</li> <li>6. Non-profit social enterprise</li> <li>7. Network, collaborative, or coalition</li> <li>8. Other (please specify): _____</li> </ol> <p><b>Number of respondents = 482</b></p>	Radio buttons

Questions		Response Options
14	<p>The federal government classifies non-profits into three categories. Which category best describes you?</p> <ol style="list-style-type: none"> <li>1. Community organization</li> <li>2. Business organization (business associations, professional associations, unions, chambers of commerce, condominium strata, etc.)</li> <li>3. Quasi-governmental organization (hospitals, public educational institutions, legislatively created organization, etc.)</li> </ol> <p><b>Number of respondents = 482</b></p>	Radio buttons
15	<p>What subsector does your organization primarily belong to? These are categories often used by the federal government (Pick the most appropriate.)</p> <ol style="list-style-type: none"> <li>1. Arts, culture, heritage, and tourism</li> <li>2. Sports, recreation, and other social clubs (e.g., leisure clubs, fitness and wellness, amateur sports)</li> <li>3. Education and research</li> <li>4. Health (e.g., nursing homes, mental and crisis intervention)</li> <li>5. Social services (e.g., multi-service agencies, child care, settlement services, services for seniors)</li> <li>6. Environment</li> <li>7. Community development and housing</li> <li>8. Law, advocacy, and politics</li> <li>9. Grantmaking, fundraising, and volunteerism promotion</li> <li>10. International</li> <li>11. Religion/faith groups</li> <li>12. Business associations, professional associations, unions</li> <li>13. Other (please specify): _____</li> </ol> <p><b>Number of respondents = 479</b></p>	Radio buttons

Questions		Response Options
16	<p>Which primary demographic groups does your organization serve and/or are the focus of your mission? (Please choose up to 5.)</p> <ol style="list-style-type: none"> <li>1. Children (0-12)</li> <li>2. Youth (13 to 24)</li> <li>3. Adults</li> <li>4. Seniors (55+)</li> <li>5. Families</li> <li>6. Women</li> <li>7. Indigenous Peoples</li> <li>8. Black people/African diaspora</li> <li>9. People who are racialized/people of colour/people of culture, other than Indigenous Peoples and Black people/African diaspora</li> <li>10. People who are newcomers, immigrants, or refugees</li> <li>11. People whose first language is not English or French</li> <li>12. People who are two-spirited, lesbian, gay, bisexual, queer, trans, non-binary, gender non-conforming</li> <li>13. People with experience with sex work</li> <li>14. People experiencing/with experience of domestic or sexualized violence</li> <li>15. People experiencing poverty or with low income</li> <li>16. People experiencing employment barriers</li> <li>17. People experiencing homelessness</li> <li>18. People with lived/living experience of substance use</li> <li>19. People experiencing mental health challenges/mental illness, or who identify as mad</li> <li>20. People experiencing chronic illness or long-term condition</li> <li>21. People experiencing disabilities not previously mentioned, including those who identify as disabled, autistic, neurodivergent, or deaf/Deaf</li> <li>22. General public/no specific focus</li> <li>23. Other (please specify): _____</li> </ol> <p><b>Number of respondents = 479</b></p>	Radio buttons

	Questions	Response Options
17	<p>This question is optional.</p> <p>If you explicitly identify as an organization that is both led-by and serving a specific equity-denied group*:</p> <p>Please specify the equity-denied group(s) you are led-by and serve:</p> <p>-----</p> <p><i>*Equity-denied group means people who share an identity that have been historically and/or currently marginalized, discriminated against, or disadvantaged</i></p> <p><b>Number of valid responses = 124</b></p>	Text box
18	<p>In the last 12 months, what was your organization's operating budget?</p> <ol style="list-style-type: none"> <li>1. 0 - \$99,999</li> <li>2. \$100,000 - \$249,999</li> <li>3. \$250,000 - \$499,999</li> <li>4. \$500,000 - \$999,999</li> <li>5. \$1,000,000 - \$2,999,999</li> <li>6. \$3,000,000 - \$9,999,999</li> <li>7. More than \$10,000,000</li> </ol> <p><b>Number of respondents = 479</b></p>	Radio buttons
19	<p>What is your primary revenue source? (Pick the category that best describes you).</p> <ol style="list-style-type: none"> <li>1. Earned income (e.g., sales of goods and services)</li> <li>2. Foundations</li> <li>3. Government sources</li> <li>4. Individual donations</li> <li>5. Membership fees</li> <li>6. Special events</li> <li>7. Corporations/businesses</li> <li>8. Mixed revenue sources</li> </ol> <p><b>Number of respondents = 479</b></p>	Radio buttons
20	<p>Does your organization have paid staff?</p> <ol style="list-style-type: none"> <li>1. Yes</li> <li>2. No, our organization is volunteer driven</li> </ol> <p><b>Number of respondents = 479</b></p>	Radio buttons



Questions		Response Options
21	<p>Do you primarily serve a rural, geographically remote, northern, or small community*?</p> <ol style="list-style-type: none"> <li>1. Yes</li> <li>2. No</li> </ol> <p>*Rural/small communities are those with a population of fewer than 20,000 people.</p> <p><b>Number of respondents = 478</b></p>	Radio buttons
22	<p>Which regional district(s) represent the geographic scope/focus of your organization? Check all that apply. To see which region(s) you are in, please click here.</p> <ol style="list-style-type: none"> <li>1. Our focus is province-wide</li> <li>2. Our focus is regional within Canada (e.g., western Canada or BC/Yukon)</li> <li>3. Our focus is national</li> <li>4. Our focus is international</li> <li>5. Alberni-Clayoquot Regional District</li> <li>6. Bulkley-Nechako Regional District</li> <li>7. Capital Regional District - Greater Victoria and Southern Gulf Islands</li> <li>8. Cariboo Regional District</li> <li>9. Central Coast Regional District</li> <li>10. Central Kootenay Regional District</li> <li>11. Central Okanagan Regional District</li> <li>12. Columbia Shuswap Regional District</li> <li>13. Comox Valley Regional District</li> <li>14. Cowichan Valley Regional District</li> <li>15. East Kootenay Regional District</li> <li>16. Fraser Valley Regional District</li> <li>17. Fraser-Fort George Regional District</li> <li>18. Kitimat-Stikine Regional District</li> <li>19. Kootenay Boundary Regional District</li> <li>20. Metro Vancouver - Vancouver</li> <li>21. Metro Vancouver - North Shore and Bowen Island</li> <li>22. Metro Vancouver - Burnaby, New Westminister</li> <li>23. Metro Vancouver - Coquitlam, Port Coquitlam, Port Moody</li> <li>24. Metro Vancouver - Richmond</li> <li>25. Metro Vancouver - Tsawwassen, Delta, Tsawwassen First Nation</li> </ol>	

	Questions	Response Options
	26. Metro Vancouver - Surrey, White Rock 27. Metro Vancouver - Langley 28. Metro Vancouver - Pitt Meadows, Maple Ridge 29. Mount Waddington Regional District 30. Nanaimo Regional District 31. North Coast Regional District 32. North Okanagan Regional District 33. Northern Rockies Regional Municipality 34. Okanagan-Similkameen Regional District 35. Peace River Regional District 36. qathet Regional District 37. Squamish-Lillooet Regional District 38. Stikine Region 39. Strathcona Regional District 40. Sunshine Coast Regional District 41. Thompson-Nicola Regional District  <b>Number of respondents = 478</b>	Radio buttons
23	What are the first three digits of your primary location's postal code? If you are a totally virtual organization and do not have a primary location, write "NIL".  <b>Number of respondents = 477</b>	Short text box
	SECTION 4  This section is optional.	Preface text
24	Please select either of the two options:  1. Continue to answer section 4. 2. Skip to the end of the survey	Radio buttons

25	<p>For questions 25 to 26, consider what you know about the past 12 months.</p> <p>Over the last 12 months, what are the overall trends in your central operations?</p> <ol style="list-style-type: none"> <li>1. Amount of physical space to host our central operations</li> <li>2. Resources (time or money) spent on IT</li> <li>3. Resources (time or money) spent on marketing and communications</li> <li>4. Conducting our central operations (e.g. internal meetings and work)</li> <li>5. Ability to procure supplies and services</li> <li>6. Time spent on reporting to funders, governments etc. on our activities</li> </ol> <p><b>Number of respondents = 337</b></p>	Radio button matrix (increasing, staying about the same, decreasing, not relevant, not sure)
26	<p>Over the last 12 months, what are the overall trends in your governance?</p> <ol style="list-style-type: none"> <li>1. How well identities of people in leadership roles (board, management) reflects the communities you serve</li> <li>2. Resources (time or money) spent on governance structure or board processes</li> <li>3. Resources (time or money) spent on strategic/scenario planning</li> <li>4. Resources (time or money) spent considering merging/strategic alliances with another organization</li> <li>5. Resources (time or money) spent managing conflict or building relationships among the board, or between the board and executive director</li> <li>6. Resources (time or money) spent on crisis management</li> </ol> <p><b>Number of respondents = 337</b></p>	Radio button matrix (increasing, staying about the same, decreasing, not relevant, not sure)
27	<p>Listed below are 6 significant challenges identified in our 2023 <i>Safety Net</i> report:</p> <ol style="list-style-type: none"> <li>1. Rising costs</li> <li>2. Increased demand for services</li> <li>3. Increased time and money spent on service delivery</li> <li>4. Reduced funding</li> <li>5. Increased efforts in recruitment and retention of staff and volunteers</li> <li>6. Increased staff mental health challenges</li> </ol> <p>Thinking of your organization, please choose 2 of the 6 challenges above, and share what factors (e.g., policy changes, changing political climate, financial, environmental etc..) you think have contributed to that challenge.</p> <p><b>Number of respondents = 335</b></p>	DEPENDENCY: Only for respondents who 'continue' to answer Section 4  Open text box
28	<p>Has your organization used the information in previous State of the Sector reports? If yes, how has this information influenced your activities?</p> <p><b>Number of respondents = 335</b></p>	Open text box

**[thevantagepoint.ca](http://thevantagepoint.ca)**

604-875-9144

1183 Melville Street

Vancouver, BC

V6E 2X5

