

02 / 2023



MONTHLY REPORT

Charity Insights Canada Project -
Projet Canada Perspectives des Organismes de Bienfaisance
[CICP-PCPOB]

#2 / 10

PROJECT YEAR 1



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A WORD FROM OUR PRINCIPAL INVESTIGATOR

As you will see from February's results, our panellists had interesting things to say about volunteers, advocacy work, collaboration, and indigenous priorities. We try to vary survey themes each month to ensure we are covering interesting and relevant topics for all. As we continue to collect results, we hope that charitable organizations, practitioners, and academics across the country and beyond find our reports and data helpful. With the project's growing bank of information, our website will soon offer an interactive dashboard where everyone will have the opportunity to explore study answers using simple queries. We are hard at work finalizing the details so stay tuned! In addition to our upcoming interactive dashboard, we will also soon be launching the first Module of our Community Education Centre's (CEC's) Data Literacy course. More information about the course and the CEC, can be found on page 2 of this report.

We want to sincerely thank all the panellists answering questions every week. Your efforts are an incredible resource for the sector. Lastly, please make sure to share these reports with your colleagues and friends. This will not only support the goal of this project, i.e. increase the knowledge about the Canadian charitable sector, but also acknowledge the weekly efforts of our participants in making this initiative impactful.

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THE CHARITY INSIGHTS CANADA PROJECT – AN OVERVIEW

The Canadian charitable sector employs 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. This knowledge gap became more apparent during the COVID pandemic when quick policy decisions were needed. The CICP-PCPOB aims to support ongoing data efforts across the country, amplify the voices of practitioners, and serve as a valuable resource for researchers, educators, nonprofit advocates, policymakers, and other stakeholders. Through a range of tools, including short weekly surveys, reports, an online data literacy hub, and a yearly data summit (November 9th, 2023), we aim to provide a comprehensive overview of the trends, challenges, and opportunities currently facing the sector.

The CICP-PCPOB 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 throughout the country. We aim to listen, learn, and improve data practices, including our own, while acknowledging our biases and limitations.

Each week, we send a ~3-minute survey to a panel of more than a 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

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



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 report. We delve more deeply into our findings when preparing our monthly and annual reports. In addition, we are developing a data literacy course which we hope to launch later this year.

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 the CICP-PCPOB project possible.

INTRODUCING THE CICP COMMUNITY EDUCATION CENTRE (CEC)

In line with the second pillar of the Charity Insights Canada Project (CICP), our commitment is to establish a durable and adaptable infrastructure that promotes access to and understanding of the data collected about the charitable sector. The Community Education Centre (CEC) is a vital component of this infrastructure, providing practitioners with access to experts and resources to assist them in their data-related inquiries and acquire essential data literacy knowledge and skills.

Our first initiative is the CEC Data Literacy Course. This online course is tailored to charity and nonprofit professionals who are new to the subject or looking to enhance their existing knowledge. The course consists of mini lectures that cover critical data literacy concepts, featuring examples applicable to the charitable sector.

Data literacy is the ability to examine, analyze, and communicate with data in a critical and ethical manner. Our aim is to increase participants' confidence in working with data while promoting critical and ethical reflection in data use. Ultimately, our goal is to equip charity and nonprofit professionals with the skills and knowledge to leverage different types of data and analysis methods in their daily work for better outcomes.



The course is structured into modules, each covering a key component of data literacy. Each module includes various capsules that address critical competencies in data literacy. Through brief videos featuring examples from the CICP project, learners will acquire the knowledge and skills necessary to transform data into insights. The course aims to offer engaging, clear, and informative sections that explore key questions such as “What?”, “Why?” and “How?” of each concept discussed. By the end of the course, participants will be familiar with the essential components of data literacy, such as defining data, reading and working with data, communicating with data through visualization and storytelling, and understanding the key ideas of ethics in data use.

We are thrilled to announce that the first module will be released in the coming months, serving as an introduction to the course. The module will guide learners through an overview of essential data-related concepts, including how data is defined (capsule 1), how it differs from information, knowledge, and wisdom (capsule 2), and why it is critical to begin with the problem definition (capsule 3).

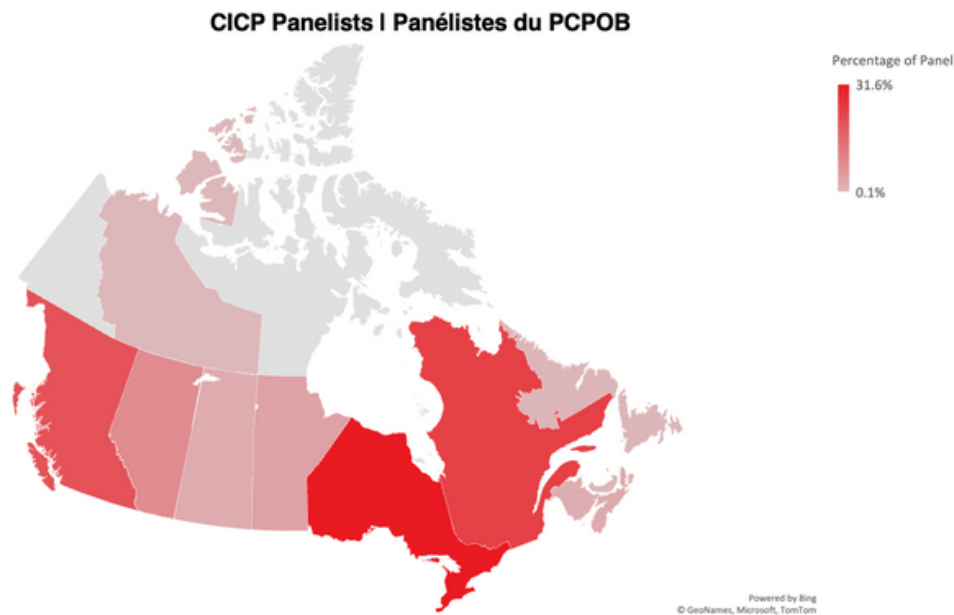
PANEL SUB-SAMPLES

As we receive results, many have asked, “But what about foundations? Or what about a specific region of the country? Are volunteer-run organizations different from the ones in our main sample?” The sections titled “**A Deeper Look**” at the end of each week delves deeper into the subsamples of the study (see Appendix for methodological details). Here we try to highlight some of the most interesting results found. These results are presented separately since not all subsamples achieve desirable statistical precision. Please see the methodology Appendix for more details.



MONTHLY THEMES

This month's weekly themes included *Volunteer Management*, *Collaboration within the Sector*, *Advocacy Work*, and *Prioritizing Indigenous Communities*.



MONTHLY HIGHLIGHTS

59%

of respondents report a **loss of volunteers** to varying degrees due to the COVID-19 pandemic.

89%

of respondents report occasional to extensive **collaboration with government** (municipal, provincial and/or federal).

57%

of respondents report that their organization **involves Indigenous people** in their work.

42%

of respondents report that their organization **engages in advocacy** to change laws, rules, or programs.

46%

of respondents evaluate their **collaboration with other charities** as *very effective*.

67%

of respondents agree to some degree that their organization is working toward **reconciliation with Indigenous communities**.



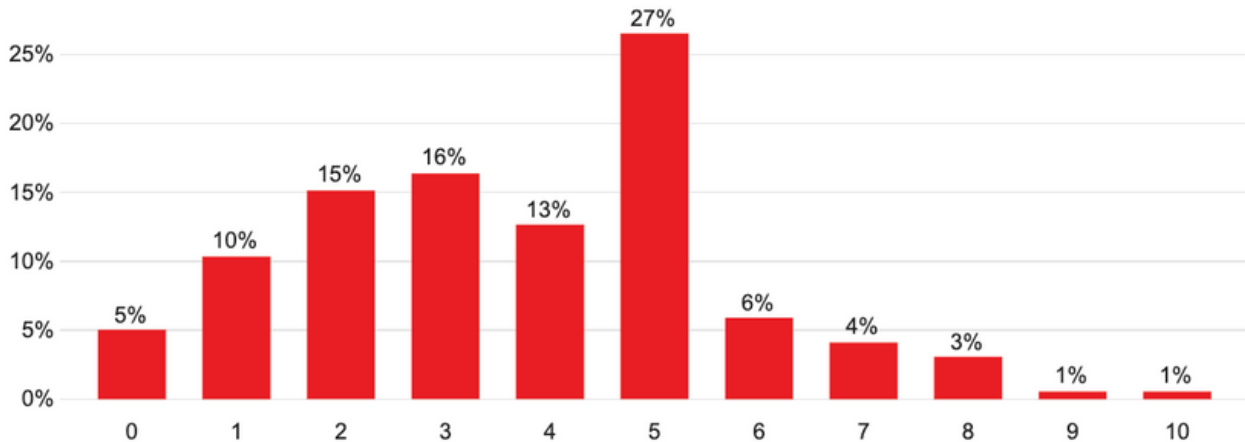
VOLUNTEER MANAGEMENT

Our week 7 survey sheds light on the impact of the COVID-19 pandemic on volunteer engagement in the Canadian charity sector. Conducted in the first week of February 2023, 709 registered charities across Canada responded to the survey.

Of the responding charities, 83% reported working with volunteers, with 59% experiencing a loss of volunteers to varying degrees due to the pandemic. Conversely, 15% reported an increase in volunteers to varying degrees while 27% didn't see a change. Recruitment of volunteers has also been affected: 57% of respondents reported varying degrees of increased difficulty with recruitment due to the pandemic.

Q2.1 - Volunteer retention / La rétention des bénévoles

(0: major loss of volunteers / perte importante de bénévoles, 5: no change/pas de changement, 10: major increase in volunteers / l'augmentation importante du nombre de bénévoles)

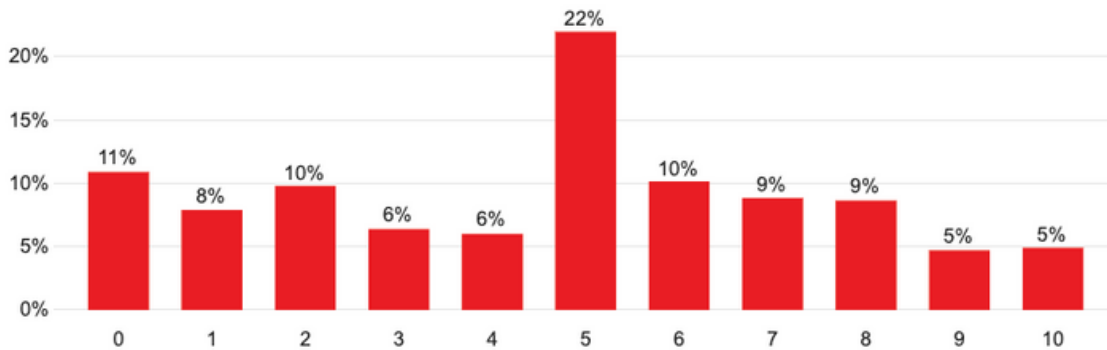


The majority of charities (89%), reported changes in the activities and roles undertaken by volunteers since the start of the pandemic, with 60% noting moderate to major changes. Meanwhile, 88% have had to make changes to how they manage volunteers. Unfortunately, these changes have had negative impacts on fundraising and events (37%) as well as on services and programs (34%).



Q2.3 - Volunteer activities & roles / Activités des bénévoles / rôles :

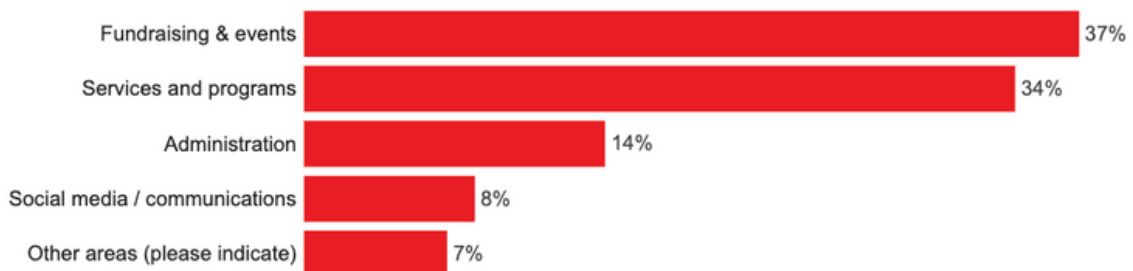
(0: no change/pas de changement, 10: major changes in volunteers' activities & roles / changements majeurs dans les activités & rôles des bénévoles)



These survey results emphasize the crucial role played by volunteers in the Canadian charity sector and echo similar findings about the significance of volunteer engagement in the sector. The survey results also highlight the unpredictable nature of volunteer management, particularly in priority areas such as fundraising and programming. Volunteer management is critical for not only volunteer recruitment and retention, but also in supporting fundraising and programming. The ability to support volunteer management during the COVID-19 pandemic had long term effects across the sector.

The pandemic has made it harder for charities to recruit and retain volunteers, resulting in many organizations having to adapt their volunteer engagement practices to the new context and the unease felt by some of resuming in-person activities.

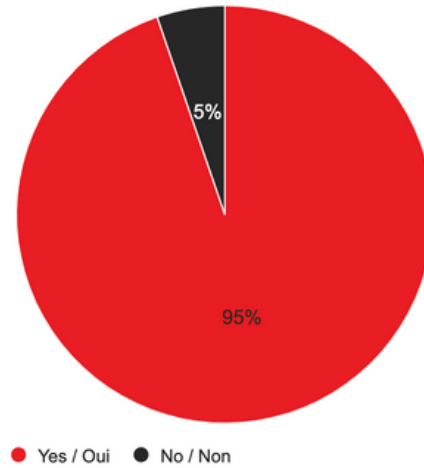
Q3 - If you experienced a change in the ways which your organization has engaged with volunteers since the beginning of the COVID-19 pandemic, have any of the below areas been negatively affected by these changes? Please indicate all that apply.





A DEEPER LOOK

In week 7, we asked whether organizations worked with volunteers. Foundations (private and public) responded that they worked with volunteers at a higher rate (95%) compared to the average response rate of designated charities (Designation C on the T3010) (83%). While it is interesting to find that foundations rely more on volunteers than the average charity, it should be noted that only 38 foundations responded to this question. Future research could help us understand how foundations use volunteers in their activities, as much of the research on volunteer management has focused on charity-type organizations.



Week 7, Q1, Foundations (private and public), 38 responses



Week 7, Q1, Charities in QC, 138 responses



Week 7, Q1, International charities, 62 responses

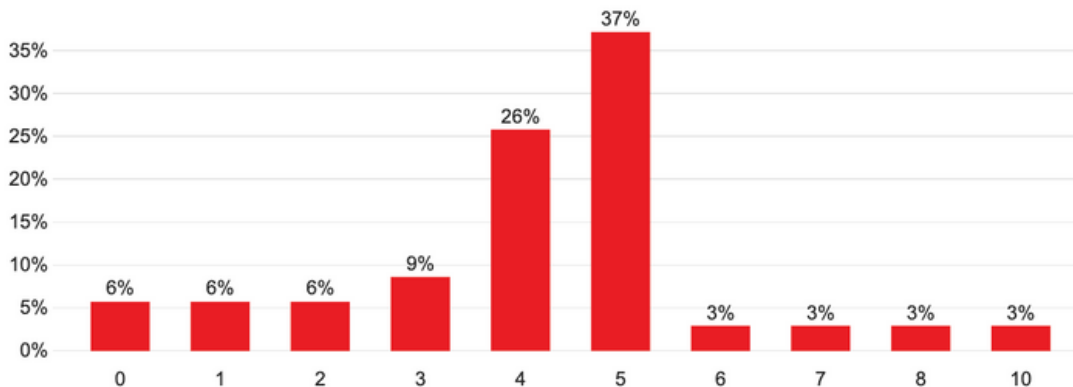
Quebec-based charities (138 responses) and international-oriented charities (62 responses), mentioned working less with volunteers than the average organization. They responded that they did not work with volunteers at 22% and 23%, respectively, compared to an average "not working with volunteers" rate of 17% for the general sample. However, the difference of 6% between the groups is not statistically significant ($p=0.165$, $p=0.218$).



When asked whether organizations have changed the way they engage with volunteers since the beginning of the pandemic, foundations (private and public) and international charities were more inclined to respond with "no change" (only 35 and 44 respondents, respectively). More specifically, foundations (private and public) answered "no change" at a rate of 37% (retention) and 34% (recruitment), compared to the overall average of 26% and 27%. Similarly, international charities responded with "no change" at rates of 35% (retention) and 41% (recruitment). It is surprising to find that 41% of the international charities we surveyed had less retention issues than one would anticipate given the restrictions on travel and international activities during the pandemic. A deeper look into how people volunteer in internationally-oriented charities would help shed light on this finding.

Q2.1 - Volunteer retention / La rétention des bénévoles

(0: major loss of volunteers / perte importante de bénévoles, 5: no change/pas de changement, 10: major increase in volunteers / l'augmentation importante du nombre de bénévoles)

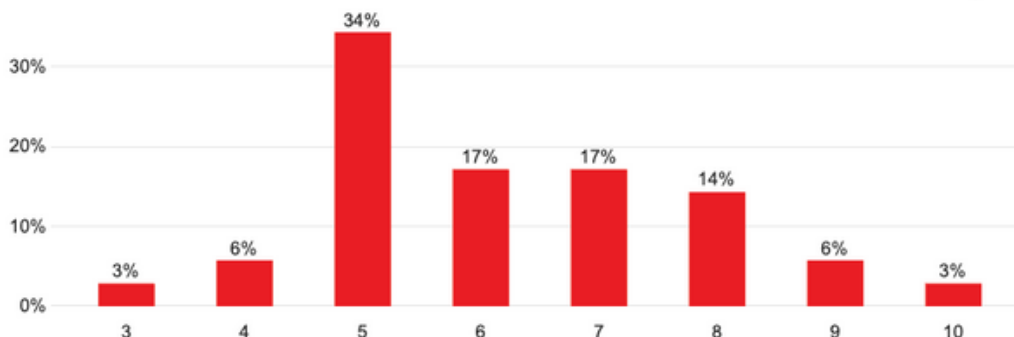


Week 7, Q2.1, Foundations (private and public), 35 responses

Q2.2 - Volunteer recruitment / Recrutement de bénévoles :

(0: less difficulty recruiting volunteers / moins de difficultés à recruter des bénévoles, 5: no change/pas de changement, 10: more difficulty recruiting volunteers / plus de difficultés à recruter des bénévoles)

35 Responses

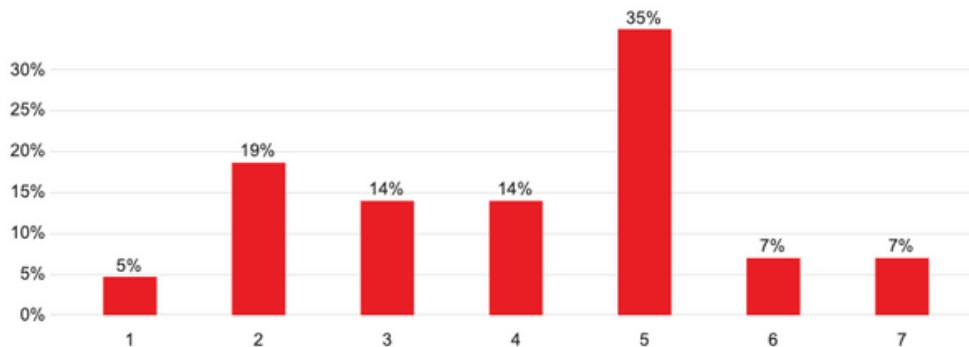


Week 7, Q2.2, Foundations (private and public), 35 responses



Q2.1 - Volunteer retention / La rétention des bénévoles

(0: major loss of volunteers / perte importante de bénévoles, 5: no change/pas de changement, 10: major increase in volunteers / l'augmentation importante du nombre de bénévoles)

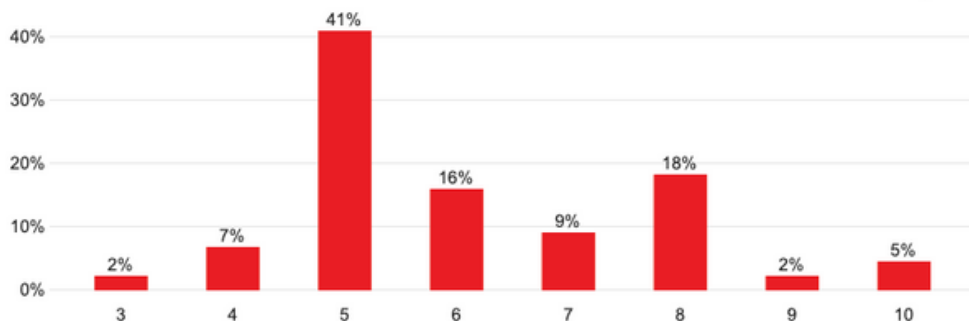


Week 7, question 2.1, International charities, 43 responses

Q2.2 - Volunteer recruitment / Recrutement de bénévoles :

(0: less difficulty recruiting volunteers / moins de difficultés à recruter des bénévoles, 5: no change/pas de changement, 10: more difficulty recruiting volunteers / plus de difficultés à recruter des bénévoles)

44 Responses

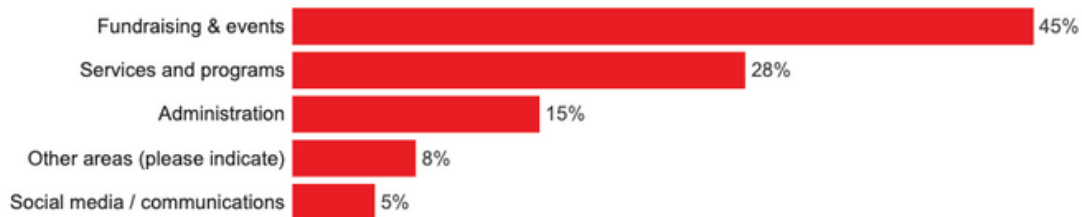


Week 7, question 2.2, International charities, 44 responses



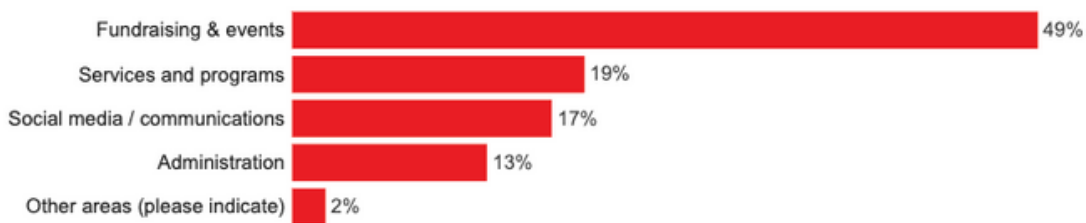
Looking at the groups of registered charities that have experienced negative changes in relation to their volunteers, foundations (private and public) and international charities stand out in their responses in our study - keeping in mind that the number of respondents was only 26 and 27, respectively. Both of these groups indicated that "fundraising & events" have been affected more than the overall sample, with 45% for the foundations and 49% for the international charities, compared to an average of 37% for the average charity.

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.



Week 7, Q3, Foundations (private and public), 26 responses

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.



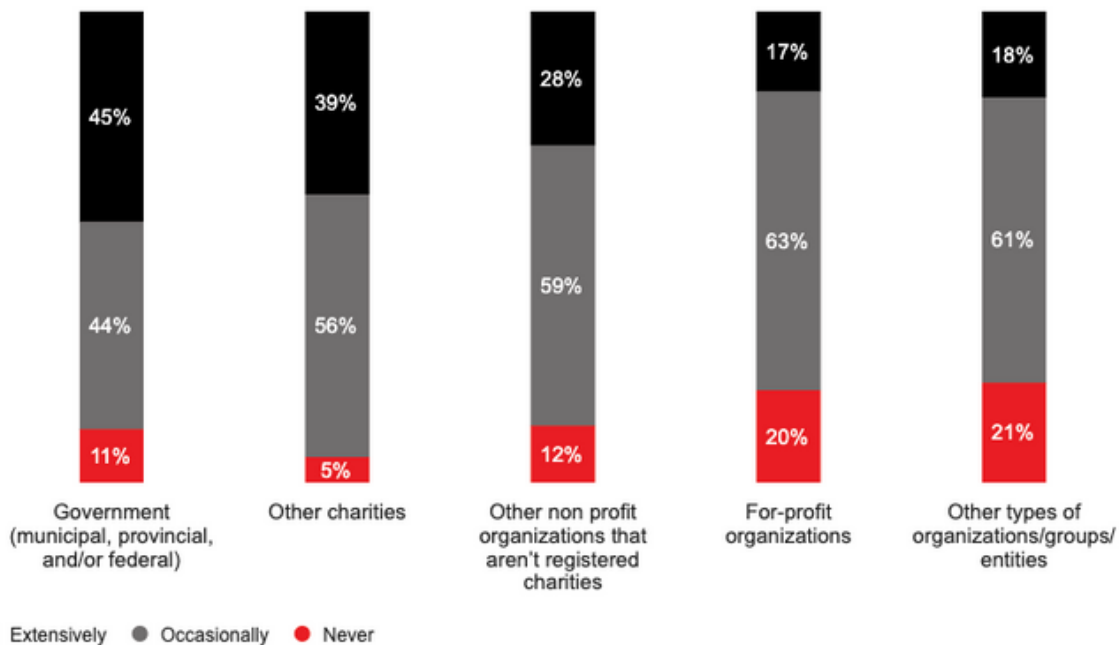
Week 7, Q3, International charities, 27 responses



COLLABORATION WITHIN THE SECTOR

The eighth weekly survey (with 695 responses) from the CICP, explores the extent to which charities collaborate with other sectors of society and the motivations driving such collaborations. There appears to be a high degree of collaboration (more than 89%) between charities and municipal, provincial, and federal governments. Specifically, 45% of charities reported extensive collaboration, and 44% reported occasional collaboration with these entities.

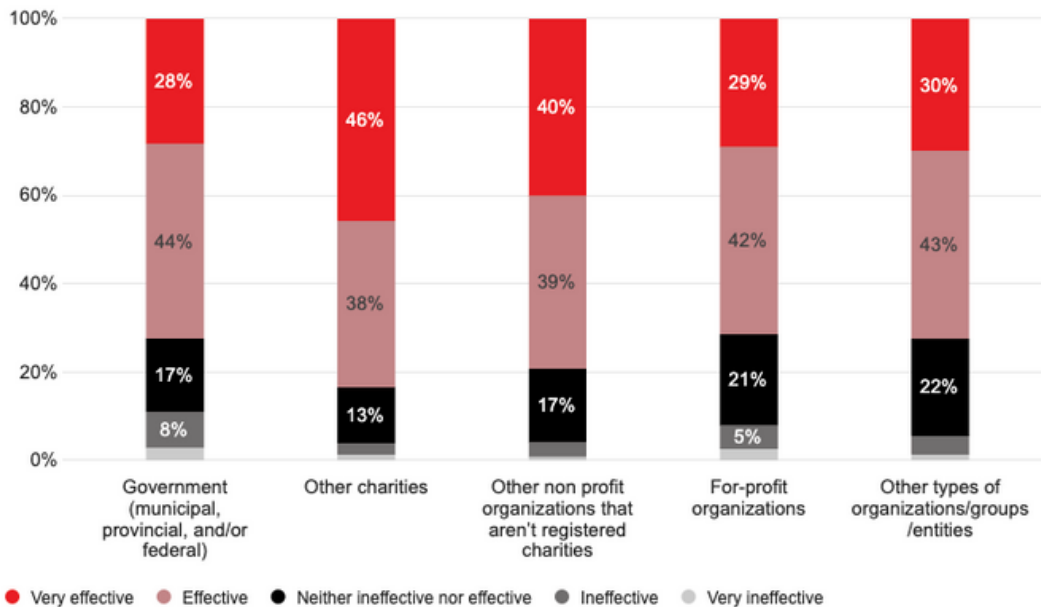
Q1 - Please select to what degree your organization collaborates with each of the below.



Collaborations between charities themselves were also found to be quite common, with 39% of charities engaging in extensive collaborations and 56% of charities engaging in occasional collaborations. High rates of occasional collaborations were also reported with nonprofits, for-profit organizations, and other types of groups. The majority of surveyed charities reported these collaborations as moderately to very effective. Interestingly, collaborations with other charities were rated as the most effective by the highest number of respondents, with 46% evaluating these collaborations as very effective.



Q2 - Please evaluate the effectiveness of your collaboration with each of the following.

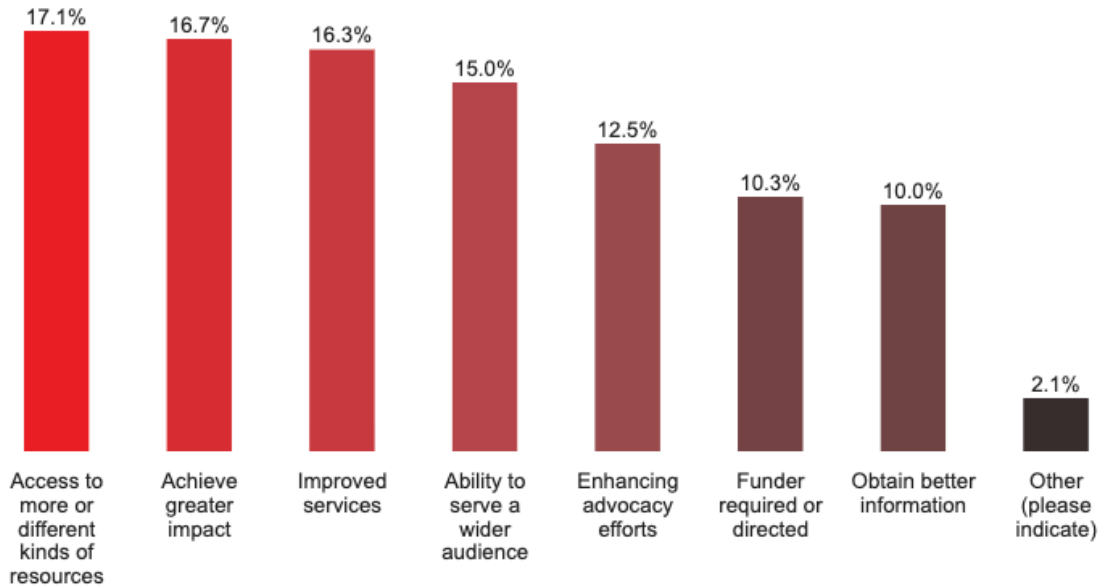


The motivations driving these collaborations are varied, with no single overarching factor identified. Rather, several similarly ranked reasons were reported, including: access to new or different resources; achieving greater impact; improved services; and the ability to serve a wider audience, among others. Collaborations were also found to be motivated by shared clients, collegiality and reciprocity, a desire to learn from one another and expand their understandings of issues, and even fun, indicating a sense of community or common purpose.

Overall, the survey results highlight the widespread prevalence of collaborations within and outside of the charitable sector and their importance in achieving a range of organizational functions. Collaborations are integral to the success of the charitable sector and broader society.



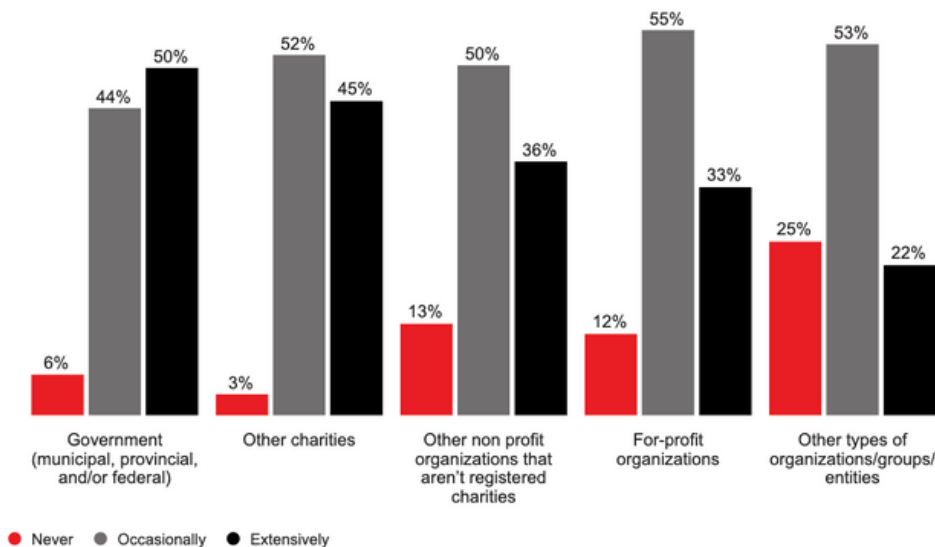
Q3 - What motivates your collaboration(s) with others? (Please select all that apply)



A DEEPER LOOK

We found that charities based in Quebec declared collaborating to a greater extent than the average charity in our study for every stakeholder considered. They answered that they worked extensively with the government (50%) as only 6% answered that they never did, and 44% occasionally.

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

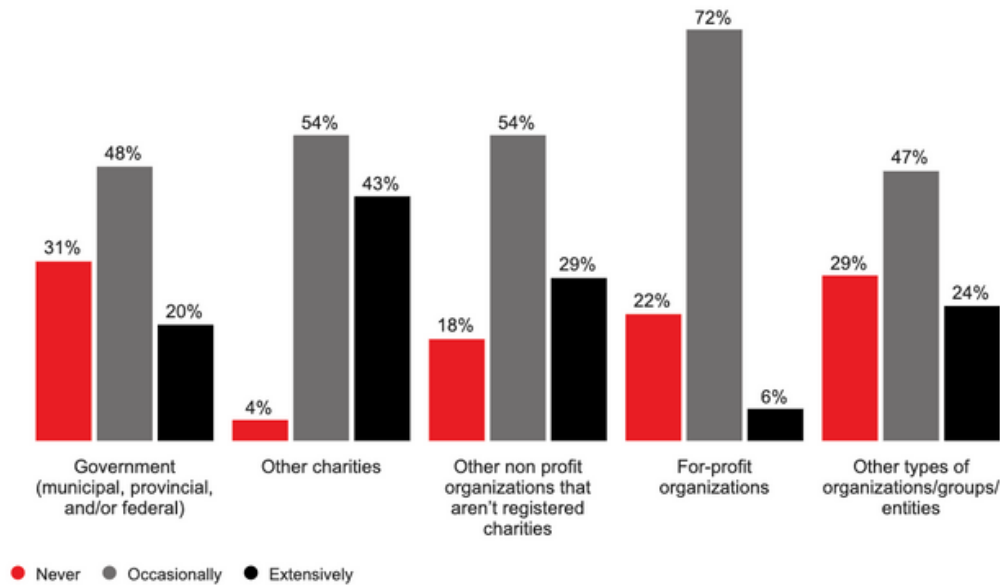


Week 8, question 1, Charities in QC, 139 responses



International charities mentioned collaborating with for-profit entities (72% occasionally) and other charities (97%), but 31% declared never collaborating with governments.

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



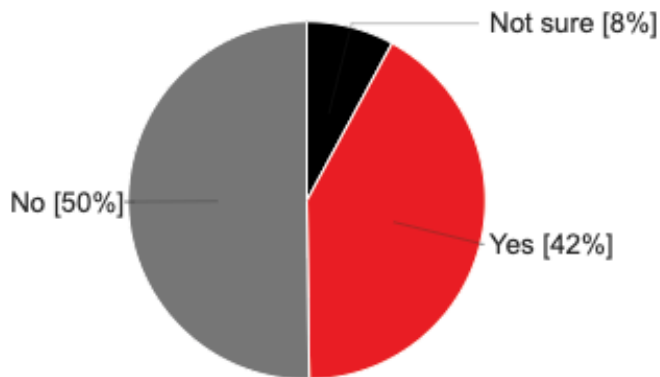
Week 8, question 1, International charities, 56 responses.



ADVOCACY WORK

Many wonder whether the changes in the CRA’s rule around political activities have had an impact on the sector thus far. Week 9’s survey focused on the extent to which Canadian charities are engaged in advocacy and how this might have changed under the recently introduced more flexible regulations. The survey, sent out the week of February 15th, collected 731 responses. The survey itself was split between an initial query of whether organizations are engaged in public policy advocacy, and – conditional on a negative response – a further question asking why.

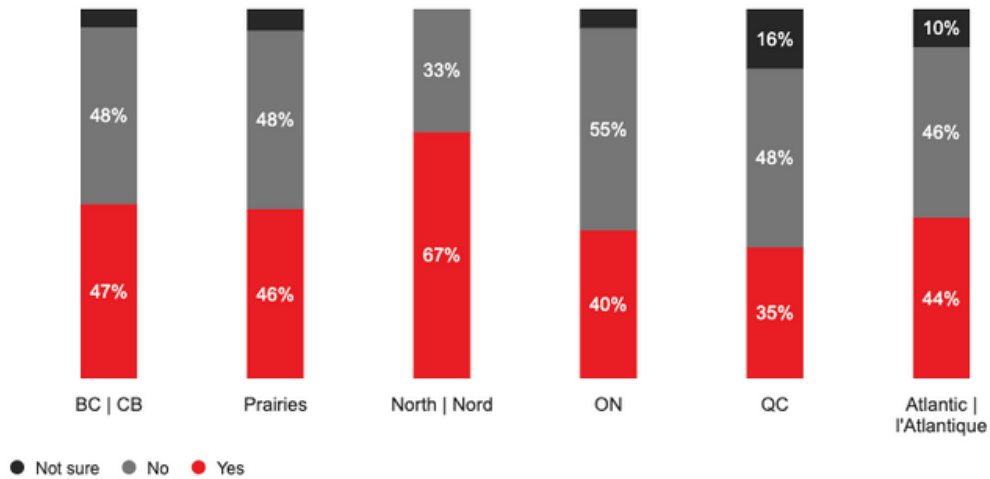
Q1 - Does your organization engage in advocacy to change laws, rules or programs?



A majority (50%) of recipients responded with “no” for the first question (no advocacy work), with 42% of recipients saying “yes”, and a further 8% stating they were unsure. This varies across provinces, with Quebec/Ontario reporting 35/40% “yes” and 48/55% “no” respectively, Western/Atlantic provinces reporting a tight clustered range of 46-48% no and 44-47% yes, and the territories reporting 67% yes versus 33% no.

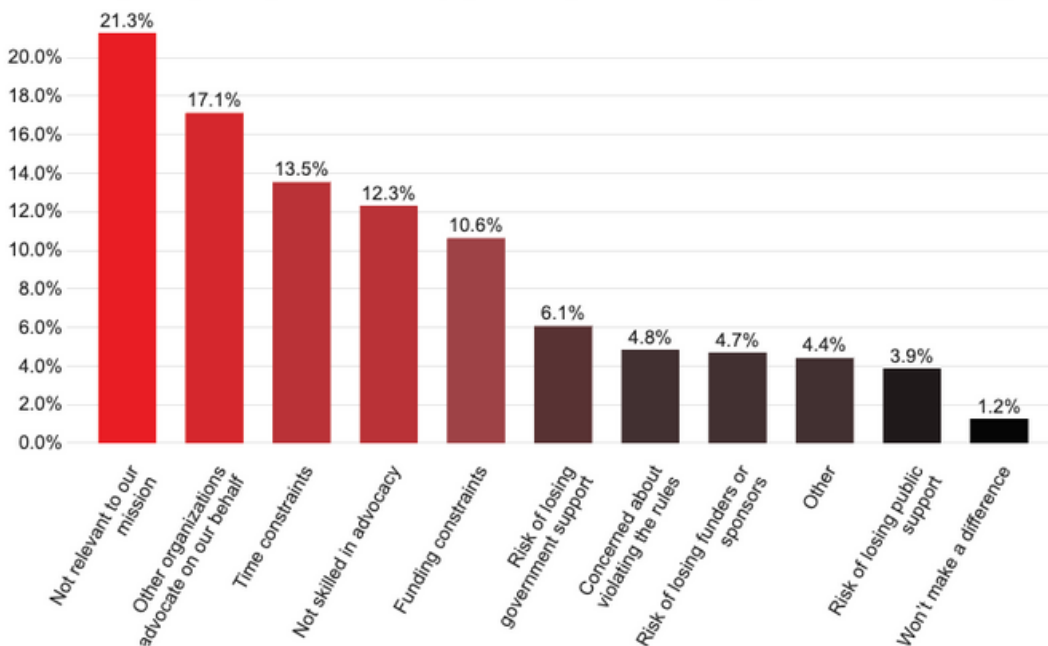


Breakout by Province | Répartition par province



The main reasons given for not engaging in advocacy are: "not relevant to our mission" 21.3%; "other organizations advocate on our behalf" (17.5%); "time constraints" (13.5%) and "lack of expertise or skills" (12.3%). 10.6% of respondents also cited funding constraints, with 6.1% specifically referencing fears of losing government support. This is interesting in the context of the regional breakdown of the report.

Q2 - If no, why does your organization not engage in this type of advocacy? (Please select all that apply)

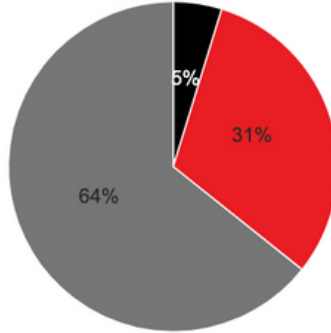




A DEEPER LOOK

Foundations (private and public) (64%, $p=0.05$), volunteer-run charities (66%, $p=0.01$), and international charities (65%, $p=0.03$) answered at higher rates that they were not engaged in any public policy compared to the average charity in our study (50%).

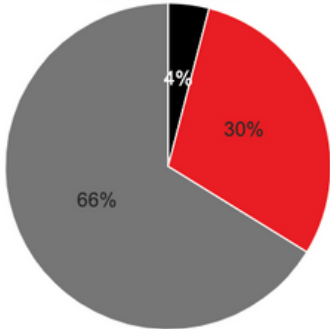
Q1 - Does your organization engage in advocacy to change laws, rules or programs?



● Not sure - Pas sûr(e) ● Yes - Oui ● No - Non

Week 9, Q1, Foundations (private and public)

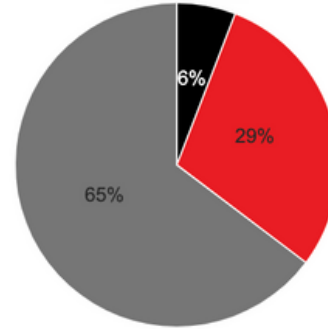
Q1 - Does your organization engage in advocacy to change laws, rules or programs?



● Not sure - Pas sûr(e) ● Yes - Oui ● No - Non

Week 9, Q1, Volunteer-run charities, 74 responses

Q1 - Does your organization engage in advocacy to change laws, rules or programs?

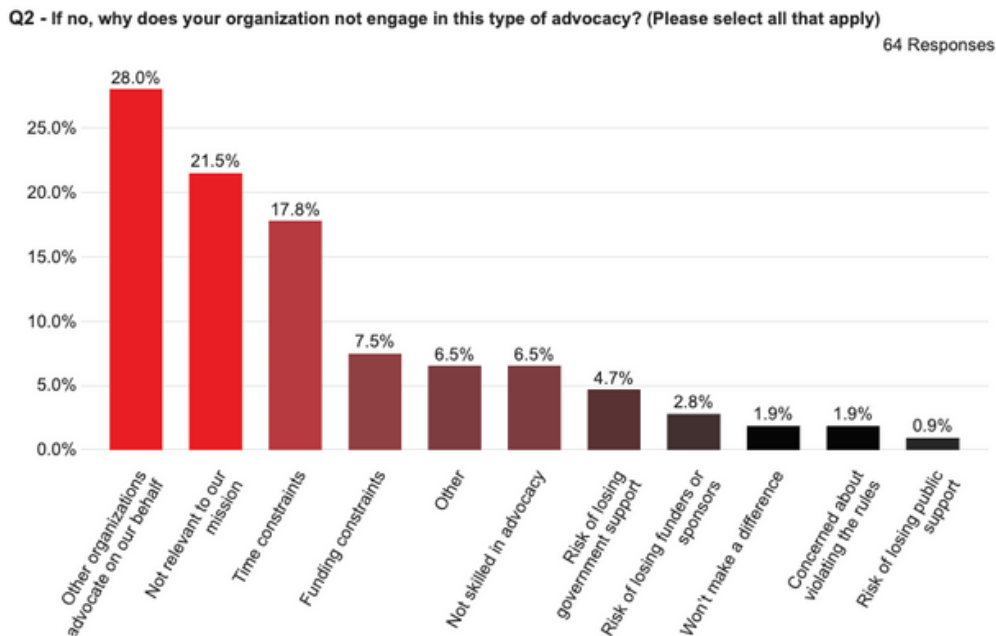


● Not sure - Pas sûr(e) ● Yes - Oui ● No - Non

Week 9, Q1, International charities, 51 responses



When asked "why does your organization not engage in this type of advocacy?", foundations (private and public) in our study responded with "not relevant to our mission" in a greater proportion than the average charity (35.6% compared to 21.3% for the total sample). Only 2.2% of foundations noted that "other organizations advocate on our behalf" compared to 17.1% for the average charity. In contrast, charities based in Quebec noted that "other organizations advocate on our behalf" at higher rates (28%) compared to only 17.1% for the average charity in the study. The 10.9% difference between the two groups is statistically significant at the 0.05 level.



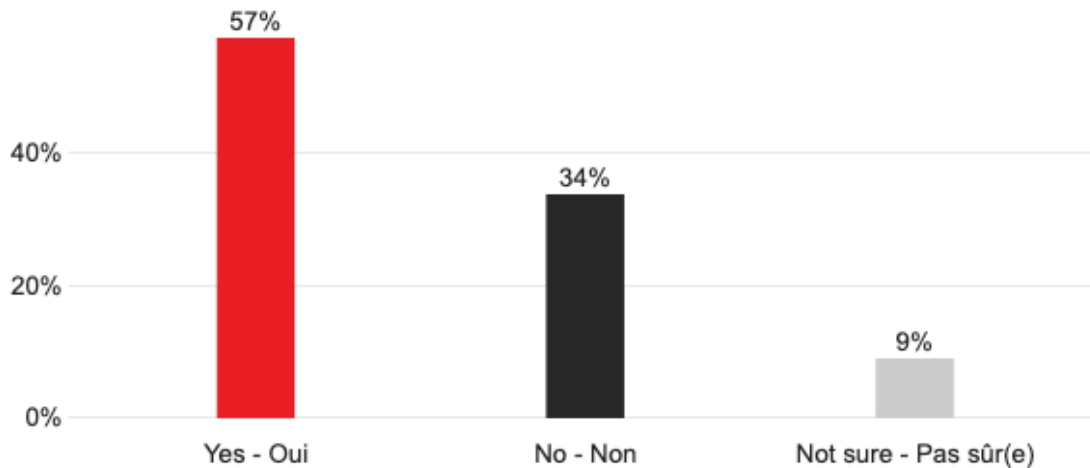
Week 9, Q2, Charities in QC, 64 responses



PRIORITIZING INDIGENOUS PEOPLES

The CICP's Week 10 survey considers the nature of indigenous involvement and reconciliation within the charitable sector. Participants were first asked if their organization involves Indigenous people in its work. The question received 682 responses, with an overwhelming 57% having selected "Yes", as well as a further 34% and 9% having stated "No" and "Not sure" respectively.

Q1 - Does your organization involve Indigenous people in its work?

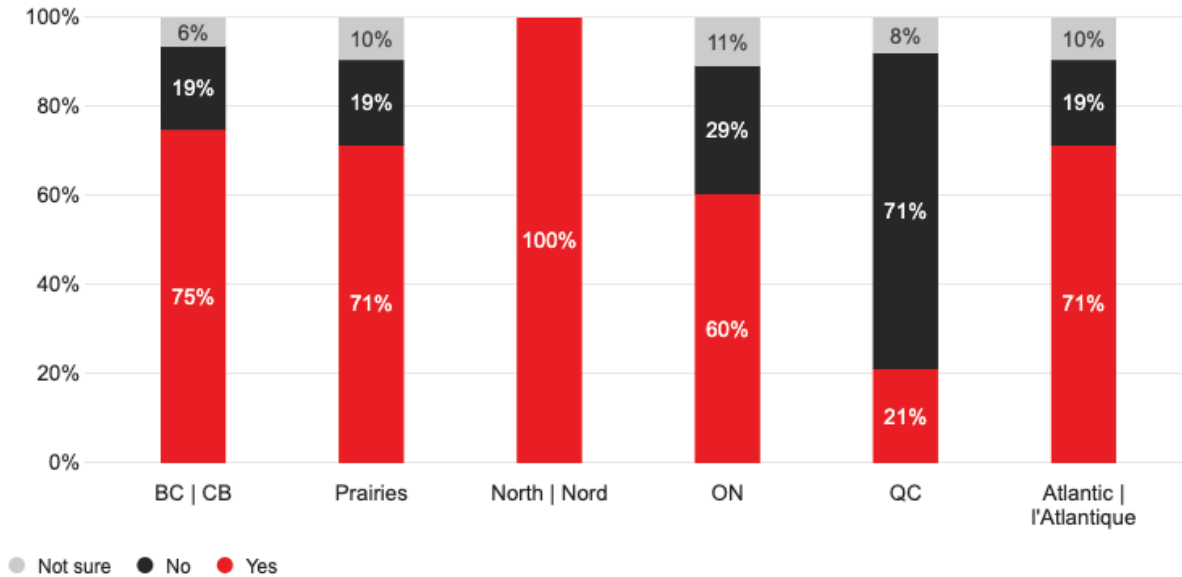


Those who answered "yes", were then prompted to select "in what ways." 25.8% and 24.4%, cited either collaboration with Indigenous organizations or input from Indigenous communities, while 19.5% noted they had indigenous staff. 16.5% noted their mission served indigenous communities.

All panelists were then asked to what extent their organization is working towards reconciliation with Indigenous communities, and prompted to provide examples of the ways that they are doing this. An overwhelming 67.1% of respondents indicated that their organization is working towards reconciliation. 18.6% of respondents answered that they were not sure, which outsized the remaining respondents that answered negatively to the question (14.4%). The regional breakdown, meanwhile, represented an interesting spectrum as per the prior week's findings, with significant contrast between Quebec (21% yes, 71% no, 8% unsure) and British Columbia (75% yes).



Breakout by Province | Répartition par province



These results across each of the provinces may be tied to demographic representation in the sample and will be investigated further by the team. Ontario/Quebec’s respective indigenous populations are quite large comparatively speaking but represent in either case less than 3% of their respective populations.[2] By comparison, indigenous populations in the western provinces range from 6-18% per capita. In the Northwest Territories, indigenous peoples are well over half of the total population. Even accounting for sampling differences between regions, the findings highlight the link with importance of population proportions impacting and organizational incentives and warrants further investigation.

It is also noteworthy to mention that this was a week where we got an unprecedented number of emails asking us to clarify the questions or to note that while they supported indigenous reconciliations, they weren't comfortable answering these questions. The team needs to reflect on how to ask these important and challenging questions for our panellists in the future.

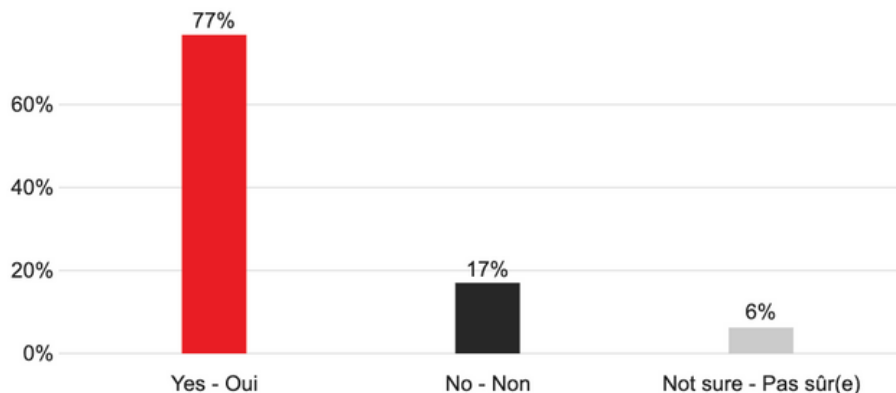
2 “Data Tables, 2016 Census: Aboriginal Ancestry (22), Residence by Aboriginal Geography (10), Age (10B) and Sex (3) for the Population in Private Households of Canada, Provinces and Territories, 2016 Census - 25% Sample Data”, Statistics Canada, 2016: <https://www12.statcan.gc.ca/census-recensement/2016/dp-pd/dt-td/Rp-eng.cfm?LANG=E&APATH=3&DETAIL=0&DIM=0&FL=A&FREE=0&GC=0&GID=0&GK=0&GRP=1&PID=111812&PRID=10&PTYPE=109445&S=0&SHOWALL=0&SUB=0&Temporal=2017&THEME=122&VID=0&VNAMEE=&VNAMEF=>



A DEEPER LOOK

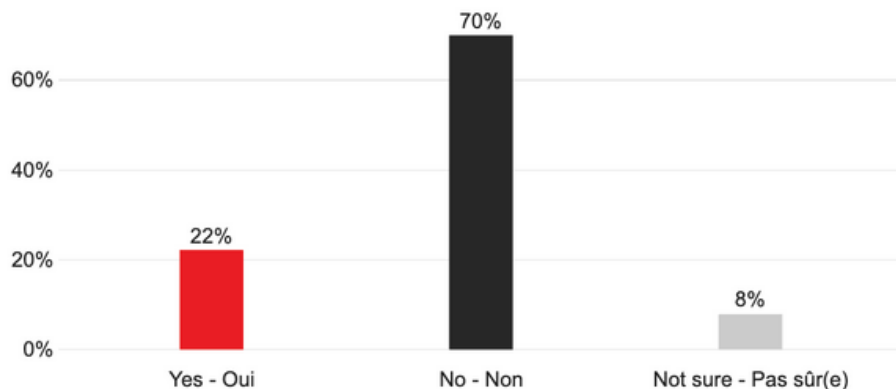
We found that while the average charities responded that they engaged with Indigenous peoples at rates of 57%, only 22% ($p=0.01$) of charities located in Quebec declared engaging Indigenous people in the work of their organization. However, when later asked about how they involved Indigenous people (Question 2), Quebec-based charities noted that they collaborated with Indigenous-led organizations at higher rates, 37.7% ($p=0.10$) compared to 25.6% for the average charity. On the other hand, 77% ($p=0.01$) of British Columbia-based charities answered that they involved Indigenous people. The differences we observed with the average charity in our study are statistically significant and warrant further in-depth study to understand why we observe such differences.

Q1 - Does your organization involve Indigenous people in its work?



Week 10, Q1, Charities in BC, 112 responses

Q1 - Does your organization involve Indigenous people in its work?

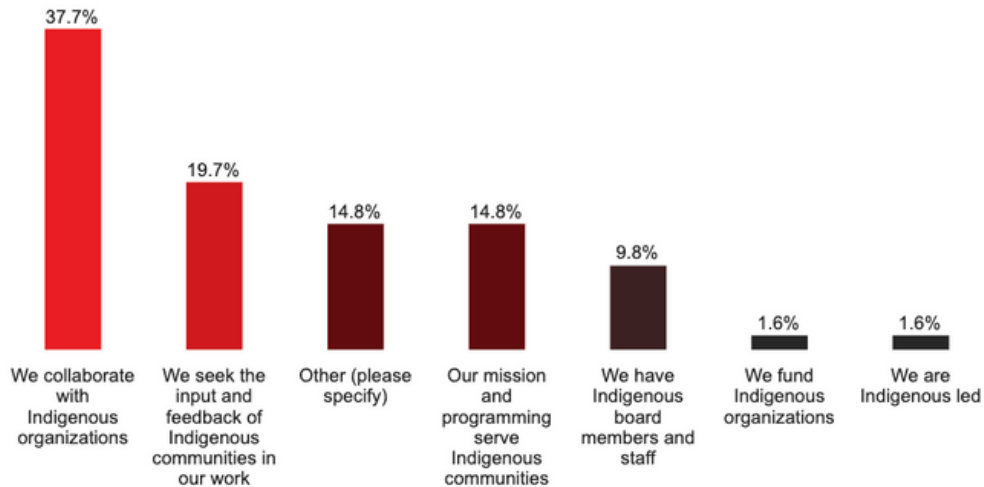


Week 10, Q1, Charities in QC, 140 responses



Q2 - In what ways does your organization involve Indigenous people in its work?

31 Responses

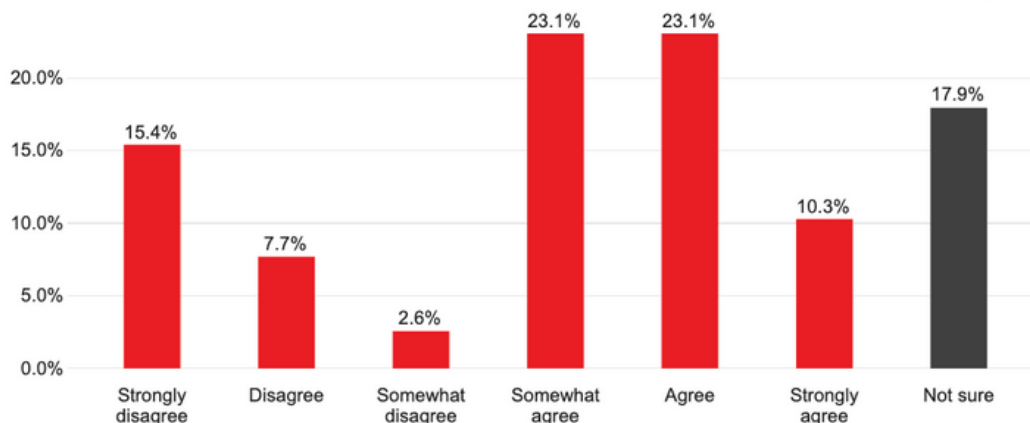


Week 10, Q2, Charities in QC, 31 responses

When asked about whether their organization worked toward reconciliation, foundations (private and public), Quebec-based charities, and international charities are more likely to respond "strongly disagree" than the total sample percentage, with 15.4% ($p=0.03$), 15.2% ($p=0.01$), and 18.4% ($p=0.01$), respectively, compared to 8.3% for the total sample. In contrast, charities located in British Columbia respond "agree" in greater proportions that their organization is working toward reconciliation than the total sample, with 37.3% ($p=0.001$) compared to 26.6% for the average charity.

Q3 - Is your organization working toward reconciliation with Indigenous communities?

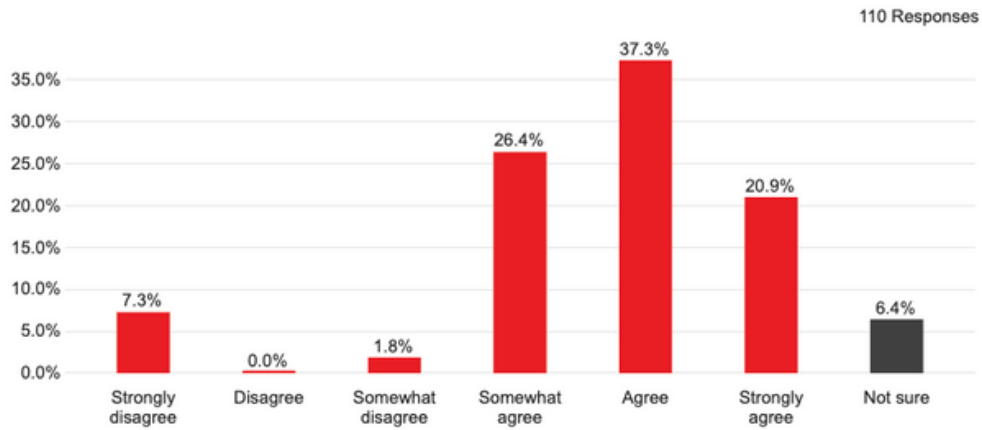
39 Responses



Week 10, Q3, Foundations (private and public), 38 responses

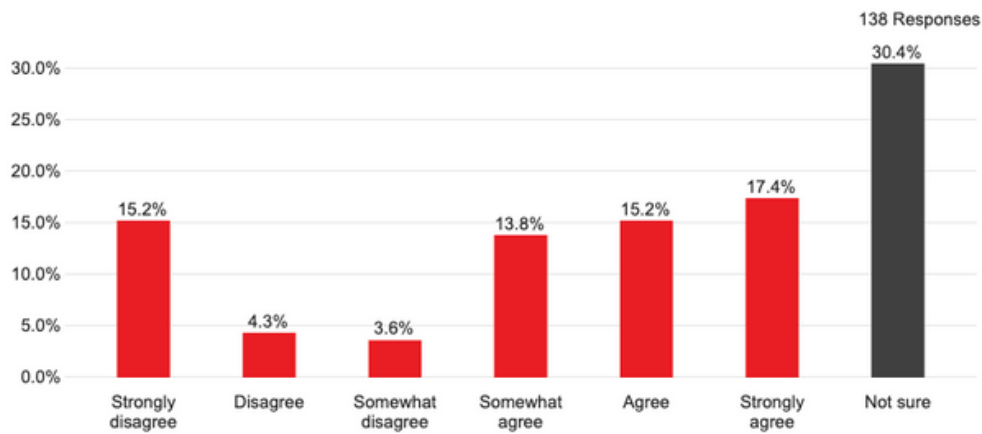


Q3 - Is your organization working toward reconciliation with Indigenous communities?



Week 10, Q3, Charities in BC, 110 responses

Q3 - Is your organization working toward reconciliation with Indigenous communities?



Week 10, Q3, Charities in QC, 138 responses



LOOKING AHEAD

In the coming months, we will be exploring the following themes/topics:

- ***HR & staffing***
 - ***Impact & Evaluation***
 - ***Funder Requirements***
 - ***Artificial Intelligence***
 - ***Inflation***
-

As the project continues to grow, we will be updating our website frequently to include more detailed analyses of the data we collect, finalize the white papers related to the study's methodology, upload working drafts of research papers our team is working on, and more. If there are questions you would like us to ask, please let us know . We cannot guarantee their inclusion, but they will be given our full attention.

Mark your calendars – the CICP-PCPOB annual data summit will take place on November 9th, 2023. This event will be an opportunity for sector stakeholders to come together to review the year's results, consider the state of the sector and review the role(s) of the project for the year(s) to come.

Help us spread the word through your networks!

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APPENDIX - METHODOLOGY

The participants in this study were recruited using randomized lists created with publicly available T3010 data (2019), administered by the Canada Revenue Agency (CRA) <https://www.canada.ca/en/revenue-agency.html>. T3010 data was downloaded and sorted into sample lists. No data was altered from its original state. Our lists were produced as copies of an official work published by the Government of Canada and were not endorsed by, or produced in affiliation with, the Government of Canada.

This year, we partnered with the 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 includes 1003 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. The methodological details will be discussed in the white paper for this study (currently in preparation). In addition to excluding religious organizations, hospitals, and schools, we decided to constitute our panel as follows:

The final sampling frame for this year's study included the whole population of registered charities that –

- a.** Were designated as charities (type C in the T3010 form, thus excluding public and private foundations (type A and B).
- b.** Had at least 1 full time employee (FTE) based on their T3010 form data.
- c.** 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 1003 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.

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

- **General Sample (GS):** Includes only designated charities type C in the T3010 form that had at least 1 full time employee (FTE) and expenditures greater than \$1 on their 2019 T3010 to make sure we focus on active charities.
- **Subsample 1 (SS1):** Includes only charities with the designation A and B (public and private foundations) that have at least 1 full time employee (FTE) and 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).

Table 1 presents an overview of our study samples.



List	Population N (32,384)	Number of participants recruited
Main Sample	14,267	704
SS1 (Foundations)	936	65
SS2 (Volunteer-run charities)	16,575	107
SS3 (Charities in BC)	1,926	157
SS4 (Geographic regions)	14,266	733
SS5 (Charities in QC)	4,992	189
SS6 (International charities)	606	70

Table 1

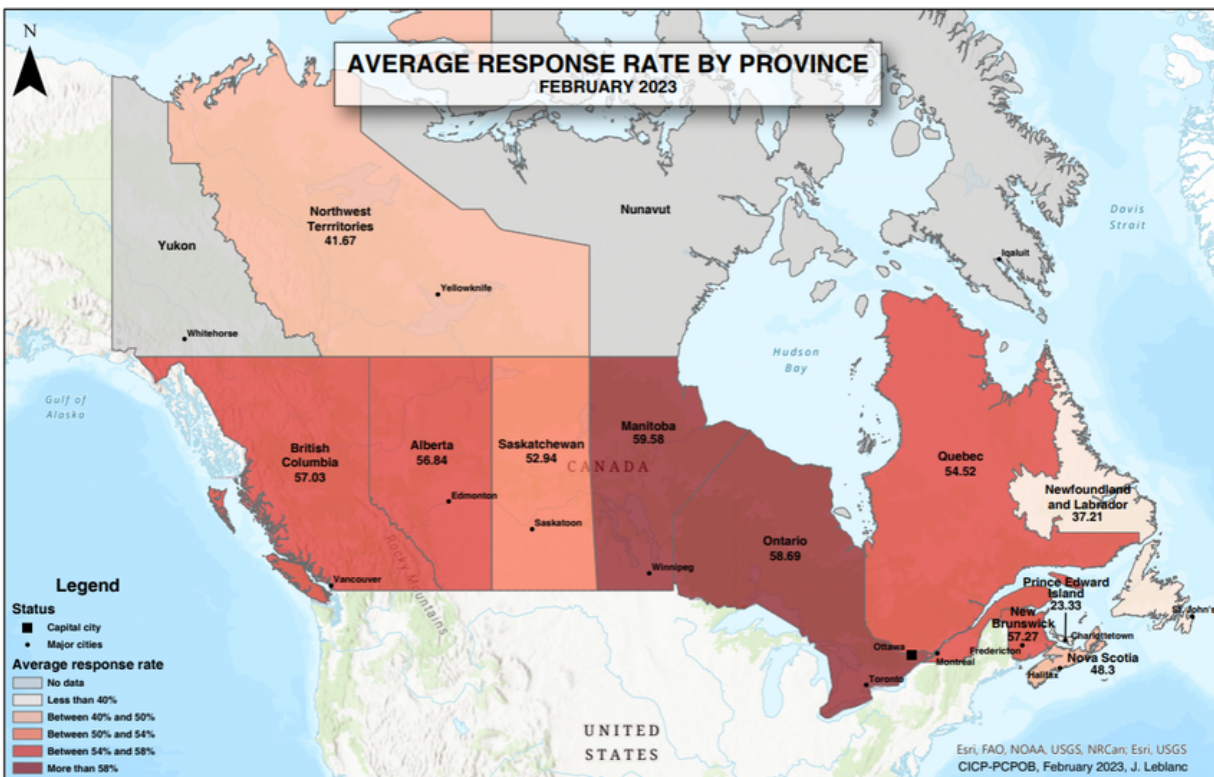
As of April 3, we had a panel of 896 subscribed panelists, with new panelists recruited weekly. Participant recruitment has been conducted via mail, e-mail, and phone calling. All new panelists have filled in a panelist information form. The data collected through these forms is then collated with existing CRA T3010 data to provide a more robust overall picture of panelist/organizational information. In addition to confirming their contact information, we ask them to give us greater details on their organization's human resources.

Questions are currently being developed by the CICP-PCPOB core team (Raggio, Phillips, Grasse, 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 (7am Eastern Time). Panelists are given a response period of 24 hours. Reminder emails are sent 24 hours after the initial survey has been distributed (Thursday morning), providing panelists with an additional 24 hours to respond. Weekly reports are published on the CICP-PCPOB website every Friday morning, providing initial graphs and descriptive findings for the week’s questions. The monthly reports, quarterly reports and research papers will provide more details on the trends observed and deeper analyses of the data collected.

We have an excellent weekly response rate of between 63 and 72%, although we find this varies across geographic regions.



More technical information will soon be available on our website, including the full downloadable data tables for December 2022 and January 2023. We will share programming 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.