Charity Insights Canada Project (CICP)

Sector ▶▶ *Snapshot*

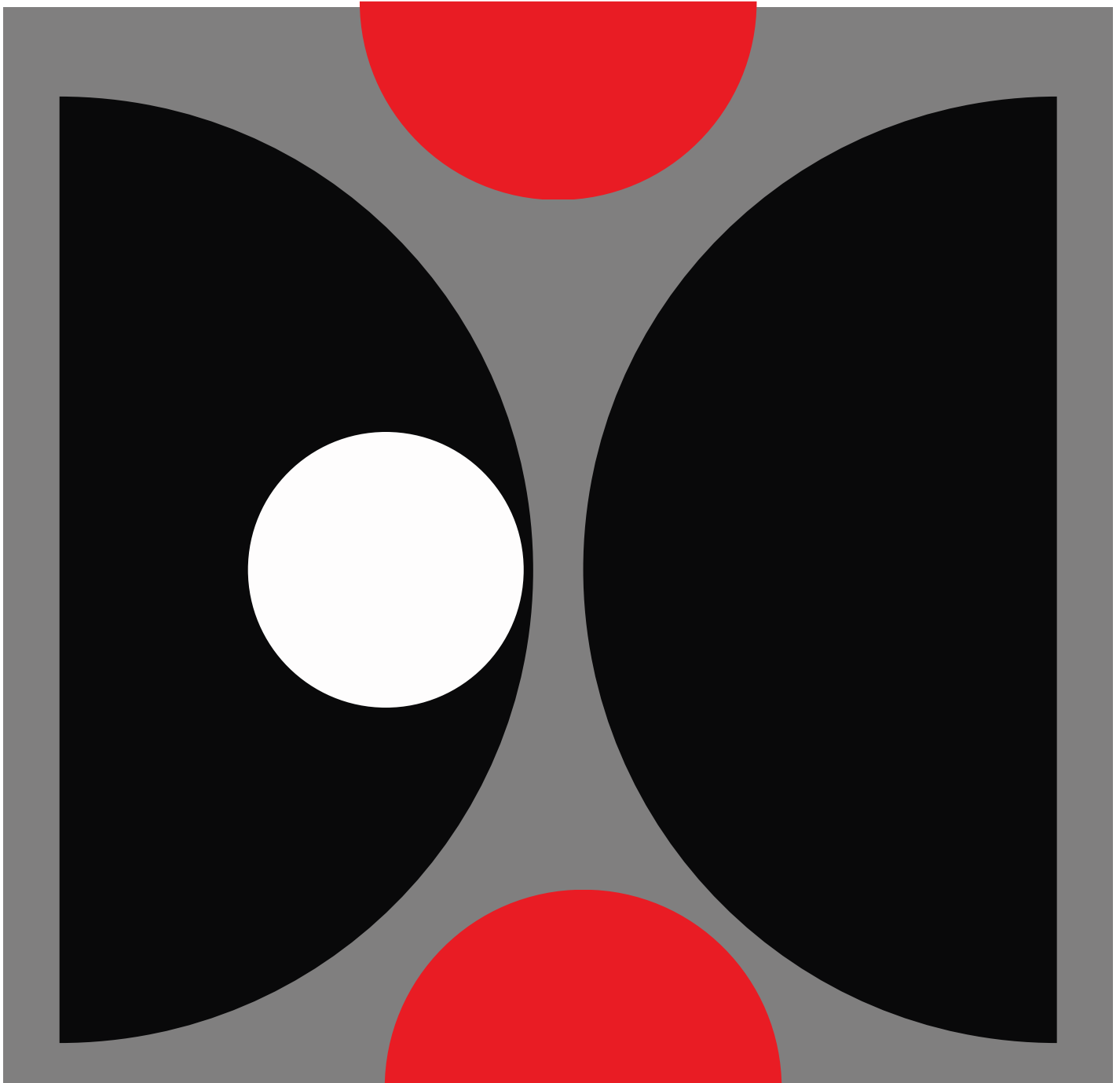**CICP Research & Publications**

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Oct - Nov 2024

Sector Snapshot

October to November 2024

Charity Insights Canada Project (CICP)

Thank you to all staff and stakeholders of the CICP who helped to make this text possible.

Note: The text in this module was written with the assistance of ChatGPT, an AI language model developed by OpenAI.

Executive Summary

The charitable sector in Canada plays a critical role in societal well-being, yet its challenges and dynamics are often underreported. Through a series of weekly surveys conducted by the Charity Insights Canada Project (CICP), we provide valuable insights into key themes shaping the sector, ranging from branding and funder requirements to the impact of environmental emergencies and sector collaboration and unity. This report synthesizes findings from the fourth quarter of the CICP's second year of study (October-November 2024) and is designed to inform policymakers, practitioners, researchers and the public about the current landscape of Canada's charitable sector.

Introduction

Over the past quarter, our surveys have explored critical but often overlooked aspects of charitable work—activities that may not make headlines but are essential for sustaining operations and driving organizational goals. We also examined emerging issues that, while not yet top priorities for charities, are shaping communities and introducing both risks and opportunities for the sector. Finally, we revisited the ongoing theme of collaboration, a timely topic given the political shifts in Canada and beyond.

The findings from this quarter shed light on the challenges and benefits charities face in implementing EDI initiatives, meeting funder requirements, and measuring impact. They provide insight into how organizations perceive and navigate large-scale trends such as AI and environmental crises. Additionally, they explore the ways charities collaborate in an increasingly competitive environment and where opportunities exist for shared standards. These insights highlight key areas where additional support could enhance efficiency and impact while also identifying risks and opportunities that charities—and those who support them—must navigate moving forward.

This report organizes the nine surveys conducted this quarter by theme, offering a snapshot of key findings. While each survey captures a piece of the sector's broader landscape, together, they provide a clearer picture of the factors shaping its future. By presenting these findings in a concise and accessible format, we aim to encourage deeper engagement with the full survey results and our data dashboards. We invite readers to explore the insights and join us in strengthening Canada's charitable sector through research.

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Research Overview

The research underpinning this report provides a comprehensive understanding of the charitable sector in Canada, covering a wide range of themes, sub-topics, and research objectives. Through weekly surveys distributed over several months, we gathered the perspectives and experiences of charitable organizations across the country.

Survey Methodology: Each week, we send a ~3-minute survey to a panel of more than a thousand registered charities nationwide. Panel participants have been randomly selected from the Canada Revenue Agency (CRA) registry and recruited via phone and email. Surveys are distributed electronically to our diverse panel of organizations, ensuring representation from various regions, sizes, and areas of focus within the sector. Each survey is designed to address specific research objectives and gather data on key topics relevant to the charitable sector. Participants are invited to provide their insights through these structured surveys, allowing for both quantitative analysis of survey responses and qualitative exploration of nuanced issues.

Data Collection and Analysis: Survey responses are collected and analyzed using rigorous methodologies to ensure accuracy, reliability, and validity of the findings. Quantitative data for this report were subjected to statistical analysis, enabling us to identify trends, patterns, and correlations within the dataset. Qualitative responses were coded and thematically analyzed to extract key themes and insights, providing rich contextual understanding of the issues at hand.

Key Themes and Findings: This quarter's research provided valuable insights across multiple themes, including EDI initiatives, financial health, turnover rates, and policy participation. Each section of the report offers actionable findings that help map the sector's current realities and inform its future direction.

Implications and Recommendations: The findings of our research have important implications for policymakers, practitioners, and stakeholders within the charitable sector. By highlighting key challenges, opportunities, and emerging trends, our report aims to inform decision-making, guide resource allocation, and inspire collaborative action towards strengthening the sector's capacity to fulfill its mission and mandate.

Limitations: While every effort was made to ensure the quality and comprehensiveness of our research, it is important to acknowledge certain limitations. These include potential biases in survey responses, limitations inherent in self-reported data, and constraints related to sample representativeness and survey methodology. Nevertheless, the findings presented in this report provide valuable insights and serve as a foundation for further research and exploration within the charitable sector.

The research presented here represents a concerted effort to advance knowledge, foster dialogue, and catalyze positive change within the charitable sector. By capturing the voices and experiences of stakeholders, we aim to contribute to efforts to strengthen the sector's resilience, sustainability, and impact in communities across Canada.

SECTION 1: EQUITY, DIVERSITY AND INCLUSION

EDI Actions and Initiatives
Exploring survey results from CICP survey no. 2.10.37

Building on earlier CICP findings that most charities have committed to integrating Equity, Diversity, and Inclusion (EDI) into their work—though many face challenges in taking concrete action (CICP survey no. 2.8.29)—we sought to better understand the specific EDI initiatives charities have undertaken in the past year. Our survey results reveal a mix of internally and externally directed activities, reflecting a range of approaches across the sector.

Key EDI Actions Taken
Some of the most frequently reported EDI-related activities include:
- **Community outreach to underrepresented groups** (31%)—the most common action taken.
- **Updating communications for inclusivity** (28%).
- **Collaborating with external partners on EDI initiatives** (25%).

Charities are also working to embed EDI into their internal structures and practices:
- **Providing EDI training to personnel** (27%).
- **Implementing inclusive hiring practices** (26%).
- **Reviewing compensation and benefits for equity** (25%).
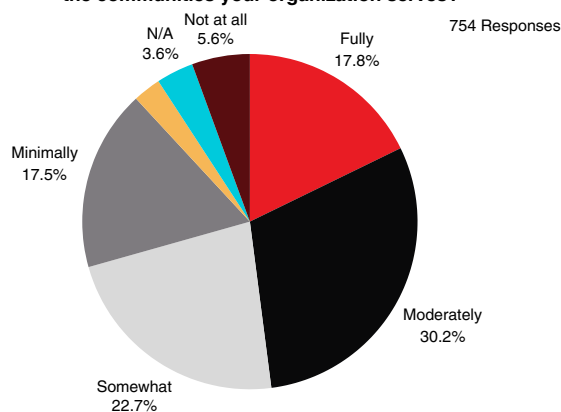- **Developing or updating an EDI policy** (23%).

Less commonly reported actions include conducting an internal EDI audit or assessment (12%) and establishing an EDI committee or working group (11%). Notably, 'no specific EDI-related actions taken in the last 12 months' was selected by roughly a third of respondents (32%), suggesting that EDI is potentially becoming less of an actionable priority for many charities than initially thought.

EDI Actions Taken by Charities in the Past Year

	759 Responses
No specific EDI-related actions taken in the past 12 months	32%
Increased community outreach to underrepresented groups – Made targeted efforts to engage with marginalized or underrepresented communities.	31%
Updated communications for inclusivity – Revised marketing, outreach, or program materials to be more inclusive and representative.	28%
Provided EDI training – Delivered training or workshops for staff, volunteers, or board members on EDI topics.	27%
Implemented inclusive hiring practices – Adopted strategies to attract and hire candidates from diverse backgrounds.	26%
Reviewed compensation and benefits for equity – Analyzed pay, benefits, and job classifications to ensure fairness across staff.	25%
Collaborated with external partners on EDI initiatives – Partnered with other organizations, consultants, or experts to advance EDI goals.	25%
Developed or updated an EDI policy – Created or revised formal policies to promote equity, diversity, and inclusion.	23%
Created safe spaces for dialogue – Held forums or discussions for staff, volunteers, or stakeholders to discuss EDI issues openly.	19%
Set EDI-related goals or targets – Established measurable objectives to improve diversity, equity, and inclusion in the organization.	13%
Conducted an internal EDI audit or assessment – Reviewed practices, policies, or structures to identify areas for improvement in EDI.	12%
Established an EDI committee or working group – Formed a group dedicated to advancing EDI within the organization.	11%

CICP Survey No.2.10.37, Q1

To what extent does your leadership team reflect the diversity of the communities your organization serves?

754 Responses

- Not at all 5.6%
- N/A 3.6%
- Fully 17.8%
- Minimally 17.5%
- Moderately 30.2%
- Somewhat 22.7%

CICP Survey No.2.10.37, Q2

Benefits of EDI Initiatives in the Charitable Sector

756 Responses

Enhanced community relationships	31%
Increased diversity	28%
Improved workplace culture	24%
Stronger organizational reputation	22%
Attracted new talent	21%
Improved service delivery	17%
Better decision-making	16%
No tangible benefits noticed yet	14%
Increased funding opportunities	13%
Greater innovation	8%
Not sure	7%
Reduced turnover	4%
Other (please specify)	3%

CICP Survey No.2.10.37, Q3

Impact of EDI Initiatives

Surveyed charities report a range of positive outcomes resulting from their EDI efforts:

- **Stronger community relationships** (31%).
- **Greater diversity within their organizations** (28%).
- **Improved workplace culture** (24%).
- **Enhanced organizational reputation** (22%).
- **Increased ability to attract new talent** (21%).

Interestingly, while EDI initiatives have helped some organizations enhance their reputation and draw in new workers, only a small percentage of charities indicate that this work has reduced turnover (4% of respondents). The impact of EDI work in terms of expanding funding opportunities is also on the lower end, with only 13% of respondents drawing a causal link between these two.

Challenges and Support Needed

Most charities indicate that greater support is needed to advance their EDI efforts, with only 8% reporting that they do not require additional assistance. The most commonly cited needs include:

- **Financial resources** (45%) **and more time and capacity** (44%).
- **Access to training and workshops** (31%).
- **Expert guidance** (25%).
- **Greater support and engagement from funders** (24%).

Notably, 23% of respondents describe their funders' level of support for EDI work as "neutral" (neither supportive nor unsupportive) (CICP survey no. 2.8.29), suggesting a potential gap in external funding and institutional backing for these initiatives.

Conclusion: Overall, our survey results highlight the diversity of EDI efforts within the charitable sector, with no one-size-fits-all approach. While many charities are actively working to strengthen their commitment to EDI, challenges remain, particularly in securing financial and capacity-building support. Our findings also suggest that EDI work is largely a collective effort within organizations rather than being solely leadership driven. Moving forward, continued sector-wide collaboration, funding, and resource-sharing will be essential in helping charities advance their EDI goals and maximize the impact of their efforts.

SECTION 2: FUNDING

Funding Requirements
Exploring survey results from CICP survey no. 2.11.42

Concerns about the scale of administrative requirements associated with charitable funding have been long-standing. Striking a balance between accountability and transparency, while avoiding excessive administrative burdens that negatively impact programming and service delivery, remains an ongoing conversation in the sector. To better understand these realities, we surveyed our panel about the funding requirements they manage and how these affect their organizations.

Number of Funders and Administrative Load
To establish a baseline, we asked charities how many funders (e.g., foundations, governments, corporations) they currently work with. Our survey found that:
- **A majority of charities (52%)** have 1-5 funders.
- **17%** have 6-10 funders.
- **10%** have 11-20 funders.
- **Only 2%** reported having 51-100 funders, and just 3% cited having more than 100 funders.

These findings indicate that while most charities manage a modest number of funders, a small percentage are dealing with a highly complex funding landscape.

Common Funders' Requirements
We also examined the types of requirements charities must fulfill, providing insight into the administrative workload involved in maintaining funding agreements. The most frequently cited deliverables were:
- **Financial reports** (79% of respondents).
- **Activity or progress reports** (71%).
- **Impact or outcome reports** (59%).

Less commonly, charities are required to provide:
- **Evaluation or assessment reports** (33%).
- **Regular check-in meetings or calls** (23%).
- **Presentations or public updates** (16%).

Interestingly, 9% of respondents reported that no deliverables are required by their funders. This raises questions about the nature of their funding arrangements and whether certain types of funding (e.g., unrestricted or legacy gifts) are less administratively demanding.
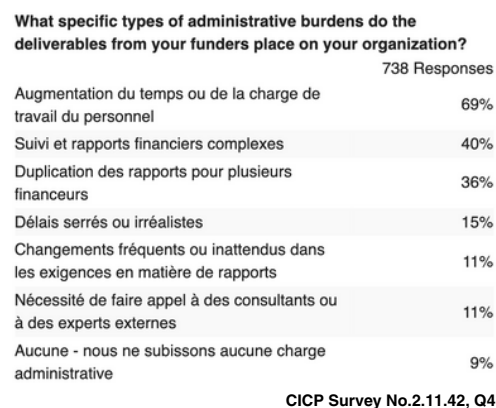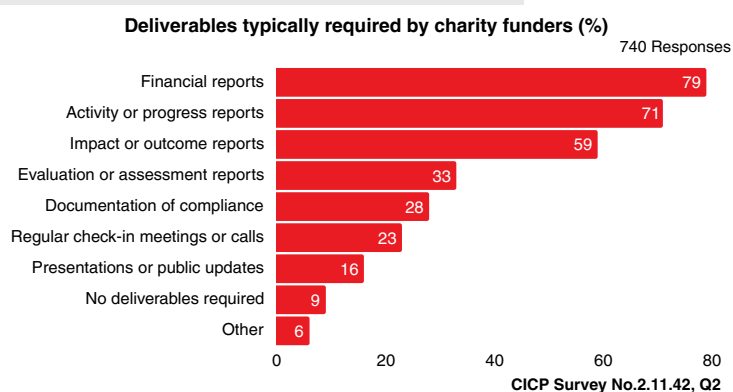
The Burden of Funding Requirements
When asked about the level of burden these requirements impose, responses varied:
- **7%** of charities experience no burden.
- **25%** report a minor burden.
- **43%** describe a moderate burden requiring significant time or effort.
- **14%** face a heavy burden that interferes with other responsibilities.

Deliverables typically required by charity funders (%)

740 Responses

Category	Value
Financial reports	79
Activity or progress reports	71
Impact or outcome reports	59
Evaluation or assessment reports	33
Documentation of compliance	28
Regular check-in meetings or calls	23
Presentations or public updates	16
No deliverables required	9
Other	6

CICP Survey No.2.11.42, Q2

What specific types of administrative burdens do the deliverables from your funders place on your organization?

738 Responses

Augmentation du temps ou de la charge de travail du personnel	69%
Suivi et rapports financiers complexes	40%
Duplication des rapports pour plusieurs financeurs	36%
Délais serrés ou irréalistes	15%
Changements fréquents ou inattendus dans les exigences en matière de rapports	11%
Nécessité de faire appel à des consultants ou à des experts externes	11%
Aucune - nous ne subissons aucune charge administrative	9%

CICP Survey No.2.11.42, Q4

The most commonly cited administrative burdens include:
- **Increased staff workload and time demands** (69%).
- **Complex financial tracking and reporting** (40%).
- **Duplicative reporting across multiple funders** (36%).
- **Tight or unrealistic deadlines** (15%).
- **The need to engage external consultants** (11%).

These findings highlight that administrative burdens stem not just from the volume of reporting but also from complexity and duplication. With many charities already managing multiple funders, and financial pressures in the sector driving organizations to seek additional funding sources, streamlining reporting requirements could help reduce strain on organizations.

Conclusion: Our survey results provide a clearer picture of how funding requirements translate into administrative burdens for charities. Given the significant time and effort required to meet funders' expectations, there is a need for ongoing discussions around best practices in grant-making and reporting. Some reform efforts—both internationally and in Canada (see Imagine Canada, 2020)—offer potential models for reducing the burden while maintaining accountability, and these may warrant further exploration by funders and policymakers.

SECTION 3: GOVERNANCE & MANAGEMENT

Measuring Impact
Exploring survey results from CICP survey no. 2.10.38
Note: This survey attempted to parallel research from the 2012 Making an Impact research study in the U.K.

Making an impact is central to the mission of most charities. A recent survey by CanadaHelps found that nearly three-quarters (73%) of respondents would be likely to donate more if they had access to a charity's impact results from the previous year (CanadaHelps, 2024). Given the importance of demonstrating effectiveness, we surveyed our panel on how they measure impact, the support they receive from funders, and the benefits they experience from tracking their results.

Prevalence of Impact Measurement
Impact measurement is common across the sector, with only 12% of charities reporting that they do not track their impact at all. However, the depth of measurement varies significantly:
- **40%** measure impact for all or almost all of their activities.
- **18%** track impact for around half of their activities.
- **23%** assess only a small proportion of their work.

While these findings highlight the prevalence of impact measurement, they do not speak to its quality—a critical factor in ensuring that charities can use their data effectively.
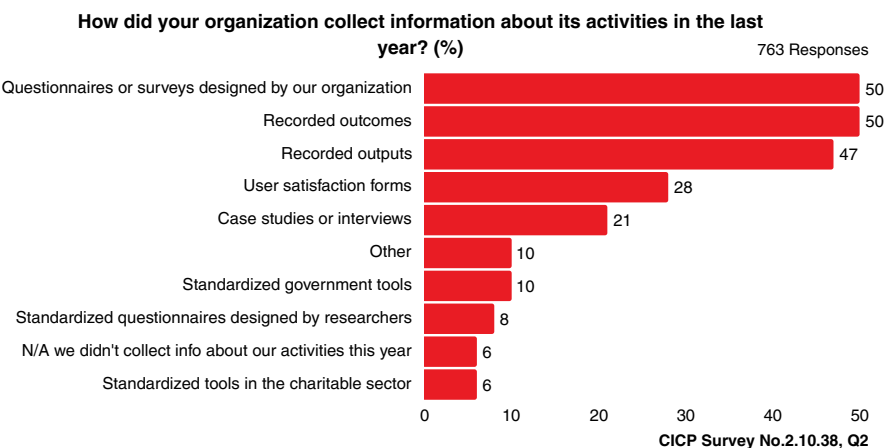
Methods of Impact Measurement
The most commonly used methods for collecting impact data include:
- **Self-developed questionnaires** (50%).
- **Outcome tracking** (50%).
- **Output tracking** (47%).

By contrast, standardized tools from external sources are far less common:
- **Government tools** (10%).
- **Researcher-developed tools** (8%).
- **Sector-wide standardized tools** (6%).

These findings align with previous research indicating that many charities develop their own measurement tools due to a lack of widely adopted sector standards (D Lasby - Imagine Canada, 2019). While customized approaches can be valuable, they may also lead to inconsistencies in data quality and comparability across organizations.

How did your organization collect information about its activities in the last year? (%)   763 Responses

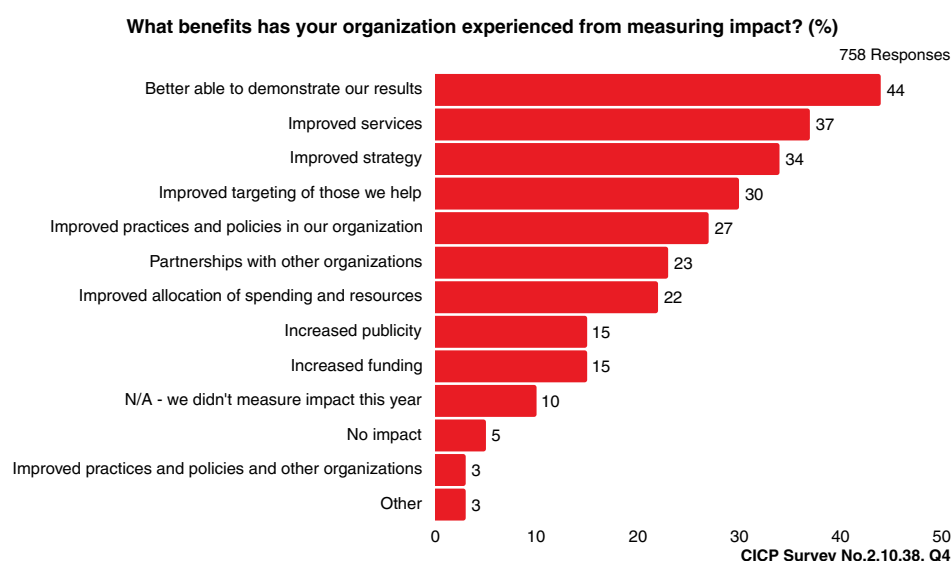|	%
Questionnaires or surveys designed by our organization	50
Recorded outcomes	50
Recorded outputs	47
User satisfaction forms	28
Case studies or interviews	21
Other	10
Standardized government tools	10
Standardized questionnaires designed by researchers	8
N/A we didn't collect info about our activities this year	6
Standardized tools in the charitable sector	6

CICP Survey No.2.10.38, Q2

The Role of Funders in Impact Measurement

As seen in our previous survey on funding requirements, funders significantly influence what charities track and report. Activity reports and impact reports are commonly requested, yet financial support for this work remains limited:

- **70%** of charities receive no dedicated funding for impact measurement.
- **19%** receive support from some of their funders.
- **Only 5%** report that most of their funders provide financial backing for impact tracking.

This disconnect—where funders require impact reporting but rarely provide resources to support it—is striking. It raises important questions about how charities can be better supported to produce high-quality, actionable impact data (D Lasby - Imagine Canada, 2019).

What benefits has your organization experienced from measuring impact? (%)

758 Responses

Benefit	Value
Better able to demonstrate our results	44
Improved services	37
Improved strategy	34
Improved targeting of those we help	30
Improved practices and policies in our organization	27
Partnerships with other organizations	23
Improved allocation of spending and resources	22
Increased publicity	15
Increased funding	15
N/A - we didn't measure impact this year	10
No impact	5
Improved practices and policies and other organizations	3
Other	3

CICP Survey No.2.10.38, Q4

Benefits of Measuring Impact

Charities that measure their impact report a range of benefits, including:

- **Stronger ability to demonstrate results** (44%).
- **Service improvements** (37%).
- **Enhanced strategic planning** (34%).
- **Better targeting of beneficiaries** (30%).

Despite these internal benefits, fewer charities report external advantages such as:

- **Increased funding** (15%).
- **Greater public visibility** (15%).

These findings suggest that impact measurement is more commonly associated with operational improvements rather than enhanced funding or public recognition. This raises the question of what differentiates organizations that successfully leverage impact data to secure more funding and visibility from those that do not.
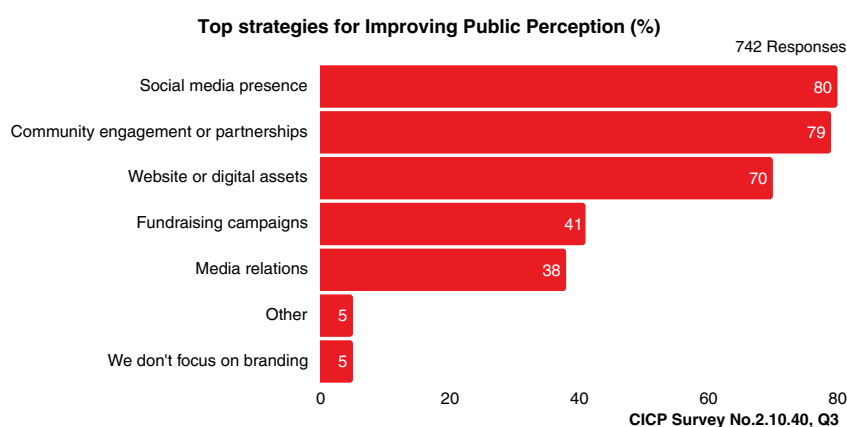
Conclusion: Our survey results confirm that impact measurement is widely practiced in the sector, though the extent and methods used vary. While charities recognize the internal benefits of tracking their impact—particularly in demonstrating results and improving services—dedicated funding for this work remains scarce. This gap raises important questions about how funders and policymakers can better support charities' evaluation efforts. If greater investment in impact measurement were available, the sector could unlock even greater benefits, both internally and in securing external support.

'Branding' & Public Perception
Exploring survey results from CICP survey no. 2.10.40

Branding is often associated with the for-profit sector, but it is equally critical for charities. A strong public image can influence engagement levels, perceptions of credibility, and access to support (CanadaHelps, 2024). Our latest survey confirms this perspective, with 83% of respondents stating that branding is either "extremely" or "very" important for them in the current funding environment.

In response, most organizations appear to be actively working to enhance their public image. However, only 19% have a dedicated branding or public image strategy, while a majority (59%) incorporate branding efforts into their broader organizational activities. Meanwhile, 8% of respondents do not see improving their public image as a priority at all.

Top strategies for Improving Public Perception (%)

742 Responses

Strategy	%
Social media presence	80
Community engagement or partnerships	79
Website or digital assets	70
Fundraising campaigns	41
Media relations	38
Other	5
We don't focus on branding	5

CICP Survey No.2.10.40, Q3

Charities appear to share common priorities when it comes to strengthening their brand. The most frequently cited approaches include developing a social media presence (80%), fostering community engagement and partnerships (79%), and leveraging websites or digital assets (70%). These findings align with research from the Blackbaud Institute, which indicates that 75% of donors research charitable causes through organizations' websites, social media channels, and charity review platforms before deciding whether or not to provide support (Blackbaud Institute, 2024, p. 4). While media relations are a less common focus (38%), their uptake suggests that many charities are employing a mix of digital and traditional branding strategies.

Branding is also widely perceived as a key factor in fundraising success. Over half (52%) of our survey respondents believe a strong public image has a major impact on their ability to attract funding, while 38% say it has some impact. However, open-ended responses reveal a range of nuanced perspectives on the challenges and complexities of branding within the charitable sector:

- *"It is not easy to build brand recognition with the general public. We budget for this, but the amounts are not sufficient to truly stand out in a very crowded media and social media landscape."*
- *"L'image publique ne se fait pas à coup de publicités ou de posts Facebook (sauf si l'on y met beaucoup d'efforts). Elle vient avec de beaux projets ayant un impact évident pour la communauté desservie."*
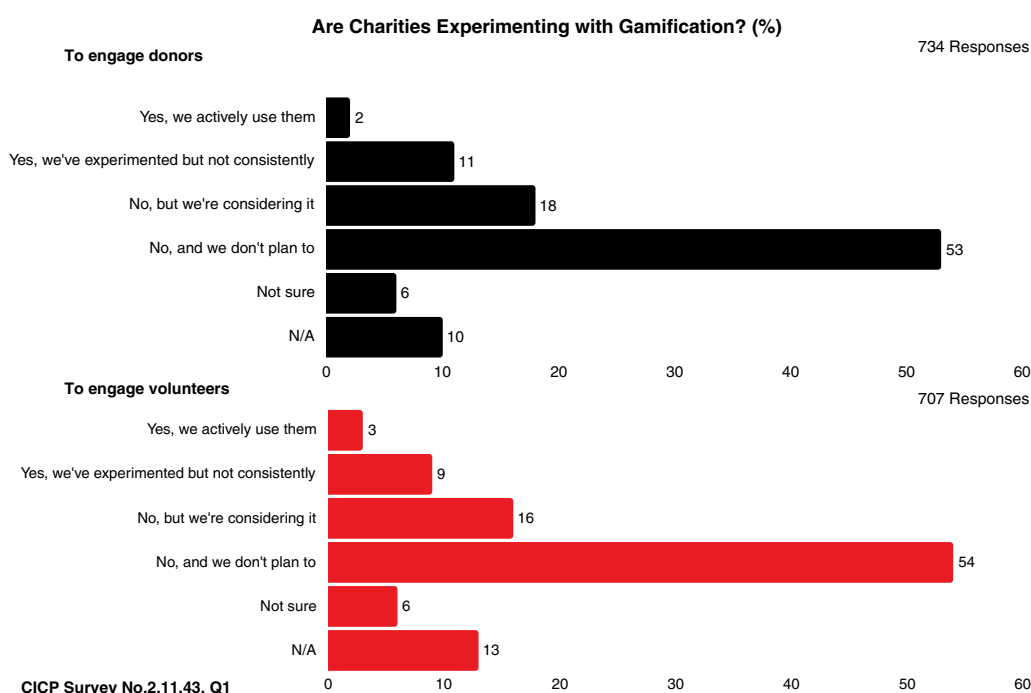
- *"We are striving to have our brand reflect the quality of service we provide. Other organizations offer similar services, but not with the same level of efficacy or accountability. Also, we serve a vulnerable population that is often stigmatized. We want our brand to counter this stigma."*
- *"Our organization is grassroots and has a small team. We are also a Black-led organization in a traditionally white space and more innovative than our rural community is used to. For all these reasons, we have to pay close attention to how our brand is perceived."*
- *"The ability to properly pursue branding is extremely difficult for smaller charities. Do you spend the funds raised on promotions, or on helping children? This is the dilemma."*

Conclusion: A majority of charities are actively working to develop their public image, using both digital platforms and community engagement to strengthen their brand. Survey results highlight widespread agreement on the importance of branding for fundraising success, yet open-ended responses underscore the diverse challenges and strategic considerations charities face. Balancing visibility with financial constraints remains a key issue, particularly for smaller organizations navigating a competitive and resource-limited sector.
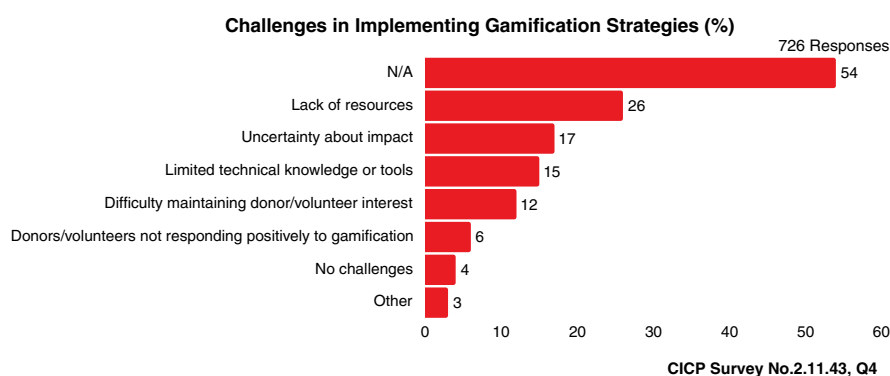

Gamification Strategies

Exploring survey results from CICP survey no. 2.11.43

Successful fundraising and volunteer engagement are core pillars for many charities—without them, program quality may suffer, and operations may slow or cease. However, many organizations have reported difficulties in one or both areas in recent years, with declining donor retention and volunteer shortages becoming increasing concerns (see CICP survey no. 2.05.15 and 2.08.30). In light of these pressures, we attempted to explore one dimension of innovation by examining charities' experiences with and perceptions of gamification strategies— being things such as reward systems, leaderboards, interactive campaigns, etc. used to engage donors and/or volunteers.

Are Charities Experimenting with Gamification? (%)

To engage donors — 734 Responses

Response	%
Yes, we actively use them	2
Yes, we've experimented but not consistently	11
No, but we're considering it	18
No, and we don't plan to	53
Not sure	6
N/A	10

To engage volunteers — 707 Responses

Response	%
Yes, we actively use them	3
Yes, we've experimented but not consistently	9
No, but we're considering it	16
No, and we don't plan to	54
Not sure	6
N/A	13

CICP Survey No.2.11.43, Q1

Among the small group of charities that have adopted gamification strategies, social sharing incentives—such as encouraging individuals to share accomplishments on social media—emerged as the most frequently used method for engaging both donors (12%) and volunteers (9%). Other strategies differ between groups: interactive fundraising campaigns are more commonly used for donor engagement (10%), while reward systems are more frequently applied to volunteers (7%).

Successful fundraising and volunteer engagement are core pillars for many charities—without them, program quality may suffer, and operations may slow or cease. However, many organizations have reported difficulties in one or both areas in recent years, with declining donor retention and volunteer shortages becoming increasing concerns (see CICP survey no. 2.05.15 and 2.08.30). In light of these pressures, we attempted to explore one dimension of innovation by examining charities' experiences with and perceptions of gamification strategies— being things such as reward systems, leaderboards, interactive campaigns, etc. used to engage donors and/or volunteers.

Challenges in Implementing Gamification Strategies (%)

726 Responses

Category	Value
N/A	54
Lack of resources	26
Uncertainty about impact	17
Limited technical knowledge or tools	15
Difficulty maintaining donor/volunteer interest	12
Donors/volunteers not responding positively to gamification	6
No challenges	4
Other	3

CICP Survey No.2.11.43, Q4

Effectiveness and Challenges

Among the 23% of our respondents who have used gamification strategies, the results of their use have been mixed:
- **Only about 8%** describe these strategies as "very successful"
- **57%** report them as "somewhat successful"
- **35%** indicate they were not successful or had minimal impact

While a majority of organizations have not considered using gamification, those who have cite several challenges that have hindered implementation:
- **Lack of resources (time, money, staff):** 26% of respondents
- **Uncertainty about potential impact:** 17%
- **Limited technical knowledge or tools:** 15%

Our findings suggest that beyond financial and human resource constraints, there are also questions about efficacy. The mixed results from organizations that have implemented gamification may reinforce hesitancy, as reflected in qualitative responses from survey participants:

- *"One part-time paid person with volunteer staff. No time for this kind of stuff, never mind the funds, people, and using such a strategy with unknown results."*
- *"It always comes down to funding! We designed a gamified volunteer program but don't have the funding for staff, services, and items in the program."*

- *"I didn't answer the success question as we have not been able to analyze data to know if increases were due to gamification strategies or other initiatives. We don't have the capacity to measure data to this level."*
- *"Would love to learn more about how others implement this concept and how they started with limited resources."*
- *"I have never heard of gamification. I will have to spend some time to investigate."*

Conclusion: Gamification strategies have yet to gain traction in the charitable sector, and data from organizations that have experimented with these techniques suggest mixed results. While most charities have seemingly not pursued gamification—and many cite resource constraints and uncertainty about effectiveness—open-ended responses indicate a latent interest in learning more. Future exploration of best practices and cost-effective models for gamification in donor and volunteer engagement may help address these concerns.

SECTION 4: OTHER EMERGING THEMES

Artificial Intelligence
Exploring survey results from CICP survey no. 2.10.39

Artificial intelligence (AI) is increasingly a focal point of competition and investment across industries, with emerging innovations reshaping work and daily life in complex and unpredictable ways. From fitness trackers and playlist recommendations to hiring practices and report writing, AI is already integrated into many aspects of modern society. However, as AI adoption accelerates, concerns around its ethical implications, development speed, and long-term societal impacts continue to grow. A March 2024 Environics study of 2,000 Canadians found that while 32% had experimented with AI tools like ChatGPT, nearly 70% were concerned that AI development could pose long-term risks to humanity (Canadians' Mixed Feelings on AI: Opportunities and Concerns, 2024). Given the charitable sector's focus on public service and community well-being, understanding how charities perceive and engage with AI is increasingly important.

Evolving Perceptions of AI in the Charitable Sector
The CICP has tracked the charitable sector's perspectives on AI over two years, revealing gradual shifts in attitudes:
- **Increased Readiness:** In 2024, 35% of charities agreed (somewhat, agree, or strongly agree) that they are prepared to use AI in their organizations, compared to 24% in 2023.
- **Recognition of AI's Sectoral Impact:** 41% of charities in 2024 agreed that AI will fundamentally change how the sector operates, up from 36% in 2023.
- **Greater Relevance of AI:** 50% of charities in 2024 disagreed with the statement "AI is not relevant to the work of our organization," compared to 44% in 2023.
- **Growing Understanding:** 32% of charities in 2024 agreed that they understand the potential applications of AI in the sector, compared to just 22% in 2023.

These trends suggest that while AI remains a relatively new concept for many organizations, there is increasing recognition of its potential applications and implications in the charitable sector.

Field	Strongly disagree	Disagree	Somewhat disagree	Neutral	Somewhat agree	Agree	Strongly agree	Not sure	N/A
I feel prepared to use Artificial Intelligence (AI) to support the work of my organization	22%	17%	12%	11%	17%	12%	6%	2%	2%
AI will fundamentally change how the charitable sector operates	5%	6%	8%	19%	20%	13%	8%	19%	1%
AI is not relevant to the work of our organization	10%	21%	19%	15%	8%	5%	7%	13%	1%
I understand well the potential applications of AI in the sector	17%	18%	13%	11%	20%	9%	3%	8%	1%

CICP Survey No.2.10.39, Q1

Perceived Benefits and Risks of AI
Despite these shifts, charities' views on AI's advantages and disadvantages have remained relatively stable between 2023 and 2024.

- **Potential Benefits of AI**
  - **AI as a Content Creation Tool:** A strong majority of charities in both years agreed that AI could support content generation for social media, websites, and email drafting (75% in 2024, up from 68% in 2023).
- **Concerns About AI's Impact**
  - **Human Decision-Making:** A majority of charities disagreed with the idea that AI would reduce the need for human intervention and decision-making in the charitable sector (61% in 2024, up from 56% in 2023).
  - **Loss of Personal Connections:** Many charities expressed concern that AI could weaken personal relationships between organizations and their communities (65% in 2024, compared to 69% in 2023).
  - **Complexity and Accessibility Issues:** A majority of charities remain concerned about AI's complexity, with 64% agreeing that AI could be too difficult to implement in their organizations, slightly down from 70% in 2023.

745 Responses

Field	Strongly disagree	Disagree	Somewhat disagree	Neutral	Somewhat agree	Agree	Strongly agree	Not Sure	N/A
AI could help charitable organizations to target more efficiently and effectively their programs and services.	3%	5%	5%	17%	22%	21%	7%	20%	1%
AI can reduce the need for human intervention and decision-making in the charitable sector.	21%	25%	15%	11%	8%	5%	1%	14%	1%
AI can help charitable organizations analyze and interpret large amounts of data more quickly and accurately.	2%	2%	2%	6%	20%	36%	22%	10%	1%
AI can help organizations in creating content for their social media posts, websites, email drafting, and more.	3%	3%	2%	8%	20%	34%	21%	9%	1%
AI could contribute to the perpetuation of bias and discrimination in the charitable sector.	2%	3%	5%	20%	13%	20%	13%	23%	2%
AI could result in the loss of personal connections between charitable organizations and the communities they serve.	2%	5%	7%	9%	14%	23%	28%	11%	1%
AI could lead to job losses or displacement of workers in the charitable sector	2%	7%	11%	13%	17%	20%	15%	14%	1%
AI could be too complex or difficult to use for smaller or less technologically advanced charitable organizations	3%	6%	8%	8%	22%	23%	19%	10%	1%
AI could pose a risk to data privacy or security for charitable organizations and their clients	1%	1%	3%	11%	17%	28%	21%	18%	1%
AI could be expensive for charitable organizations to implement	1%	4%	7%	15%	16%	21%	15%	20%	1%

CICP Survey No.2.10.39, Q2

Conclusion: Our survey results indicate small but notable shifts in how charities perceive AI, with increased recognition of its relevance and potential applications. More charities in 2024 report feeling prepared to use AI and understanding its implications compared to 2023. However, overall perceptions of AI's risks and benefits remain largely consistent. While many organizations see AI as a valuable tool for content creation, concerns persist regarding its complexity, potential impact on human connections, and its role in decision-making processes. As AI continues to evolve, ongoing dialogue and sector-specific research will be essential to help charities navigate its risks and opportunities effectively.

Impact of Environmental Emergencies

Exploring survey results from CICP survey no. 2.11.45

Note: This survey attempted to parallel research from CCVO's 2014 research study Calgary's Nonprofit Sector After The Flood

In 2024, environmental emergencies—such as wildfires, floods, and severe storms—caused devastating impacts on homes, livelihoods, and community infrastructure across Canada. In Jasper, Alberta, wildfires damaged or destroyed approximately one-third of the town's structures (Statistics Canada, 2024). Parts of Ontario and Quebec experienced severe flooding as a result of Hurricane Debby, while Calgary faced one of the most destructive hailstorms in its history. According to Statistics Canada, 2024 was on track to become the costliest year on record for catastrophic weather-related insurance payouts before the year had even ended (Statistics Canada, 2024).

To close out this year's survey series, we asked charities about their experiences with environmental emergencies in the past year to better understand how these crises have affected their operations. 10% reported that their facilities, property, or materials sustained damage due to flooding, wildfires, or another environmental emergency in the past year, while another 4% indicated that while they did not experience direct damages, they were at risk from an environmental emergency. The vast majority (86%) reported neither damages nor risk exposure in 2024.

Funding Recovery Efforts

For organizations that incurred losses, a combination of funding sources was used to cover the costs. The most common sources were:
- **Organizational financial reserves** (40%)
- **Insurance payouts** (39%)

While a relatively small proportion of charities experienced direct losses, their reliance on internal financial reserves and insurance highlights important considerations for sector-wide preparedness. Less commonly, some organizations turned to individual donations, government funding, corporate support, or foundation grants to recover. Notably, 14% of affected charities did not have the necessary funds to cover their losses, raising concerns about financial resilience in the face of future disasters.

Has your organization experienced additional costs associated with flooding, wildfires, or other environmental emergencies in the last year?

	701 Responses
N/A – Our organization has not been affected by flooding, wildfires, or other environmental emergencies in the last year	76%
Increased insurance premiums	8%
Repairs or maintenance related to emergency preparedness	7%
Loss of revenue due to disruptions	6%
Purchase of emergency supplies or equipment	5%
Assisted other organizations affected by and/or responding to the emergency	4%
Temporary relocation of staff or operations	4%
Increased demand for our services or activities	3%
Increased communications or public relations efforts	3%
Other (please specify):	3%
Not sure	3%
Expanded our mandate to assist in providing emergency response services or activities	2%
Legal or compliance-related expenses	1%

CICP Survey No.2.11.45, Q3

Indirect Financial Burdens

Most organizations (76%) reported that environmental emergencies did not result in additional costs beyond direct damages. However, for those that did, the financial impact varied:

- **Increased insurance premiums** (8%)
- **Repair or maintenance costs** (7%)
- **Loss of revenue due to service disruptions** (6%)
- **Purchase of emergency supplies** (5%)
- **Legal or compliance-related costs** (1%)

Additionally, very few charities reported incurring costs related to expanding their services to include emergency response efforts. These findings suggest that, while direct damages were relatively rare, some organizations are facing indirect financial pressures due to climate-related disasters.

704 Responses

Field	Agree	Disagree	Neither agree nor disagree	Not sure	N/A
We have a plan to operate out of another facility if forced to evacuate due to an environmental emergency.	25%	46%	8%	5%	16%
We have copies of vital records stored in a safe location.	59%	24%	7%	6%	4%
We have plans in place in case key staff and/or volunteers cannot perform their roles as a result of an environmental emergency.	31%	37%	14%	6%	11%
Staff and volunteers in my organization understand their roles in the event of an environmental emergency.	27%	34%	15%	12%	12%
Staff and volunteers with key roles in an environmental emergency have received the training they need to perform those roles.	18%	44%	12%	7%	18%

CICP Survey No.2.11.45, Q4

Gaps in Preparedness

Given that most respondents were not directly impacted by environmental emergencies this year, it is perhaps unsurprising that preparedness levels among charities are mixed. Our survey revealed several critical gaps:

- **46%** do not have a plan to operate out of an alternate facility in case of evacuation.
- **24%** do not store vital records in a safe location.
- **37%** lack a plan for staff or volunteer absenteeism due to an environmental emergency.
- **34%** report that staff and volunteers are unclear on their roles in the event of an emergency.
- **44%** indicate that key personnel lack the necessary training to fulfill emergency response roles.

While risk exposure varies across charities, these findings suggest a general need for improved contingency planning and training. Given that climate change is projected to "increase the frequency, intensity, and duration of extreme weather events" (Government of Canada, 2024), ensuring that charities are prepared for potential disruptions is increasingly vital. Even organizations that are not directly affected may play a critical role in supporting communities through emergency response and recovery efforts.

Conclusion: Most charities were fortunate to avoid direct impacts from environmental emergencies in 2024, which may explain some of the preparedness gaps identified in this survey. However, with climate-related disasters becoming more frequent and severe, strengthening readiness measures—such as contingency planning, staff training, and financial resilience—will be increasingly important. Enhancing preparedness not only protects the continuity of charitable operations but also enables organizations to provide crucial support to affected communities in times of crisis.

SECTION 5: COLLABORATION

Charity 'Co-opetition' (Cooperative Competition)
Exploring survey results from CICP survey no. 2.10.41

In an environment where resources such as funding are often in short supply, and where collaboration can be a key strategy for success, we examined how charities navigate the balance between competition and cooperation. As a starting point, we asked charities if they engage in both competition and collaboration, or 'co-opetition', with other organizations and received mixed results:

- **Yes, frequently:** 21%
- **Yes, occasionally:** 36%
- **No, we compete but do not collaborate:** 3%
- **No, we collaborate but do not compete:** 27%
- **No, we neither compete nor collaborate:** 12%

Our findings indicate that a majority of charities (57%) engage in both competition and collaboration. Notably, more organizations lean toward collaboration, with 27% reporting they collaborate without competing, while only 3% say they compete without collaborating.

In which areas does your organization collaborate with other charities despite competing for funding or other resources? (%)

752 Responses

Area	%
Sharing best practices or knowledge	61
Program delivery or service provision	54
Advocacy initiatives	38
Fundraising campaigns	31
Joint research	18
Shared services (IT, admin)	16
Other	8
N/A	7
We don't collaborate with others	7

CICP Survey No.2.10.41, Q2

Areas of Collaboration

Despite competing for limited resources, charities report working together in various ways. The four most commonly cited areas of collaboration include:

- **Sharing best practices or knowledge** (61%)
- **Program delivery or service provision** (54%)
- **Advocacy initiatives** (38%)
- **Event planning or fundraising campaigns** (31%)

These results suggest that competition does not significantly deter charities from cooperating in ways that enhance sector-wide effectiveness, including fundraising efforts.

Challenges in Balancing Competition and Collaboration

While many charities have embraced a co-opetition model, it is not without difficulties. The most frequently reported challenges include:

- **Tension over limited funding/resources** (21%)
- **Differing organizational priorities or goals** (16%)
- **Lack of trust or transparency** (8%)

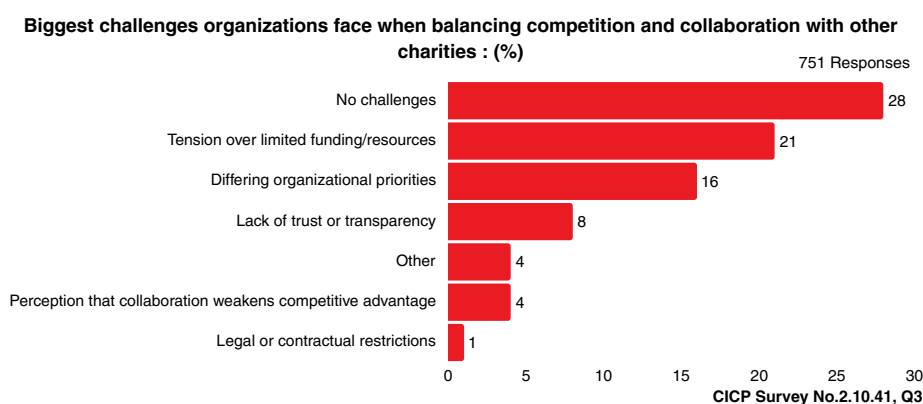- **Concerns that collaboration weakens competitive advantage** (4%)

Interestingly, nearly **three in ten respondents (28%)** indicated that they do not experience challenges balancing competition and collaboration, suggesting that many organizations have found effective strategies for managing these dynamics.

Future Outlook on Collaboration

Looking ahead, there is no clear consensus among charities about how co-opetition will evolve:

- **39%** anticipate more opportunities for collaboration.
- **25%** believe collaboration levels will remain the same.
- **15%** expect collaboration to decrease as competition intensifies.
- **20%** are uncertain about future trends.

The mixed outlook underscores the uncertainty surrounding funding availability and sector-wide changes that may impact collaboration strategies in the coming years.

Biggest challenges organizations face when balancing competition and collaboration with other charities : (%)

751 Responses

Challenge	Value
No challenges	28
Tension over limited funding/resources	21
Differing organizational priorities	16
Lack of trust or transparency	8
Other	4
Perception that collaboration weakens competitive advantage	4
Legal or contractual restrictions	1

CICP Survey No.2.10.41, Q3

Conclusion: Our survey results highlight that while competition for resources is a reality, collaboration remains a widely valued strategy among charities. Despite challenges such as funding constraints and differing priorities, many organizations actively engage in co-opetition and have found ways to balance these dynamics. Encouragingly, charities continue to work together across key areas such as knowledge sharing, service delivery, and advocacy, reinforcing the sector's commitment to collective impact.

Sector Collaboration & Unification

Exploring survey results from CICP survey no. 2.11.44

While predictions about the future of charity collaboration remain mixed (see CICP survey no. 2.10.41), a vast majority of our survey respondents (79%) believe that increased collaboration among charities in their region would improve outcomes for the communities they serve. Respondents cited several reasons for this perspective, emphasizing increased visibility, resource-sharing, and efficiency gains:

However, not all charities are certain about the benefits of greater collaboration. Fourteen percent of our respondents indicated that they were unsure, often citing concerns about resource constraints, the administrative burden of partnerships, or existing collaborative efforts:

- *"I don't know if each charity has the capacity or resources to figure out new ways of working."*
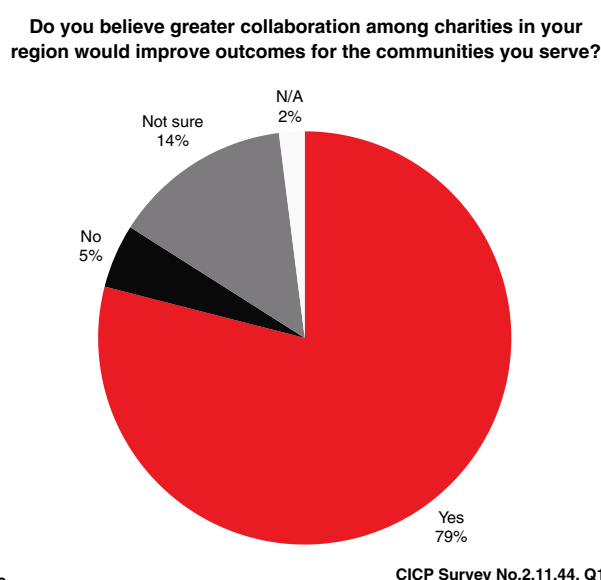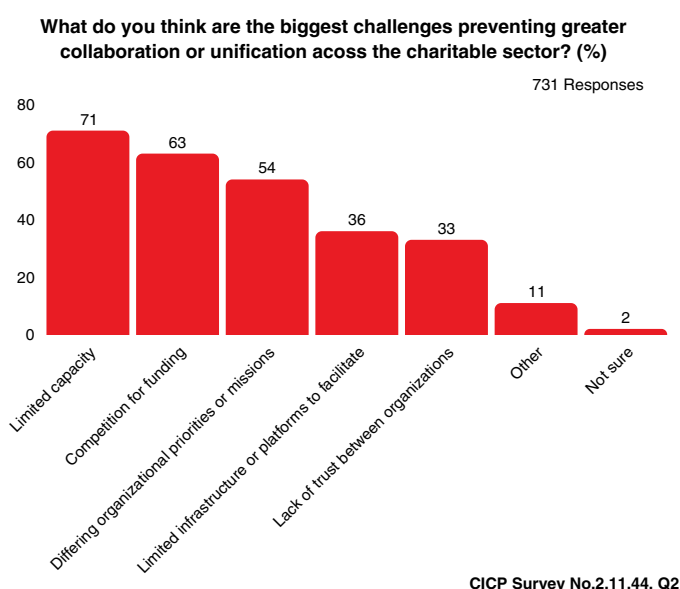- *"Collaborations are a lot of work."*

- *"There is already a solid group of charities in this region that collaborate with each other."*
- *"Je pense que nous avons déjà une bonne collaboration entre organismes communautaires. Le problème, c'est le CISSS qui arrive avec des projets en silo qui vient parfois dédoubler nos missions ou nos services. Il devrait mieux soutenir nos missions au lieu de les dédoubler."*

Barriers to Greater Collaboration

Despite broad support for increased collaboration, respondents identified several significant challenges. The most frequently cited barriers include:

- **Limited time or staff capacity** (71%)
- **Competition for funding** (63%)
- **Differing organizational priorities or missions** (54%)

These results suggest that while collaboration is desirable, it requires dedicated time and effort—resources that many organizations already struggle to allocate. Additionally, competition for funding remains a persistent obstacle, as organizations may be wary of forming partnerships that could dilute their access to financial support.

What do you think are the biggest challenges preventing greater collaboration or unification acoss the charitable sector? (%)

731 Responses

Category	%
Limited capacity	71
Competition for funding	63
Differing organizational priorities or missions	54
Limited infrastructure or platforms to facilitate	36
Lack of trust between organizations	33
Other	11
Not sure	2

CICP Survey No.2.11.44, Q2

Do you believe greater collaboration among charities in your region would improve outcomes for the communities you serve?

Response	%
Yes	79%
Not sure	14%
No	5%
N/A	2%

CICP Survey No.2.11.44, Q1

Perspectives on Sector-Wide Standards

Beyond local collaboration, our survey explored attitudes toward broader unification within the sector. A majority (55%) of respondents expressed support for sector-wide standards or certifications, another 36% remained neutral or unsure, while only 9% disagreed or strongly disagreed. Respondents suggested various areas that could benefit from standardization, with common themes including equity, diversity, and inclusion (EDI), ethics, funding practices, staff compensation, and workplace conditions:

- "Salary and workplace standards."
- "EDI, trauma-informed approaches."
- "Standards for staff and volunteers."
- "Salaries and benefits standards would level the playing field for staff recruitment and retention and allow for organizations to share staff and collaborate more."
- "Ethical conduct, sector-specific standards."
- "Le financement."

Potential for a National Collaboration Initiative

When asked how they would respond to a national-level initiative aimed at strengthening collaboration and unification across the charitable sector, responses were largely positive:

- **30%** of respondents indicated they would enthusiastically participate.
- **53%** stated they would participate cautiously with reservations.
- **Only 7%** said they would not participate.
- **Just 2%** reported they would actively oppose such an effort.

These findings suggest that while there is potential for widespread participation in a sector-wide collaboration initiative, engagement levels would likely depend on the specific structure and perceived benefits of such an initiative.

Conclusion: In line with previous findings on cooperative competition (survey 2.10.41), our results indicate that many charities recognize the benefits of increased collaboration, despite the challenges involved. While limited resources, funding competition, and differing organizational priorities present barriers, the interest in collaboration remains strong. Additionally, a majority of respondents see value in sector-wide standards or certifications, suggesting that standardization could serve as a focal point for unifying efforts across the charitable sector.

Conclusion

Our survey findings reveal a sector that is both resilient and adaptive, navigating complex challenges while seeking innovative solutions to enhance impact and sustainability. While competition for funding is a persistent concern, collaboration continues to be a strategic approach for many charities, whether through knowledge sharing, joint service delivery, or advocacy efforts. Encouragingly, despite resource constraints, many organizations remain open to sector-wide initiatives aimed at increasing standardization and unification.

The role of branding and public perception is becoming increasingly significant as charities operate in a competitive funding environment. Organizations are recognizing the need to differentiate themselves while maintaining public trust. Similarly, impact measurement is a growing priority, with charities striving to demonstrate their effectiveness to donors and stakeholders, even as they face challenges in securing resources for this work.

Looking ahead, the sector is likely to see continued shifts in how charities approach funding, collaboration, and donor engagement. Non-financial donor support, in particular, may become an increasingly important resource for organizations seeking to diversify their contributions beyond traditional monetary donations. Likewise, the future of sector collaboration remains uncertain, with some organizations predicting greater unity while others anticipate ongoing competition for limited resources.

Ultimately, our findings from this quarter underscore the need for continued dialogue, strategic adaptation, and sector-wide support systems to help charities navigate evolving dynamics. By leveraging insights from ongoing research, organizations can make informed decisions that strengthen their resilience and ensure they continue to serve their communities effectively in the years ahead.

Looking Ahead

We hope the research findings presented here provide policymakers, funders and other stakeholders within the charitable sector with valuable insights to inform decision-making, guide resource allocation, and inspire collaborative action. We also hope charities can use this data to strengthen their advocacy work and their needs claims with communities, donors and policymakers.

As we conclude our second researching year, we would like to extend our gratitude to all the charitable organizations who have and who are currently participating in our surveys and contributing their valuable insights and experiences. We would also like to acknowledge and express appreciation to our stakeholders, partners and Advisory Committee members for their support and collaboration throughout the research process.

If there are questions you would like us to ask in future surveys, please email them to us at CICP.Research@carleton.ca. We cannot guarantee their inclusion, but they will be given our full attention. Contact us at the following email address and follow us on our socials for more information:

Email: CICP.Research@carleton.ca
Website: https://carleton.ca/cicp-pcpob/
Newsletter sign up: https://confirmsubscription.com/h/t/3D0A2E268835E2F4
Follow us on LinkedIn: https://www.linkedin.com/company/cicp-pcpob/

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APPENDIX: Methodology

The participants in this study were recruited using randomized lists created with publicly available T3010 data (2021), administered by the Canada Revenue Agency (CRA) https://www.canada.ca/en/revenue-agency.html. T3010 data was downloaded and sorted into sample lists. No data was altered from its original state. Our lists were produced as copies of an official work published by the Government of Canada and were not endorsed by, or produced in affiliation with, the Government of Canada.

This year, we partnered with the Survey Research Centre at the University of Waterloo to create our initial sample lists. As a team, we felt it was good practice to have a third party draw our randomized samples. From the initial population of roughly 85,000 Canadian registered charities in 2021, we decided to exclude some organizations from the study. As we continue to study the whole population of registered charities, we hope that subsequent years will include more organizations.

The principal exclusions we discussed as a team from the T3010 dataset included: religious organizations associated with a specific denomination or place of worship (with some exceptions), hospitals, and schools. While the entire panel includes roughly 1,000 registered charities across the country, we also were mindful of creating seven subsamples to help us study specific groups with our final population of organizations. We opted for this strategy after our pilot study in June and July 2022 revealed important challenges in recruiting some strata of the population of registered charities after our initial exclusions. The full methodological details will be discussed in the white paper for this study (currently in preparation). In addition to excluding religious organizations, hospitals, and schools, we decided to constitute our panel as follows:

The final sampling frame for this year's study included the whole population of registered charities that –
- Were designated as charities (type C in the T3010 form, thus excluding public and private foundations (type A and B).
- Had at least 1 full time employee (FTE) based on their T3010 form data.
- Had expenditures greater than $1 on their 2021 T3010 to make sure we focus on active charities.

Based on these criteria, the sampling frame was roughly 32,000. We drew a randomized list of all the organizations left and recruited a panel of roughly 1,100 participants. We refer to that first sample as the "main sample." However, given our interest in specific subgroups of Canadian registered charities and in consultation with the sampling experts at UWaterloo, we created a series of sub-samples that would allow us to study some groups that proved problematic to recruit in our pilot phase.

The following sub-sample categories were created to include some of these hard-to-reach populations. In future years of the project, we will investigate further some of these subgroups and develop strategies to improve our recruitment efforts. These subsamples (SS) are as follows:

1. **Subsample 1 (SS1):** Includes only charities with the designation A and B (public and private foundations) that had expenditures of at least $1 in 2021. (N=947)
2. **Subsample 2 (SS2):** Includes only charities with the designation C (charities) that have no full-time employee (FTE) or that left the field blank and that had expenditures of at least $1 in 2021. These are what we think of as volunteer run organizations. (N=3,053)
3. **Subsample 3 (SS3):** Includes all charities designated as C (charities) with at least one full time employee in the province of British Columbia and that had expenditures of at least $1 in 2021. (N=1,940)
4. **Subsample 4 (SS4):** Includes designation C charities with at least 1 FTE, $1 in expenditures in 2021 ensuring representation from all geographical regions of the country. (N=14,333)
5. **Subsample 5 (SS5):** Includes designation C charities with at least 1 FTE, $1 in expenditures in 2021 ensuring representation from the province of Québec. (N=4,515)
6. **Subsample 6 (SS6):** Includes designation C charities with at least 1 FTE, $1 in expenditures in 2021 that have spent at least $1 internationally. (N=795)
7. **Subsample 7 (SS7):** Includes designation C charities with at least 1 FTE, $1 in expenditures in 2021 and that is committed to the advancement of religion (category codes 0030, 0040, 0050, 0060, 0070, 0080, 0090). (N=13,935)

Each of the above lists was assigned a separate randomized number using the ranuni() function and then sorted by that number to scramble them.

As of August 20th, we had a panel of 1,045 subscribed panellists. Participant recruitment was conducted via e-mail, and phone calling. All panellists have filled in a panellist information form. The data collected through these forms is then collated with existing CRA T3010 data to provide a more robust overall picture of panellist/organizational information. In addition to confirming their contact information, we ask them to give us greater details on their organization's human resources.

Questions are currently being developed by the CICP core team (Raggo and Mathieson). We are in the process of establishing an advisory board to help us respond to the needs of the communities and make sure the project captures emerging trends. Advisory board members will be recruited from various organizations representing the charitable sector in Canada.

Project surveys are distributed weekly on Wednesday mornings (6am Eastern Time). Panellists are given an initial response period of 24 hours. Reminder emails are sent 24 hours after the initial survey has been distributed (Thursday morning), providing panellists with an additional 24 hours to respond. Weekly reports are published on the CICP website every Friday morning, providing initial graphs and descriptive findings for the week's questions. The monthly reports and research papers will provide more details on the trends observed and deeper analyses of the data collected.

More technical information will soon be available on our website, including the full downloadable data tables for December 2022 – now. We will share programing codes used to create our samples, analyses (when available), and research papers as we continue to develop the project. We are committed to collaborative, transparent, and accessible research. We welcome researchers interested in collaborating with our team.