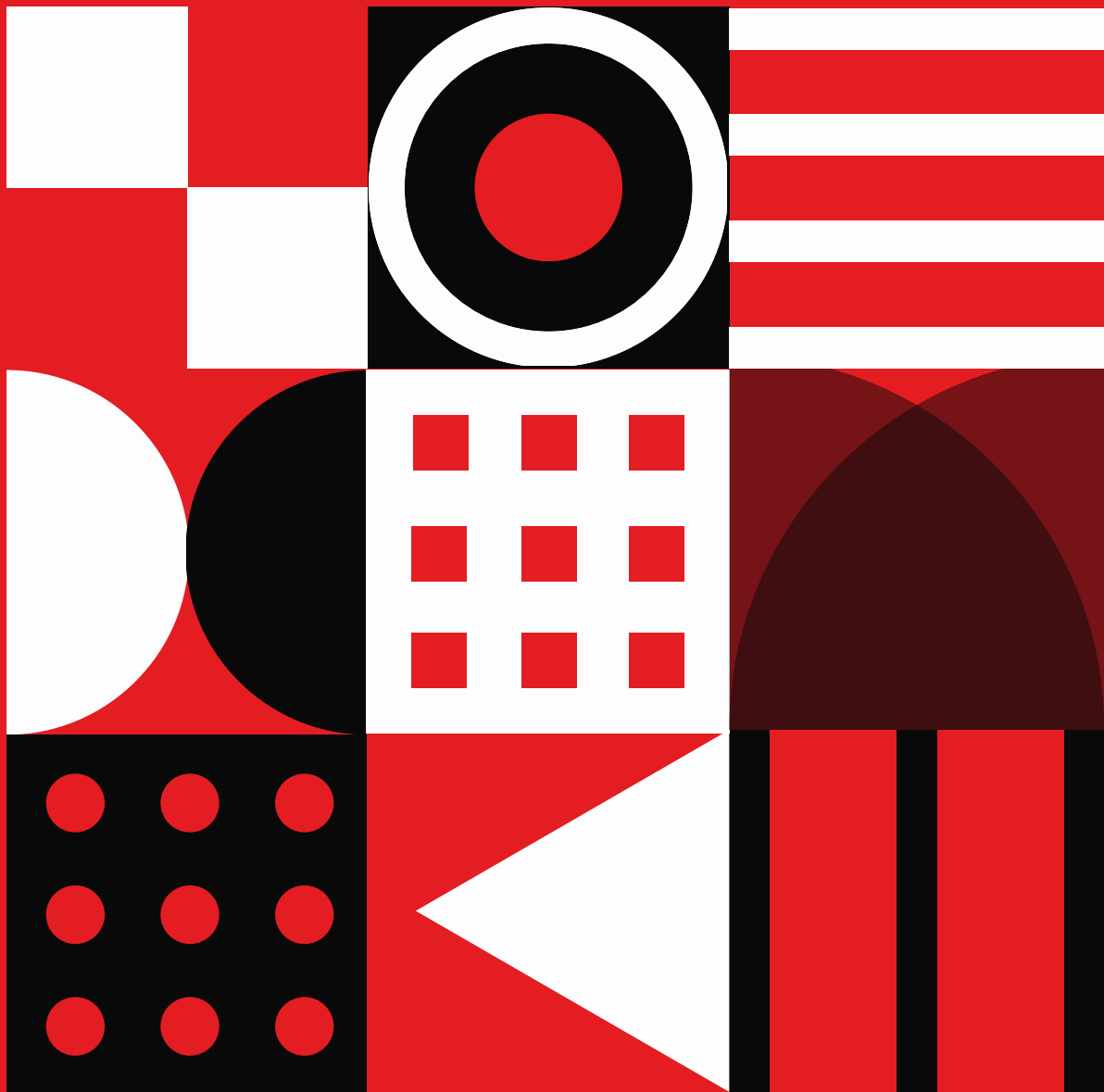


*Charity Insights Canada
Project (CICP)*



State of the Canadian Charitable Sector

Mid-Year
Report
2023



Charity Insights Canada Project Mid-Year Report 2023

December 2022 - June 2023

The Charity Insights Canada Project's (CICP) 2023 Mid-Year Report presents a comprehensive overview of the state of Canada's nonprofit and charitable sector. Based on weekly surveys conducted from December 2022 to June 2023, this report provides a detailed exploration of the dynamic landscape facing Canada's charitable sector. In a rapidly changing environment marked by evolving funding dynamics, heightened expectations for equity and inclusion, and emerging technological challenges, charities are adapting and innovating to fulfill their critical missions. This report delves into key areas such as governance, leadership, funding, policy concerns, and the incorporation of new technologies like Artificial Intelligence (AI). One central theme emerges throughout the data: charities play an indispensable role in Canadian society, serving as critical agents of change and community support. While challenges are apparent, from the imperative of diversifying funding sources to the need for enhanced digital literacy, this report also highlights the sector's resilience and dedication to making a positive impact. By addressing these issues, the charitable sector can continue its essential work and contribute to shaping a more equitable and just society for all Canadians. The data collected by this project so far, offers a glimpse into the complex and dynamic world of Canada's charitable organizations.

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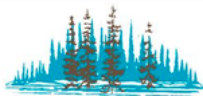
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Overview of the CICP

The Canadian charitable sector employs more than 10% of the country's full-time workforce and accounts for 8.3% of the country's GDP.[1] However, there is a lack of accurate and up-to-date information about the sector. The CICP aims to support ongoing data efforts across the country, amplify the voices of practitioners, and serve as a valuable resource for researchers, nonprofit advocates, policymakers, and other stakeholders. Through a range of tools, including short weekly surveys, reports, an online community education centre, and a yearly data summit, we aim to provide a comprehensive overview of the trends, challenges, and opportunities currently facing the sector.

The CICP has three fundamental goals:

- To **inform** sector stakeholders and researchers by regularly surveying a representative sample of registered charities - collecting longitudinal data on critical aspects of the charitable sector;
- To **build** a lasting and flexible infrastructure to promote access to and understanding of the data collected about the sector;
- To **strengthen** relationships between the sector and policymakers in designing evidence-based policies on issues impacting the charitable sector.

We are committed to a systems-oriented and purposeful approach to closing the information gap about registered charities in Canada. We seek to amplify voices from the sector, particularly those from underserved communities. We aim to listen, learn, and improve data practices, including our own, while acknowledging our biases and limitations.

Each week, we send a short survey to a panel of roughly one thousand registered charities nationwide. Panel participants were randomly selected from the CRA registry and recruited via phone, email, and mail. Panellists from organizations differing in size and scope, sectors of activity, and geographic locations have graciously agreed to remain, anonymously, on the panel for a year. Survey results are published 48 hours after their initial distribution. We publish weekly reports on our website (<https://carleton.ca/cicp-pcpob>) and send a weekly newsletter with the latest survey reports. We delve more deeply into our findings when preparing our monthly and quarterly reports.

The transformational investment by the Alberta-based Muttart Foundation, the Lawson Foundation and Metcalf Foundation in Ontario, the Vancouver Foundation in British Columbia, an anonymous donor, and Carleton University has made this project possible.

1 CanadaHelps. (2022). The Giving Report 2022: Giving at a Crossroads.

Executive Summary

The CICP's 2023 Mid-Year Report summarizes insights from short, weekly surveys distributed to a panel of registered charities (including a small sub-sample of public and private foundations) across Canada, distributed between December 2022 and June 2023.

This report offers a comprehensive analysis of the current landscape of Canada's charitable sector, providing insight into the challenges and opportunities it faces in a time of profound transformation. Spanning eight key sections, this report explores critical areas such as governance, equity, diversity, and inclusion (EDI), funding, and the impacts of emerging technologies like Artificial Intelligence (AI) on the sector. In an era of unprecedented change and challenges, the sector stands at the forefront of ongoing social and economic transformations.

Across the sector, charities are seeing rises in demand and increases in costs associated with their services. These pressures are not only posing financial difficulties for organizations, but they are also impacting organizations' abilities to support and retain personnel. Volunteer recruitment and retention rates are down since the beginning of the COVID-19 pandemic, and organizations have observed increases in mental health challenges amongst their staff. Factors like burn-out and inadequate remuneration and benefits are current leading causes for employee turnover within the sector, begging questions on what changes can be made within governance and management initiatives to ensure a strong and satisfied work force in the sector.

Furthermore, this report underscores the significance of EDI within the sector. Charitable organizations are increasingly embracing EDI initiatives, striving to realize representative demographics within their workplaces. The report reveals certain disparities, particularly in gender representation, underscoring the necessity for heightened awareness and targeted action in specific leadership roles.

Policy considerations remain pivotal, with charitable organizations advocating for greater access to government funding and policies conducive to the sector's growth. Organizations in the sector are actively forming coalitions and establishing relationships with government officials to strengthen their advocacy efforts. Additionally, charities are displaying a keen interest in emerging technologies, notably Artificial AI, while concurrently expressing the need for increased educational opportunities and seamless integration of AI into their operations.

In the midst of these and other challenges, the Canadian charitable sector's unwavering resilience and adaptability shine through, driven by its steadfast commitment to fostering a -

more equitable and just society for all Canadians. This report ties together the data contributed by hundreds of registered charities across Canada to provide a narrative account of the charitable sector's current state, including the challenges it faces and the potential opportunities that lay ahead.

1. Emerging Trends for the Sector in 2023

In 2023, registered charities across Canada have found themselves navigating unprecedented challenges. Many organizations have not yet recovered from problems that arose during the COVID-19 pandemic and that have been made worse by inflation, high interest rates and related economic difficulties. Six months of surveys conducted by the CICP reveal three concerning trends, described below.

1.1 Substantial Financial Challenges

“With the drastic increase of the cost of living, there will be more demands on our organization to provide more staples. With higher demands and decreased donations, this will be problematic.” -- CICP survey respondent

Many charities across Canada are struggling to meet increasing demands for their services while experiencing significant constraints on their existing resources. For nearly 50% of survey respondents, inflation has led to an “increase” or “major increase” in demand for services in their communities, and for 60% of respondents, inflation has raised the costs of providing those services (Figure 1). These results reflect recent findings from CanadaHelps: the sector has seen a 54.4% increase in demand for services, while 79.7% of charities are facing increased costs for delivery of those services (CanadaHelps, 2023).

61% of respondents believe their financial health will “remain about the same” in 2023, while 20% expect it to improve and 16% predict it will worsen (Figure 2).

Survey respondents report varying experiences when it comes to changes in revenues to their organizations in recent years. Across a range of areas, such as “event-based fundraising,” “earned income,” “individual giving,” and more, 40% to 60% of respondents report seeing “no change” in revenue in the six months prior to responding to the survey (Figure 3). However, 16% to 40% of respondents have seen a decrease across revenue areas in recent years, and 20% to 33% have seen increases. These variations across organizational experiences beg further analysis. For now, however, most respondents agree that “funding and economic concerns” are the primary trend or issue that the sector should be paying attention to in the year ahead (Figure 4).

“Unable to afford staff wages to increase services provided. Have the staff but no funding to increase their hours to accommodate the increase in requested services.” -- CICP survey respondent

1.2 Addressing Staff & Volunteer Crises, Including Mental Health Challenges

In addition to financial difficulties related to service demand and delivery, other problems have emerged within the sector. The recruitment and retention of staff, along with broader human resources (HR) issues, have consistently appeared as among some of the most pressing worries for charities (as depicted in Figure 4, Figure 5, and Figure 6). These issues have persisted from problems that flared during the COVID-19 pandemic: respondents report that “staff burnout and turnover” and “challenges in volunteer recruitment and retention” were among the worst effects of the pandemic on their organizations (Figure 7). The volunteer part of this is important as 83% of respondents report that they work with volunteers (Figure 8). Nearly 60% of respondents say they lost volunteers due to the pandemic and now face challenges in volunteer recruitment (Figure 9), and 63% indicate that fundraising and events have been negatively affected by volunteer-related changes (Figure 10).

While turnover rates among employees, volunteers and board members over the past year appear to be relatively low (at least 50% of respondents report turnover as being 10% or less within each of these groups), there are still at least a quarter of organizations reporting turnover rates of 21% to 80%+ within employees and volunteers (Figure 11). To put that data in perspective, consider that there are nearly 84,000 registered charities in Canada and that approximately 21,000 of them are facing troubles in terms of retaining personnel.

Finding solutions to these HR strains seems to be no simple task. Many charities are planning to grow their teams, with 44% of respondents saying they plan to fill at least one position in the near future (Figure 12). However, they face challenges: 44% of organizations say the main reason for employee turnover within their organization is “remuneration and benefits” (Figure 13), and 50% of organizations identify being “unable to meet competitive salaries/benefits” as a primary hiring constraint (Figure 6). This HR crisis echoes earlier research about factors affecting recruitment, research about insufficient salary offerings, lack of candidates with relevant experience, budgetary constraints, and competition from for-profit organizations and government agencies (HR Council for the Nonprofit Sector, 2008 & 2012; Ontario Nonprofit Network, 2022).

When navigating HR challenges in the sector, nonprofits and charities need to articulate their added value in the labour market. While competitive compensation may be challenging to achieve, there is room to emphasize comparative advantages in other realms, including in providing benefits such as a good organizational culture, flexible work hours and scheduling, offering a good work-life balance, and more (Figure 14). Could there be a shift where benefits and work culture take precedence over traditional compensation packages? It is crucial for charities to revisit their HR strategies, placing a premium on organizational culture, work flexibility and balance, in order to remain competitive in today's employment landscape.

“...Many entry level employees can earn more in other sectors with less stress/responsibility. As a funded facility, we have limited ability to increase wages without governmental support.” -- CICP survey respondent

<< ...la culture organisationnelle veut que chaque personne puisse travailler dans une approche métadisciplinaire. Certaines personnes, habituées de travailler dans une approche où les disciplines sont segmentées, peuvent avoir de la difficulté à se joindre à l'équipe. >> -- CICP survey respondent

Adding to the gravity of these HR challenges are mounting mental health concerns within the sector. When charities are asked about noticeable changes in mental health challenges faced by their staff, personnel, or volunteers in recent years, 74% report major to minor increases (Figure 15). Staff burnout has long been a top concern in the charitable sector – and still is today (CanadaHelps, 2023). More than any other option provided, respondents indicated that staff burnout and turnover have been some of the greatest lasting effects of the COVID-19 pandemic for their organization (Figure 7). 63% of respondents say that “increased workload” is the main factor contributing to mental health challenges within their organizations (Figure 16).

Mental health in the sector needs to be understood as a priority that requires investment -- to not only improve productivity and sustainability in the sector, but also to support the overall well-being of the 2.5 million people working within it.

1.3 Limited Preparedness for Climate Change

Climate change and climate disasters, such as extreme floods, wildfires, smoke, and storms, continue to pose serious concerns for Canadians. However, a striking 78% of charities within the country do not have an internal policy or strategy pertaining to climate change (Figure 17). The primary reasons cited for this omission are “not applicable to our mission” and “other organizational priorities at the moment” (Figure 18). It is possible this could change, given the spike in media coverage about climate change and hints that funders plan to direct greater attention and financing to climate-change-related initiatives (Canadian Philanthropy Commitment on Climate Change 2023).

In any case, environmental issues could present many challenges to charities across Canada, and the lack of preparedness among three quarters of these organizations will play out in the coming years.

2. Collaboration

2.1 Strong Government-to-Charity Funding and Collaboration

Charities in Canada collaborate considerably with various levels of government, as evident from the results depicted in Figure 19. Moreover, approximately 72% of organizations rate their collaborations with government as being either “very effective” or “effective” (Figure 20). When asked what changes government can implement to better support the growth and sustainability of the charitable sector in Canada, 64% of respondents indicated “greater access to government funding” (Figure 21).

In short, collaborations with government have yielded results – and charities want more of them. Approximately 33% of respondents report that their government funding increased in the six months before the survey (Figure 3), and 73% indicate that “government grants” will be an important element of their revenue/funding structure in the coming years (Figure 22). Other researchers have reported that government funding to charities is increasing in Canada, compared to decreases in corporate, individual, and charity-to-charity gifts (CanadaHelps, 2023). Questions of access and transparency in how government funds are allocated are important and are areas which our project aims to study in greater detail in the coming months.

2.2 Extensive Collaboration Within the Charitable Sector

There is a noteworthy pattern of collaboration across the charitable sector in Canada that expands beyond charity-to-government relations. Approximately 95% of respondents report collaborating with other registered charities, while 87% report collaborating with nonprofit organizations (those that are not registered charities) (Figure 19). These charity-to-charity and charity-to-nonprofit partnerships are generally regarded as being either “very effective” or “effective” (see Figure 20).

Collaborations with for-profit organizations, on the other hand, fall somewhat short. Survey respondents say such collaborations are slightly less effective than others, which could explain why 20% of respondents report “never” collaborating with for-profit organizations (Figure 19). As charities explore new funding sources and models to share resources, private-sector collaborations arguably remain underexplored, or perhaps 20% choose to not collaborate with these entities due to past shortcomings or failures.

When asked what could have the biggest impact on the charitable sector in the next few years, respondents prioritize “greater emphasis on cross-sector partnerships and collaborations” (Figure 23). This great emphasis on collaboration across the sector could be in part due to the COVID-19 pandemic. When asked how the pandemic has impacted the way that a respondent’s organization achieves or plans to achieve its mission and goals, 27% of respondents indicate that it has increased their organization’s focus and efforts on “collaboration and partnerships” (Figure 24). Whether due to the pandemic or not, charities are clearly motivated to enhance the effectiveness and reach of their work: respondents place considerable importance on achieving greater impact (77%) and improving services (75%) (Figure 25).

2.3 Identifying Collaborators and Maintaining Strong Relationships

How are organizations identifying new partners/collaborators? Most respondents seem to take a passive approach to identifying their collaborators. Figure 26 shows that 77% of respondents identify potential partners through “referrals from existing partners or stakeholders,” as opposed to the more active approach of “community needs assessments or surveys” (30%) and “online directories or databases” (16%). Other methods identified by panellists reflect a subjective tendency: a number of written responses mention referrals or word of mouth, while fewer mention more direct and informed outreach methods. These results may highlight a reliance on trust and existing relationships in the sector, where connections are often cultivated through networks and shared missions, rather than outreach. The results may also suggest an opportunity for growth in seeking more diverse collaborations that may bring fresh perspectives and innovative solutions to the sector’s challenges. Given the general appetite for meaningful collaborations, it is also an important area that would benefit from increased resources for capacity building and support from funders.

Despite fairly widespread sentiments across the sector that collaborations are useful. Tensions do arise within these relationships. “Communication breakdowns” and “Differences in organizational culture or priorities” rank highest among challenges encountered during partnerships with other organizations (Figure 27). Closely following are challenges such as “Difficulty in securing funding or resources” and “Lack of time and resources required to work effectively with a partner” (Figure 27). These findings echo past reports, such as a 2019 study from the Calgary Chamber of Voluntary Organizations, which identified consensus-building and narrow mission mandates, as well as resource scarcity and competition, as substantial hurdles (CCVO, 2019, p.9). Additionally, a 2014 study, highlighted communications and branding as significant challenges, though other factors were considered more pressing (Bridgespan Group, 2014, p. 12).

In summary, organizations across Canada’s charitable sector are collaborative creatures. These relationships are not simply transactional but are built on shared goals and impacts. When looking for new charitable and nonprofit partners, 84% of respondents consider “alignment with organizational mission or values,” whereas only 59% consider “capacity to contribute to resources or funding” (Figure 28), hinting at an emphasis on values over financial considerations (in contrast to government collaborations, which seem to focus on funding).

2.4 Broader Considerations in Collaboration

Current findings from the CICP’s surveys suggest a notable trend towards charities partnering with each other. This could be significant when considering policy changes at the government level: 58% of respondents indicate that they can advocate for policy changes if they “participate in advocacy coalitions and networks” with other charities and nonprofits (Figure 29).

Furthermore, increasing collaborative efforts could hold significance in the context of actions related to Indigenous reconciliation: 59% of respondents report that they are engaging in collaborations with Indigenous communities or organizations to better involve Indigenous people in the work of their organization (Figure 30). This is an area where charities have room to further develop and grow in the years ahead.

Another critical point revolves around the disparities in resources within the sector and the evolving landscape of technological capabilities, particularly in relation to Artificial Intelligence (AI) and other digital tools. The introduction of ChatGPT in December 2022 and other AI tools like it, has profound implications for the sector, whether organizations are prepared for this digital revolution or not. The capacity for AI integration within organizations in the sector has the potential to either shape or limit future collaborative growth. While the for-profit sector is actively leveraging AI technology, the charitable and nonprofit sector appears to lag behind. This discrepancy presents an opportunity for capacity building, with universities and initiatives like the CICP, to offer more education and support about these technologies (as discussed further in Section 8, “Charities’ Technology Gap: Opportunities and Challenges with AI”).

In essence, the sector is experiencing a shift towards greater collaboration, with a particular emphasis on fostering effectiveness and achieving shared goals. As the landscape of partnerships evolves, it has the potential to influence policy changes, Indigenous reconciliation efforts, and the adoption of advanced technologies within the sector. These dynamics underscore the importance of staying adaptable and proactive in addressing the needs and opportunities of the charitable and nonprofit landscape.

3. Equity, Diversity, and Inclusion (EDI) in the Charitable Sector

Equity, diversity, and inclusion (EDI), including gender-related aspects, have become prominent topics of discussion within the Canadian charitable sector. Generally, charities view racial-justice movements as having a positive impact on their organizations (Figure 31). The CICP explores this positive influence and assesses the extent to which organizations reflect the demographics of the communities they serve, as well as the degree to which they have or plan to implement EDI initiatives.

3.1 Representation and Engagement with EDI Initiatives

Overall, the findings suggest that personnel working within charities appear to be representative, to some degree, of the communities they serve. When asked to indicate the degree which stakeholders are representative of the communities they serve, on a scale from 0 to 10 (from “not at all representative” to “highly representative”), volunteers, operational staff, board members, and collaborators all come in at a mean score of 6.9 or 7.0 (Figure 32) (equivalent to roughly a B- grade based on Carleton University's grading rubric). However, senior staff members receive a slightly lower score of 6.6 (equivalent to a C grade). This latter result is consistent with other research, like Charity Village's 2022 EDI Report, which emphasizes the potential lack of diversity in leadership roles within charities (Charity Village, 2022). Substantial efforts are still needed to enhance representation, particularly within the sector's leadership ranks.

Regarding EDI initiatives, when asked if their organizations are actively pursuing such initiatives, a resounding 80% of respondents say they are, while 8% say they are not, and 12% indicate these initiatives are “Not Applicable” to their organization (Figure 33). 29% of survey respondents say that a common type of grant requirement from funders is “diversity, equity and inclusion goals and reporting” (Figure 34). While funder requirements can force organizations to take EDI more seriously, it can also lead to superficial changes. Support in implementing and evaluating the effectiveness of these initiatives is pivotal to distinguish meaningful transformations from mere compliance with funder demands.

When asked why their organizations are not pursuing EDI initiatives, data and written comments primarily point towards “organizational constraints” in the form of personnel, resources, and time. Others indicate that they feel as though their organizations are inherently inclusive and therefore do not see a need to pursue any kinds of official internal policies.

These results are enlightening and pair with other sector research, such as “Shifting power dynamics: Equity, diversity, and inclusion in the nonprofit sector,” a 62-page report from a survey of 1,655 charities and nonprofit groups. Led by Imagine Canada and the Equitable Recovery Collective (ERC), the 2023 report indicates that organizations with leadership from Black and racialized communities and other underrepresented groups are doing more than their white-led counterparts to advance EDI in the sector -- despite the former experiencing increased expectations and facing greater barriers than their white-led counterparts (Equitable Recovery Collective, 2023). Furthermore, while most organizations incorporate EDI into their operational policies to at least some extent, only 44% have a dedicated, stand-alone EDI policy – and these 44% are mostly minority-led organizations and organizations with equity working groups, according to the ERC report.

The charitable sector in Canada seems to recognize the importance of EDI and is making strides to address it. However, there is still substantial work to be done to ensure adequate representation, particularly in leadership roles, and to foster meaningful EDI initiatives that go beyond superficial compliance with funder requirements. These efforts are vital for achieving greater equity, diversity, and inclusion within the sector.

3.2 Gender Equity and Representation

When asked to describe the representation of different genders within their organizations, the majority of respondents indicate that they view their organizations’ gender distribution as balanced: 69% believe it is “representative” or “somewhat representative” for management and leadership; 72% for general staff; 78% for their board; and 75% believe it is “representative” or “somewhat representative” for volunteers (Figure 35). In contrast, those viewing their organizations as “somewhat not representative” or “not representative” are in the minority, ranging from 20% to 29% across the four roles.

When respondents were asked to provide comments regarding the previously mentioned question about gender representation, the majority (141 respondents) commented about the predominance of women in “general staff” positions, with only a few mentioning a predominance of men. Others mentioned that their organizations are working towards gender balance and inclusivity, and some were confused about the concept of gender representation (Figure 36). These comments about the predominance of women in general staff roles contrast sharply with the perception of balanced representation (in Figure 35), and the comments as a whole suggest a binary view of gender dynamics within the sector.

These findings and comments raise questions about how charitable organizations perceive and understand both “gender” and “representation” – and the extent to which organizations are aware of stereotypes and histories related to charitable work.

The CICP team intentionally refrained from defining gender representation when asking panellists to elaborate on this within their organization, leaving the questions open to interpretation. At the very least, it seems that charities interpret the term “representation” in the context of the sector’s known predominance of women, as illustrated by written comments from respondents: for example, “Our industry is 97% female dominated, so it is no surprise that our board and staff have few men,” and “We are about 80-90% women in our staff and volunteers – which is representative of our sector but not of the population.” Such over-representation is worth a closer look. According to a 2018 literature review compiled by the Ontario Nonprofit Network (ONN), stereotypes may arise due to the nature of care work inherent in charitable missions and the fact that, historically, such work has been associated with women, particularly individuals from racialized backgrounds, immigrant communities, and Indigenous populations (Ontario Nonprofit Network, 2018).

The insights gleaned from respondents and the supporting evidence from ONN underscore the complexity of gender representation in the sector and highlight the intersection of perception, historical context, and the current landscape of diversity and inclusion. The striking contrast between perceived gender balance and the actual predominance of women in general staff roles indicates a potential gap in awareness or understanding of gender dynamics within the sector.

It is also worth noting that the minimal acknowledgment of non-binary representation in the data highlights a broader challenge in the sector: the need to recognize and include non-binary and other gender-diverse individuals in discussions and practices related to gender equality.

3.3 Evaluating Gender Equity Efforts in the Sector

Looking more closely at gender-equity related efforts, it seems clear that more work remains to be done to advance gender EDI within the sector. While flexible work policies and gender-neutral language are relatively common, critical areas such as equal pay and targeted recruitment for gender diversity lag behind.

For instance, Figure 37 illustrates that “flexible work policies” and “gender-neutral language” are prevalent in 53% and 42% of organizations, respectively. However, only 37% have “implemented equal pay policies,” and just 30% are engaged in “recruitment efforts aimed at increasing gender diversity” (Figure 37).

These statistics raise numerous questions: Why are some gender-equity initiatives more widespread than others? Is it due to resource constraints, a lack of awareness, or other factors?

The survey results bring us to a juncture, encouraging dialogue and prompting organizations to challenge their understanding of gender EDI. At best, the findings highlight the necessity for ongoing commitment and strategic action within the sector to ensure that gender-equity initiatives are implemented and aligned with the unique needs and realities of different organizations.

4. Sector Efforts to Prioritize Indigenous Peoples and Communities

Past research into the actions of non-Indigenous-focused charities, with respect to Indigenous prioritization, has centered almost exclusively on the funding relationships these organizations have with Indigenous charities (Blumberg, 2019; The Circle on Philanthropy and Aboriginal Peoples in Canada [The Circle], 2014). The CICP has contributed to a broader understanding of this subject by examining how organizations engage, or fail to engage, with Indigenous issues and priorities. This research is significant, as several organizations and networks, such as The Circle, were created in recognition of the charitable sectors' limited understanding of the context and challenges faced by Indigenous communities (Couchman et al., 2020).

Of the 389 surveyed organizations that say they involve Indigenous people in their work, the two most common forms of engagement are: “We collaborate with Indigenous organizations” (59%); and “We seek the input and feedback of Indigenous communities in our work” (56%) (Figure 30). These high rates of collaboration and consultation may reflect an effort to develop culturally appropriate programs and initiatives. However, it is likely that non-Indigenous-led charities lack knowledge about how to operate effectively within an Indigenous context (Measuring the Circle, 2017).

More specifically, among the 395 respondents working on Indigenous reconciliation efforts, 16% are engaging in reconciliation actions involving “collaboration and partnership” with Indigenous communities (Figure 38). Another 17% say they act to “acknowledge land or culture” and 17% take action in “staff training.”

These preliminary findings highlight the need for further exploration to better understand the dynamics between the charitable sector and Indigenous reconciliation efforts. It appears that there is substantial work that remains to be done.

It is worth mentioning that when the CICP survey questions regarding Indigenous people were sent to charities, the research team received a handful of emails seeking clarification of the questions. Some respondents seemed hesitant to state that they do not undertake explicit efforts towards reconciliation, expressing support for these efforts in principle, but indicating that their organizations have not taken concrete steps. This feedback provides an opportunity for refinement of survey design to better consider respondents' understanding.

5. Funding

In this section, the CICP delves into three key aspects that have surfaced from the data pertaining to funding: (1) charities' drive towards income diversification; (2) relationships between charities and funders; and (3) the intriguing contradiction between declines in donations and optimistic financial forecasts.

5.1 Charities' Drive Towards Income Diversification

The data underscores the sector's need and ambition for greater income diversification. Participants were asked to rate their funding diversification on a scale from 0 to 10, with 0 signifying "not diverse" and 10 indicating "highly diversified." The nationwide average stands at 5.2 out of 10 (Figure 39). Moreover, when asked if their organizations plan to diversify revenue and funding sources soon, 60% answer "yes," 15% answer "no," and 20% indicate "I don't know" (Figure 40). This dominant "yes" response aligns with the fact that respondents identify "funding and economic concerns" as their primary concern in 2023 (Figure 4)

The pursuit of income diversification, which has been discussed in forums like the CharityVillage Connects podcast in 2022, seems to be a response to the financial risks facing charities (Charity Village Connects, 2022). Not only have organizations been grappling with the economic shocks of the pandemic and inflation, but funders and donors themselves have encountered financial instability. Also, the number of Canadians who donate (per tax filings) has dropped by five percentage points in the past 10 years alone, alongside an overall dip in gifts from corporations and charity-to-charity gifts (CanadaHelps, 2023). This complex financial landscape has likely prompted charities and nonprofits to minimize their risks by trying to diversify their funder base, a strategy aimed at reducing dependence on any single financial source.

5.2 Relationships Between Charities and Funders

Expectations between funders and charities seem to align well, and negotiation processes are generally characterized by comfort and mutual understanding, at least from the perspective of charities: 73% of respondents say that funders' primary expectations centre on "outcome and impact reporting," followed by 59% listing "budget restrictions and reporting," and 43% saying "timeline and progress reporting" (Figure 34). Interestingly, "diversity, equity and inclusion goals and reporting" trails with only 29%.

When asked how often funders require charities to change programs or objectives to meet funders requirements, participants indicate a reassuring result, with just over half of charities saying that funders rarely or never require program changes (33% say “rarely” and 18%, “never”) (Figure 41). This finding highlights a general alignment between organizational goals and funder expectations, an important aspect of the sustainability of funding relationships.

However, while just over half of charities express comfort in negotiating with funders about funding requirements, approximately 27% are “somewhat uncomfortable,” “uncomfortable” or “very uncomfortable” (Figure 42). This could suggest a concerning trend when considering that 39% of charities also say that funders require changes to programs or goals to fit funding requirements (3% report “almost always,” 9% say “frequently” and 27%, “occasionally”) (Figure 41).

5.3 Declining Donations vs. Optimistic Financial Forecasts

In the six months leading up to the survey, 41% of respondents observed a decrease or great decrease in “event-based fundraising,” and 31% saw a decline in “individual contributions/ donations” (Figure 3). These trends echo Canadian research showing that funds raised in the sector are lower, compared to pre-pandemic levels, and that gifts from individuals have decreased for nearly 45% of charities due to inflation (CanadaHelps, 2023).

However, a paradox emerges when examining the sector’s expectations regarding future financial health: 36% of the CICP’s respondents anticipate changes to their financial situation in the near future (with 20% expecting improvement and 16% predicting a worsening), while a majority, 61%, believe their financial health will “remain about the same” (Figure 2). How do respondents reconcile the disparity between declining fundraising and their optimistic outlook for financial stability? Perhaps one answer lies in Figure 3, which shows that, overall, 40% to 60% of respondents say there were no changes in any revenue area in the previous six months. Also, they report an “increase” or “great increase,” in the previous six months before the survey, in government funding, as well as increases in investment income, membership fees and dues, and foundation funding. While such increases likely cannot replace decades-long declines in individual giving in the charitable sector and more recent declines in corporate giving, it could explain some optimism for the future.

6. Governance and Management

Governance and management are central themes to any charitable and nonprofit organization. The CICP surveys conducted so far shed light on key aspects of this important topic.

6.1 Board Size and Style

The average board size among Canadian charities is seven (Figure 43), and 75% of respondents feel their board size is “just right,” while an interesting 16% think their board size is “too small” (Figure 44). International benchmarks, such as Bain Capital’s study (Blenko et al., 2010), have suggested seven as an optimal number for organizational decision-making, although, of course, board size depends on dynamics within an organization.

Regarding board style, a majority of respondents (67%) employ a “policy or governance board,” which primarily focuses on setting strategic direction and policy, with little to no involvement in operational matters (Figure 45). This model is consistent with findings from other research (see Bradshaw et al., 2007). While this model can offer clear role distinctions, it can also lead to potential disconnection between the board and staff, as strict boundaries might limit communication and collaboration. The second most popular board style, reported by 26% of respondents, is a “working board,” which is involved in all aspects of a charities work, including implementation (Figure 45).

6.2 Important Leadership Qualities for the Charitable Sector

Besides possessing functional skills, such as financial and nonprofit management, today’s CEOs and executive directors are also expected to be perseverant and flexible in order to stay true to their organization’s charitable mission amid increasing challenges in the sector.

Respondents say that the top five functional skills relevant to a charitable organization today are (Figure 46):

- Understanding and alignment with organizational mission.
- Financial management/budgeting.
- Subject area/sector knowledge.
- Experience working with boards.
- Nonprofit management experience.

When asked to rank leaders' competencies and aptitudes, respondents emphasized the following five relational skills (Figure 47):

- Working effectively with board and staff.
- Managing/Leading change.
- Persevering under adverse conditions.
- Inspiring commitment from staff and others.
- Developing relationships/Networking.

These findings underscore the significance of balancing functional skills (i.e., task-oriented skills), with responsive competencies (i.e., relational skills and personal attributes) in leadership roles within the charitable sector.

Overall, the findings echo recent international and Canadian studies on nonprofit leadership competencies, studies that emphasize a leader's commitment to mission-driven work, their adaptability in uncertain environments, and their propensity for a collaborative leadership approach (Bish & Becker, 2016; McIssac et al., 2013; Yukl et al., 2013). Furthermore, the value placed on resilience and the ability to inspire others in the CICP surveys align with Clutterbuck and Arundel's (2017) and Raggo's (2021) expansive definition of leadership, suggesting a shift towards leadership models that value moral inclusivity and emotional intelligence.

6.3 “Hard” and “Soft” Skills Preferred in the Sector

When asked what skills they would prioritize if their organization could successfully hire for one position in the near future, respondents referred to a number of “hard skills” (technical abilities and job-specific competencies) and “soft skills” (non-technical skills) (Figure 48).

The top five sets of “hard skills” identified by respondents were:

I. Fundraising and grant writing: Many respondents mentioned skills related to fundraising and grant writing, which are crucial for securing financial support for their organizations.

II. Project management: Project management skills were frequently mentioned. The ability to plan, organize, and execute projects effectively is vital for the successful implementation of various initiatives or programs within organizations. This skill set ensures that resources are used efficiently, timelines are met, and goals are achieved.

III. Marketing and communications: Marketing and communication skills were also prominent, indicating a growing demand for digital fluency in the sector.

IV. Administration and office management: Skills related to administration and office management, such as bookkeeping, data management, and resource development, were frequently referenced.

V. Social and community service skills – Specific skills mainly relating to frontline physical and mental healthcare services, such as intervention and general social working skills were also mentioned by a number of respondents.

In addition to these more tangible hard skill sets, panellists also identified a number of “soft skills” which they deem to be desirable for incoming personnel. Notably, the four primary “soft skill” sets that emerged from written response data broadly included:

I. Communication skills: This includes various aspects of effective communication, such as verbal and written communication, active listening, interpersonal skills, and more.

II. Leadership and management skills: This category encompasses leadership abilities, team management, supervision, and the ability to motivate and engage staff or volunteers.

III. Adaptability and flexibility: Respondents frequently mentioned adaptability and flexibility as crucial soft skills. This involves being open to change, adjusting to different situations, and being able to work in diverse or evolving environments.

IV. Problem-solving and critical thinking: Respondents highlighted the importance of problem-solving and critical thinking skills. These skills involve the ability to analyze situations, find solutions, and make informed decisions.

This distribution of preferences suggests a sector that is not just looking for individuals to fill a role, but for contributors who can uplift and advance the entire team and organization. As charitable entities navigate the complexities of their respective missions, having a workforce adept in both hard and soft skills becomes essential.

Many organizations are facing difficulties in identifying and recruiting personnel with these diverse skill sets (Figure 6). Additionally, the sector faces other workforce challenges that affect recruitment and retention of qualified staff. These challenges encompass broader aspects such as competitive remuneration, comprehensive benefits, and growing concerns regarding mental health and burnout. These multifaceted issues, reflected in the survey results and external reports, emphasize the need for a comprehensive human resources strategy to address the primary obstacles for HR management in the sector. (For more, refer to “Emerging Trends for the Sector in 2023,” the first section of this report.)

7. Policy

Public policies create the structures within which populations live and charities operate. By influencing the development of public policies, charities have the potential to enact systemic change in Canada, both for the sector itself and the population more widely.

7.1 Policy Concerns Revolve Mainly Around Funding

While several policy areas demand attention within the sector, one of the primary concerns among charities is the need for adequate government funding. When asked what changes government can implement to better support the growth and sustainability of the charitable sector in Canada, 64% of respondents highlight “greater access to government funding” (Figure 21). Additionally, 34% call for “increased investment in infrastructure/capacity-building,” 25% seek “increased tax incentives” and 24% advocate for “support for charities in rural and remote areas” (Figure 21).

These results echo broader shifts in the charitable funding landscape. Notably, since the 1990s, there has been a move away from core funding to project-based funding, which focuses on outcomes and often requires project-impact reporting (Burrowes & LaForest, 2017). However, project-based funding often restricts the allocation of funds for other areas of need, such as infrastructure or development, creating challenges in the long term.

Historical context adds depth to these findings. A 2003 survey conducted by Statistics Canada showed that more than half of Canada’s charitable and nonprofit organizations had difficulty with infrastructure-related issues, such as retaining staff, and just under half mentioned that they had trouble securing funds from government and other sources (Hall et al., 2004). In the same survey, 60% of organizations that received government funding saw a reduction in that amount of funding and unwillingness on the part of the government to finance core operations (ibid).

Two decades later, respondents in the CICP surveys suggest that the funding challenges observed in 2003 persist today, indicating that the situation has not improved – and has potentially gotten worse, given other factors, such as rising inflation, increasing interest rates, declining donations, and more.

7.2 Advocacy Work

Another aspect of policy considerations in the sector is advocacy work. The CICP data reveals mixed levels of engagement in advocacy activities. When asked if their organization engages in advocacy to change laws, rules or programs, half of respondents say that they do not, while only 42% confirm that they do (Figure 49).

For charities that do not engage in advocacy, 45% of respondents report that it is irrelevant to their mission, while 36% rely on other organizations to advocate on their behalf and about a quarter of respondents say they lack time, skill, or funding to engage in these initiatives (Figure 50). These latter obstacles seem to be persistent, as corroborated by a 2016 report from Imagine Canada, which stated that more than half of charities identified a lack of mission relevance, skill, and time for advocacy engagement (Lasby & Cordeaux, 2016). Interestingly, while lack of mission relevance is now seemingly the primary barrier to advocacy participation, it was the least reported obstacle in the 2016 Imagine Canada study (Lasby & Cordeaux, 2016).

Notably, the issue of perceived ineffectiveness, once a significant barrier, has diminished considerably since 2016. Only 3% of respondents in our survey reported that they do not engage in advocacy efforts because they believe that it “won’t make a difference,” while Imagine Canada found that perceived ineffectiveness was a barrier for 54% of registered charities (Lasby & Cordeaux, 2016). Imagine Canada also found that concerns about violating Canada Revenue Agency (CRA) rules and losing government support prevented 64% and 60% of their respondents, respectively (Lasby & Cordeaux, 2016). In the CICP survey, only 10% of respondents report they are “concerned about violating the rules” and only 13% worry about “risk of losing government support” (Figure 50).

In addition, in 2019, the Income Tax Act was amended to remove the restriction on the amount of resources that charities are allowed to devote to engagement with public policy development (Cameron & Kwiecien, 2019). CICP respondents seem unaffected by those changes. When asked if relaxed CRA rules on “political activities” a few years ago changed their advocacy work, 43% of respondents say, “No change / No impact on our advocacy work” and 49% say either “Not sure” or “NA: it’s not relevant to us or our work” (Figure 51).

Given that less than half of charities report engaging in advocacy work, it is likely that the main reasons for this are that many charities are either completely volunteer run and/or believe that advocacy is irrelevant to their mission, or to a lesser degree, believe they lack the time, skill, or funding to do so. The findings and research from others suggest that charities need full-time employees, resources, mission relevance, and collaborations with other organizations to engage in advocacy. Also, it is possible there is now reduced fear of violating CRA rules and/or losing government funding, along with increased confidence that advocacy does make a difference.

7.3 Coalition Building and Collaborative Advocacy: Future Directions

The CICP data suggests that many charities “build relationships with government officials,” “participate in advocacy coalitions” and “collaborate with stakeholders to present a unified agenda” as primary methods for advocating for policy changes at the government level (Figure 29). Coalitions allow charities to pool scarce resources, present a unified front and provide anonymity and protection for charities that wish to engage in advocacy but fear government pushback (Burrowes & Laforest, 2017).

These findings underscore the effectiveness of building relationships and participating in coalitions, relative to other advocacy strategies. Research suggests that governments prefer working with coalitions (Burrowes & LaForest, 2017; Fyall, 2016). The emphasis placed on building relationships and coalitions may indicate that charities find these to be a particularly effective tactics, relative to other options.

8. Charities' Technology Gap: Opportunities and Challenges with AI

The following section on charities' engagement with Artificial Intelligence (AI) provides insights into the sector's perceptions and readiness concerning this emerging technology.

The CICP data reveals that many organizations do not understand AI, do not feel prepared to use it, and do not consider it relevant to their operations (Figure 52). Many also express concerns about the potential costs and complexities associated with AI adoption, as well its ethical and interpersonal implications. Despite these reservations, many organizations also seem to be appreciating some of the benefits that new AI technologies could have for the sector. For example: 44% of respondents indicate that they think AI could help charitable organization to target their programs and services more effectively; 63% believe that AI can help organization analyze and interpret large data sets more quickly and accurately; and 57% agree that AI can help in creating content for organizations' social media and communications efforts (Figure 53)

One key takeaway from these findings is the strong desire for education and training on AI technologies and their practical integration into charitable work (Figure 54). In the first CICP survey of 2023, only 1% of respondents ranked "Our use of technology" as a strength (Figure 55). Historically, charities have lagged behind in technology adoption and have sought funding and support to enhance their digital capabilities, according to CanadaHelps' "Are Canada's Charities Ready for Digital Transformation?," an online survey of approximately 1,400 charities in 2021. The study revealed that the majority of charities rate their skill level as "fair," "poor" or "not aware" regarding most digital tools, including customer relationship management software and fundraising software (CanadaHelps, 2021).

Although charities have typically lagged in terms of integrating technology into their practices, getting a head start on some of these emerging technologies could prove beneficial to the sector. The desire expressed by participants for education and training in these areas is promising – learning the basics of these emerging technologies and understanding how they are relevant and can be used to improve operations could have major benefits for the sector.

"More opportunities to learn about AI, case studies about where it's working and how, lessons learned on mistakes and pitfalls." -- CICP survey respondent

"Je ne connais pas suffisamment l'IA pour porter un jugement précis sur cette question et sur l'ensemble des question posées se rapportant sur l'IA." -- CICP survey respondent

Conclusion

The Canadian charitable sector is undergoing a profound transformation and adaptation, influenced by a multitude of internal and external factors. This comprehensive, mid-year report, spanning eight key sections, provides a deep dive into the challenges and opportunities that charities face today. From the complexities of governance and leadership to the pressing issues of equity, diversity, and inclusion, it is evident that the sector is adapting in some ways.

Organizations are grappling with shifts in funding dynamics, with an increased need for funding diversification and concerns over declining donations, all the while striving to fulfill their missions in the face of inflation, rising interest rates and economic uncertainty in 2023 and beyond. This report underscores the importance of education and capacity building, particularly in the realm of emerging technologies, to ensure that charities are equipped to navigate the evolving landscape.

While there are significant challenges ahead, the resilience, adaptability, and commitment of Canada's charitable sector to its core values and missions offer hope for the future. As the sector continues to evolve, it plays a pivotal role in shaping a more equitable and just society for all Canadians.

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APPENDIX I: Survey Methodology

The participants in the CICP surveys were recruited using randomized lists created with publicly available T3010 data (2019), administered by the Canada Revenue Agency (CRA) at <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 Canadian Hub for Applied and Social Research (CHASR) at the University of Saskatchewan 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 83,991 Canadian registered charities in 2019, we decided to exclude some organizations from the study in the first year. 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 of participants includes 1,074 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 the important challenges in recruiting some strata of the population of registered charities after our initial exclusions. 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 2019 T3010 to make sure we focus on active charities.

Based on these criteria, the sampling frame was 32,384. We drew a randomized list of all the organizations left and recruited a total of 1,074 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 CHASR, we created a series of sub-samples that would allow us to study some groups that proved problematic to recruit in our pilot phase. (Please note that analysis of the data from the sub-samples do not appear in the Mid-Year Report of January-July 2023.)

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.

- Subsample 1 (SS1): Includes only charities with the designation A and B (public and private foundations) that had expenditures of at least \$1 in 2019.
- 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 2019. Those are what we think of as volunteer run organizations.
- 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 2019.
- Subsample 4 (SS4): Includes designation C charities with at least 1 FTE, \$1 in expenditures in 2019 ensuring representation from all geographical regions of the country.
- Subsample 5 (SS5): Includes designation C charities with at least 1 FTE, \$1 in expenditures in 2019 ensuring representation from the province of Québec.
- Subsample 6 (SS6): Includes designation C charities with at least 1 FTE, \$1 in expenditures in 2019 that have spent at least \$1 internationally (information found in Schedule 4).

The following table presents an overview of our study samples:

List	Population N (32,384)	# of participants recruited
Main Sample	14,267	704
SS1 (Foundations)	936	65
SS2 (Volunteer-run charities)	16,575	124
SS3 (Charities in BC)	1,926	157
SS4 (Geographic regions)	14,266	732
SS5 (Charities in QC)	4,992	189
SS6 (International charities)	606	70

As of October 18th, we had a panel of 853 subscribed panellists. Participant recruitment has been conducted via mail, email, and phone calling. All new 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 panellists' and/or organizations' information. In addition to confirming their contact information, we ask them to give us more details on their organization's human resources.

Study questions are currently being developed by the CICP core team (Raggo, Phillips, 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 (6 a.m. 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 findings for the week's questions. The monthly reports and research papers created by the CICP 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 2022-2023. 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.

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Figure 1: How has inflation affected service provision (the activities you undertake to fulfill your mission) ?

Figure 2: Can you select how you expect your organization's financial condition/health to change over the next 3 to 6 months?

Figure 3: Has your organization seen an increase or a decrease in the following revenue areas in the past 6 months?

Figure 4: What is the number 1 trend or issue that the sector should be paying attention to over the next year?

Figure 5: Please rate how challenging each of the following have been for your charity to manage in recent years

Figure 6: Of the below, what do you foresee causing difficulties or constraints in your abilities to fill this position or others?

Figure 7: What have you found to be the greatest lasting effects of the COVID-19 pandemic on your organization to date?

Figure 8: Does your organization work with volunteers?

Figure 9: Pandemic's impact on volunteer retention and recruitment in charities.

Figure 10: If you experienced a change in the ways which your organization has engaged with volunteers since the beginning of the COVID-19 pandemic, have any of the below areas been negatively affected by these changes?

Figure 11: On average, what would you estimate your personnel turnover rates to be, based on the past year?

Figure 12: Do you plan to fill a position in the next 6 months?

Figure 13: From the below options, please select what you think could be reasons for employee turnover within your organization.

Figure 14: From the below options, select what you think could be the reasons employees stay with your organization.

Figure 15: Have there been any noticeable changes in the mental health challenges faced by staff/personnel/volunteers at your organization in recent years?

Figure 16: What have been the main factors/drivers for changes in mental health challenges faced by staff/personnel/volunteers at your organization in recent years ?

Figure 17: In relation to climate change, does your organization have an internal policy or strategy in place?

Figure 18: If you answered no [in Figure 17], can you tell us more about why your organization has not adopted such a policy or strategy?

Figure 19: Please select to what degree your organization collaborates with each of the below.

Figure 20: Please evaluate the effectiveness of your collaboration with each of the following.

Figure 21: In your opinion, what changes can government implement to better support the growth and sustainability of the charitable sector in Canada?

Figure 22: Please select which of the below will be important elements in your revenue/funding structure over the coming years.

Figure 23: Which of the following do you think could have the biggest impact on the charitable sector in Canada in the next few years?

Figure 24: How has the COVID-19 pandemic impacted the way that your organization achieves or plans to achieve its mission and goals?

Figure 25: What motivates your collaboration(s)? Please select all that apply.

Figure 26: How do you identify potential partners to collaborate with within the sector?

Figure 27: In your experience, what are some common challenges that arise when collaborating with other organizations?

Figure 28: What factors do you consider when selecting partners to collaborate with within the sector?

Figure 29: How can organizations like yours advocate for these [changes to laws, rules or programs] and other policy changes at the government level?

Figure 30: In what ways does your organization involve Indigenous people in its work?

Figure 31: How much do you feel each of the below will affect the work of your organization over the next year?

Figure 32: For your organization, please indicate to what degree the following stakeholders are representative of the communities that they serve.

Figure 33: Is your organization pursuing equity, diversity and inclusion initiatives?

Figure 34: What are the most common types of grant requirements that you encounter from funders?

Figure 35: How would you describe the representation of different genders within your organization?

Figure 36: Please include any comments you would like to add in response to the question [in Figure 35].

Figure 37: Which of the following initiatives has your organization implemented to promote gender equity and inclusion?

Figure 38: Can you please provide us with an example of something your organization is doing to support or prioritize reconciliation with Indigenous communities?

Figure 39: How diverse are your revenue/funding sources?

Figure 40: Do you plan to diversify your revenue/funding sources in the near future?

Figure 41: How often do funders require changes to your programming or goals to fit their requirements?

Figure 42: How comfortable do you feel negotiating with funders about their requirements?

Figure 43: How many members are on your board of directors?

Figure 44: Do you think that this number [of board members] is (1) too small; (2) just right; (3) too large?

Figure 45: How would you best describe the style of your board?

Figure 46: Please assess each of the following skills or experiences for their relevance to the role of an executive director/CEO in a charitable organization.

Figure 47: Please assess each of the following competencies/aptitudes for their relevance to the role of an executive director/CEO in a charitable organization.

Figure 48: If your organization could successfully hire for one position in the near future, what kinds of skills would you be looking for?

Figure 49: Does your organization engage in advocacy to change laws, rules or programs?

Figure 50: If no [in Figure 49], why does your organization not engage in advocacy?

Figure 51: A few years ago, the CRA [Canada Revenue Agency] relaxed the rules on 'political activities.' Has this changed your advocacy work?

Figure 52: Respondents' views on AI [Artificial Intelligence] preparedness and relevance.

Figure 53: In your opinion what are some of the potential advantages and disadvantages of using artificial intelligence (AI) in the charitable sector?

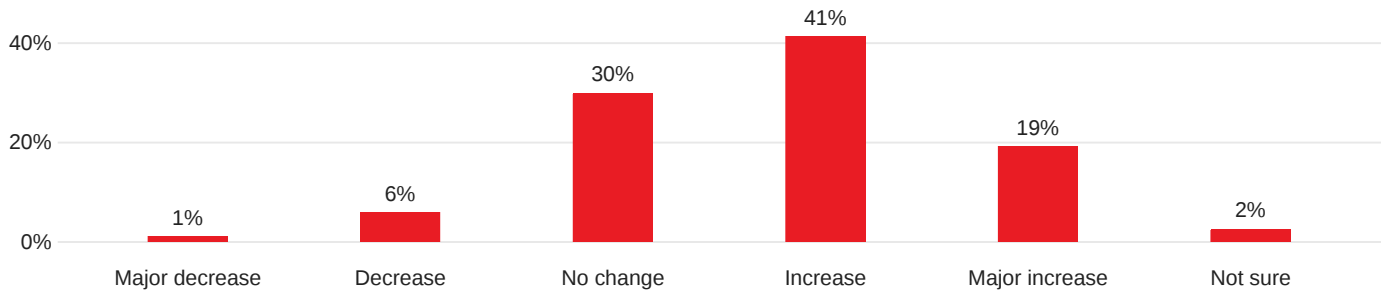
Figure 54: What kinds of support would you need to increase your knowledge of AI technologies and their potential integration into the work of your organization?

Figure 55: What are your organization's greatest assets or strengths?

Figure 1: How has inflation affected service provision (the activities you undertake to fulfill your mission)?

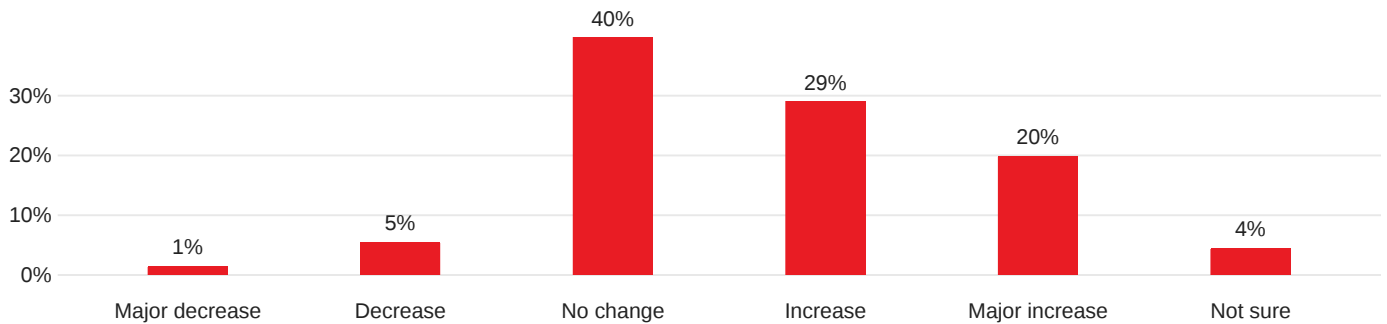
Costs of services/activities

654 Responses



Demand for services

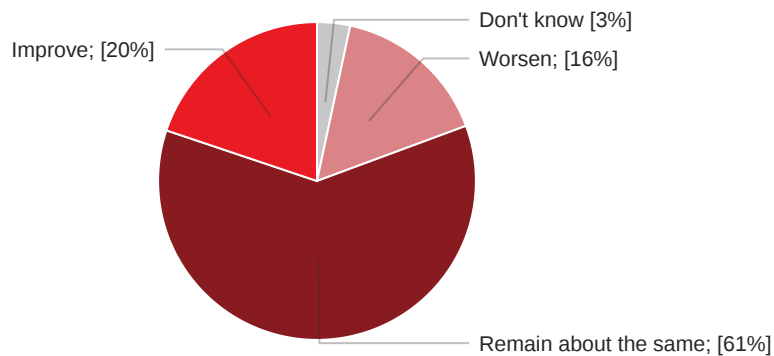
653 Responses



Source: CICP Year 1, Week 15, Question 2

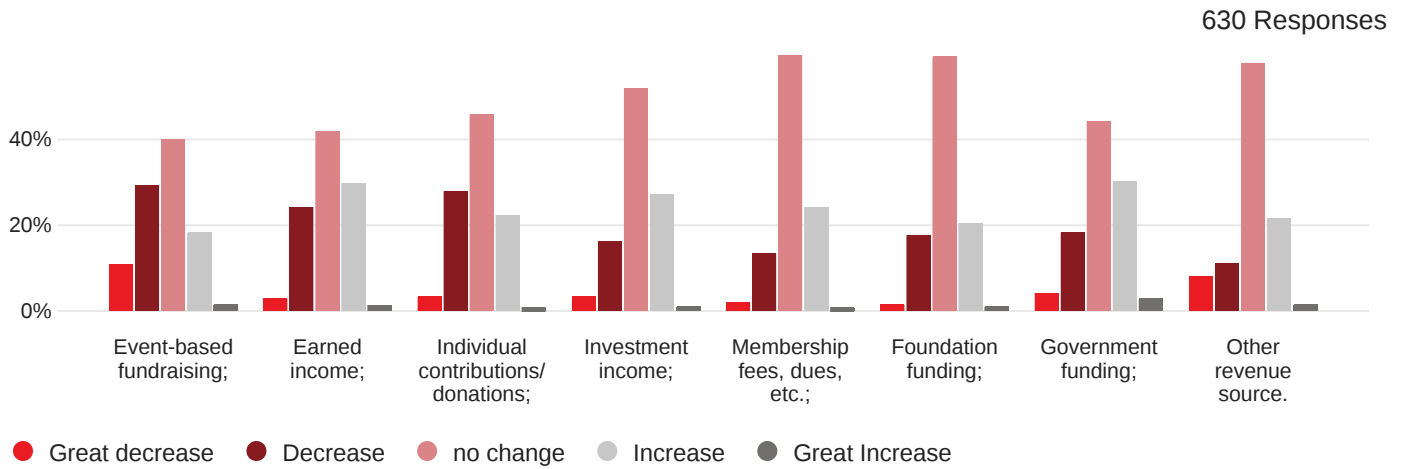
Figure 2: Can you select how you expect your organization’s financial condition/health to change over the next 3 to 6 months?

625 Responses



Source: CICP Year 1, Week 21, Question 1

Figure 3: Has your organization seen an increase or a decrease in the following revenue areas in the past 6 months?

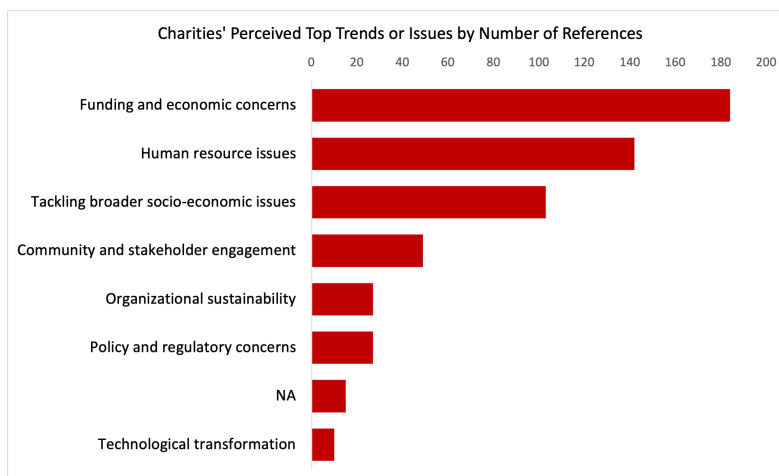


630 Responses

Field	Great decrease	Decrease	no change	Increase	Great Increase
Event-based fundraising;	11%	29%	40%	18%	2%
Earned income;	3%	24%	42%	30%	1%
Individual contributions/donations;	3%	28%	46%	22%	1%
Investment income;	3%	16%	52%	27%	1%
Membership fees, dues, etc.;	2%	14%	60%	24%	1%
Foundation funding;	2%	18%	59%	20%	1%
Government funding;	4%	18%	44%	30%	3%
Other revenue source.	8%	11%	58%	21%	1%

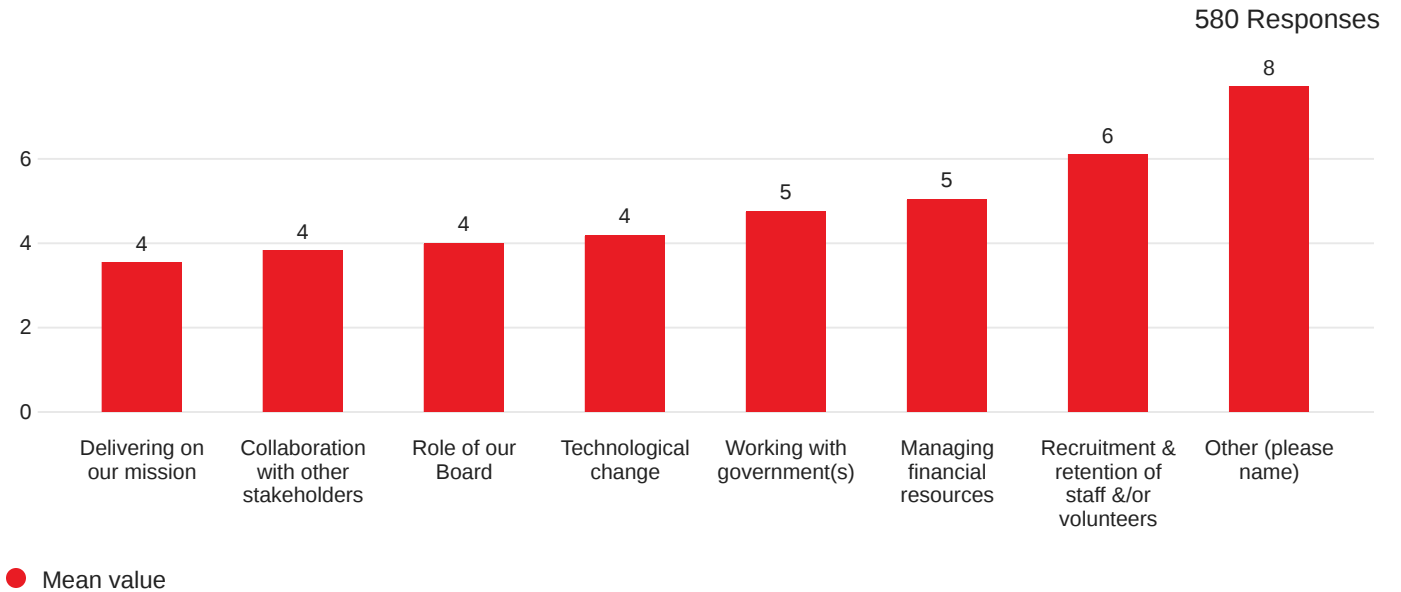
Source: CICP Year 1, Week 21, Question 2

Figure 4: What is the number 1 trend or issue that the sector should be paying attention to over the next year? The chart below is based on 560 responses and 557 coded references. (Note: a "reference" refers to a specific segment of coded text (e.g. a written commentary) reflecting a theme or idea).



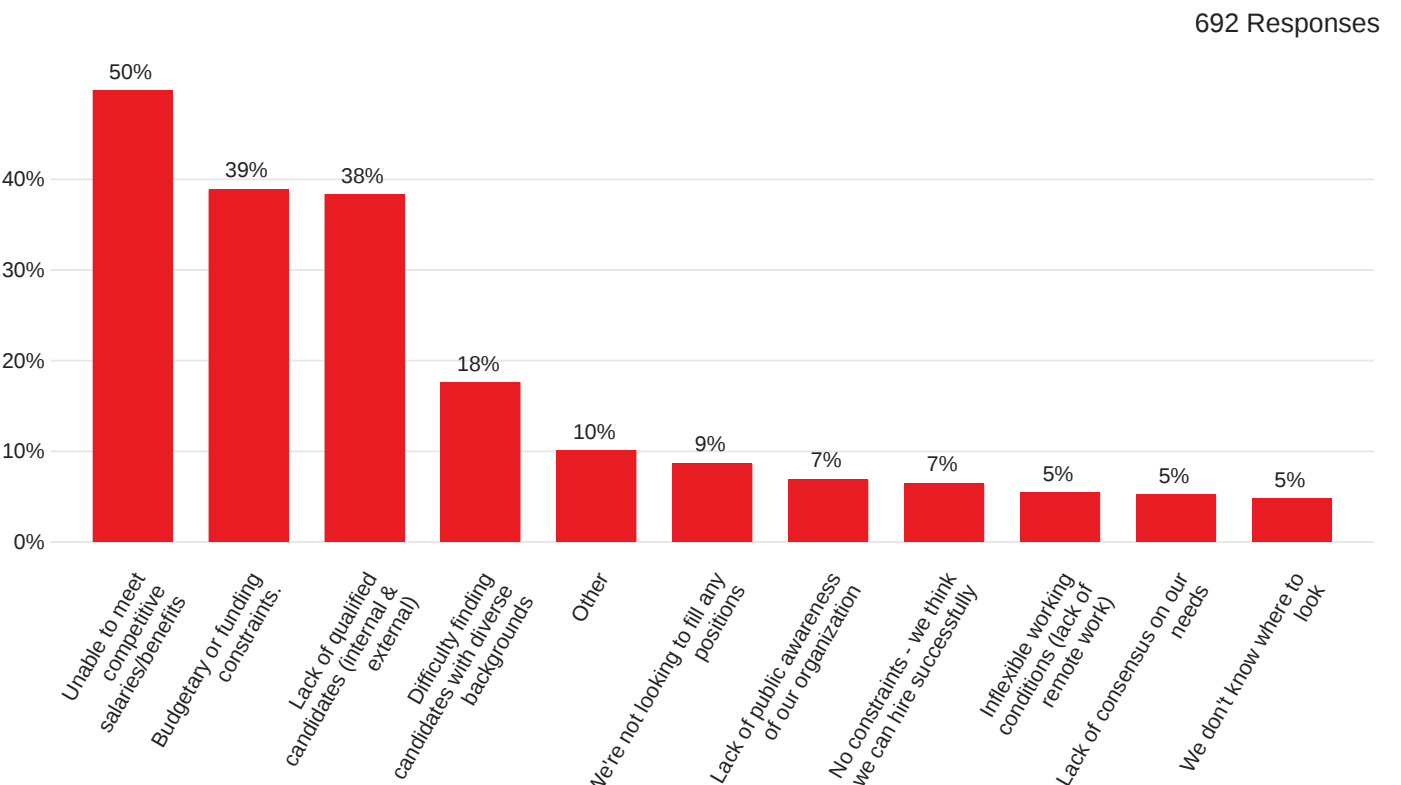
Source: CICP Year 1, Week 3, Question 2

Figure 5: Please rate how challenging each of the following have been for your charity to manage in recent years (sliding scale of 0-10, with 0 being 'Not challenging at all' and 10 being 'Very challenging').



Source: CICP Year 1, Week 1, Question 2

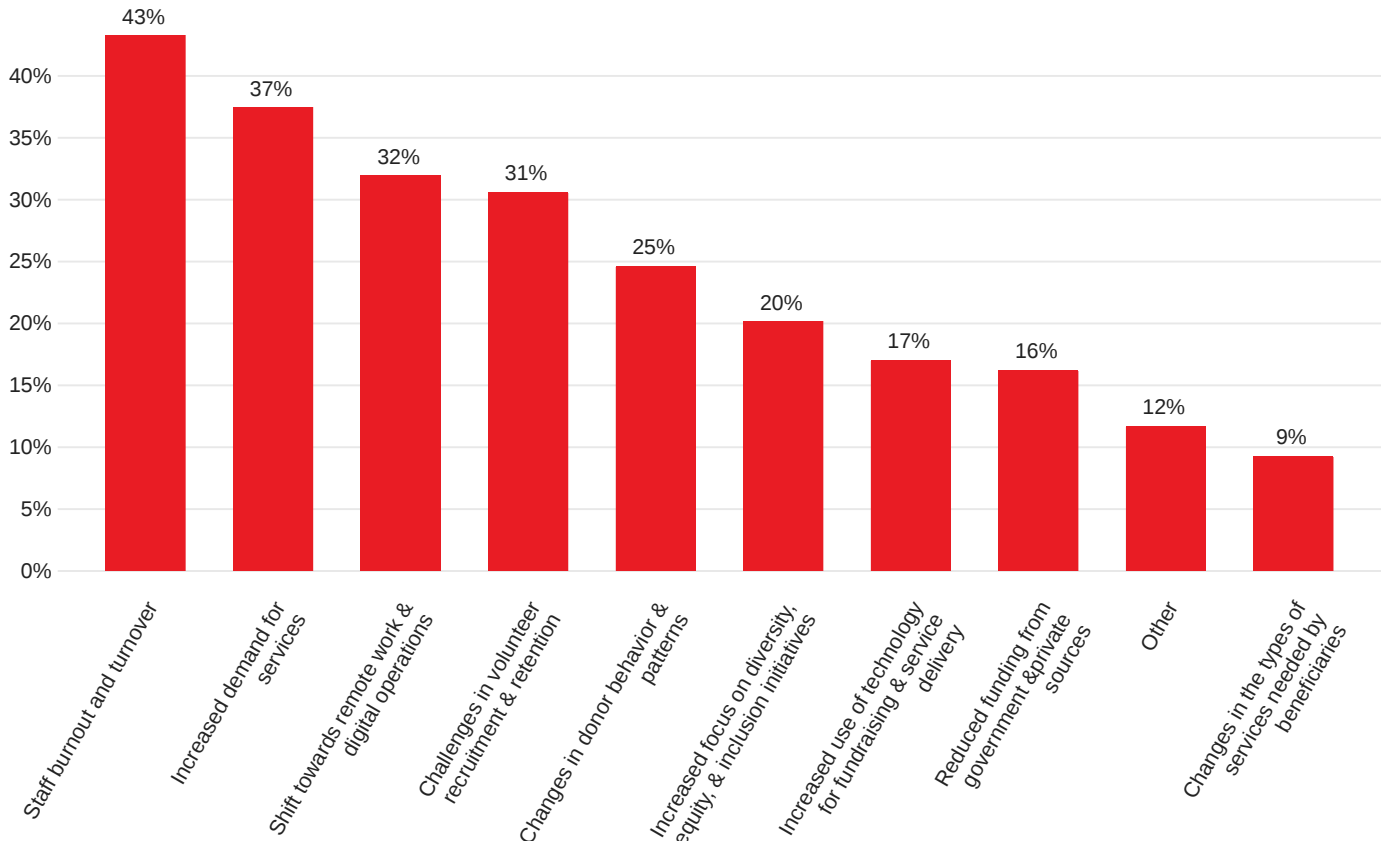
Figure 6: Of the below, what do you foresee causing difficulties or constraints in your abilities to fill this position or others?



Source: CICP Year 1, Week 4, Question 3

Figure 7: What have you found to be the greatest lasting effects of the COVID-19 pandemic on your organization to date? (Please select up to 3.)

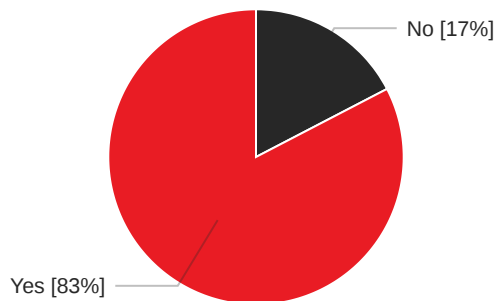
635 Responses



Source: CICP Year 1, Week 20, Question 1

Figure 8: Does your organization work with volunteers?

708 Responses



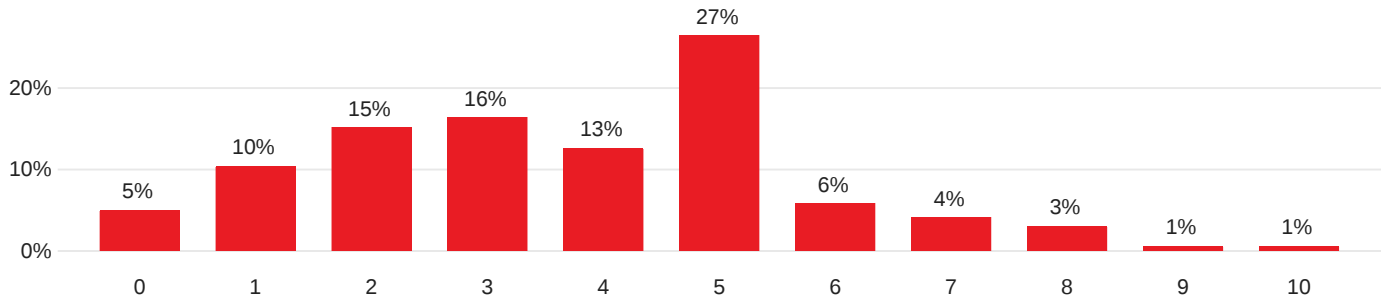
Source: CICP Year 1, Week 7, Question 1

Figure 9: Pandemic’s impact on volunteer retention and recruitment in charities.

Volunteer retention

(0: major loss of volunteers, 5: no change, 10: major increase in volunteers)

562 Responses

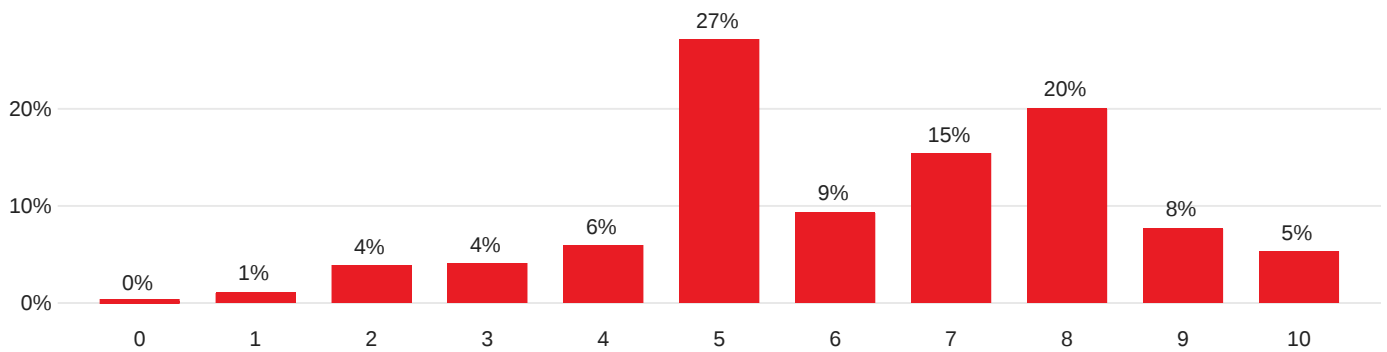


Source: CICP Year 1, Week 7, Question 2.1

Volunteer recruitment

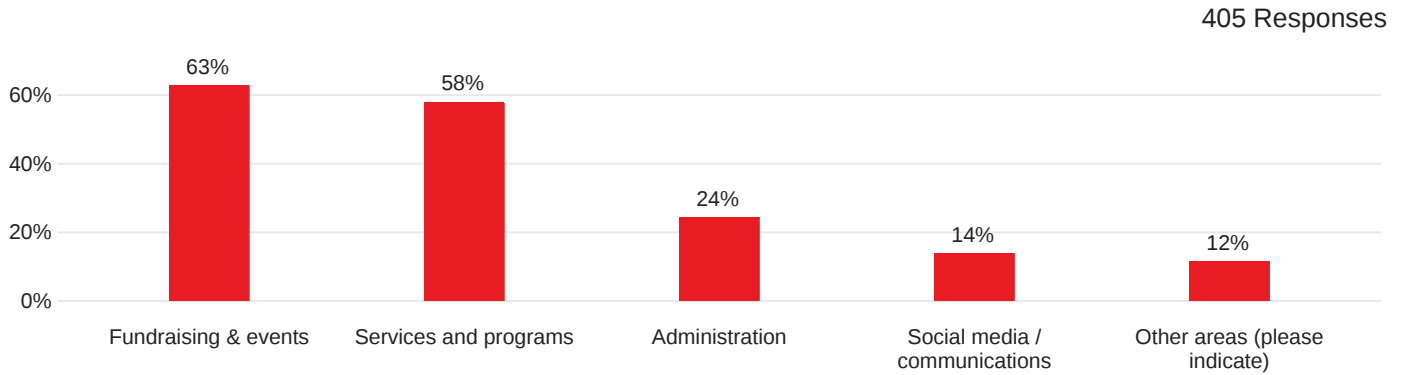
(0: less difficulty recruiting volunteers, 5: no change, 10: more difficulty recruiting volunteers)

570 Responses



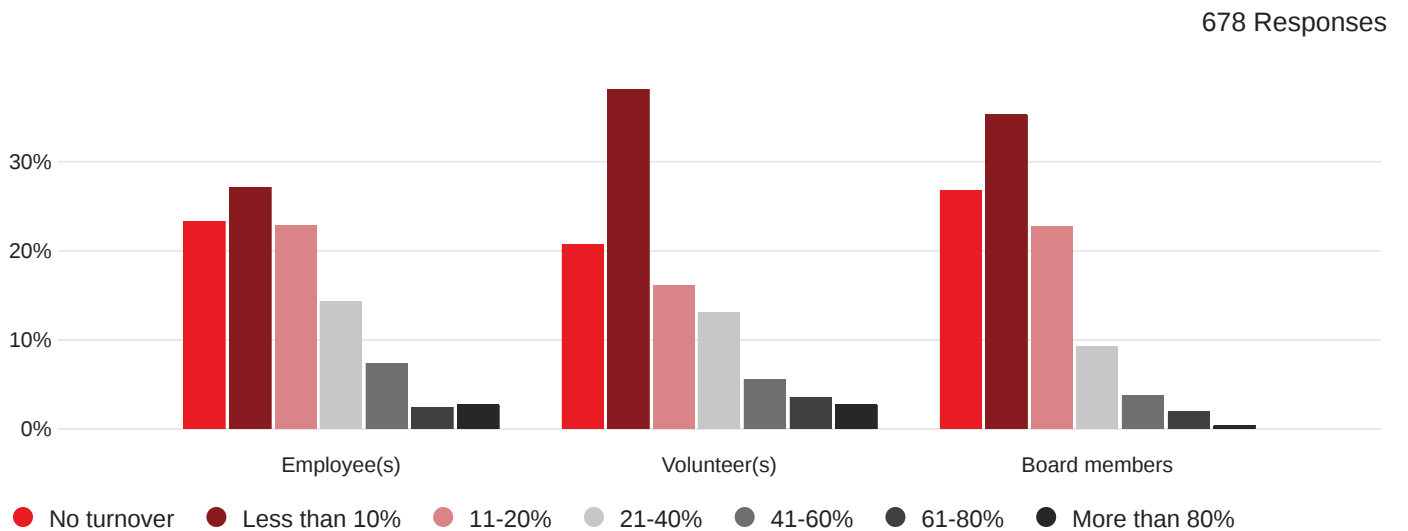
Source: CICP Year 1, Week 7, Question 2.2

Figure 10: If you experienced a change in the ways which your organization has engaged with volunteers since the beginning of the COVID-19 pandemic, have any of the below areas been negatively affected by these changes? Please indicate all that apply.



Source: CICP Year 1, Week 7, Question 3

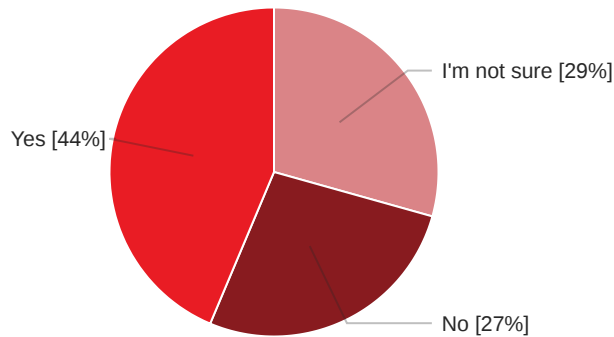
Figure 11: On average, what would you estimate your personnel turnover rates to be, based on the past year?



Source: CICP Year 1, Week 11, Question 1

Figure 12: Do you plan to fill a position in the next 6 months?

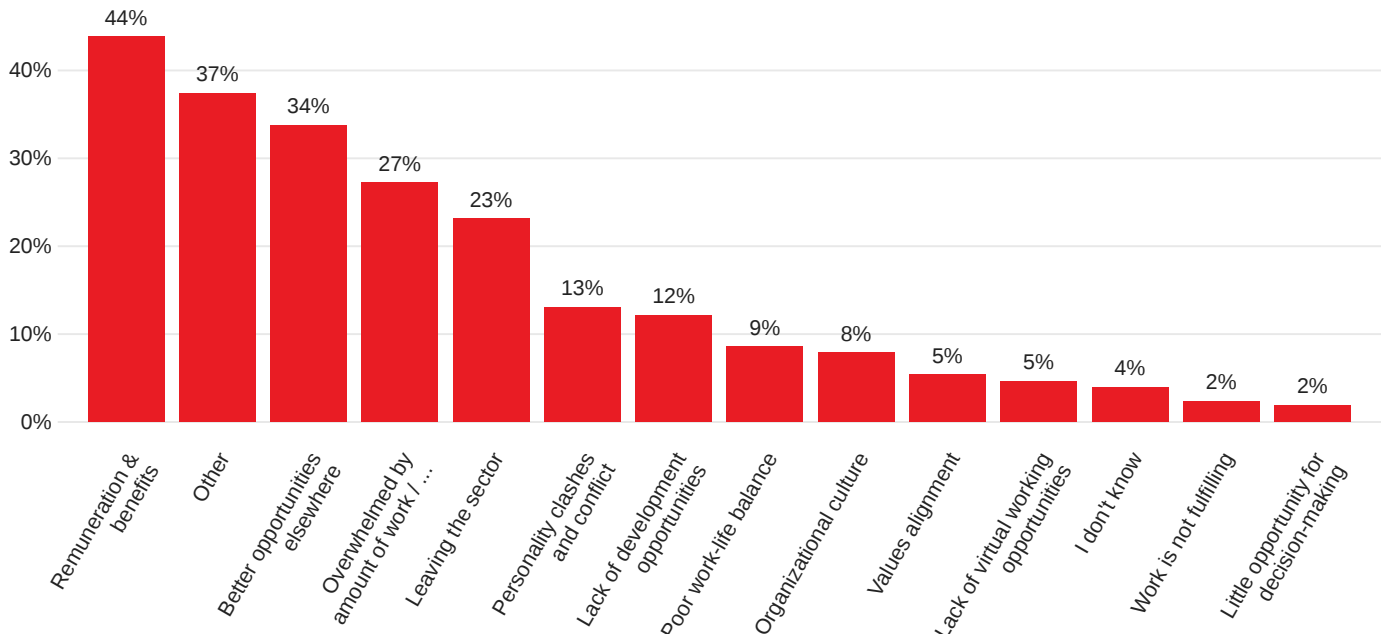
678 Responses



Source: CICP Year 1, Week 4, Question 2

Figure 13: From the below options, please select what you think could be reasons for employee turnover within your organization.

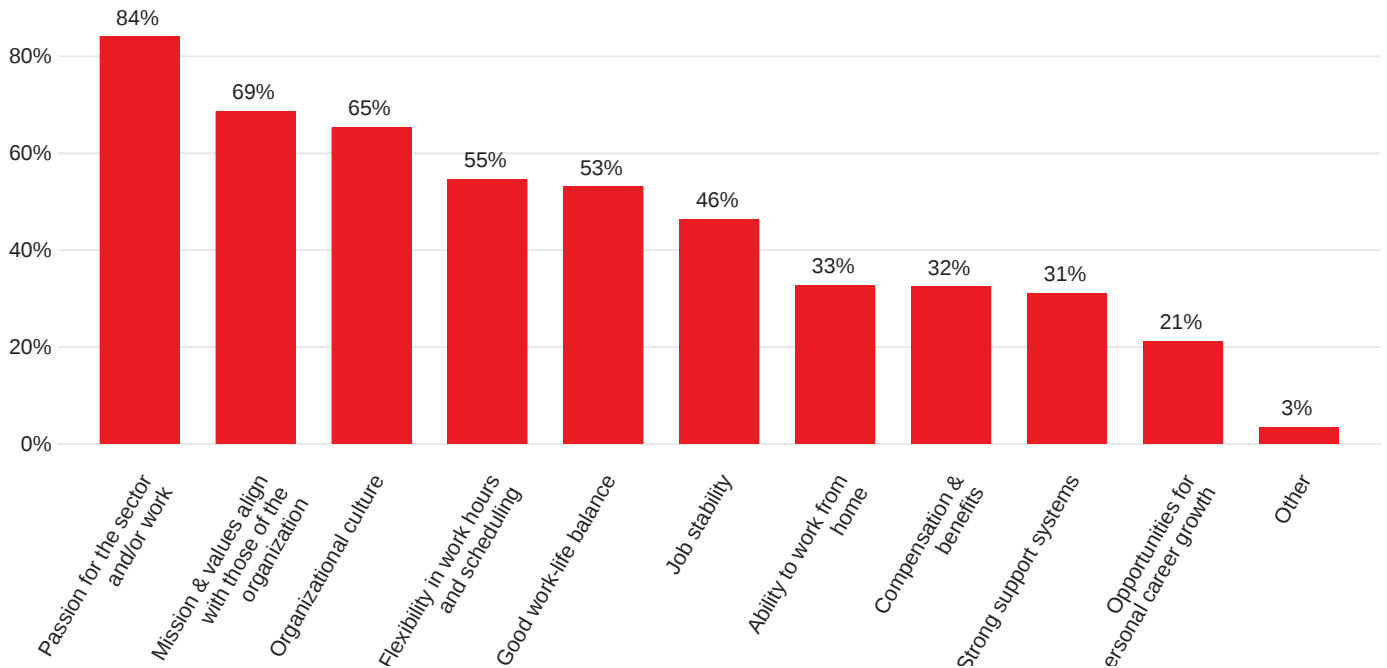
592 Responses



Source: CICP Year 1, Week 11, Question 2

Figure 14: From the below options, select what you think could be the reasons employees stay with your organization.

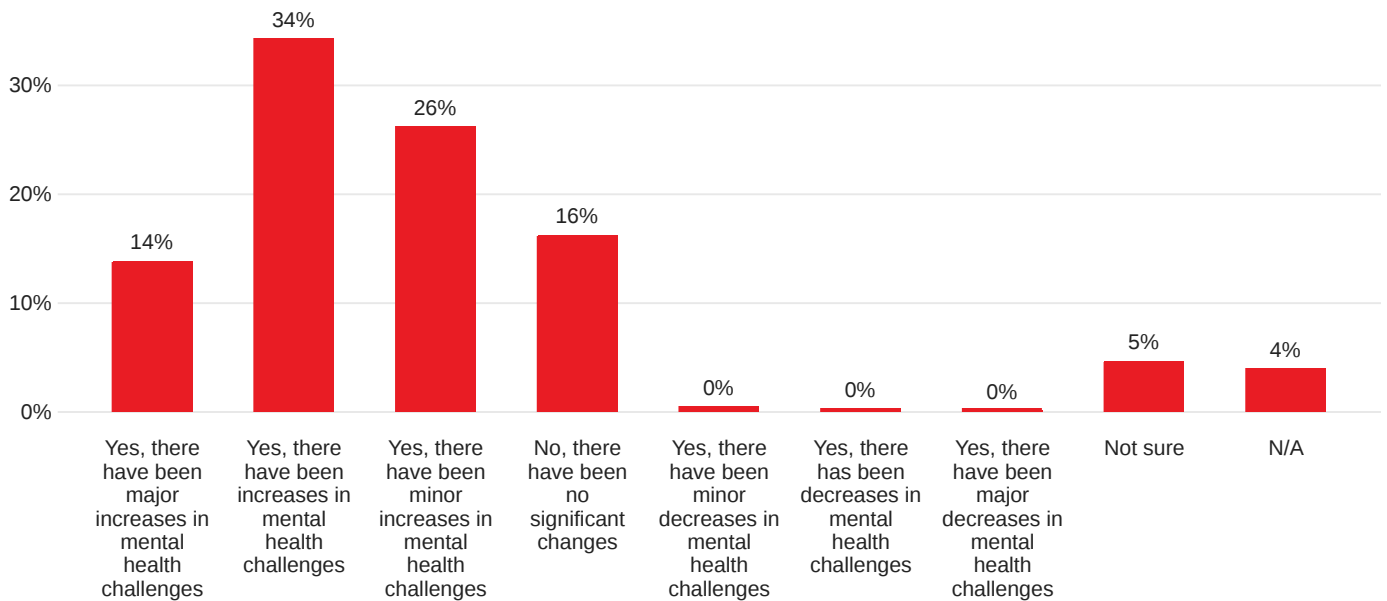
620 Responses



Source: CICP Year 1, Week 11, Question 3

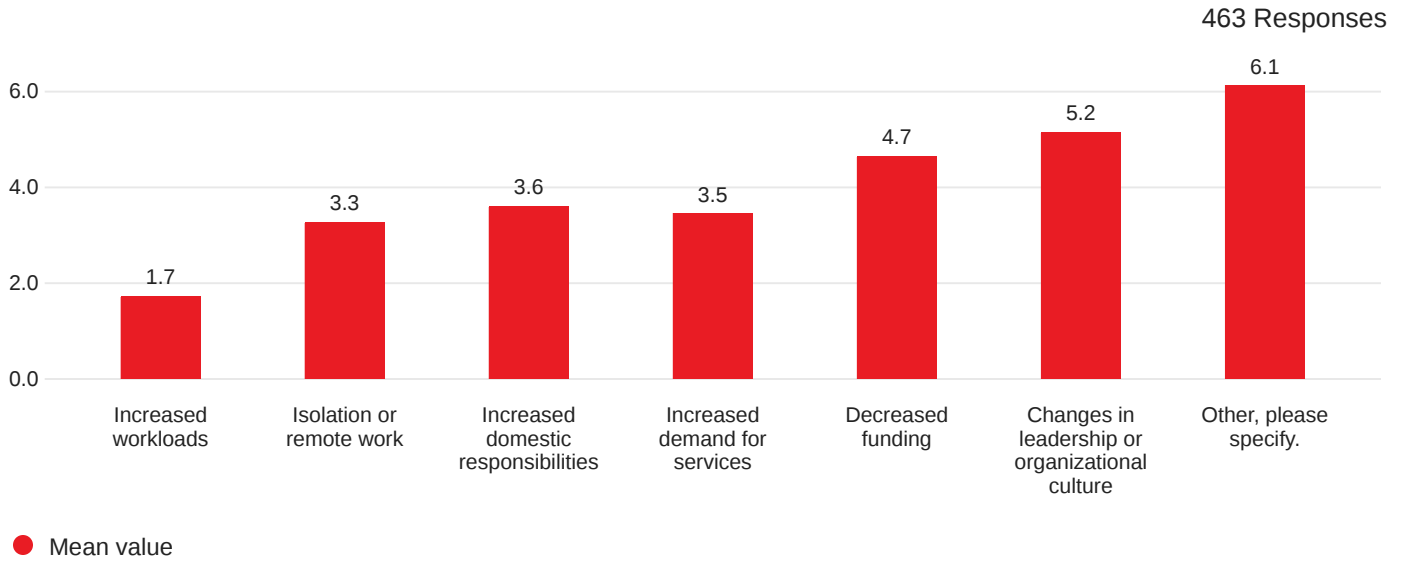
Figure 15: Have there been any noticeable changes in the mental health challenges faced by staff/personnel/volunteers at your organization in recent years?

652 Responses



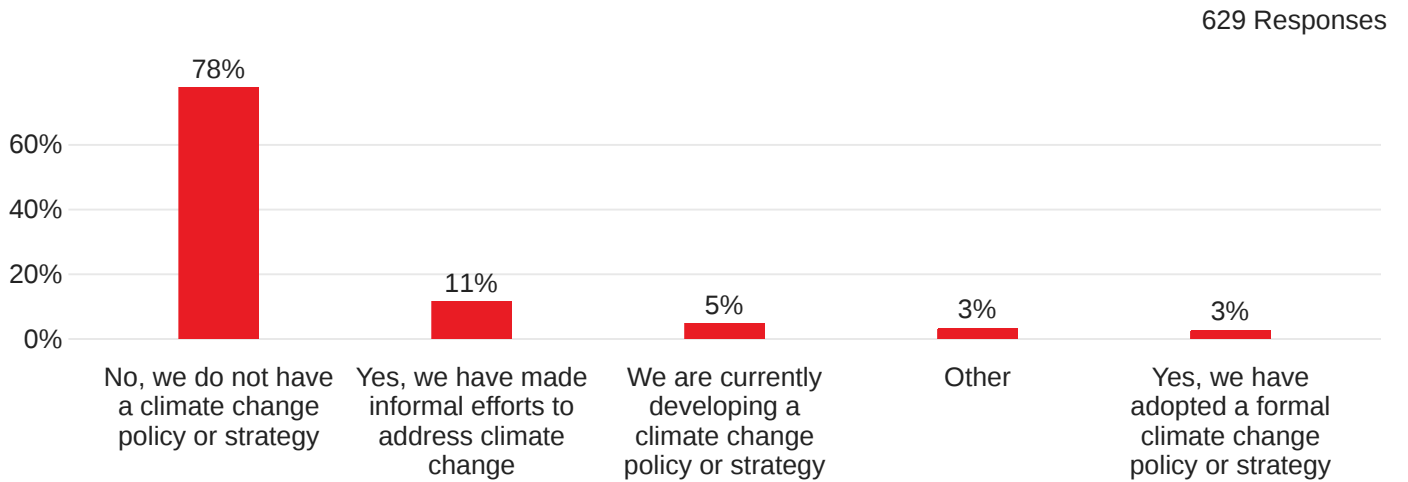
Source: CICP Year 1, Week 17, Question 1

Figure 16: What have been the main factors/drivers for changes in mental health challenges faced by staff/personnel/volunteers at your organization in recent years ? Please rank in order from 1 to 7, from most to least significant.



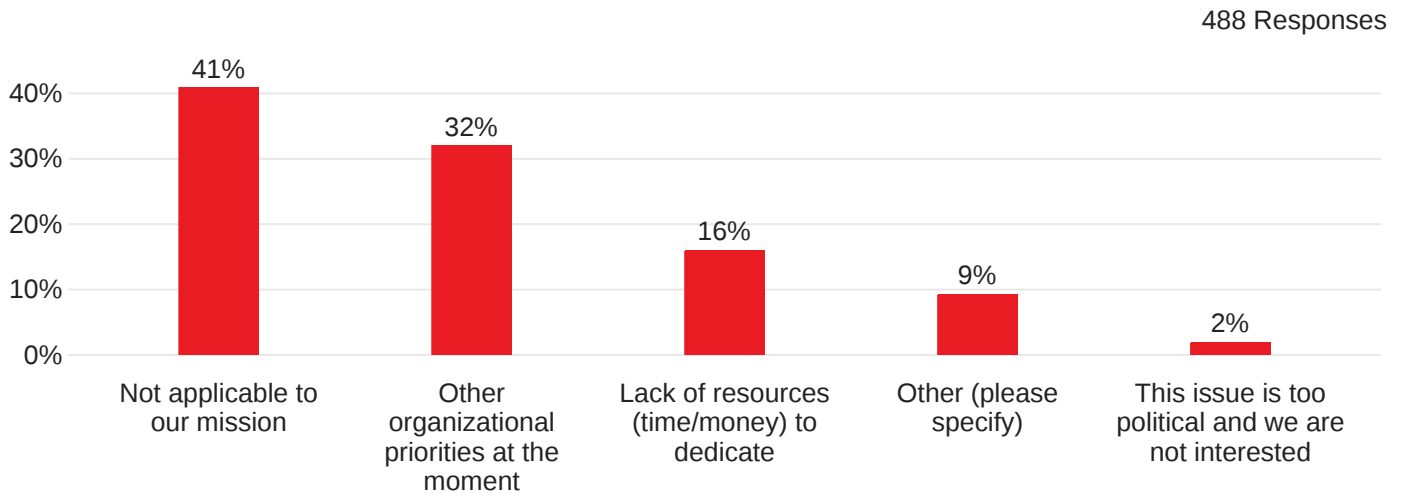
Source: CICP Year 1, Week 17, Question 1.2

Figure 17: In relation to climate change, does your organization have an internal policy or strategy in place?



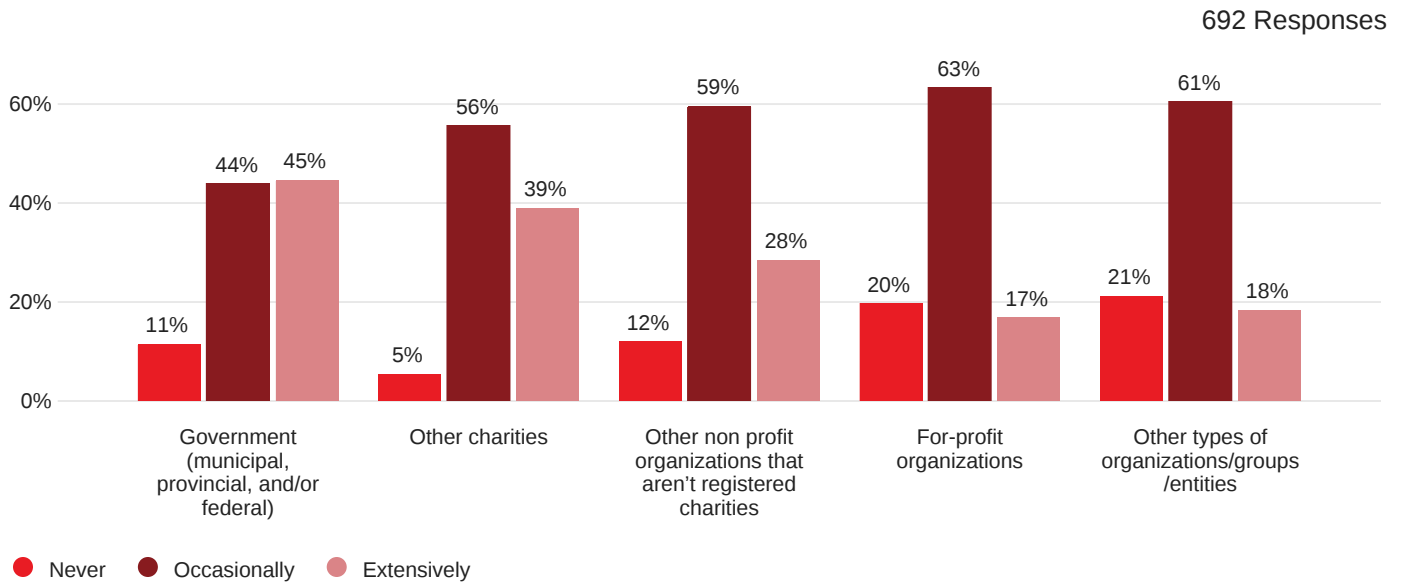
Source: CICP Year 1, Week 24, Question 1

Figure 18: If you answered no [in Figure 17], can you tell us more about why your organization has not adopted such a policy or strategy?



Source: CICP Year 1, Week 24, Question 1.1

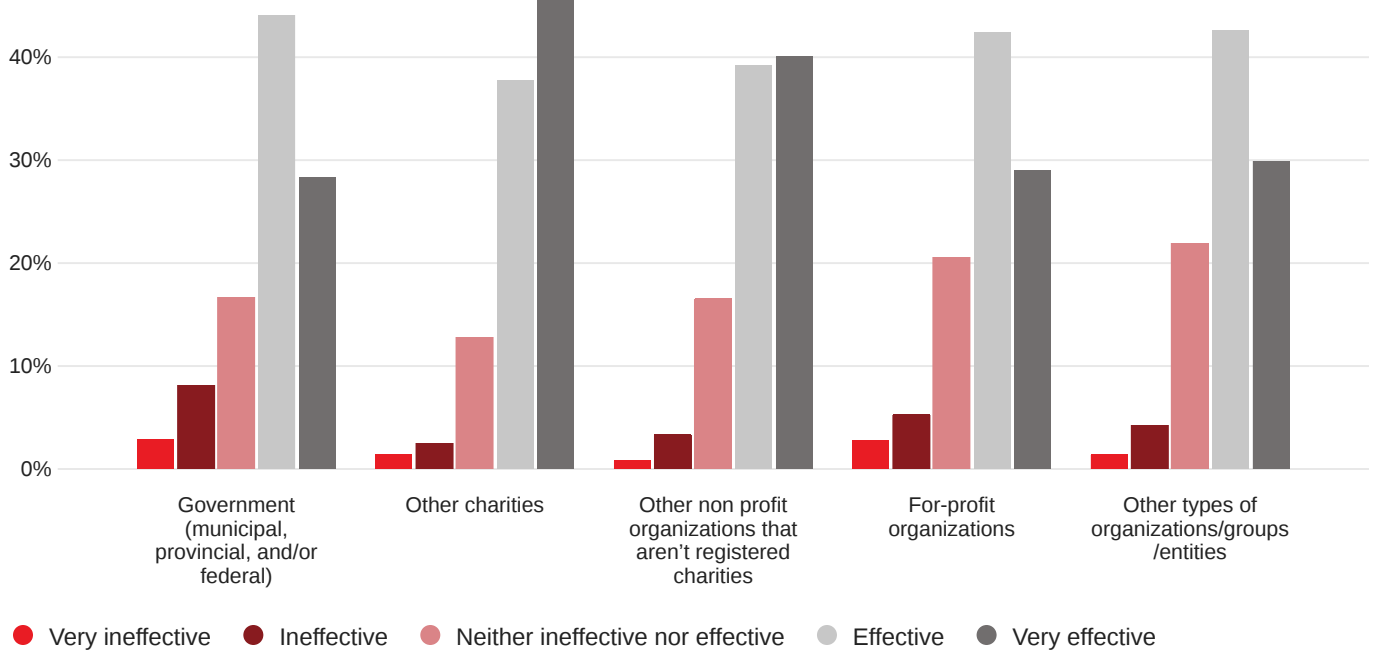
Figure 19: Please select to what degree your organization collaborates with each of the below.



Source: CICP Year 1, Week 8, Question 1

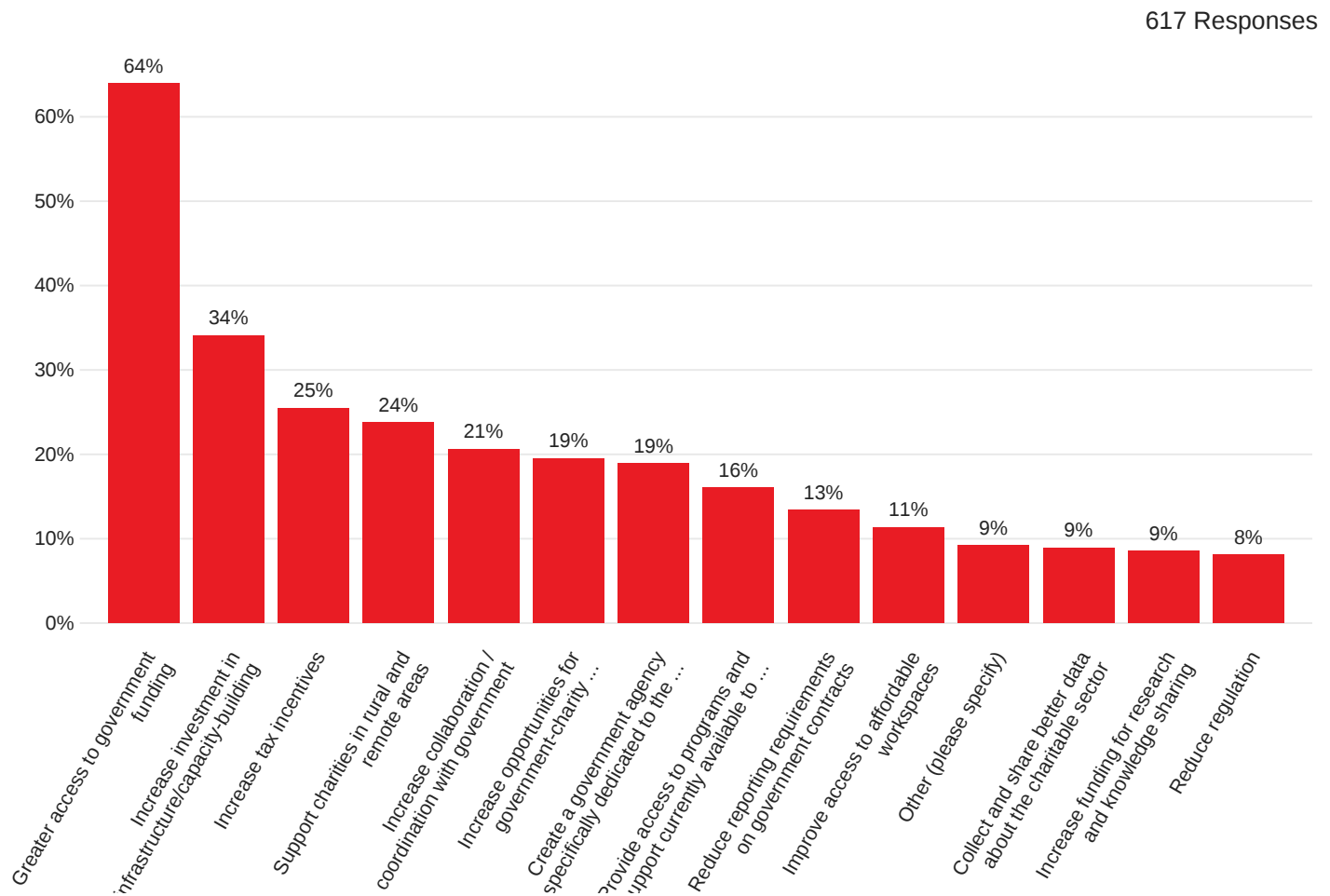
Figure 20: Please evaluate the effectiveness of your collaboration with each of the following.

685 Responses



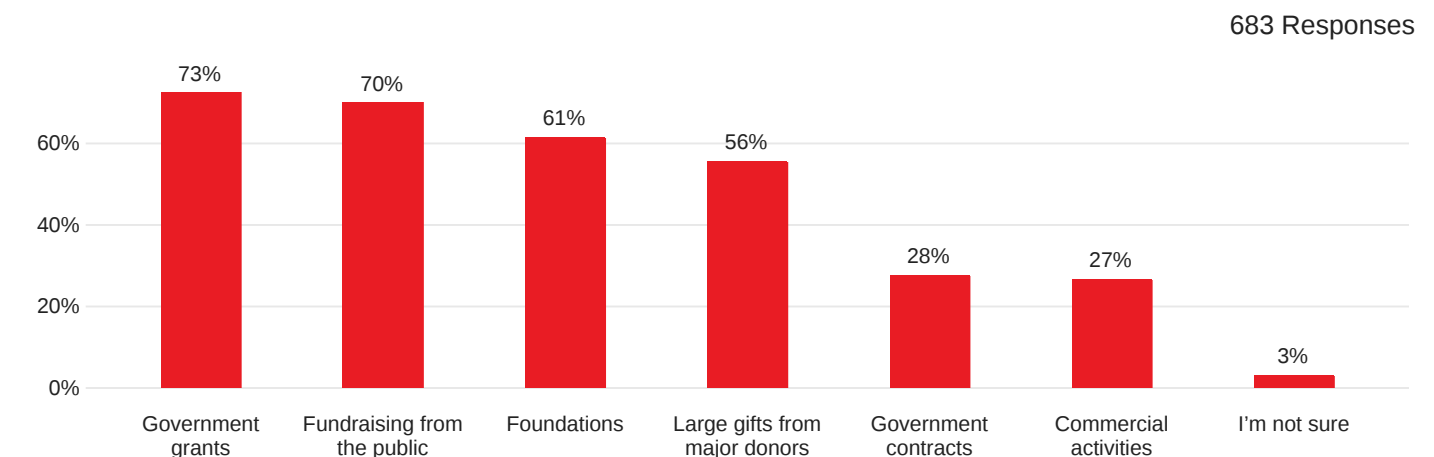
Source: CICP Year 1, Week 8, Question 2

Figure 21: In your opinion, what changes can government implement to better support the growth and sustainability of the charitable sector in Canada? Please select your top 3 choices.



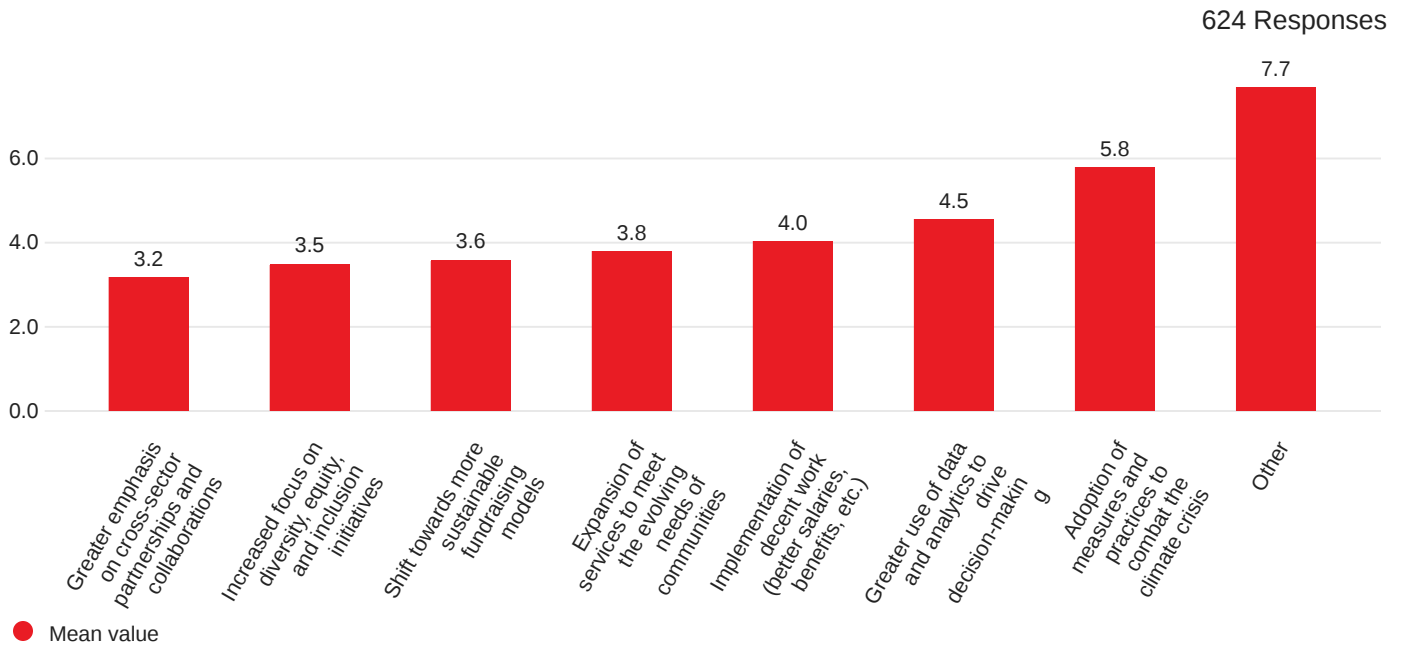
Source: CICP Year 1, Week 19, Question 1

Figure 22: Please select which of the below will be important elements in your revenue/funding structure over the coming years. Please select all that apply.



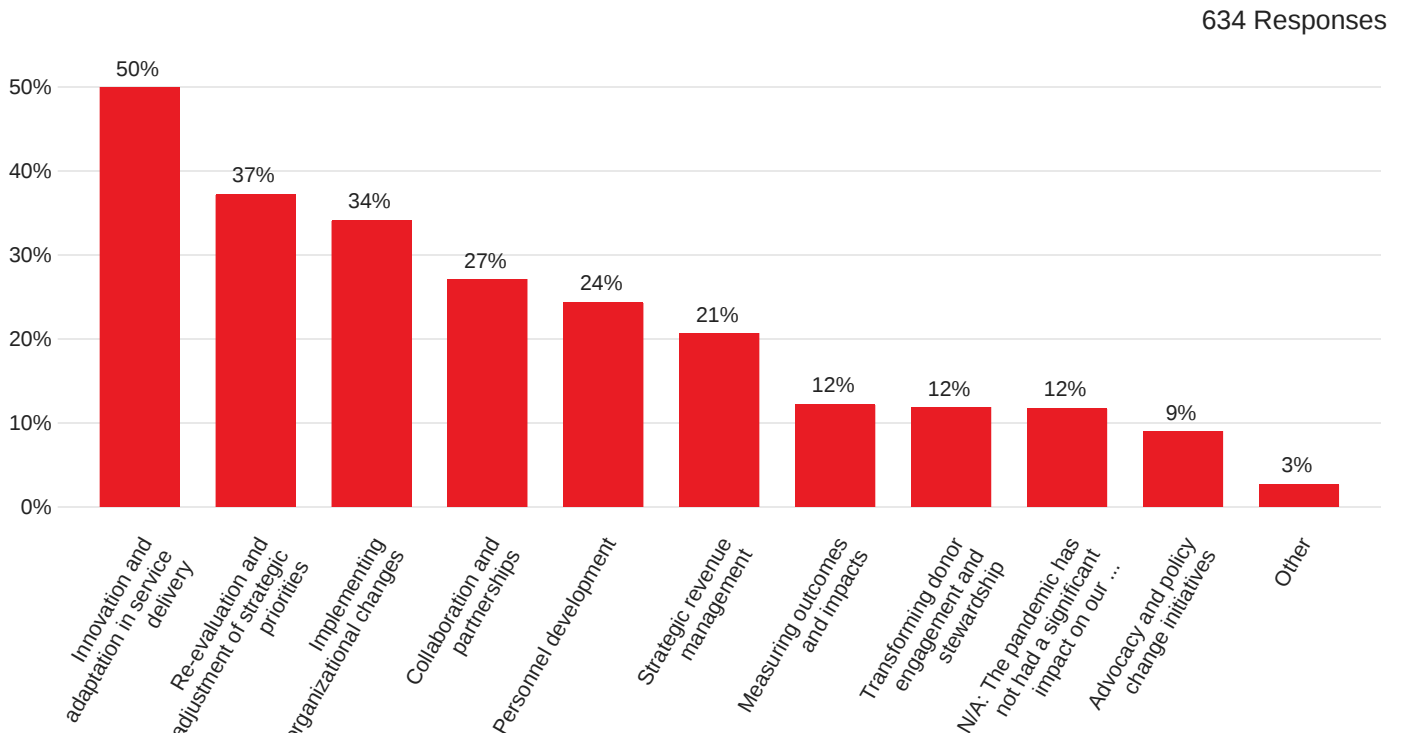
Source: CICP Year 1, Week 6, Question 3

Figure 23: Which of the following do you think could have the biggest impact on the charitable sector in Canada in the next few years, ranked from greatest impact (1) to least impact (8).



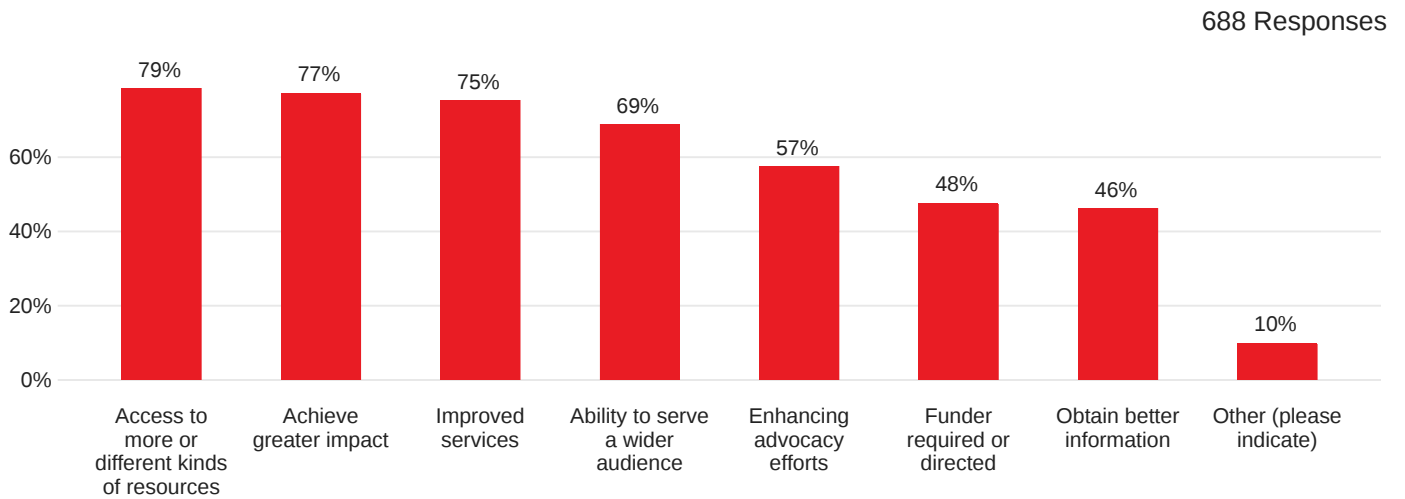
Source: CICP Year 1, Week 20, Question 3

Figure 24: How has the COVID-19 pandemic impacted the way that your organization achieves or plans to achieve its mission and goals? It has increased our focus and efforts on _____. (Select up to 3.)



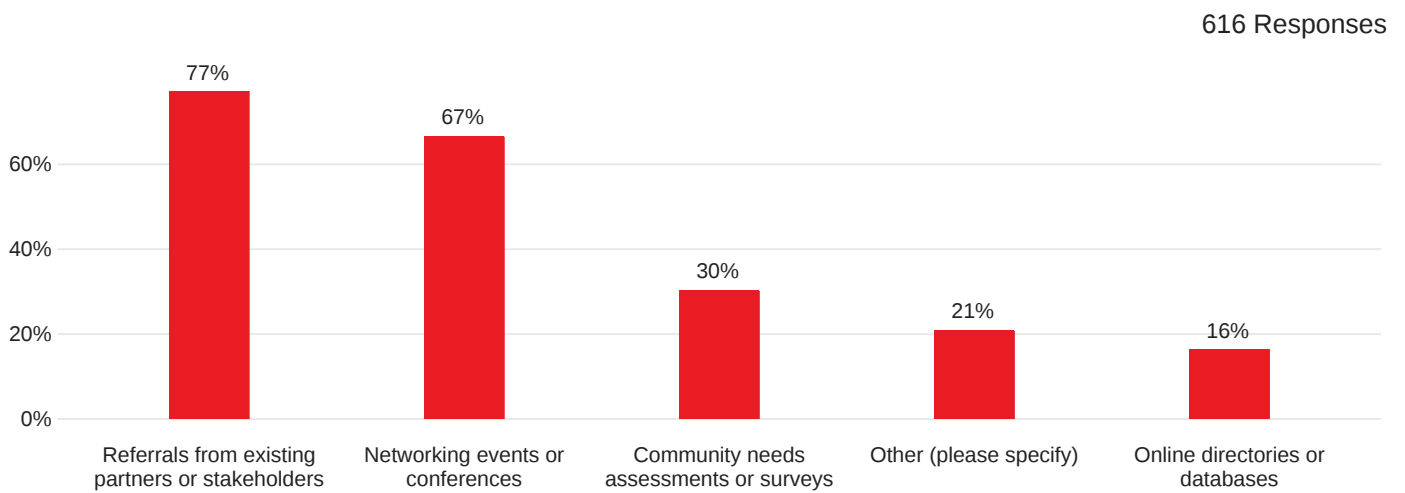
Source: CICP Year 1, Week 20, Question 2

Figure 25: What motivates your collaboration(s)? Please select all that apply.



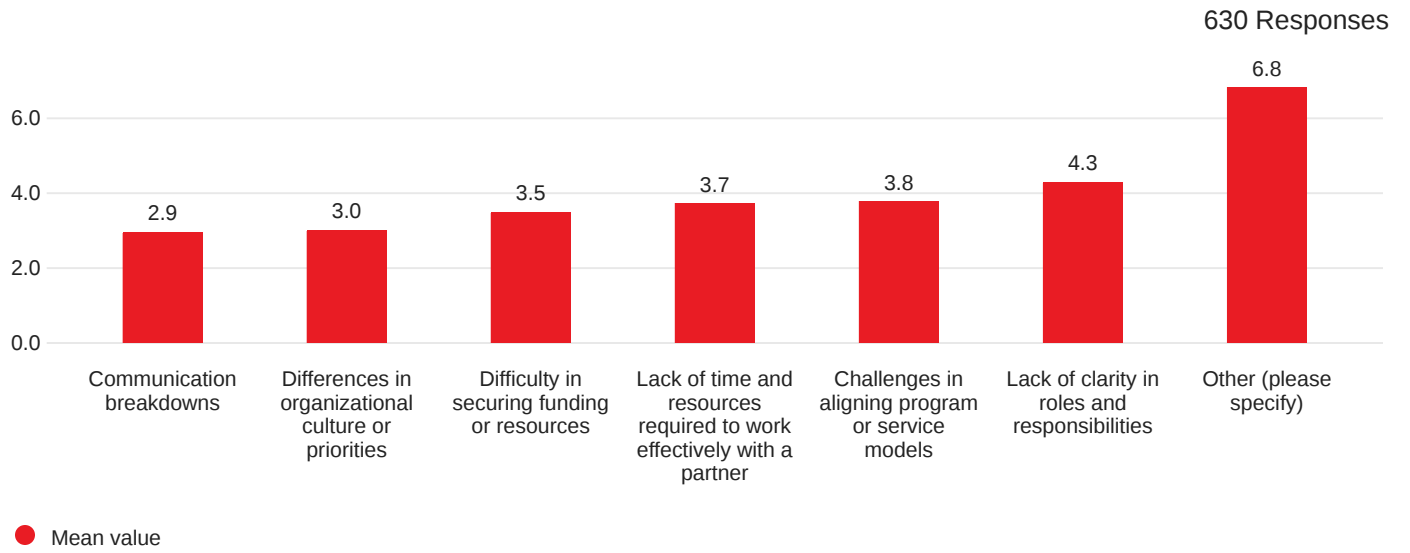
Source: CICP Year 1, Week 8, Question 3

Figure 26: How do you identify potential partners to collaborate with within the sector?



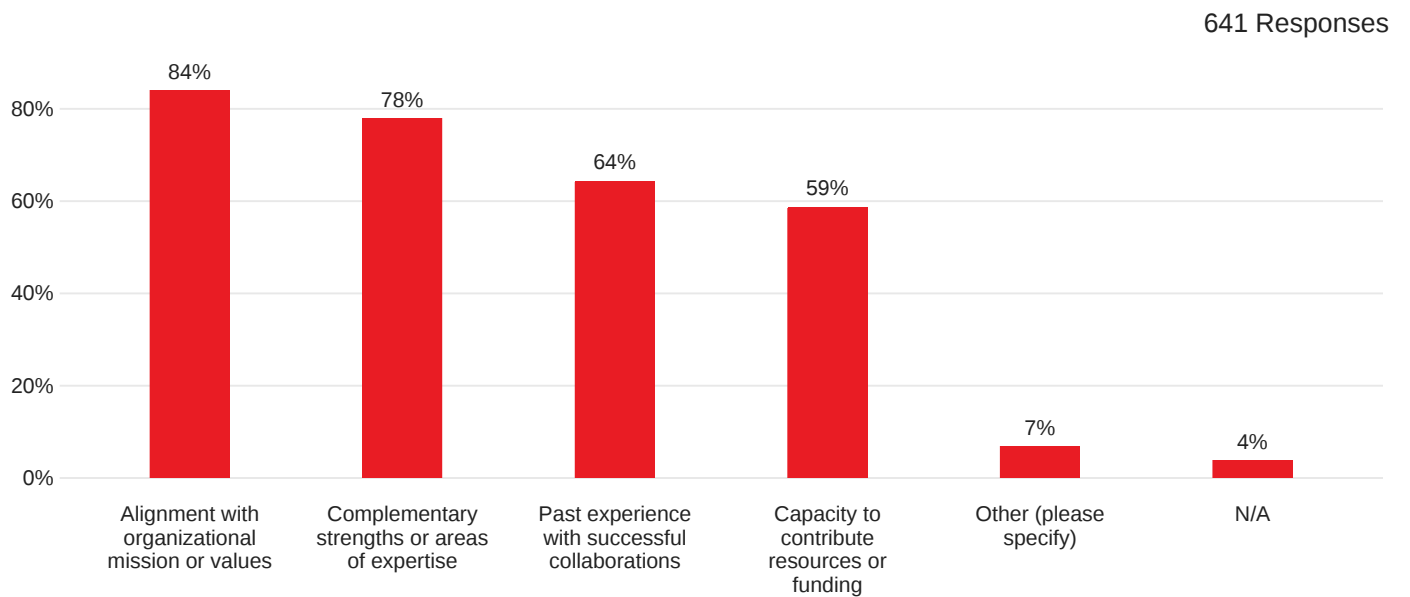
Source: CICP Year 1, Week 18, Question 1

Figure 27: In your experience, what are some common challenges that arise when collaborating with other organizations (ranked from 1 to 7, from most to least challenging)?



Source: CICP Year 1, Week 18, Question 3

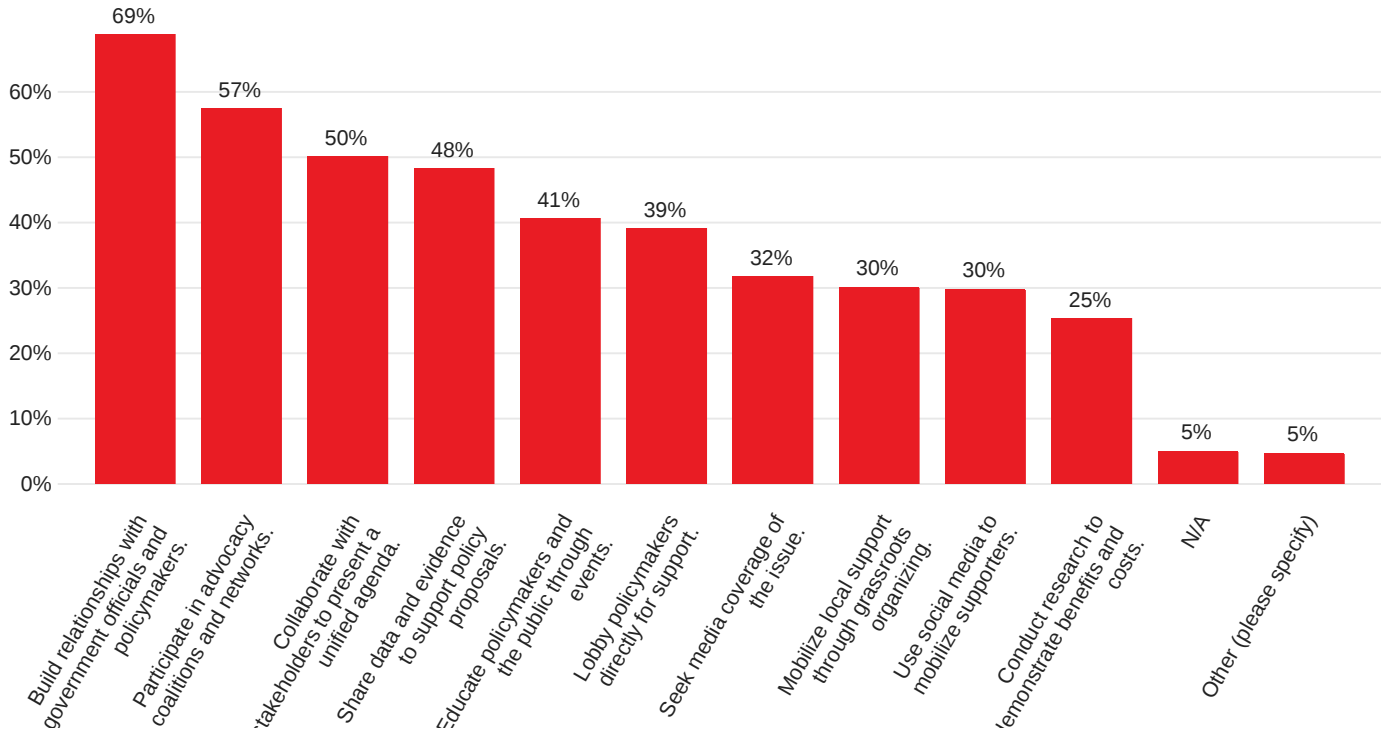
Figure 28: What factors do you consider when selecting partners to collaborate with within the sector?



Source: CICP Year 1, Week 18, Question 2

Figure 29: How can organizations like yours advocate for these [changes to laws, rules or programs] and other policy changes at the government level? (Please select all that apply.)

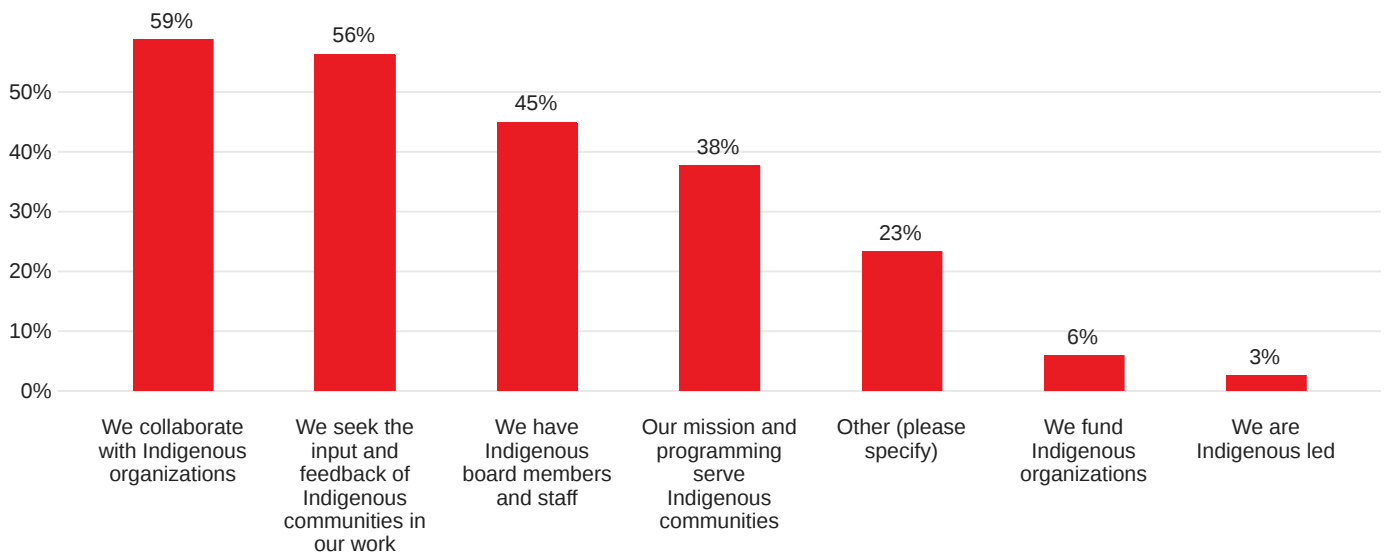
623 Responses



Source: CICP Year 1, Week 19, Question 2

Figure 30: In what ways does your organization involve Indigenous people in its work? Question posed only to those who indicated “Yes” when asked if they involve Indigenous people in their work.

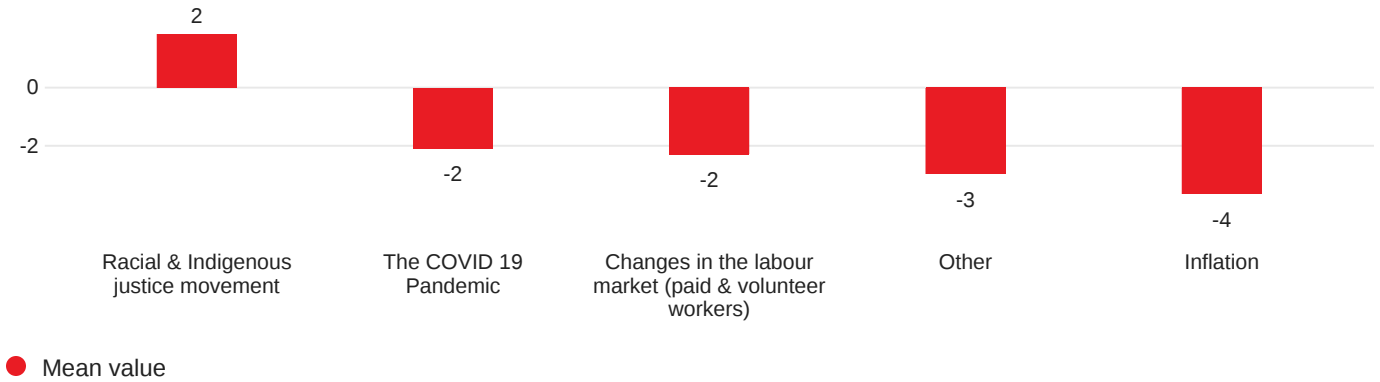
389 Responses



Source: CICP Year 1, Week 10, Question 2

Figure 31: How much do you feel each of the below will affect the work of your organization over the next year? (Sliding scale from significant harm (-10) to significant benefit (+10)).

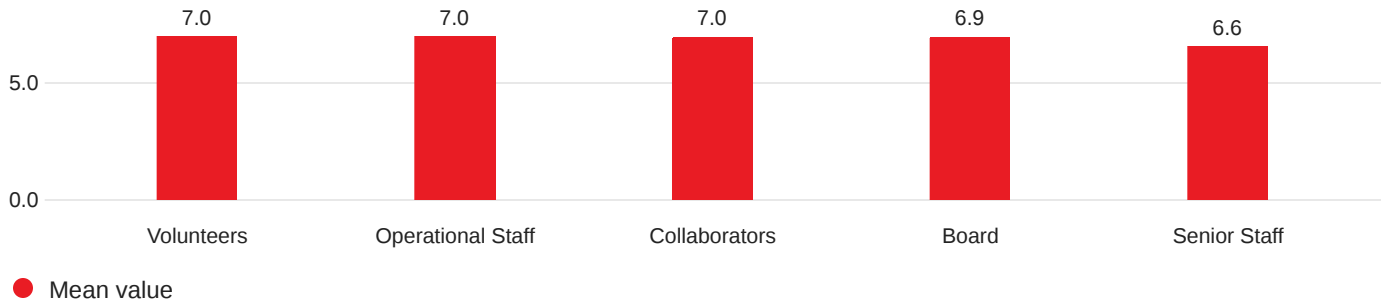
651 Responses



Source: CICP Year 1, Week 2, Question 1

Figure 32: For your organization, please indicate to what degree the following stakeholders are representative of the communities that they serve. (Sliding scale: 0 is “Not at all representative” and 10 is “Highly representative.”)

709 Responses



Source: CICP Year 1, Week 5, Question 1

Figure 33: Is your organization pursuing equity, diversity and inclusion initiatives?

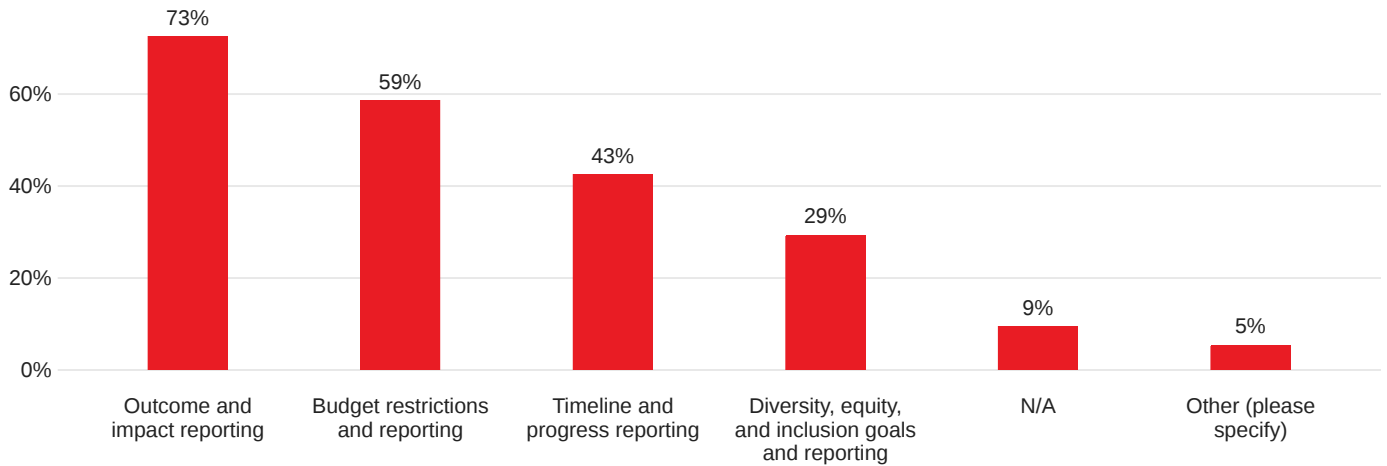
715 Responses



Source: CICP Year 1, Week 5, Question 2

Figure 34: What are the most common types of grant requirements that you encounter from funders?

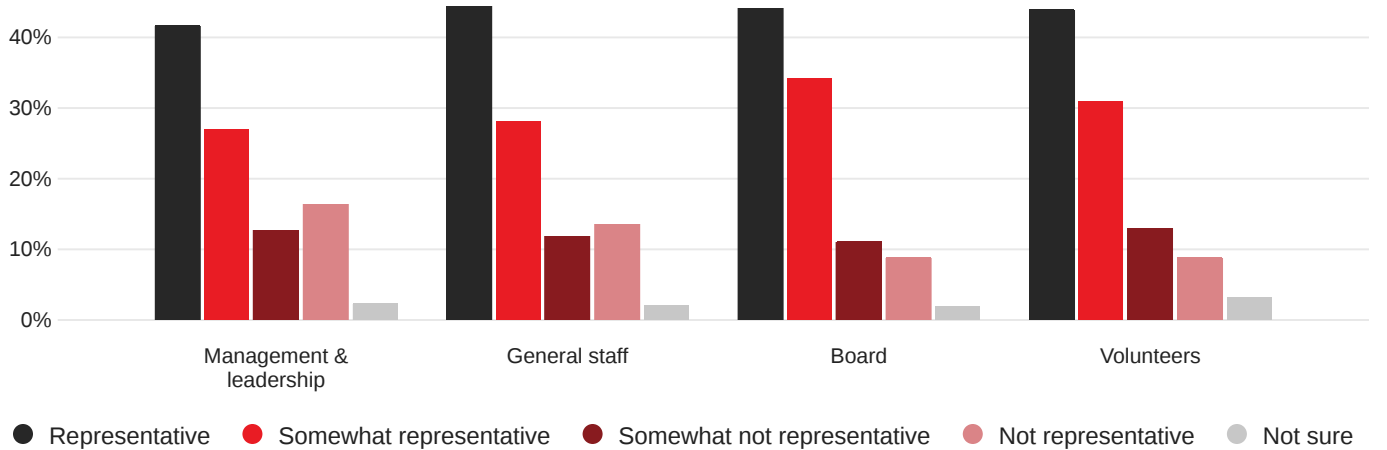
643 Responses



Source: CICP Year 1, Week 13, Question 1

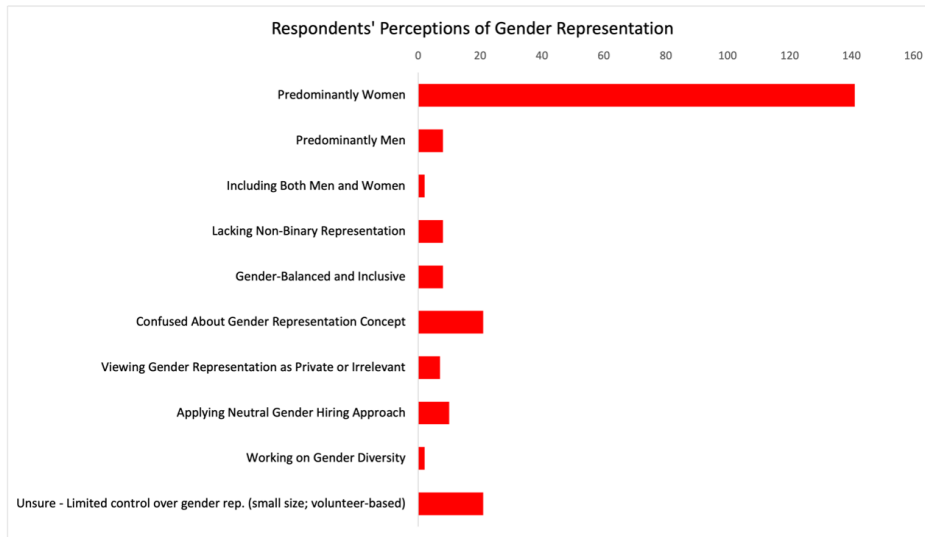
Figure 35: How would you describe the representation of different genders within your organization?

604 Responses



Source: CICP Year 1, Week 22, Question 1

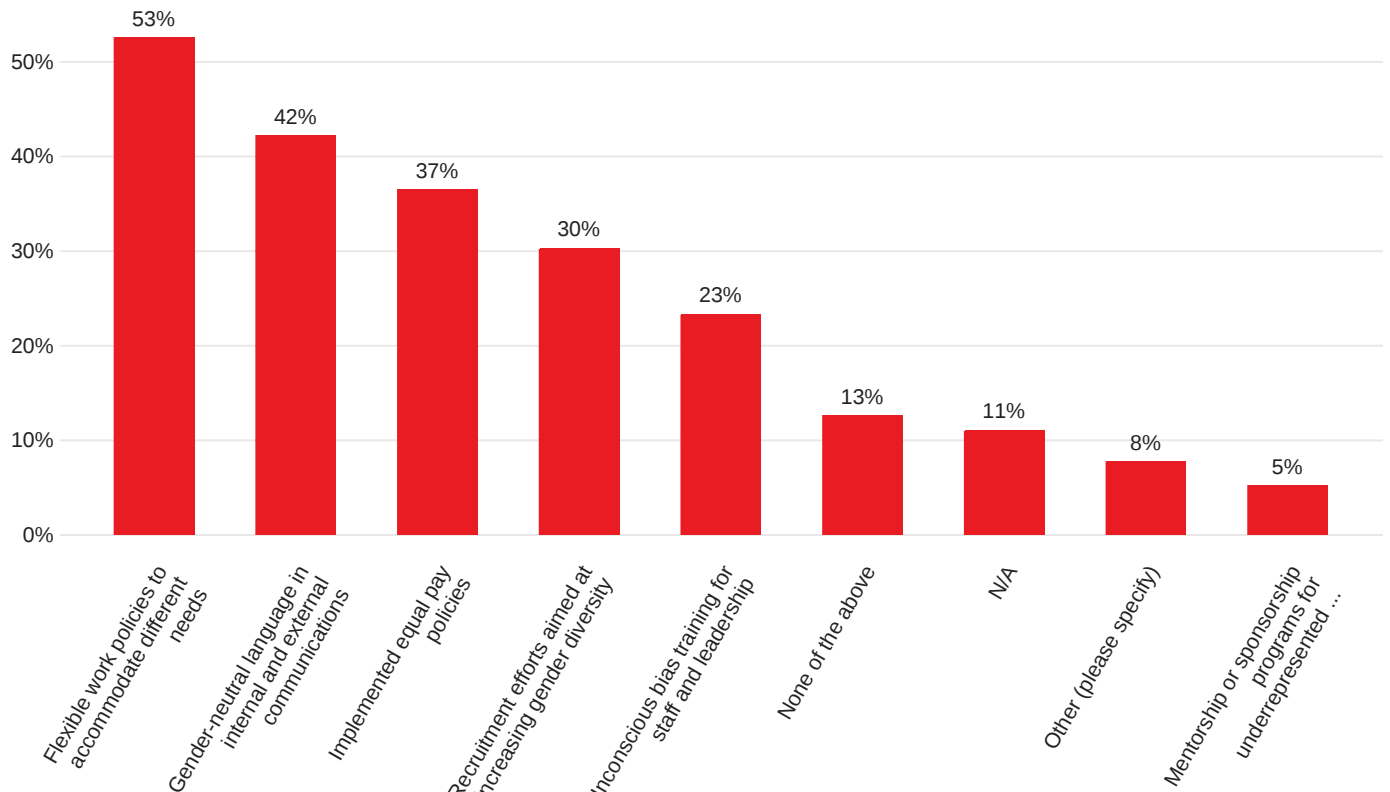
Figure 36: Please include any comments you would like to add in response to the question [in Figure 35]. The chart below is based on 217 responses and 228 coded references. (Note: a "reference" refers to a specific segment of coded text (e.g. a written commentary) reflecting a theme or idea).



Source: CICP Year 1, Week 22, Question 2

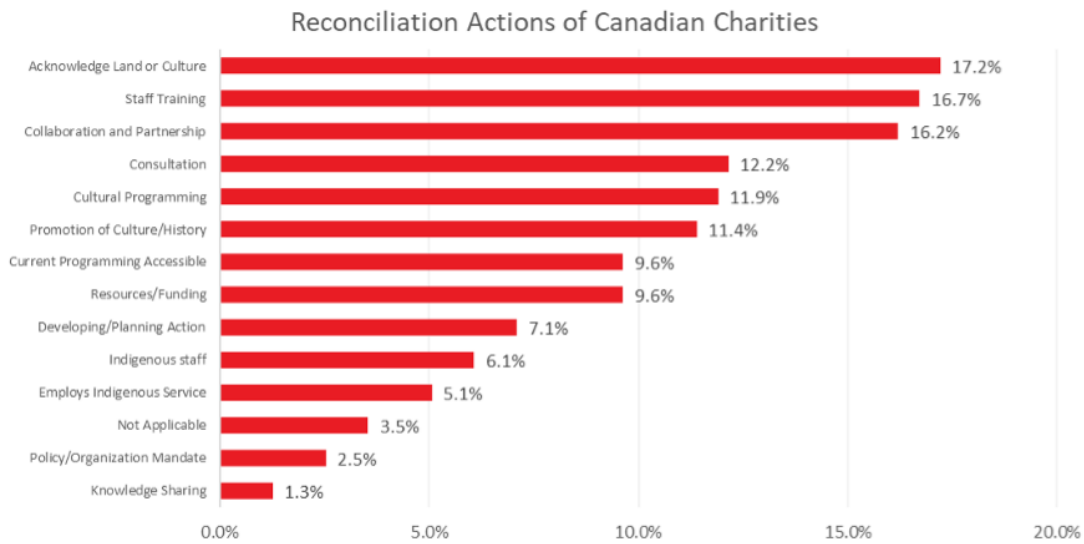
Figure 37: Which of the following initiatives has your organization implemented to promote gender equity and inclusion? Please select all that apply.

627 Responses



Source: CICP Year 1, Week 22, Question 3

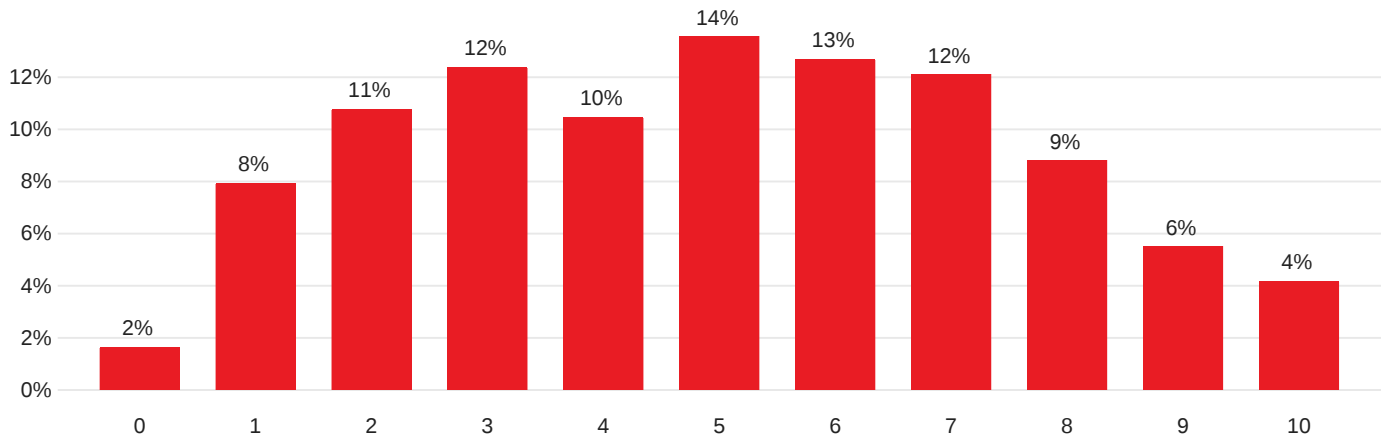
Figure 38: Can you please provide us with an example of something your organization is doing to support or prioritize reconciliation with Indigenous communities? (Question posed only to respondents who indicated some level of agreement when asked if they agree that their organization is working towards [Indigenous] reconciliation). The chart below is based on 395 responses and 571 coded references. (Note: a "reference" refers to a specific segment of coded text (e.g. a written commentary) reflecting a theme or idea).



Source: CICP Year 1, Week 10, Question 4

Figure 39: How diverse are your revenue/funding sources? (On a scale from 0 (not diverse) to 10 (highly diversified).)

670 Responses



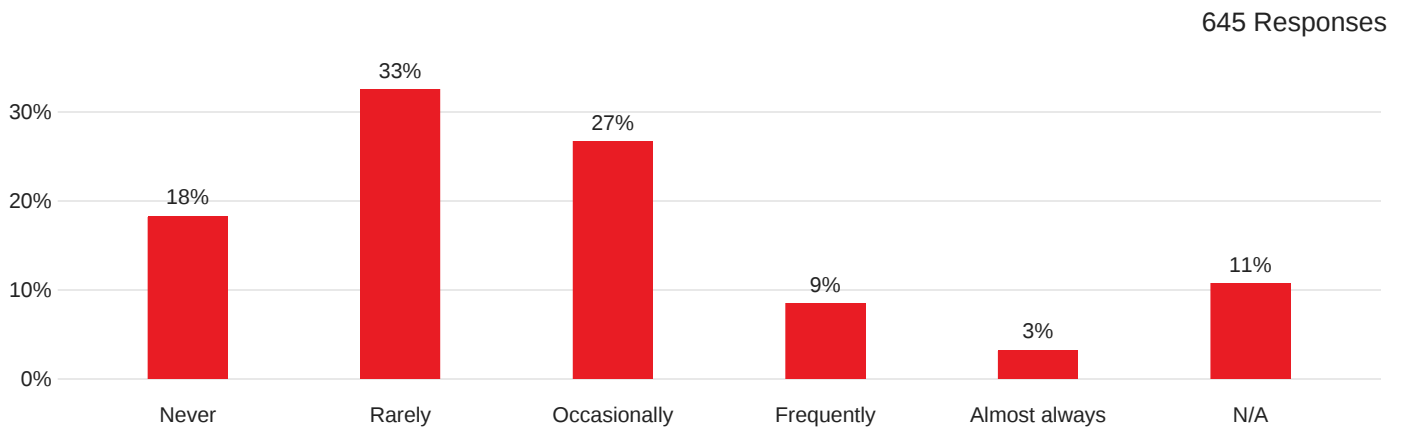
Source: CICP Year 1, Week 6, Question 1

Figure 40: Do you plan to diversify your revenue/funding sources in the near future?



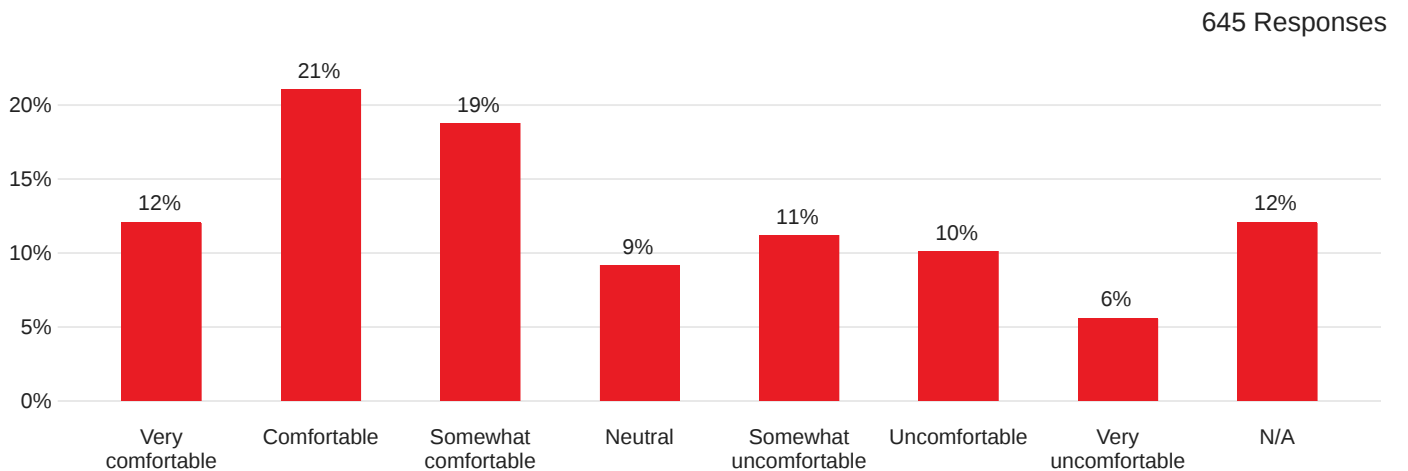
Source: CICP Year 1, Week 6, Question 2

Figure 41: How often do funders require changes to your programming or goals to fit their requirements?



Source: CICP Year 1, Week 13, Question 2

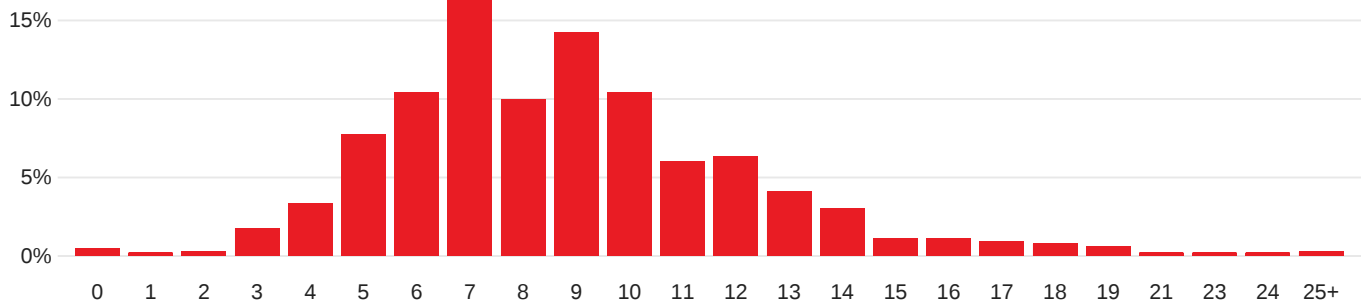
Figure 42: How comfortable do you feel negotiating with funders about their requirements?



Source: CICP Year 1, Week 13, Question 3

Figure 43: How many members are on your board of directors?

633 Responses



Source: CICP Year 1, Week 16, Question 1

Figure 44: Do you think that this number [of board members] is (1) too small; (2) just right; (3) too large?

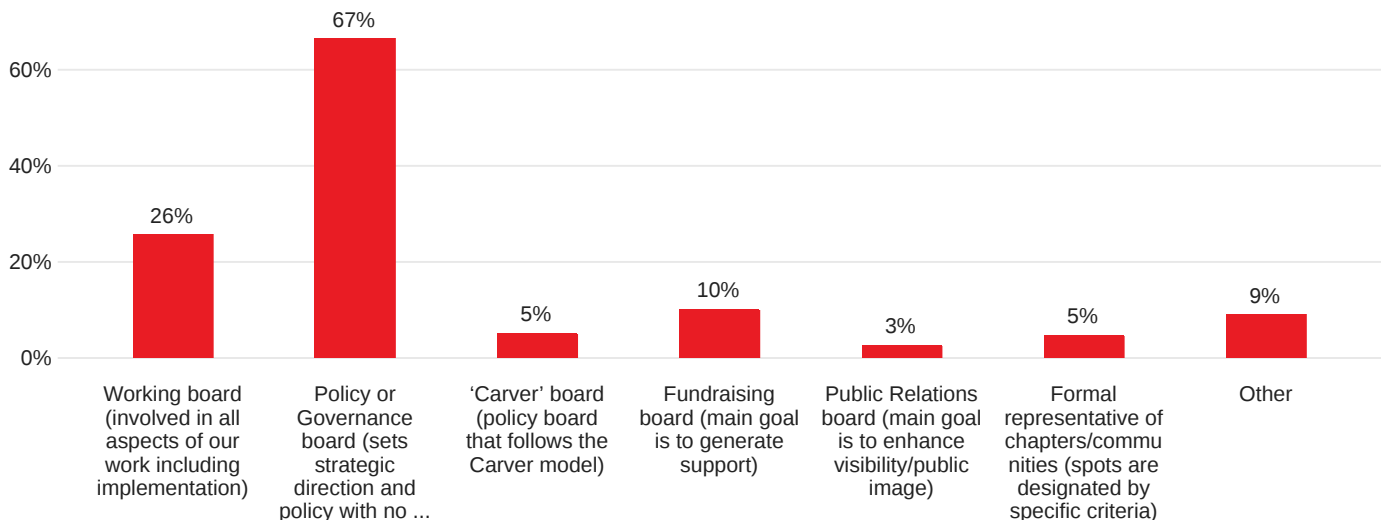
638 Responses



Source: CICP Year 1, Week 16, Question 2

Figure 45: How would you best describe the style of your board?

635 Responses



Source: CICP Year 1, Week 16, Question 3

Figure 46: Please assess each of the following skills or experiences for their relevance to the role of an executive director/CEO in a charitable organization.

Field	623 Responses			
	Not necessary	Desirable	Important	Critical
Understanding and alignment with organizational mission	1%	5%	24%	69%
Financial management/budgeting	1%	9%	40%	49%
Subject area/sector knowledge	1%	13%	36%	50%
Experience working with boards	1%	17%	42%	38%
Nonprofit management experience	2%	17%	48%	32%
General senior management experience	3%	27%	41%	28%
Human resources experience	3%	20%	51%	24%
Public relations experience	2%	26%	48%	22%
Grant writing experience	6%	29%	41%	22%
Fundraising experience	5%	31%	43%	19%
General nonprofit experience	4%	33%	48%	13%
Field/On site experience	7%	35%	41%	13%
Program evaluation	4%	31%	50%	12%
Educational qualifications	9%	39%	42%	10%
Bilingualism (Eng/Fr)	42%	37%	7%	5%
Data analysis experience	18%	48%	26%	4%
Research Skills	24%	44%	22%	4%
Private sector/business experience	33%	41%	19%	3%
Other (please specify):	11%	3%	22%	33%

Source: CICP Year 1, Week 23, Question 1

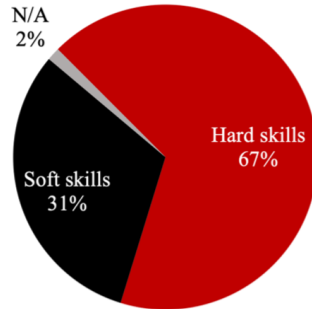
Figure 47: Please assess each of the following competencies/aptitudes for their relevance to the role of an executive director/CEO in a charitable organization.

Field	621 Responses			
	Not necessary	Desirable	Important	Critical
Working effectively with board and staff	0%	3%	21%	75%
Managing/Leading change	0%	6%	37%	56%
Persevering under adverse conditions	1%	6%	36%	56%
Inspiring commitment from staff and others	0%	6%	42%	51%
Developing relationships/ Networking	0%	7%	43%	49%
Strategic planning	1%	8%	43%	47%
Creating a diverse and inclusive work environment	2%	12%	43%	41%
Balancing personal life and work	2%	15%	47%	33%
Fostering participative management	1%	16%	51%	29%
Other (please specify):	12%	0%	22%	25%

Source: CICP Year 1, Week 23, Question 2

Figure 48: If your organization could successfully hire for one position in the near future, what kinds of skills would you be looking for? The chart below is based on 643 responses and 1439 coded references. (Note: a "reference" refers to a specific coded segment of text (e.g., a written comment) reflecting a theme or idea.)

Hard Skills & Soft Skills by Number of References



Source: CICP Year 1, Week 4, Question 1

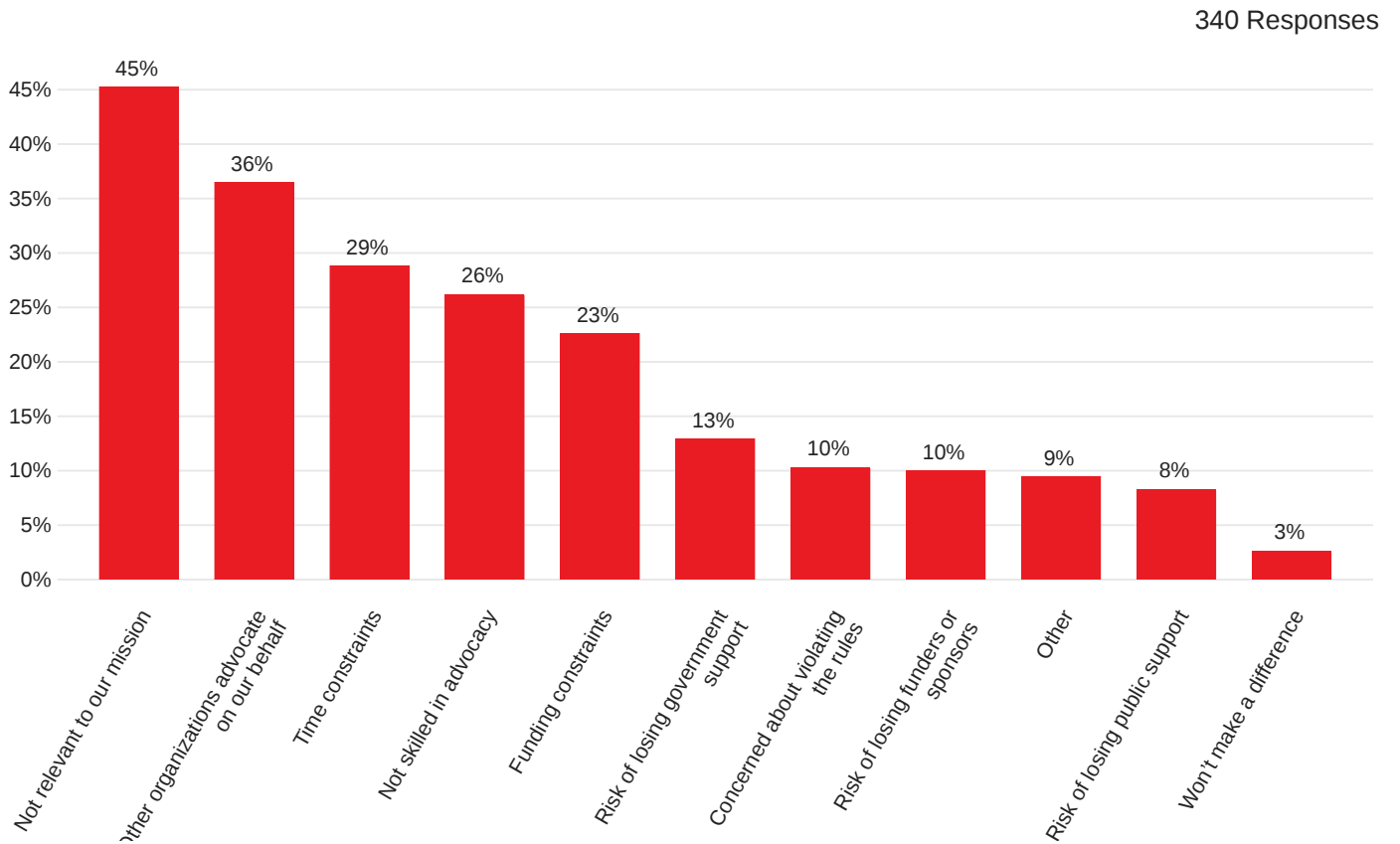
Figure 49: Does your organization engage in advocacy to change laws, rules or programs?

695 Responses



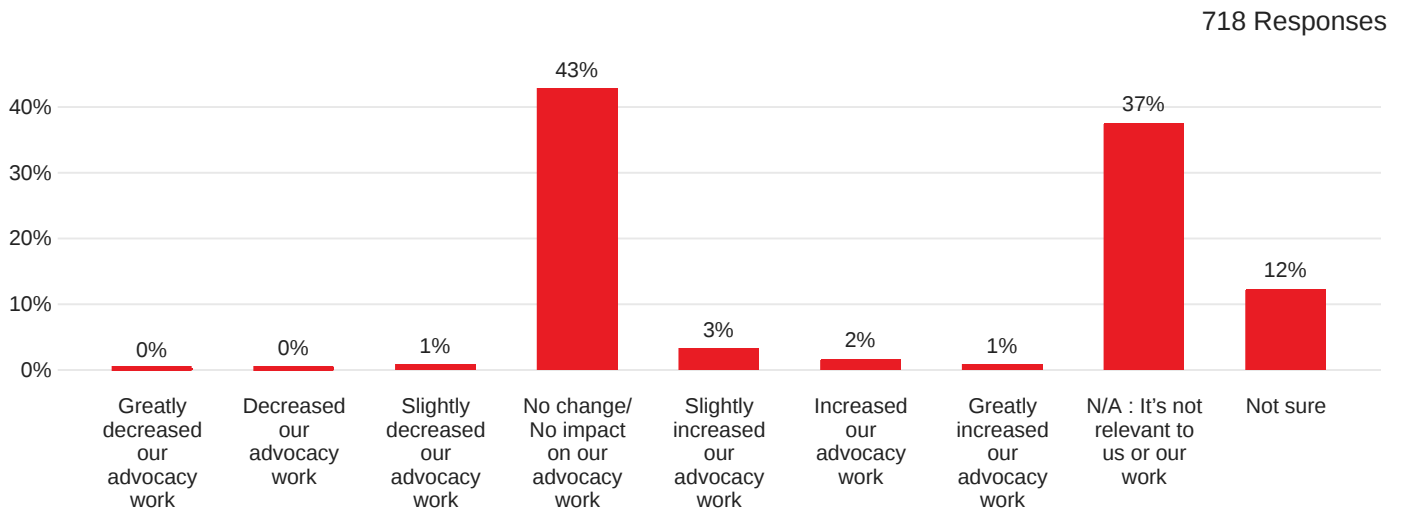
Source: CICP Year 1, Week 9, Question 1

Figure 50: If no [in Figure 49], why does your organization not engage in advocacy? (Please select all that apply.)



Source: CICP Year 1, Week 9, Question 2

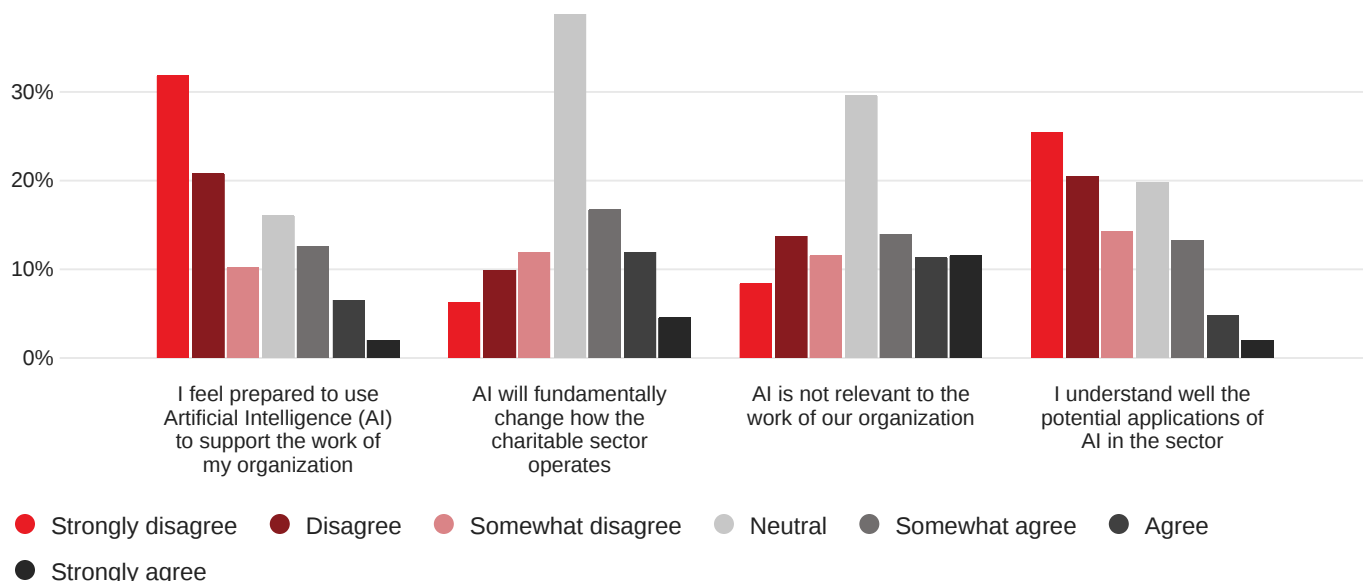
Figure 51: A few years ago, the CRA [Canada Revenue Agency] relaxed the rules on 'political activities.' Has this changed your advocacy work?



Source: CICP Year 1, Week 9, Question 3

Figure 52: Respondents' views on AI [Artificial Intelligence] preparedness and relevance.

617 Responses



Source: CICP Year 1, Week 14, Question 1

Figure 53: In your opinion what are some of the potential advantages and disadvantages of using artificial intelligence (AI) in the charitable sector?

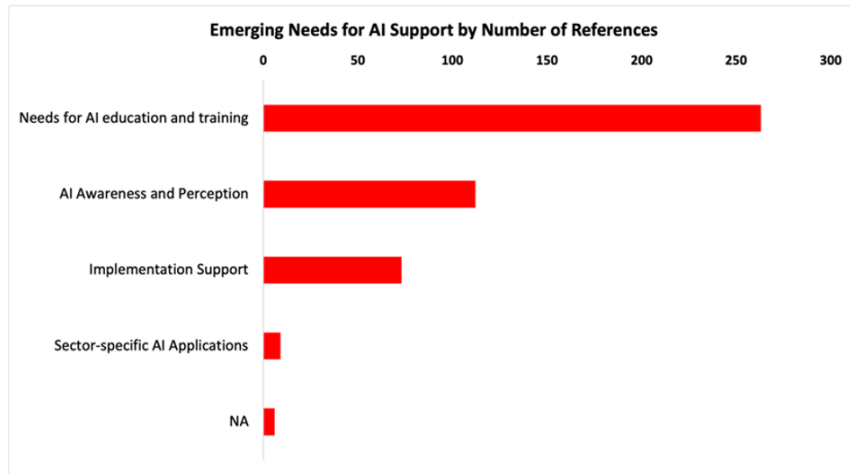
615 Responses

Field	Strongly disagree	Disagree	Somewhat disagree	Neutral	Somewhat agree	Agree	Strongly agree
AI could help charitable organizations to target more efficiently and effectively their programs and services.	7%	5%	6%	36%	27%	17%	2%
AI can reduce the need for human intervention and decision-making in the charitable sector.	25%	22%	18%	22%	9%	4%	1%
AI can help charitable organizations analyze and interpret large amounts of data more quickly and accurately.	3%	1%	2%	16%	32%	31%	15%
AI can help organizations in creating content for their social media posts, websites, email drafting, and more.	4%	4%	7%	20%	32%	25%	8%
AI could contribute to the perpetuation of bias and discrimination in the charitable sector.	3%	3%	6%	41%	19%	16%	11%
AI could result in the loss of personal connections between charitable organizations and the communities they serve.	2%	4%	4%	14%	19%	30%	27%
AI could lead to job losses or displacement of workers in the charitable sector	3%	5%	10%	25%	23%	18%	15%
AI could be too complex or difficult to use for smaller or less technologically advanced charitable organizations	2%	3%	5%	14%	24%	29%	23%
AI could pose a risk to data privacy or security for charitable organizations and their clients	1%	3%	6%	27%	23%	23%	18%

AI could be expensive for charitable organizations to implement 1% 1% 4% 19% 19% 27% 28%

Source: CICP Year 1, Week 14, Question 2

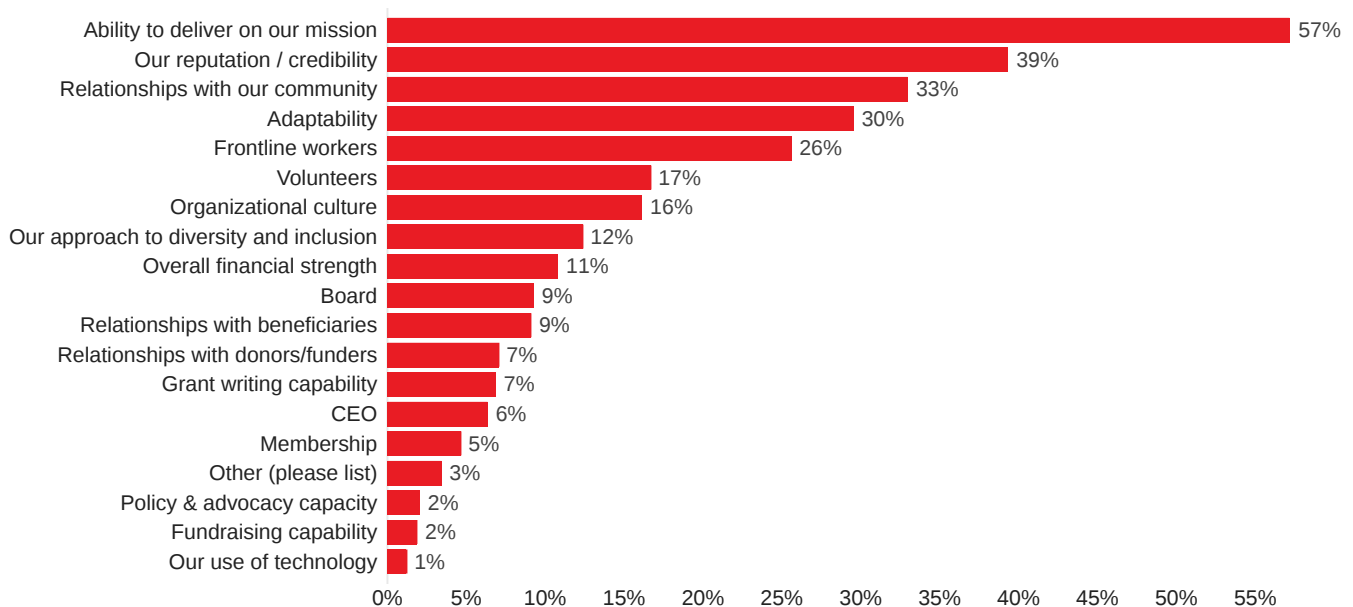
Figure 54: What kinds of support would you need to increase your knowledge of AI technologies and their potential integration into the work of your organization? *The chart below is based on 404 responses and 463 coded references.* (Note: a "reference" refers to a specific segment of coded text (e.g. a written commentary) reflecting a theme or idea).



Source: CICP Year 1, Week 14, Question 3

Figure 55: What are your organization’s greatest assets or strengths? (Multiple choice — please select no more than three.)

582 Responses



Source: CICP Year 1, Week 1, Question 1