2023 STATE OF BC'S NON-PROFIT SECTOR

SAFETY NET

MAY 2023

vantage point
Transforming Not-for-Profit Leadership

vancouver foundation

Vancity Community Foundation

Victoria Foundation

United Way British Columbia

LAND ACKNOWLEDGEMENT

We gratefully acknowledge that Vantage Point's office is located on the unceded, traditional, ancestral territories of the Coast Salish People, including the Skwxwú7mesh (Squamish), xʷməθkʷəy̓əm (Musqueam), and səlílwətaʔɬ (Tsleil-Waututh) Nations. The work that we do, and that of the partners of this report, spans across the lands of 203 distinct First Nations in British Columbia. We recognize that they have been custodians of this land for thousands of years and pay our respect to Elders and knowledge keepers, both past and present. We are grateful for the opportunity to live and work on this now-shared territory. We are deeply grateful to convene on these lands, the majority of which are unceded. Unceded means the land was never handed over, through any process understood or accepted. Unceded lands still rightfully belong to the nations who have stewarded them since time immemorial.

ABOUT THIS REPORT

This report is the third in a series originally initiated by a partnership between Vantage Point, Vancouver Foundation, Victoria Foundation, and the City of Vancouver. The first report, No Immunity (2020)[1], was published during the COVID-19 pandemic, and the second, Unravelling (2021)[2], the following year, both outlining the pandemic's impact on non-profits around BC.

Since the first two reports, the BC context has changed. We are now entering an endemic stage of the pandemic, a softening of physical distancing, the sunsetting of emergency pandemic funding supports, and the creation of the BC Recovery and Resiliency Fund, an initial sector development fund from the provincial government administered through three funders. The years 2022 to 2023 also brought high inflation, extreme climate events, and a housing crisis, among other challenges. It's time to ask how BC non-profits are coping.

This year, Vancity Community Foundation and United Way BC have joined the partnership to survey non-profit organizations across BC and to understand the current context for on the ground operations.

The 2023 State of the Sector survey was designed to allow for disaggregated data analysis and equity analysis while providing a snapshot of trends, challenges, opportunities, and successes for non-profits in our province.

ABOUT VANTAGE POINT

Our mission is to transform non-profit organizations by convening, connecting, and equipping leaders to lift organizational capacity and sector impact. Vantage Point exists to support the people moving non-profits forward—Executive Directors, board members, senior leaders, managers, staff, and volunteers. Non-profit professionals approach us for training and consulting in: governance, leadership, planning, and human resources. Vantage Point organizes coalitions and peer-based networks to share knowledge, resources, and advocacy efforts.

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

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

PROJECT PARTNERS

vancouver foundation

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

www.vancouverfoundation.ca

VICTORIA FOUNDATION

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

www.victoriafoundation.bc.ca

Vancity Community Foundation

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

www.vancitycommunityfoundation.ca

United Way British Columbia

Working with communities in BC's Interior, Lower Mainland, Central and Northern Vancouver Island, we serve residents and businesses through the creation and support of healthy, caring, inclusive communities. We help businesses and non-profits discover their capacity to influence and create social good by connecting leaders with resources they need to excel at what they do.

www.uwbc.ca

ACKNOWLEDGMENTS

We thank all the respondents of the survey and all those across BC who circulated and encouraged their networks to participate. We acknowledge that the sector is continuing to provide essential services to communities across the province under changing and challenging circumstances. To participate in a survey is yet another demonstration of the generosity and community-minded spirit that makes this sector indispensable. We also acknowledge those who were unable to complete it, including those who received the survey and those who did not.

Vantage Point would like to thank the partners for collaborating on this project, including the City of Vancouver's Social Policy department for its support in survey design and distribution. Gratitude to consultant Trina Isakson for leading the partners through the survey design, consultant Meena Das, and Knowledge Philanthropists, Melissa Lee and Ellison Tong [3], for support with data analysis and knowledge translation.

Meena is a people-driven data equity consultant, speaker, trainer, and research volunteer for nonprofits and social impact agencies. With a decade+ of experience in the tech and nonprofit sectors, Meena is the founder and principal at NamasteData (www.namastedata.org).

Melissa is a Program Coordinator at Foundry Surrey, and brings five years of experience working in the non-profit sector in community development and engagement, governance, and research. To pursue her interest in data science, she is currently enrolled in a Data Science Diploma program at BrainStation.

3 Ellison gratefully declined the opportunity to include a brief profile description.

CONTENTS

EXECUTIVE SUMMARY

There are approximately 31,000 non-profit organizations in BC [4], including community, business, and government non-profits. Together, they represent 335,000 jobs [5] and contributed $28 billion to BC's economy in 2021[6].

This survey and report represent a snapshot in time about the community non-profit sector specifically, as the primary respondents to the survey. The community non-profit sector employed 87,000 workers[7] (3.2% of BC's total employed workforce) and contributed $4.39 billion to BC's GDP in 2021[8].

In 2023, the sector continues to be committed to serving residents in their communities. Providing health support to seniors, childcare programs, food security, recreation, arts, housing, emergency response activities—and all other diverse services provided by this sector—requires staff and volunteers who are resilient and dedicated. This year's survey respondents underscored the salient point that it is the people behind this sector, and their labour, that make organizations' services possible throughout changing and uncertain times. BC is stronger when we bolster the strengths of the sector over the long-term.

Despite the challenges of the last year, 46% of respondents indicated feelings of hope and optimism in response to questions about morale and mood in the sector. The sector reported that in order to thrive over the next year, non-profits will rely on a combination of internal resources, external supports from their local communities, and investments from institutions with funding capacity.

When asked what successes, priorities, and supports are contributing to making their organization stronger, several non-profits explicitly stated that it is too soon to say they are *thriving* [9]. There is hope for the future, but still work to be done.

> **This attitude showcases the dual nature of the non-profit sector. BC non-profits are both a vital safety net and service provider for local communities, and rely on the partnership of government, funders, philanthropists, and volunteers to deliver our work. This multi-stakeholder partnership is a crucial safeguard against conditions that threaten the sustainability and vibrancy of non-profit organizations.**

Government funding has been a critical factor for the sector over the last year. BC non-profits are a partner with government in delivering important community services. The feedback from organizations across the province underscored the need for recovery funding to continue and for improved funding practices.

4 There are 31,418 active registered societies in the OrgBookBC database. Government of BC, "OrgBook BC", accessed on April 20, 2023. https://orgbook.gov.bc.ca/search?q&category%3Aentity_type=S&credential_type_id=1&inactive=false&page=1.

5 Statistics Canada, "Table 36-10-0617-01, Employment in non-profit institutions by sub-sector (x 1,000)", accessed on April 3, 2023, https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3610061701.

6 Statistics Canada, "Table 36-10-0614-01, Gross domestic product (GDP) and income of non-profit institutions by activity (x 1,000,000)", accessed on April 3, 2023. https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3610061401.

7 Statistics Canada, "Table 36-10-0617-01, Employment in non-profit institutions by sub-sector (x 1,000)", accessed on May 4, 2023. https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3610061701.

8 Statistics Canada, "Table 36-10-0616-01 Gross domestic product (GDP) of non-profit institutions by sub-sector (x 1,000,000)", accessed on May 4, 2023. https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3610061601.

9 See Appendix C.

These practices should reflect trust-based principles, decent work, and multi-year, core, and unrestricted commitments. They should also include timely and predictable communications about supports.

Three central themes emerged from the survey responses:

Theme 1: Overwhelmed–Doing More With Less

Throughout BC, non-profit organizations are doing more to meet increasing program and service demands from communities they serve while also doing more to take care of staff with increased wages and benefits. With rising costs, expenses are increasing while overall revenues are staying the same, meaning non-profits are doing more with less.

Theme 2: HR Concerns Loom—Staffing and Unsustainable Budgets Top of Mind

Concerns related to human resources are contributing to feelings of uncertainty, anxiety, and worry about the future. The top sources of worry are connected to staffing-related funding and staff recruitment and retention:

- There is inadequate funding for quality compensation, new or more staff, qualified and quality staff, wage increases, inflation-adjusted wages, and benefits (e.g. how to retain staff without a pension or Registered Retirement Savings Plan). In some cases, employers are already making wage adjustments by accessing contingency funds.
- Support for staff well-being: Organizations are observing staff burnout, mental health challenges, stress, overload, and staff who are financially stretched and struggling, even for organizations who identified as a living wage employer.
- Conditions are leading to high turnover and organizational instability from absences caused by the use of sick leaves and disability leaves. Further, funding stability is harder to maintain because operations are more expensive.

Theme 3: Stabilizing–But For How Long?

There are signs of stabilization in the sector. Feelings of hope and motivation exist among some non-profits. The sector, by nature, is driven by and exists because of a future-oriented vision and a strong commitment to meeting community needs. BC's non-profit sector has continued to exist and evolve despite precarity in the past. But respondents to this year's survey couched references to optimism within clear concerns about sustainability and the ability to thrive in the face of increasing cost and staffing pressures.

READING THIS REPORT

The survey findings represent a snapshot in time. The survey reached 757 organizations[10] when it was circulated in early 2023, from January 4th to January 27th (24 days), to Vantage Point and the project partners' networks through email blasts and social media. The responses provide a temperature check on a segment of the sector during this period.

Respondents Overview

To better understand the respondents to this survey, survey questions 15 to 28 pertained to organizational characteristics. The number of respondents to these questions range from 460 to 464, and the descriptions below are expressed as a percentage of these total number of respondents[11].

The majority of respondents in this report are community non-profit organizations[12] (93%) that have registered charitable status and paid staff (91%).

Only 4% of respondents were business serving non-profit institutions[13], and 2% were government non-profit institutions.[14]

Respondents from the social services subsector account for 41%, followed by arts, culture, heritage and tourism (14%), and health (8%).

Government is the most common primary revenue source among respondents (46%), followed by mixed revenue (26%), earned income (9%), and foundations (9%). In urban-serving organizations, more respondents reported mixed revenue sources than in rural-serving organizations. Of the respondents that indicated organizational operating budgets, about half have operating budgets under $1 million, 24% have budgets between $1 million - $2.9 million, 13% between $3 million - $9.9 million, and 9% have budgets above $10 million.

About half of the respondents reported that their organization's programs, services, or activities focus on people from specific demographic groups (52%), and the other half do not (48%). Of those that do have specific demographic focuses, the groups served most frequently by respondents were [15]:

- 1) People experiencing poverty or with low income (38%)
- 2) Youth (36%)
- 3) Children (31%)
- 4) Seniors (30%)
- 5) Families (29%)

Thus, the demographic groups most likely to be impacted by non-profits represented in this report are people experiencing poverty or with low income, youth, children, seniors, and families. All of this should be taken into consideration when reviewing the results of the report.

10 543 responded to multiple questions in the survey; 243 left empty responses.

11 See Appendix C.

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

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

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

15 Respondents can choose to report that they serve more than one demographic category, thus the percentages exceed 100%.

Summary Trends

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

A. Revenues
B. Expenses
C. Program and service delivery
D. Human resources
E. Central operations
F. Governance

Understanding summary trends by weighted averages

In the survey, from questions 3 to 10, respondents were asked to choose a trend for each component within the six major parameters. The trend options were: Increasing, Staying about the same, Decreasing, Not relevant, and Not sure.

Weighted average was used for this scales-based analysis by assigning each of these options with a number or weighted bucket (5 = Increasing, 4 = Staying about the same, 3 = Decreasing, 2 = Not relevant, and 1 = Not sure). Then, the average was calculated for each component, producing a number that indicates, on average, how all respondents are doing, as a group. This average number is used to identify the summary trend among all respondents. Where the calculated average is too close to two options (ex. 4.5 can be rounded to 4 or 5), then the trend is expressed as a range between two trends (ex. staying about the same to increasing).

The interpretation and sense-making of the summary trends were made from referencing the qualitative responses collected from the five open-ended questions.

Disaggregated Data Analysis

Whenever trends are presented, the report highlights differences between 1) rural-serving and urban-serving organizations[16], 2) the three subsectors with highest response rates (social services, arts/culture/tourism/heritage, and health), and 3) health authority regions.

In terms of geographic representation, about 22% of respondents indicated that they have a province-wide focus, 16% focus on the City of Vancouver, 13% on Greater Victoria and the Southern Gulf Islands, and another 13% focus on other areas within Metro Vancouver.

This report offers geographic analysis at a regional level by grouping respondent locations into provincial health authority regions: 44% indicated they focus on the Fraser Health region; 40% on Vancouver Coastal Health region; 31% on Interior Health region; 29% on the Vancouver Island Health region, and 14% on the Northern Health region.[17] The grouping and their reported response rates can be found in Appendix A.3 (note: respondents did not have to disclose a geographic focus).

While there are other ways to further examine the collected data, the disaggregated analysis in this report is included to emphasize the importance of understanding the trends within local communities and subsectors. Non-profits are all unique, even as systemic structures and practices create common experiences for non-profits as a distinct sector.

16 Rural-serving and urban-serving are self-reported by respondents and not formally defined.
17 As this was a multiple-choice question, these respondents may have selected multiple geographic regions of focus (thus the total response rate adds up to more than 100%).

The broad buckets of comparisons included here offer a preliminary tool to subsequent inquiries that can surface the different conditions impacting various types of community non-profits across BC. This type of attention and engagement with data is one of the steps to take that will better ensure BC's non-profit sector is adequately supported, universally and equitably, with custom supports that appreciate organizational differences.

Qualitative Grounding

We received 1533 responses (including single words and multi-word descriptors) from 543 respondents to the opening question 'share three words describing how your organization is doing or feeling now, at the start of 2023'. These qualitative responses offered a helpful orientation to guide the interpretation of the rich data shared by respondents.

Generally, organizations are feeling under pressure. The most frequent feeling words were categorized as fearfulness, sadness, and hopefulness words. Based on the 10 most frequently used words in the responses, respondents conveyed the sense of fear and sadness using the following: overwhelmed, tired, stretched, uncertain, busy. Hopefulness is conveyed with: hopeful, optimistic, growing, stable, excited.

Table 1 Most frequent fearfulness/sadness words

Descriptive words	Count
Overwhelmed	49
(Top related words: Stretched, tired, busy, stressed, struggling, burnt out, exhausted, overworked)	164
Uncertain	31
(Top related words: Uncertainty, unsure)	12
Cautious	21
(Top related words: Concerned, worried, nervous, anxious)	54
Underfunded, understaffed, surviving	32
Total:	**363**

Table 2 Most frequent hopefulness/resiliency words

Descriptive words	Times used
Hopeful	68
Optimistic	57
Growing	33
Excited	24
Stable	24
Total:	**206**

Words like busy are not inherently fearful or sad; however, in the context of the question asking organizations to answer with only 3 words, we interpreted busy as being markedly so, and likely contributing to how the organization is feeling or doing—i.e., akin to stretched or overworked. We then sought to understand why organizations are feeling overwhelmed, tired, stretched/busy, and uncertain—even as they are feeling hopeful and resilient.

Generally, organizations are feeling under pressure, with a mix of fearfulness, sadness, and hopefulness.

Image: Word cloud of top responses entered in the first of three entries to the opening question. Overwhelmed was the most frequent first word that came to mind for respondents, followed by stretched, busy, growing, hopeful, and tired.

IN DEPTH REVIEW

Theme 1: Overwhelmed—Doing More With Less

- During data analysis, one of the first inquiries we set out to understand were the conditions contributing to respondents being overwhelmed. Out of the six major parameters surveyed, it became clear that while revenues have remained the same or decreased, components among expenses, human resources, and program and service delivery are largely increasing. In particular, overall service demand is clearly increasing. This means that organizations are experiencing higher costs and time or money spent on service delivery and staffing demands (e.g. wages, salaries, and benefits). And, there is no sign that funding is increasing.
- Organizations are spending increasing resources (time or money) on human resources-related investments. Organizations are likely overwhelmed because of increasing staff hours worked and increasing spending on recruitment and retention while trying to meet greater service demands.
- Because overall revenues remain the same while expenses are increasing, organizations are doing more for their staff and communities, with less resources.

A. Revenue Trends

On average, respondents reported that their overall revenues stayed the same over the last year. This was an interesting subjective response, because the responses revealed that government sources (a primary revenue source for 46% of respondents) and individual donations trended as staying about the same, but funding from all other revenue streams is decreasing.

Government revenue sources that have stayed the same over the past year were crucial to stabilizing the sector through 2022. However, given the rise in operating expenses, wages, and the pressures of inflation, government support that is staying the same means it is not keeping up with financial realities.

Highlight Quotes

In response to the question: "Looking ahead from now into the next year, what concerns/ challenges are top of mind? What is making it difficult to thrive, or has you worried?":

"Operating costs, including wages and salaries, are increasing exponentially and government funding for programs remains the same. Budgets are not sustainable."

"10% max limit for admin costs from foundations so administrative needs get assumed by other staff."

In response to the question: "What successes, priorities and supports are you grateful for or are making you stronger? What is helping you thrive?":

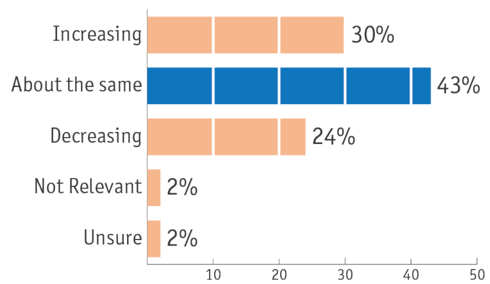
"Nothing at the moment. Everything feels overwhelming."

How to read the bar charts

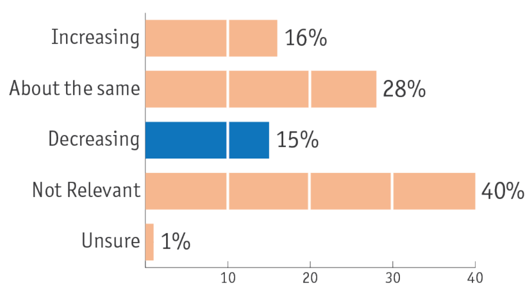
The summary trend by weighted average is highlighted as the bar in blue. Where the summary trend is expressed as ranging between one trend to another (ex. staying about the same to increasing), it means that the weighted average score is too close to either weighted bucket to be differentiated as trending more strongly one way versus the other; these trends are indicated by two bars highlighted in blue. The number of respondents for all six major parameters is 543 respondents.

■ = Summary trend by weighted average

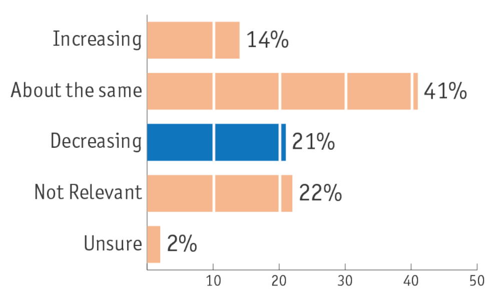
A.1. Overall revenues



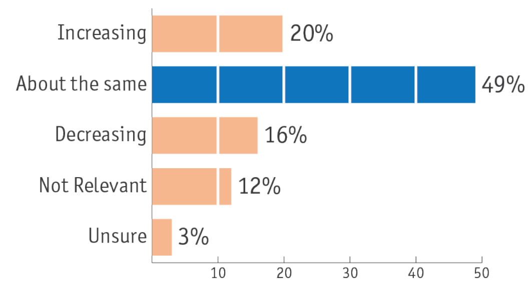
A.2. Revenue from earned income (e.g. goods and services)



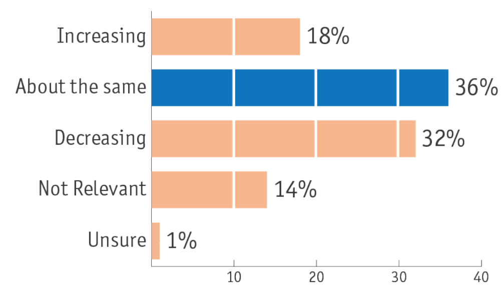
A.3. Revenue from foundations



A.4. Revenue from government sources

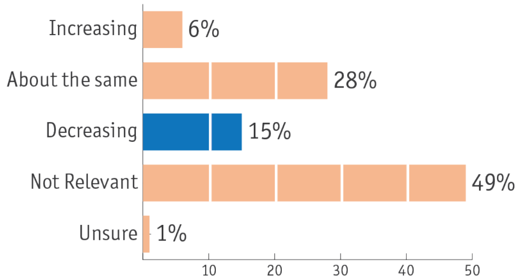


A.5. Revenue from individual donations

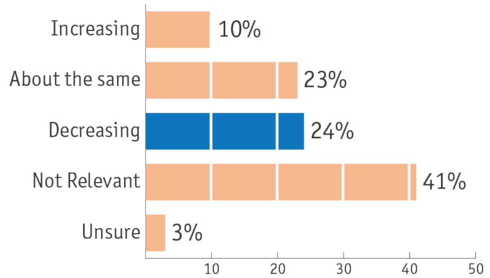


Most respondents indicated that their primary revenue source is government.

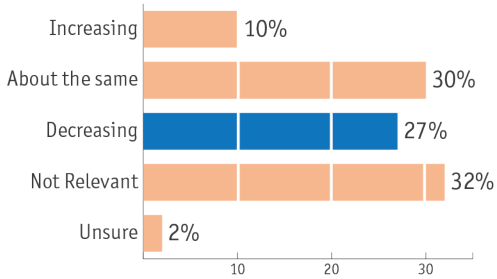
A.6. Revenue from membership fees



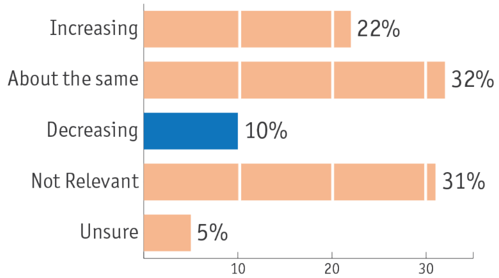
A.7. Revenue from special events



A.8. Revenue from corporations/businesses



A.9. Accessing financial reserves



Disaggregated Analysis: Differences between the summary trends as compared across subsectors, rural vs. urban-serving organizations, and health authority regions

Table 3 Revenue Summary Trends by Weighted Average

Components	Summary Trend
A.1. Overall revenues	About the same
A.2. Revenue from earned income (e.g. goods and services)	↓ Decreasing
A.3. Revenue from foundations	↓ Decreasing
A.4. Revenue from government sources	About the same
A.5. Revenue from individual donations	About the same
A.6. Revenue from membership fees	↓ Decreasing
A.7. Revenue from special events	↓ Decreasing
A.8. Revenue from corporations/businesses	↓ Decreasing
A.9 Accessing financial reserves	↓ Decreasing

Table 4 Revenue Summary Trends by Location and Subsector

Components	Rural-serving	Urban-serving	Social Services	Arts/Culture/ Heritage/Tourism	Health
A.1. Overall revenues	About the same	About the same	About the same	About the same	About the same
A.2 Earned income	↓ Decreasing	↓ Decreasing	↓ Decreasing	About the same	↓ Decreasing
A.3. Foundations	↓ Decreasing	About the same	About the same	↓ Decreasing	↓ Decreasing
A.4. Government sources	About the same	About the same	About the same	About the same	About the same
A.5. Individual donations	↓ Decreasing	About the same	About the same	↓ Decreasing	About the same
A.6. Membership fees	↓ Decreasing	↓ Decreasing	↓ Decreasing	↓ Decreasing	↓ Decreasing
A.7. Special events	↓ Decreasing	↓ Decreasing	↓ Decreasing	↓ Decreasing	↓ Decreasing
A.8. Corporations/ businesses	↓ Decreasing	↓ Decreasing	↓ Decreasing	↓ Decreasing	↓ Decreasing
A.9. Accessing financial reserves	↓ Decreasing	↓ Decreasing	↓ Decreasing	↓ Decreasing to About the same	About the same

= Trending differently from summary trend

Health authority region trending differently from revenue summary trends

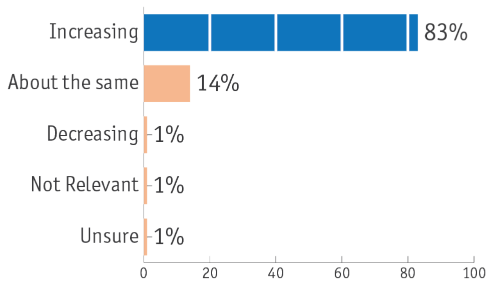
For the Vancouver Coastal Health region, revenue from foundations remained about the same (vs. decreasing), and accessing financial reserves remained about the same (vs. decreasing). For Fraser Health, revenue from individual donations was decreasing to remaining about the same (vs. about the same). For Northern Health, revenue from individual donations was decreasing (vs. about the same). For Vancouver Island, accessing financial reserves remained about the same (vs. decreasing).

B. Expense Trends

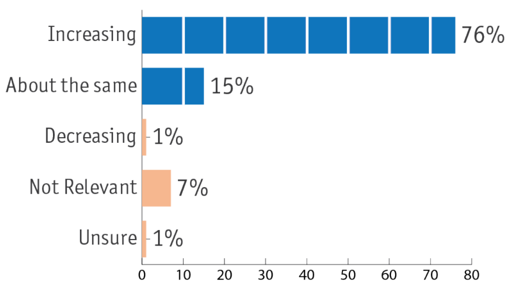
Overall expenses are increasing. This means that organizations are experiencing higher costs, all the while with the same financial resources. All areas of expenses identified in the survey are trending from staying about the same to increasing, except for office space expenses, which is staying about the same.

= Summary trend by weighted average

B.1. Overall expenses

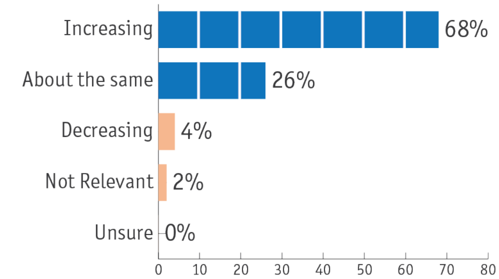


B.2. Salaries and benefits

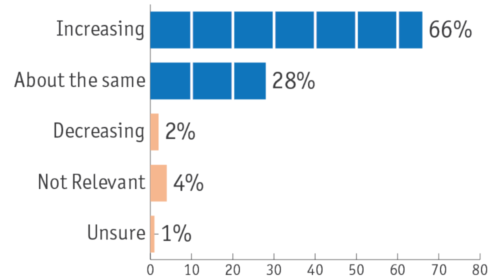


Organizations are experiencing higher costs while servicing greater demand with the same amount of financial resources.

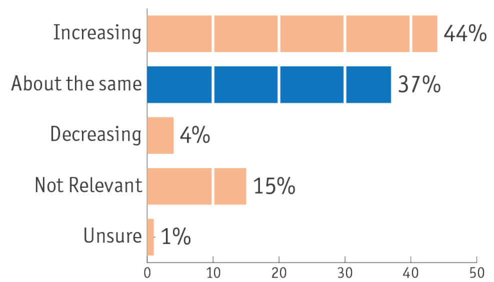
B.3. Spending on programs, services, and activities



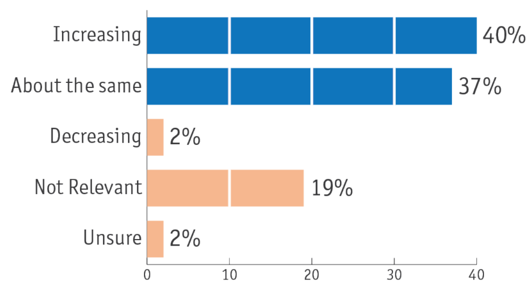
B.4. General administration costs



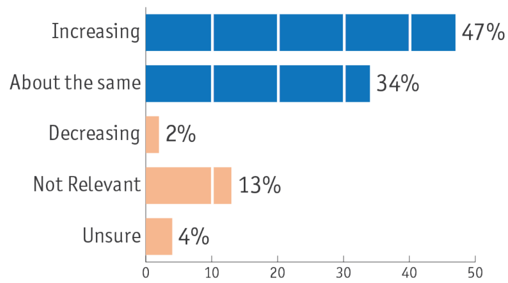
B.5. Office space expenses



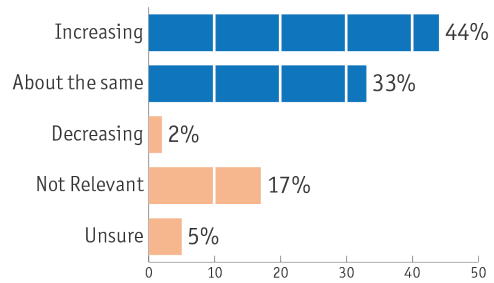
B.6. Programming space expenses



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



B.8. Investments in decolonization and reconciliation



Disaggregated Analysis: Differences between the summary trends as compared across subsectors, rural vs. urban-serving organizations, and health authority regions

Table 5 Expense Summary Trends by Weighted Average

Components	Summary Trend
B.1. Overall expenses	↑ Increasing
B.2. Salaries and benefits	↑ About the same to Increasing
B.3. Spending on programs, services, and activities	↑ About the same to Increasing
B.4. General administration costs	↑ About the same to Increasing
B.5. Office space expenses	About the same
B.6 Programming space expenses	↑ About the same to Increasing
B.7 Investments in diversity, equity, inclusion, belonging, accessibility	↑ About the same to Increasing
B.8 Investments in decolonization and reconciliation	↑ About the same to Increasing

Table 6 Expense Summary Trends by Location and Subsector

Components	Rural-serving	Urban-serving	Social Services	Arts/Culture/ Heritage/Tourism	Health
B.1. Overall expenses	↑ Increasing	↑ Increasing	↑ Increasing	↑ Increasing	↑ Increasing
B.2. Salaries and benefits	About the same	↑ Increasing	↑ Increasing	↑ Increasing	↑ Increasing
B.3. Spending on programs, services, and activities	↑ Increasing	↑ Increasing	↑ Increasing	↑ Increasing	↑ Increasing
B.4. General administration costs	↑ Increasing	↑ Increasing	↑ Increasing	↑ Increasing	↑ Increasing
B.5. Office space expenses	About the same	About the same	About the same	About the same	About the same
B.6. Programming space expenses	About the same	About the same	About the same	About the same	About the same
B.7. Investments in diversity, equity, inclusion, belonging, accessibility	About the same	About the same	About the same	About the same	About the same
B.8. Investments in decolonization and reconciliation	About the same	About the same	About the same	About the same	About the same

= Trending differently from summary trend

Health authority region trending differently from expense summary trends

For Interior Health, salaries and benefits and general administration costs remained about the same (vs. about the same to increasing for both). For Northern Health, spending on programs, services, and activities remained about the same (vs. about the same to increasing).

Theme 2: HR Concerns Loom—Staffing and Unsustainable Budgets Top of Mind

- HR concerns are contributing to feelings of uncertainty, anxiety, and worry about the future for non-profits across regions and sub-sectors. Staff-related funding and recruitment and retention issues were identified as the most common organizational challenges. High turnover, inadequate funding for competitive compensation, inflation-adjusted wages, and benefits are top-of-mind concerns.
- Respondents noted the challenge of retaining staff without access to a pension or RRSP plan, for example, as a hurdle to recruiting and retaining new employees. They also mentioned the double-edged sword of paying for these things from contingency funds as an unsustainable practice.

  Staff mental health, stress, overload, and instability were referenced as key areas for improvement. In addition to well-being and burnout concerns, some respondents shared that staff expressed feeling financially stretched and struggling—even when working for a living wage employer—and highlighted inadequate access to sick and disability leaves as areas of concern.
- Finally, organizations identified unstable funds as having a negative impact on operations. Over a third of the respondents pointed to a trend of decreasing volunteers as having an impact on human resources.

Staff-related funding and recruitment and retention issues were identified as the most common challenges.

Highlight Quotes

"Our biggest challenge is lack of staffing resources, especially in child care sector. ***We have a lot of opportunity to expand programs and services, yet we can't find the staff to work.*** *We've implemented several innovative ideas to recruit as recommended by experts, nothing is working."*

"Staffing–we have ***insufficient funding*** *to attract and retain staff."*

"Staffing retention, the prospect of a recession, and ongoing problems with inflation/supply chain issues and ***government funding not keeping pace****."*

*"The rapid increase of costs that previously were not as dynamic in growth as staffing costs****—now we have to manage significant increases in both,*** *and the province seeking to REDUCE its 10% admin rule which is not realistic in the first place."*

"HR costs are increasing but our funding is staying the same. We must get into ***more fundraising*** *and develop a strategy."*

"Inflation & cost of living increases while ***funding amounts for some programs have remained unchanged for a decade.*** *The anonymized union's negotiations and (much-deserved but challenging) wage increase for staff. Long-term staff retiring/quitting/medical leaves, resulting in loss of agency knowledge & insights in programming & delivery."*

C. Human Resources Trends

All areas of staffing are trending from about the same to increasing—including the number of full-time, part-time, temporary, contract, seasonal staff, and independent artists.

- 61% of respondents reported increasing wages/salaries for staff, and 29% are increasing benefits; however, this is within the context of overall revenues remaining, on average, the same.
- For 31% of respondents, average hours staff worked is increasing. As service demands increase, many organizations need more staff or volunteers, and/or need to compensate staff for longer hours, potentially contributing to burnout and added pressure.
- 50% of respondents reported that their organizations are spending more resources on staff recruitment and retention. A similar number of respondents also reported increasing resources for developing HR-related policies, issues around staff mental health and wellbeing, and training and professional development.
- 44% of respondents reported staff absences or use of sick leave are increasing. This is both an expense and a reflection of the increased demands and pressures on non-profit workers.

61% increased staff wages/salaries and 29% increased benefits

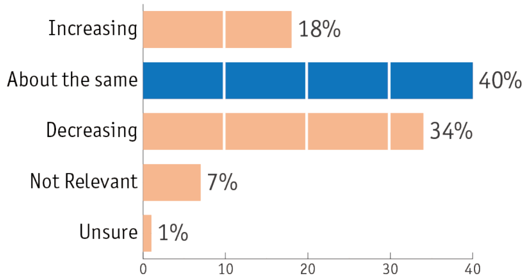
31% reported average hours staff worked is increasing

50% reported increased staff recruitment and retention spending

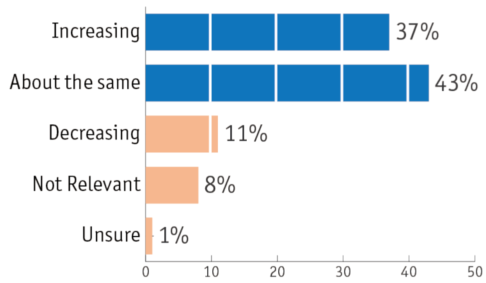
44% reported staff absences or use of sick leave are increasing

= Summary trend by weighted average

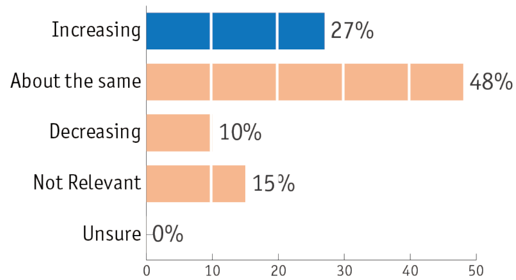
C.1. Level of volunteer involvement



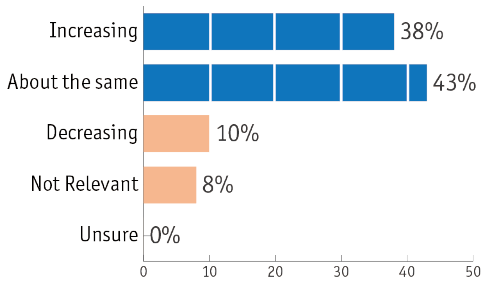
C.2. Resources (time or money) spent on recruitment and retention of volunteers



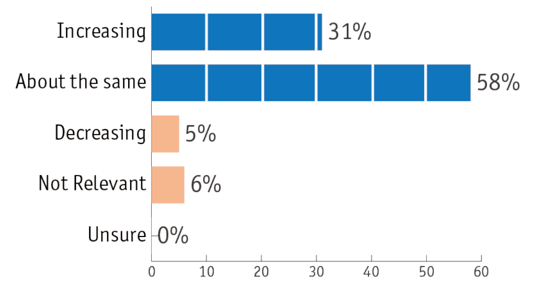
C.3. Number of full time staff



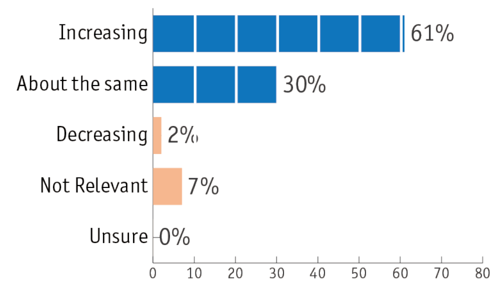
C.4. Number of part-time, temporary, contract, or seasonal staff, or independent artists



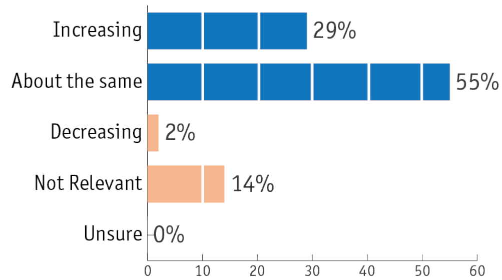
C.5. Staff hours (average hours worked per staff member)



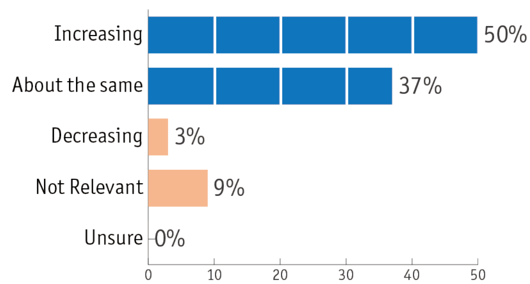
C.6. Levels of wages/salaries offered to staff



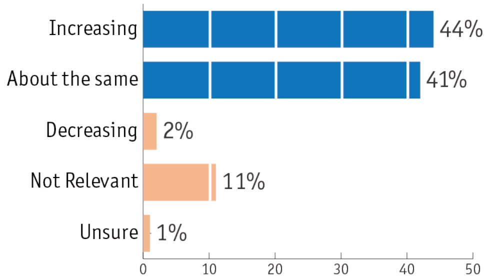
C.7. Level of benefits offered to staff



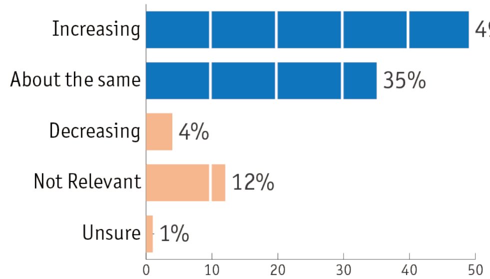
C.8. Resources (time or money) spent on recruitment and retention of staff



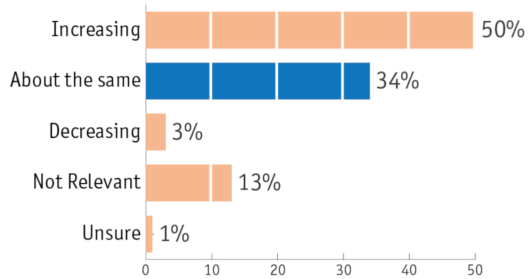
C.9. Staff absences/use of sick leave



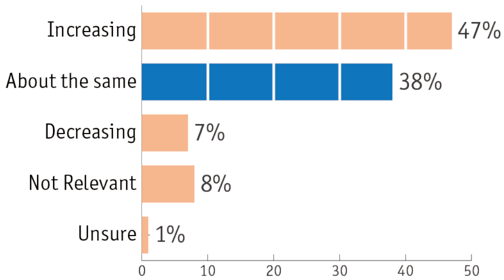
C.10. Resources (time or money) spent on developing HR-related policies (sick leave, work from home)



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



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



A note to non-profit leaders: While the BC Government has introduced new pay transparency legislation that will require employers to include wage or salary ranges on all publicly advertised jobs, it will not affect employers with fewer than 50 employees. Despite this, all non-profits should move to the practice of disclosing salary ranges in order to advance pay equity in the sector.

As a sector that employs a disproportionate percentage of people from equity-seeking groups (i.e. women, newcomers), non-profit leaders should also work to ensure that there is not a significant wage gap within their own organization. The Wagemark initiative undertaken in 2012 recommends that wages at the top of the wage scale should not be more than 8 times the amount paid to staff at the bottom of the wage scale.[18]

18 MASS LBP, "Wagemark", accessed on May 4, 2023. https://www.masslbp.com/wagemark.

Disaggregated Analysis: Differences between the summary trends as compared across subsectors, rural vs. urban-serving organizations, and health authority regions

Table 7 Human Resource Summary Trends by Weighted Average

Components	Summary Trend
C.1. Level of volunteer involvement	About the same
C.2. Resources (time or money) spent on recruitment and retention of volunteers	↑ About the same to Increasing
C.3. Number of full time staff	↑ About the same to Increasing
C.4. Number of part-time, temporary, contract, or seasonal staff, or independent artists	↑ About the same to Increasing
C.5. Staff hours (ie average hours worked per staff member)	↑ About the same to Increasing
C.6. Levels of wages/salaries offered to staff	↑ About the same to Increasing
C.7. Level of benefits offered to staff	↑ About the same to Increasing
C.8. Resources (time or money) spent on recruitment and retention of staff	↑ About the same to Increasing
C.9. Staff absences/use of sick leave	↑ About the same to Increasing
C.10. Resources (time or money) spent on developing HR-related policies	↑ About the same to Increasing
C.11. Resources (time or money) spent on HR issues related to staff mental health and wellbeing	About the same
C.12. Resources (time or money) spent on training and professional development	About the same

Table 8 Human Resource Summary Trends by Location and Subsector

Components	Rural-serving	Urban-serving	Social Services	Arts/Culture/ Heritage/Tourism	Health
C.1. Level of volunteer involvement	About the same	About the same	About the same	About the same	About the same
C.2. Recruitment /retention of volunteers spending	About the same	About the same	About the same	About the same	About the same
C.3. Number of full-time staff	About the same	About the same	About the same	About the same	About the same
C.4. Number of part-time, temp., or seasonal staff	About the same	About the same	About the same	About the same	About the same
C.5. Staff hours	About the same	About the same	About the same	About the same	About the same
C.6. Wages/salaries	About the same	↑ Increasing	↑ Increasing	↑ Increasing	↑ Increasing
C.7. Level of benefits	About the same	About the same	About the same	About the same	About the same
C.8. Recruitment / retention of staff spending	About the same	About the same	About the same	About the same	↑ Increasing
C.9. Staff absences/use of sick leave	About the same	About the same	About the same	About the same	About the same
C.10. HR-related policy development spending	About the same	About the same	About the same	About the same	About the same
C.11. Staff mental health and wellbeing spending	About the same	About the same	About the same	About the same	About the same
C.12. Training and professional development spending	About the same	About the same	About the same	About the same	About the same

= Trending differently from summary trend

Health authority region trending differently from human resource summary trends

The only regional distinction of note related to HR was the level of wages/salaries offered to staff; for Vancouver Coastal and Vancouver Island, this was increasing (vs. about the same to increasing).

Theme 3: Stabilizing—But For How Long?

- There are some signs of stabilization, feelings of hope, and motivation.
- Non-profits in the province are sustaining their operations, programs and service delivery at 'normal' levels despite increasing pressure and the beginning of sunsetting for COVID wage supports and other programs.

Highlight Quotes

The quotes below highlight the operational and capacity impacts of this changing context, and the likelihood of negative impacts disproportionately affecting smaller sized organizations:

*"There seems to be a lack of understanding that while COVID created many problems it also exposed many issues that we were able to address through COVID funding. **As the pandemic eases, it's disheartening to see that funders are going back, in a large part, to business as usual** which means we do not have the resources to continue to address these previously hidden issues."*

*"As a relatively small organization focused on working with racialized immigrant women and children, this means things will **go back to the old ways and large organizations with huge infrastructure will continue to get the lion's share of resources."***

*"COVID supports that were allowing us to bolster operations and pay staff adequately etc. now being **discontinued**."*

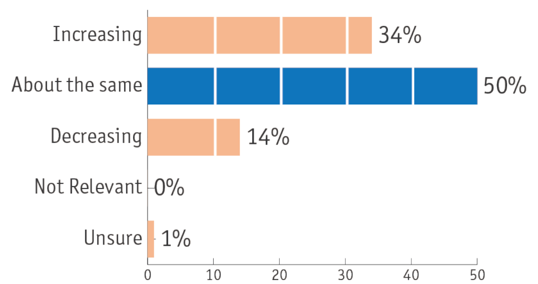
D. Programs and Service Delivery Trends

78% of respondents report increasing overall demand for services. Nearly half of the respondents (48%) are increasing their offerings of new programs and services.

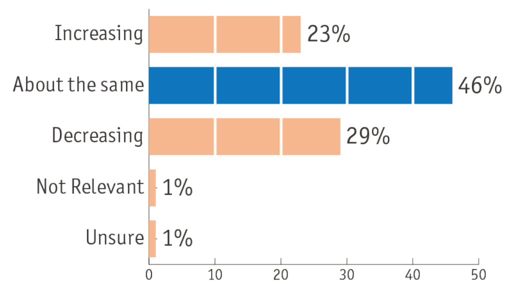
Non-profits' ability to deliver on their missions and their capacity to deliver programs and services is staying about the same.

= Summary trend by weighted average

D.1. Overall ability to deliver on our mission

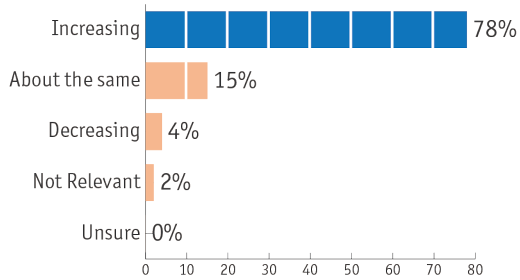


D.2. Capacity to deliver our programs, services, or activities

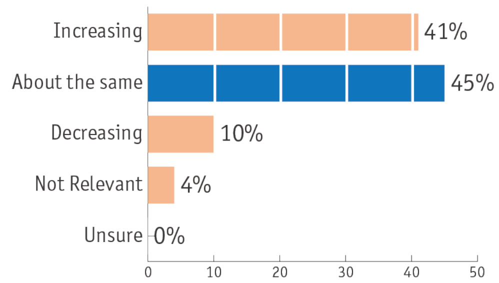


Over three quarters of respondents report increasing demand for services.

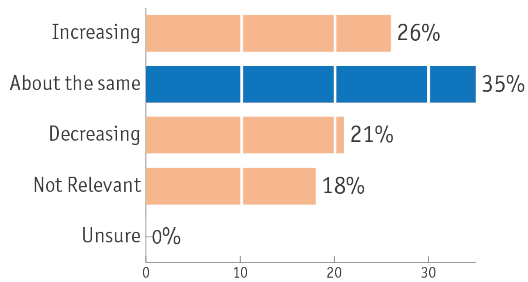
D.3. Overall demand for services/support from clients and communities



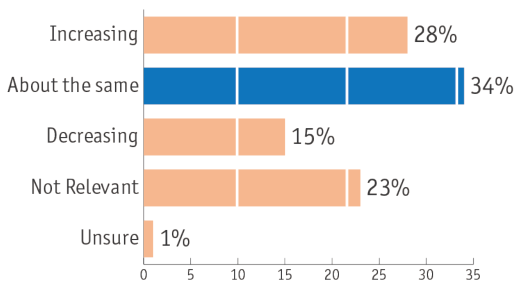
D.4. Delivering existing programs, services, or activities in-person



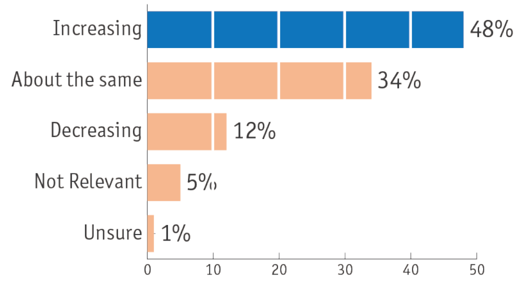
D.5. Delivering existing programs, services or activities remotely (virtually/online/by phone)



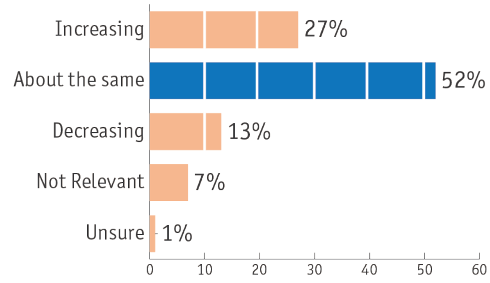
D.6. Delivering existing programs, services or activities in hybrid formats (people participating in person and online at the same time)



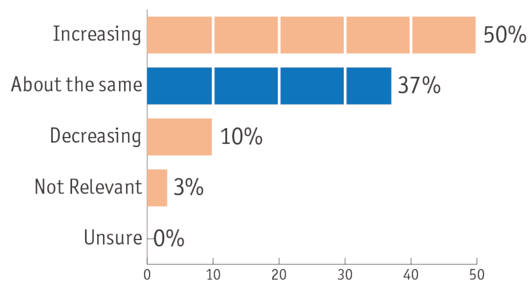
D.7. Focus on offering new programs, services or activities



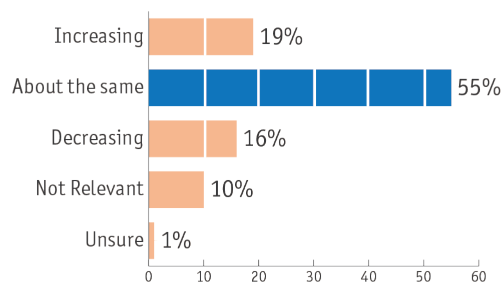
D.8. Resources (time or money) spent on evaluation



D.9. Resources (time or money) spent on outreach, relationships, and partnership



D.10. Amount of physical space to deliver our programs, services, and activities



Disaggregated Analysis: Differences between the summary trends as compared across subsectors, rural vs. urban-serving organizations, and health authority regions

Table 9 Programs and Service Delivery Summary Trends by Weighted Average

Components	Summary Trend
D.1. Overall ability to deliver on our mission	About the same
D.2. Capacity to deliver our programs, services, or activities	About the same
D.3. Overall demand for services/support from clients and communities	↑ Increasing
D.4. Delivering existing programs, services, or activities in-person	About the same
D.5. Delivering existing programs, services or activities remotely (virtually/online/by phone)	About the same
D.6. Delivering existing programs, services or activities in hybrid formats (people participating in person and online at the same time)	About the same
D.7. Focus on offering new programs, services or activities	About the same
D.8. Resources (time or money) spent on evaluation	About the same
D.9. Resources (time or money) spent on outreach, relationships, and partnership	About the same
D.10. Amount of physical space to deliver our programs, services, and activities	About the same

Table 10 Programs and Service Delivery Summary Trends by Location and Subsector

Components	Rural-serving	Urban-serving	Social Services	Arts/Culture/ Heritage/Tourism	Health
D.1. Ability to deliver on mission	About the same	About the same	About the same	About the same	About the same
D.2. Capacity to deliver programs, services, or activities	About the same	About the same	About the same	About the same	About the same
D.3. Demand for services/ support	↑ Increasing	↑ Increasing	↑ Increasing	About the same	↑ Increasing
D.4. Delivery of in-person programs, services, or activities	About the same	About the same	About the same	About the same	About the same
D.5. Delivery of online programs, services or activities	↓ Decreasing	About the same	About the same	About the same	About the same
D.6. Delivery of in-person and online programs, services or activities	↓ Decreasing	About the same	About the same	↓ Decreasing	About the same
D.7. Focus on offering new programs, services or activities	About the same	About the same	About the same	About the same	About the same
D.8 Spending on evaluation	About the same	About the same	About the same	About the same	About the same
D.9 Spending on outreach, relationships, and partnership	About the same	About the same	About the same	↑ Increasing	About the same
D.10 Amount of physical space	About the same	About the same	About the same	About the same	About the same

= Trending differently from summary trend

Health authority region trending differently from programs and service delivery summary trends

For Interior Health, demand for services/support was about the same (vs. increasing) and in-person service delivery was increasing (vs. about the same). Vancouver Coastal Health and Fraser Health both reported hybrid service delivery was decreasing (vs. about the same).

E. Central Operation Trends

In terms of central operations, respondents report having about the same amount of capacity in areas that support operations (i.e., information technology, physical space, marketing and communications), even as demand for services/support are increasing.

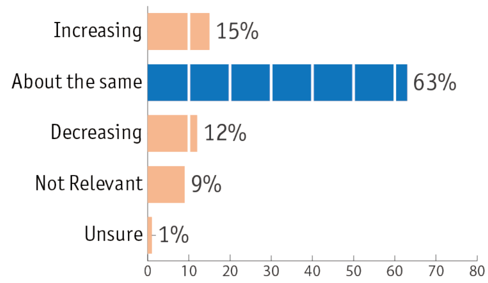
But organizations' ability to procure supplies and services is trending from staying about the same to decreasing, which could be related to supply chain issues and/or inflation. Notably, 54% of respondents are increasing resources spent on IT. Another 50% report increasing resources on marketing and communications. Administrative fees, or core, overhead funding allocations should be increased to 30% of total project costs to provide organizations with adequate resources for organizational health and resilience.

Despite longstanding calls to improve onerous reporting processes on grantees, it appears that there is no noticeable decrease in the time organizations spend on reporting. Time spent reporting to funders and governments is increasing for 46% of respondents and staying about the same for 47%.

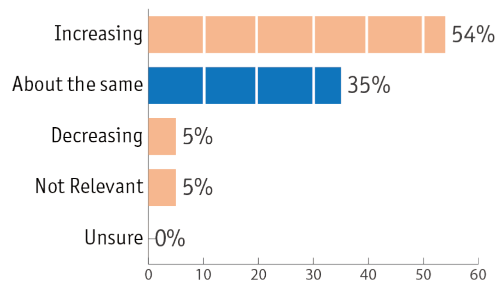
Of note, in the 2021 Unraveling report, 50% of respondents reported spending more time reporting to funders. It is important for funders to understand how their reporting requirements negatively impact grantees and to continue efforts to further streamline application and reporting processes.

= Summary trend by weighted average

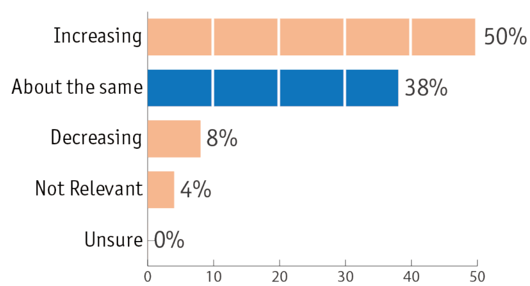
E.1. Amount of physical space to host our central operations



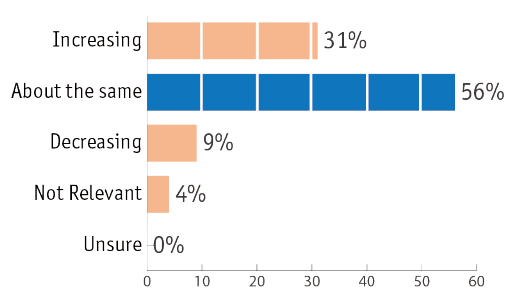
E.2. Resources (time or money) spent on IT



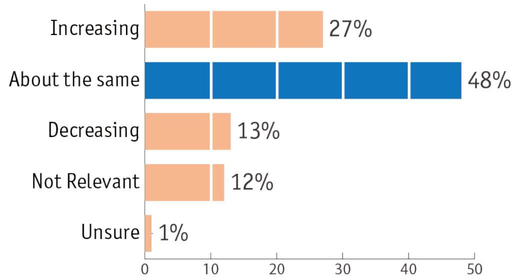
E.3. Resources (time or money) spent on marketing and communications



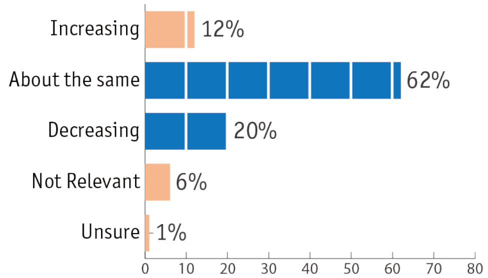
E.4. Conducting our central operations (e.g. internal meetings and work) in person



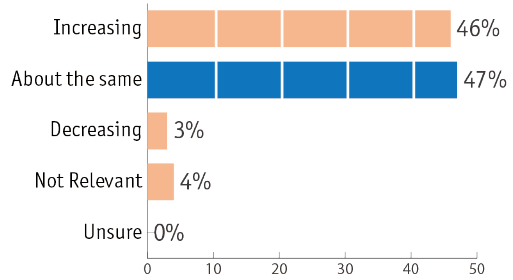
E.5. Conducting our central operations (e.g. internal meetings and work) in hybrid formats (people participating in person and online at the same time)



E.6. Ability to procure supplies and services



E.7. Time spent on reporting to funders, governments etc. on our activities



Disaggregated Analysis: Differences between the summary trends as compared across subsectors, rural vs. urban-serving organizations, and health authority regions

Table 11 Central Operations Summary Trends by Weighted Average

Components	Summary Trend
E.1. Amount of physical space to host our central operations	About the same
E.2. Resources (time or money) spent on IT	About the same
E.3. Resources (time or money) spent on marketing and communications	About the same
E.4. Conducting our central operations (e.g. internal meetings and work) in person	About the same
E.5 Conducting our central operations (e.g. internal meetings and work) in hybrid formats (people participating in person and online at the same time)	About the same
E.6. Ability to procure supplies and services	↓ Decreasing to About the same
E.7. Time spent on reporting to funders, governments etc. on our activities	About the same

Table 12 Central Operations Summary Trends by Location and Subsector

Components	Rural-serving	Urban-serving	Social Services	Arts/Culture/ Heritage/Tourism	Health
E.1. Amount of physical space	About the same	About the same	About the same	About the same	About the same
E.2. Spending on IT	About the same	About the same to ↑ Increasing	↑ Increasing	About the same	↑ Increasing
E.3. Spending on marketing and communications	About the same	About the same	About the same	About the same to ↑ Increasing	About the same
E.4. Conducting central operations in person	About the same	About the same	About the same	About the same	About the same
E.5. Conducting central operations in hybrid format	About the same	About the same	About the same	About the same	About the same
E.6. Ability to procure supplies and services	About the same	About the same	About the same	About the same	About the same
E.7. Time spent on reporting to funders	About the same	About the same	↑ Increasing	About the same to ↑ Increasing	About the same

= Trending differently from summary trend

Health authority region trending differently from central operations summary trends

There was no difference in trends between all health authority regions.

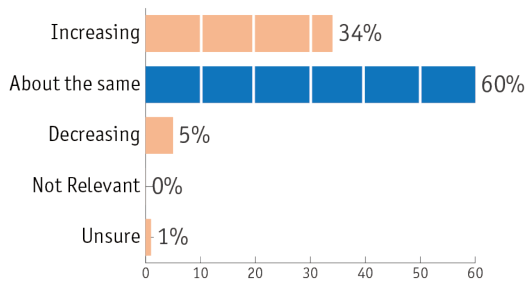
F. Governance Trends

Despite the challenges of the last year, respondents reported that in the areas of merging, conflict management, and crisis management, they are spending decreasing or similar amounts of resources. It appears that there is some stabilization happening.

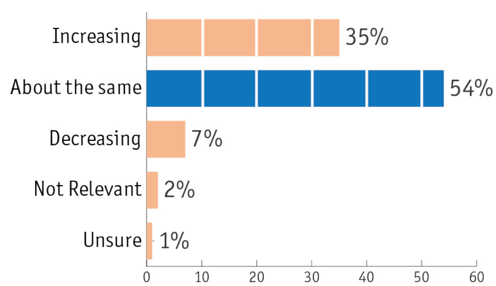
Good governance contributes to high standards of organizational services, impact, and management. Governance-related work and investments all require organizational time and resources, which could be more adequately compensated with higher administrative or core funding fees.

= Summary trend by weighted average

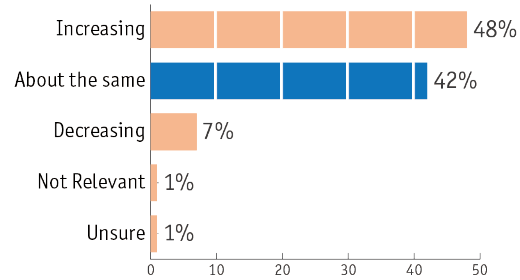
F.1. How well identities of people in leadership roles (board, management) reflects the communities you serve



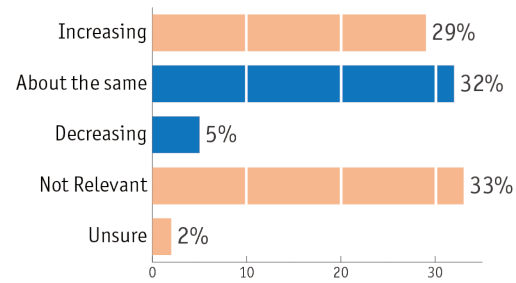
F.2. Resources (time or money) spent on governance structure or board processes



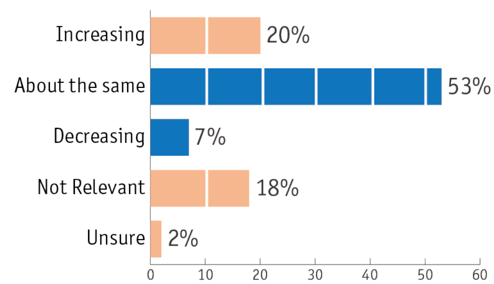
F.3. Resources (time or money) spent on strategic/scenario planning



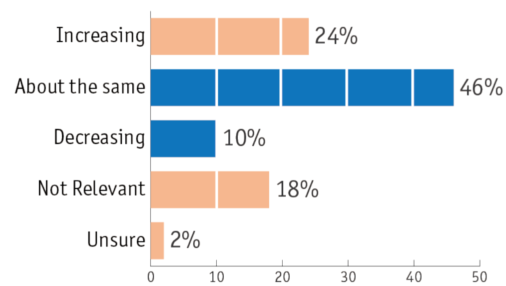
F.4. Resources (time or money) spent considering merging/strategic alliances with another organization



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



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



Disaggregated Analysis: Differences between the summary trends as compared across subsectors, rural vs. urban-serving organizations, and health authority regions

Table 13 Governance Summary Trends by Weighted Average

Components	Summary Trend
F.1. How well identities of people in leadership roles (board, management) reflects the communities you serve	About the same
F.2. Resources (time or money) spent on governance structure or board processes	About the same
F.3. Resources (time or money) spent on strategic/scenario planning	About the same
F.4. Resources (time or money) spent considering merging/strategic alliances with another organization	↓ Decreasing to About the same
F.5. Resources (time or money) spent managing conflict or building relationships among the board, or between the board and executive director	↓ Decreasing to About the same
F.6. Resources (time or money) spent on crisis management	↓ Decreasing to About the same

Table 14 Governance Summary Trends by Location and Subsector

Components	Rural-serving	Urban-serving	Social Services	Arts/Culture/ Heritage/Tourism	Health
F.1. Identities of people in leadership roles reflect the communities you serve	About the same	About the same	About the same	About the same	About the same
F.2. Resources spent on governance structure or board processes	About the same	About the same	About the same	About the same	About the same
F.3. Resources spent on strategic/scenario planning	About the same	About the same	About the same	↑ Increasing	About the same
F.4. Resources spent on merging/strategic alliances with another organization	↓ Decreasing to About the same	About the same	About the same	↓ Decreasing to About the same	↓ Decreasing
F.5. Resources spent on managing conflict or building relationships among the board, or between the board and executive director	About the same	About the same	About the same	About the same	About the same
F.6. Resources spent on crisis management	About the same	About the same	About the same	About the same	About the same

= Trending differently from summary trend

Health authority region trending differently from governance summary trends

The only component of governance that was different among health authority regions is resources (time or money) spent considering merging/strategic alliances with another organization; for Vancouver Coastal and Vancouver Island, this component was about the same (vs. decreasing to about the same).

CONCLUSION

Non-profits are indispensable. They have evolved to do more than small scale good deeds. Balancing the work of private interests and the public good, the non-profit sector is a major employer that provides a range of essential services to help ensure healthy and connected communities.

Next Steps: Opportunities to Strengthen Partnerships

The 2023 State of the Sector Survey respondents demonstrate an ongoing commitment to their work. But there are opportunities for both policy makers and funders to help support the capacity of non-profits to continue providing the programs and services that make up an important part of communities' safety net.

Beyond granting, we asked survey respondents how policy makers and non-government funders can support BC non-profits to identify, create, and sustain community-driven solutions while the sector is under pressure. The recommendations below are summaries based on the 481 responses collected.

1. Capacity building investments

Investments in capacity building through unrestricted, multi-year core funding will be key. Specifically, we recommend that administrative or core funding allocations be increased to, at minimum, 30% of project/program-based funding requests, and where possible, the progressive proliferation towards full unrestricted funding opportunities.

Secondly, organizations need relief from inflation, particularly to support staff and volunteer recruitment and retention. In 2022, the average annual inflation rate in BC was 6.9%, the highest in 40 years[19].

We recommend that government funding embed inflationary increases into the structure of funding agreements. When funding agreements don't include increases for inflation, the value of contribution decreases each year. This reduces stability in the sector. Capacity building investments that support staff recruitment and retention are investments in job creation.

Respondents noted that during the pandemic, they experienced adaptability, support and flexibility from funders. This allowed for agile program and service delivery changes, and the ability to respond to emerging and temporary needs like food insecurity or emergency supports. The approach offered "fresh perspectives and renewed energies" that respondents recommend be continued, alongside recently created stabilization recovery funds.

Organizations can better support communities when they are adequately funded to provide emergent crisis response to unpredictable events not usually addressed by existing core programs and services.

2. Continue expanding trust-based funding practices

Non-profits encourage funding decisions and communication to be made quickly and transparently, well before funding cycles expire. Funders should be in regular communication with grantees with updates about service needs in communities and funders' priorities and goals.

19 BC Stats, "Consumer Price Index, Reference date: March 2023", accessed on May 4, 2023. https://www2.gov.bc.ca/assets/gov/data/statistics/economy/cpi/cpi_highlights.pdf .

While reducing onerous application and reporting requirements, funders can:

- Use enquiry processes to build relationships to understand the unique contexts each organization operates within.
- Use language that invites trust-based collaboration, encouraging organizations to share the true costs of operations.
- Trust in organizations' commitments to the communities they serve, recognizing they are experts with respect to which organizational areas need investments to better serve the causes and populations served by their missions.

3. Workforce development and labour force strategies

Community non-profits employ approximately 87,000 individuals, representing 3.2% of the province's total employed workforce at the end of 2021. Over the next ten years, community services are projected to be among the top five occupational groups in BC.[20]

More work is needed to ensure that community services jobs are good jobs. This report demonstrates how organizations have been spending more resources (time or money) on human resources, not only to recruit and retain quality staff and volunteers but also to strengthen organizational capacity to adequately meet high service demands from the community. These costs need to be adequately funded to ensure both organizational stability for individual non-profits, as well as the sector's sustainable workforce development and leadership on decent work.

20 Government of BC, "Labour Market Outlook predicts bright future", BC Gov News, accessed May 4, 2023. https://news.gov.bc.ca/28195.

Decent work means more than fair wages and benefits[21]. It also means acknowledging the highly gendered nature of the non-profit sector's workforce—and developing solutions that address women's particular interests and concerns[22]. We recommend prioritizing the effort to secure and develop the sector's long-term workforce now, through joint sector and government leadership on developing a sector labour force strategy.

The non-profit sector is an important economic driver and provides services and programs that are essential to ensure healthy and connected communities across BC. When non-profits, government, corporate partners, and community residents work together, we can build strong and thriving communities. There is much we can do together—non-profits need the right conditions to achieve maximum community impact.

21 For more on decent work in the non-profit sector, please see: https://theonn.ca/topics/policy-priorities/people/decent-work/

22 For more on the gendered nature of the non-profit sector, please see: https://theonn.ca/topics/onn-projects/decent-work-for-women/

All funding sources decreased except government sources and individual donations

Overall expenses and service demand increased

Most common challenges: staffing issues and funding

Organizations are feeling overwhelmed, tired, stretched, uncertain, busy

50% reported increased staff recruitment and retention spending

Rural: Revenue from foundations and individual donations decreased

vs. stayed the same for urban

44% reported increased staff absences or use of sick leave

61% increased staff wages/ salaries and 29% increased benefits

APPENDIX

A. More About the Survey Respondents

The 2023 State of the Sector survey was circulated between Jan 4th and Jan 27th, 2023 (24 days) to Vantage Point and partners' networks through email blasts and social media and reached 757 organizations. This report represents a snapshot of trends in the non-profit sector in BC.

A.1 Subsectors Represented Among Respondents

* e.g. Leisure clubs, fitness and wellness, and amateur sports
** e.g. Nursing homes, mental and crisis intervention
*** e.g. Multi-service agencies, child care, settlement services, and services for seniors

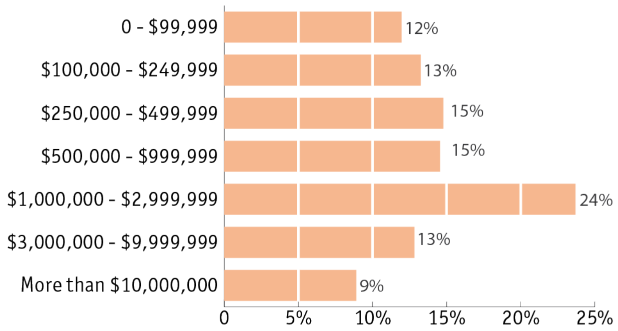
The majority of respondents were not organizations that are led-by and serving a specific equity-denied group. Just under a quarter of respondents (22%, n=463) indicated that their organization explicitly identifies as both led-by and serving a specific equity-denied group[23], and they are most likely organizations led-by and serving:

- Indigenous people (31%)
- People with disabilities (28%)
- POC (23%)
- LGBTQIAS2+ people (10%)
- Women (19%)

23 People who share an identity that have been historically and/or currently marginalized, discriminated against, or disadvantaged.

In terms of operating budget size, half of respondents (n=460) were organizations with operating budgets under $1M. A quarter had budgets between $1M to $2.9M, and nearly another quarter consist of organizations $3M and above.

A.2 Current Annual Operating Budgets



Government was the primary revenue source for 46% of respondents, although in urban-serving organizations, more respondents reported mixed revenue sources than in rural-serving organizations. 26% of the respondents to this survey (n=460) serve a rural, geographically remote, northern, or small community.

A.3 Geographic Focus and Response Rates Grouped by Health Authority Regions in BC

Fraser Health Authority

Regional District	response rate	no. of responses
Fraser Valley Regional District	5.43%	25
Metro Vancouver—Burnaby, New Westminster	9.13%	42
Metro Vancouver—Surrey, White Rock	7.39%	34
Metro Vancouver—Langley	5.87%	27
Metro Vancouver—Coquitlam, Port Coquitlam, Port Moody	8.04%	37
Metro Vancouver—Tsawwassen, Delta, Tsawwassen First Nation	5.00%	23
Metro Vancouver— Pitt Meadows, Maple Ridge	3.48%	16

Vancouver Coastal Health Authority

Regional District	response rate	no. of responses
Metro Vancouver—North Shore and Bowen Island	8.04%	37
Metro Vancouver—Vancouver	15.87%	73
Metro Vancouver—Richmond	8.04%	37
Squamish-Lillooet Regional District	3.26%	15
Sunshine Coast Regional District	2.61%	12
qathet Regional District	1.30%	6
Central Coast Regional District	1.09%	5

Interior Health Authority

Regional District	response rate	no. of responses
Okanagan-Similkameen Regional District	5.00%	23
Thompson-Nicola Regional District	5.00%	23
Central Kootenay Regional District	4.57%	21
East Kootenay Regional District	2.17%	10
Kootenay Boundary Regional District	2.17%	10
Columbia Shuswap Regional District	1.96%	9
Cariboo Regional District	1.74%	8
Central Okanagan Regional District	5.00%	23
North Okanagan Regional District	3.48%	16

Fraser Health Authority

Regional District	response rate	no. of responses
Fraser Valley Regional District	5.43%	25
Metro Vancouver—Burnaby, New Westminster	9.13%	42
Metro Vancouver—Surrey, White Rock	7.39%	34
Metro Vancouver—Langley	5.87%	27
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Sunshine Coast Regional District	2.61%	12
qathet Regional District	1.30%	6
Central Coast Regional District	1.09%	5

B. Open-ended responses of 19 organizations that are currently not thriving

The organizations included in this section explicitly stated in their responses to Question 11 that they are currently not thriving.

3 words describing current morale/feelings
1. Tired, Anxious, Worried
2. Overburdened, Uncertain, Focused
3. Overwhelmed, Stressed, Anxious
4. Tenuous, Burned out, Transitional
5. Tired, Overstretched, Struggling
6. Defeated, Frustrated, Hopeful
7. Dying, Desperate, Underfunded
8. Worried, Hopeful, Tired
9. Scarcity, Broke, Disheartened
10. Stressed, Overwhelmed, Focused
11. Recovering, Evolving, Angst
12. Instability, Uncertainty, Losses
13. Stressed, Financial shortfall, Shortage of volunteers
14. Anxious, Proud, Wary
15. Overwhelmed, Stressed, Worried
16. Weak, Needs volunteers, Disoriented
17. Overwhelmed, Underfunded, Burnt out
18. Financial worries, Labour worries, Client worries
19. Stable, Security, Sustainability

What successes, priorities and supports are you grateful for or are making you stronger? What is helping you thrive?
1. Nothing
2. What helps non-profit's thrive is financial investment. This investment must be predictable, consistent and assured.
3. Nothing at the moment. Everything feels overwhelming.
4. At the moment, significant changes to our staffing (the loss of some key senior staffers) have made the work environment much more stressful. Burnout and tension are at an all-time high. Staff don't seem equipped to maintain the current level of output. All in all, not much is making me feel stronger or like we are thriving.
5. I honestly can't think of anything.

What successes, priorities and supports are you grateful for or are making you stronger? What is helping you thrive?	
6.	Our client's success is the only thing keeping the staff going.
7.	Funding would help us thrive, but as we don't have much, we're dying.
8.	I am grateful for my current board and some of our funders who are moving towards easier grants and reporting. We are not thriving though. We all need rest and more support.
9.	We are not thriving at the moment. We are a graduate not for profit and rapidly losing funding.
10.	We're not thriving—we're trying to recover from a difficult year and staffing shortages.
11.	We are grateful that our patron base is coming back after the pandemic, but slowly. We are currently assessing if the base is the 'new normal'. We continue to try new things to see if we can increase our base. Of our three revenue lines (earned income, fundraising and donations, and government funding) earned income is increasing from covid levels but government funding (which got us through covid) and donations (same) are both lower, and government funding is now inexplicable delayed (BC Arts Council grants).
12.	Economic recovery support is critical but needs to be sustained.
13.	Nothing
14.	Dedication of staff has been crucial to delivery of our programs. Government COVID supports were crucial over the past 2 years but with earned revenue still reduced from drop in tourism we are facing a difficult year without further support
15.	The fact I'm good at time management and saving money. As for supports, our organization does not qualify for 95% of grants–even though we are a not for profit society. Government simply doesn't understand what we actually do in our industry.
16.	We are not thriving, had to sell the bus and not able to find appropriate electric vehicle
17.	We need funding. Especially for a permanent building
18.	Don't know
19.	Our current funders are amazing and continue their support for our programs and services. Our priorities remain financial stability , security and sustainability in what remains a very challenging time, identify and address areas of demand and continue to retain and attract superlative counsellors and staff.

Looking ahead from now into the next year, what concerns/challenges are top of mind? What is making it difficult to thrive, or has you worried?	
1.	Unstable office situation. Staffing.
2.	The continued need to reapply for funding, the lack of core funding, consistent multi-year funding is a major concern. It makes it difficult to secure and maintain a committed group of staff, volunteers and Board.
3.	The govt money will run out and then what do we do as revenues have not returned to normal.

Looking ahead from now into the next year, what concerns/challenges are top of mind? What is making it difficult to thrive, or has you worried?
4. See above. Recruitment and retention are becoming more and more difficult. Many potential candidates for specialized positions are not prepared to move to the lower mainland of BC given the cost of living.
5. Low audience attendance for performances; amount of time spent on HR issues (performance, harassment, behaviour issues); amount of time spent on EDI and accessibility work
6. How to feed clients three meals, two snacks and beverages on $9 daily. How to generate more revenue to pay increasing staff wages and how to retain staff without a pension or RRSP plan
7. We've had to end the contract for our only employee.
8. Everyone is tired and there is no money. Funders are withholding/delaying operating disbursements and that put us in a precarious situation as donations are down. Staff turnover is a real thing. We are just so tired, but are hopeful that things will turn around. It feels like no one is remembering the lessons of the pandemic towards community support and mental wellness.
9. Lack of funding. We are currently discussing closing the agency.
10. Finding good staff, securing funding.
11. There is still a reluctance of our patrons to return, our earned revenue while increasing is not at pre-covid levels. Staffing turnover since the pandemic started is at 93%, training difficult due to new norm of a hybrid workforce. Add increasing costs from vendors and salaries, and our current model is not sustainable long term. The worry is we will need to have a reduction in operations which will impact contractors, vendors and staff. This is very worrisome, and a scaling down of operations appears inevitable as revenue streams stay below pre-covid levels.
12. Funding and support from donations, sponsors decreasing.
13. Lack of volunteers and reluctance of participants to travel as a result of Covid and increasing cost of living
14. Inflation and cost of living are huge challenges. We are not able to keep up with the needs of staff salaries and higher costs to put on regular programs.
15. Being able to have enough revenue to continue.
16. We will likely have to close the society
17. Decrease in financial donations and an increase in trauma and crisis among clients
18. We are struggling with being able to attract good labour when the cost of living is going up and we can't meet wage expectations.
19. Other agencies provide higher compensation than we do, some significantly so and we will likely (but understandably) lose counsellors to better paying agencies, being able to secure additional funding, not just from existing ones but have the time and access to new funding opportunities, and to ensure our counsellors and staff continue to get support for their own possible mental health issues, should the need arise.

Looking ahead from now into the next year, what opportunities or possibilities interest you? What else might help you thrive?
1. Building a team with experience and skills.
2. Multi-year funding, financial investment in the sector, government recognition regarding the necessity of the non-profit sector and funding structured to reflect that.
3. No idea
4. More time. More money. More staff.
5. No idea
6. Social Enterprise.
7. We need money.
8. Increased funding for staffing so folks don't burn out.
9. More funding. Multi year funding in particular.
10. We're hoping to raise more funding from local businesses.
11. Our programming is very interesting for our next fiscal year. It is hoped it will drive earned revenue to pre-covid levels. It is as close to pre-covid programming that we have gotten. If it drives revenues higher than anticipated, it will enable us to leave operations at pre-covid levels, if not, we will need to downsize.
12. Funding is the most critical.
13. Funds to help with advertising to attract volunteers and participants
14. We will be placing increased efforts on audience development as a way to build sustainability over the long term.
15. Grants that we could actually apply for.
16. Electric transit options
17. A place to hold classes to increase peoples basic skills
18. Don't know
19. Securing new partnership and other collaborative opportunities, access to new funding opportunities, increasing staff numbers to address the increased demand for counsellors, programs and services.

Consider the successes, challenges, and possibilities you shared above. What resources, information, or support does your organization need from all levels of government and funders to help with these?
1. Increased grants to provide better wages.
2. Multi-year funding, financial investment in the sector, government recognition regarding the necessity of the non-profit sector and funding structured to reflect that.
3. More funding. Funders working together so we can stop writing the same grants over and over again. Stop expecting arts organizations to solve the EDI and climate crisis.

Consider the successes, challenges, and possibilities you shared above. What resources, information, or support does your organization need from all levels of government and funders to help with these?

4. See above.
5. Funding to meet HR, EDI and accessibility expectations and requirements
6. Increase in funding for women's bed-based services, increase in recovery-orientated systems of care, improved messaging for youth, and safety-sensitive jobs, including parenting. Analysis of quality of life for those engaged in services to determine what services are working, why, and how it is improving the lives of British Columbians. Accountability for the distribution of safe supply and harm reduction. Taking advantage of missed opportunities to help people recover.
7. We need money.
8. More unrestricted funding and less complicated grants and reporting
9. More funding.
10. a) Streamlining processes/making it easier to hire foreign workers b) IRCC dealing with the backlog of refugee applications and releasing allocations to SAHs, reducing the reporting requirement c) support with all the reporting requirements for federal funding
11. Covid has stretched out into 3 of our fiscals now. Recovery is still underway. Government funding has changed as well as its timing, with little notification on the part of the provincial govt. We are large enough to weather this, but smaller organizations are not. Funders, and government need to understand that organizations are still recovering. If they do not want not for profits to be shut down, downsized and staff and applicable vendors cut back on impacting the economy, they need to design new programs to help not for profits weather this long, trying recovery period.
12. Funding long-term sustainable. Government and other funders to stop the onerous amount of reporting and applications.
13. Money
14. We desperately need operating support. Relying on inconsistent project funding puts our staff and programs in jeopardy and does not enable long term planning.
15. Money. Grants. Funding.
16. Support local initiatives
17. Funding
18. Navigating the funding landscape in BC is quite challenging.
19. To secure additional funding from our existing government funders (increase of block funding) so that our programs don't just break even, to learn more about how to access new streams of funding and to have the financial means to compensate grant writers for their research and writing services.

C. Survey Questions

Questions		Response Options
	The following questions ask about **current** trends in your organization. **Consider what you know about the past 12 months, and what you expect heading into the next 12 months.** **This is meant to be a gut check, we don't expect you to look up specific numbers.**	Preface text
1.	This survey is designed to have one response per organization, and should be completed by the executive director or similar. I confirm that I am the designated person from my organization to complete this survey. • Yes • No **Number of respondents = 758**	Radio buttons
2.	Share three words that describe how your organization is doing/feeling right now. **Number of respondents = 543**	3 short text boxes
3.	What are the current overall trends in your actual revenues? a. Overall revenues b. Revenue from earned income (e.g. sales of goods and services) c. Revenue from foundations d. Revenue from government sources e. Revenue from individual donations f. Revenue from membership fees g. Revenue from special events h. Revenue from corporations/businesses i. Accessing financial reserves **Number of respondents = 543**	Radio button matrix (increasing, staying about the same, decreasing, not relevant, not sure)
4.	What are the current overall trends in your actual expenses? a. Overall expenses b. Salaries and benefits c. Spending on programs, services, and activities d. General administration costs e. Office space expenses f. Programming space expenses g. Investments in diversity, equity, inclusion, belonging, accessibility h. Investments in decolonization and reconciliation **Number of respondents = 543**	Radio button matrix (increasing, staying about the same, decreasing, not relevant, not sure)

Questions	Response Options
5+6 What are the current overall trends in your delivery of programs, services, or activities? a. Overall ability to deliver on our mission b. Capacity to deliver our programs, services, or activities c. Overall demand for services/support from clients and communities d. Delivering existing programs, services, or activities in-person e. Delivering existing programs, services or activities remotely (virtually/online/by phone) f. Delivering existing programs, services or activities in hybrid formats (people participating in person and online at the same time) g. Focus on offering new programs, services or activities h. Resources (time or money) spent on evaluation i. Resources (time or money) spent on outreach, relationships, and partnership j. Amount of physical space to deliver our programs, services, and activities **Number of respondents = 543**	Radio button matrix (increasing, staying about the same, decreasing, not relevant, not sure)
7+8 What are the current overall trends in your human resources? a. Level of volunteer involvement b. Resources (time or money) spent on recruitment and retention of volunteers c. Number of full time staff d. Number of part-time, temporary, contract, or seasonal staff, or independent artists e. Staff hours (ie average hours worked per staff member) f. Levels of wages/salaries offered to staff g. Level of benefits offered to staff h. Resources (time or money) spent on recruitment and retention of staff i. Staff absences/use of sick leave j. Resources (time or money) spent on developing HR-related policies (e.g. sick leave, work from home) k. Resources (time or money) spent on HR issues related to staff mental health and wellbeing l. Resources (time or money) spent on training and professional development **Number of respondents = 543**	Radio button matrix (increasing, staying about the same, decreasing, not relevant, not sure)

Questions	Response Options
9. What are the current overall trends in your central operations? a. Amount of physical space to host our central operations b. Resources (time or money) spent on IT c. Resources (time or money) spent on marketing and communications d. Conducting our central operations (e.g. internal meetings and work) in person e. Conducting our central operations (e.g. internal meetings and work) in hybrid formats (people participating in person and online at the same time) f. Ability to procure supplies and services g. Time spent on reporting to funders, governments etc. on our activities **Number of respondents = 543**	Radio button matrix (increasing, staying about the same, decreasing, not relevant, not sure)
10. What are the current overall trends in your governance? a. How well identities of people in leadership roles (board, management) reflects the communities you serve b. Resources (time or money) spent on governance structure or board processes c. Resources (time or money) spent on strategic/scenario planning d. Resources (time or money) spent considering merging/strategic alliances with another organization e. Resources (time or money) spent managing conflict or building relationships among the board, or between the board and executive director f. Resources (time or money) spent on crisis management **Number of respondents = 543**	Radio button matrix (increasing, staying about the same, decreasing, not relevant, not sure)
11. What successes, priorities and supports are you grateful for or are making you stronger? What is helping you thrive? **Number of respondents = 481**	Open text box
12. Looking ahead from now into the next year, what concerns/challenges are top of mind? What is making it difficult to thrive, or has you worried? **Number of respondents = 481**	Open text box
13. Looking ahead from now into the next year, what opportunities or possibilities interest you? What else might help you thrive? **Number of respondents = 481**	Open text box
14. Consider the successes, challenges, and possibilities you shared above. What resources, information, or support does your organization need from all levels of government and funders to help with these? **Number of respondents = 481**	Open text box

Questions	Response Options
These questions let us know the types of organizations that have responded to this survey. We ask these questions so that: • We can promote the survey to types of organizations that we haven't heard from • We can disaggregate survey results to see if different types of organizations are experiencing different trends.	Preface text
15. What is the current legal status of your overall organization (check all that apply): a. Unincorporated grassroots or community group (not a registered organization) b. Registered charity (have charitable tax status with the CRA) c. Registered non-profit (e.g. under BC Societies Act or federal Not-for-profit Corporations Act) d. Nonprofit co-operative (under provincial or federal legislation) e. Project under an umbrella/host organization, charitable platform, or fiscal agent f. Non-profit social enterprise g. Network, collaborative, or coalition h. Other (please specify): ___________ **Number of respondents = 458**	Radio buttons
16. The federal government classifies non-profits into three categories. Which category best describes you? a. Community organization b. Business organization (business associations, professional associations, unions, chambers of commerce, condominium strata, etc) c. Quasi-governmental organization (hospitals, public educational institutions, legislatively created organization, etc) **Number of respondents = 458**	Radio buttons
17. What subsector does your organization primarily belong to? These are categories often used by the federal government. (Pick the most appropriate.) a. Arts, culture, heritage and tourism b. Sports, recreation, and other social clubs (e.g. leisure clubs, fitness and wellness, amateur sports) c. Education and research d. Health (e.g. nursing homes, mental and crisis intervention) e. Social services (e.g. multi-service agencies, child care, settlement services, services for seniors) f. Environment g. Community development and housing h. Law, advocacy, and politics i. Grantmaking, fundraising, and volunteerism promotion j. International k. Religion/faith groups l. Business associations, professional associations, unions m. Other (please specify): ___________ **Number of respondents = 458**	Radio buttons

Questions	Response Options
18. Does your organization focus its programs, services, or activities on people from specific demographic groups? a. Yes b. No **Number of respondents = 464**	Radio buttons
19. Who are the primary demographic groups your organization serves and/or are the focus of your mission? (Please choose up to 5.) a. General public/no specific focus b. Children (0-12) c. Youth (13 to 24) d. Adults e. Seniors (55+) f. Families g. Women h. Indigenous Peoples i. Black people/African diaspora j. People who are racialized/people of colour/people of culture, other than Indigenous Peoples and Black people/African diaspora k. People who are newcomers, immigrants or refugees l. People whose first language is not English m. People who are Two Spirited, lesbian, gay, bisexual, queer, trans, non-binary, gender non-conforming n. People with experience with sex work o. People with experience of domestic or sexualized violence p. People experiencing poverty or with low income q. People living with employment barriers r. People experiencing homelessness s. People with lived/living experience of substance use t. People living with mental health challenges/mental illness, or who identify as mad u. People with a chronic illness or long-term condition v. People with disabilities not previously mentioned, including those who identify as disabled, autistic, neurodivergent, or deaf/Deaf w. Other (please specify): ___________________ **Number of respondents = 232**	DEPENDENCY: Only for Y to previous question Radio buttons
20. Are you an organization that explicitly identifies as an organization that is both led-by and serving a specific equity-denied group? Equity-denied group means people who share an identity that have been historically and/or currently marginalized, discriminated against, or disadvantaged. • Yes • No **Number of respondents = 463**	Radio buttons

Questions	Response Options
21. Please specify which equity-denied group(s) you are led-by and serve: ____________________ **Number of respondents = 101**	DEPENDENCY: only those who selected YES above Text box
22. What was your organization's current operating budget? a. 0 - $99,999 b. $100,000 - $249,999 c. $250,000 - $499,999 d. $500,000 - $999,999 e. $1,000,000 - $2,999,999 f. $3,000,000 - $9,999,999 g. More than $10,000,000 **Number of respondents = 460**	Radio buttons
23. In terms of the primary space your organization currently operates in, please indicate whether you rent, lease, own, or other. We realize you may operate out of more than one space, but please answer for your primary space only. a. Rent at or near market rates b. Rent at nominal/subsidized rates c. Lease d. Own e. Have space gifted by another organization/business/government f. Rent in a coworking/shared space g. Don't have a primary physical space h. Other (please specify): __________ **Number of respondents = 460**	Radio buttons
24. What is your primary revenue source? (Pick the category that best describes you). a. Earned income (e.g. sales of goods and services) b. Foundations c. Government sources d. Individual donations e. Membership fees f. Special events g. Corporations/businesses h. Mixed revenue sources **Number of respondents = 460**	Radio buttons
25. Does your organization have paid staff? (Pick the category that best describes you). • Yes • No, our organization is volunteer driven **Number of respondents = 460**	Radio buttons

Questions	Response Options
26. Do you primarily serve a rural, geographically remote, northern or small community? (Rural/small communities are those with a population of fewer than 20,000 people) • Yes • No **Number of respondents = 460**	Radio buttons
27. Which regional district(s) represent the geographic scope/focus of your organization? Check all that apply. To see which region(s) you are in, please click here. • Our focus is province-wide • Our focus is regional within Canada (e.g. western Canada or BC/Yukon) • Our focus is national • Our focus is international • Alberni-Clayoquot Regional District • Bulkley-Nechako Regional District • Capital Regional District - Greater Victoria and Southern Gulf Islands • Cariboo Regional District • Central Coast Regional District • Central Kootenay Regional District • Central Okanagan Regional District • Columbia Shuswap Regional District • Comox Valley Regional District • Cowichan Valley Regional District • East Kootenay Regional District • Fraser Valley Regional District • Fraser-Fort George Regional District • Kitimat-Stikine Regional District • Kootenay Boundary Regional District • Metro Vancouver - Vancouver • Metro Vancouver - North Shore and Bowen Island • Metro Vancouver - Burnaby, New Westminster • Metro Vancouver - Coquitlam, Port Coquitlam, Port Moody • Metro Vancouver - Richmond • Metro Vancouver - Tsawwassen, Delta, Tsawwassen First Nation • Metro Vancouver - Surrey, White Rock • Metro Vancouver - Langley • Metro Vancouver - Pitt Meadows, Maple Ridge • Mount Waddington Regional District • Nanaimo Regional District • North Coast Regional District • North Okanagan Regional District • Northern Rockies Regional Municipality • Okanagan-Similkameen Regional District • Peace River Regional District • qathet Regional District • Squamish-Lillooet Regional District • Stikine Region • Strathcona Regional District • Sunshine Coast Regional District • Thompson-Nicola Regional District **Number of respondents = 460**	Checkboxes
28. What are the first three digits of your primary location's postal code? If you are a totally virtual organization and do not have a primary location, write NIL. **Number of respondents = 460**	Short text box