Points of Light:

The State of the Alberta Nonprofit Sector

Calgary Chamber of Voluntary Organizations

This report is the culmination of an effort by the Calgary Chamber of Voluntary Organizations (CCVO) to provide Albertans with useful and timely information about the thousands of nonprofit organizations that operate in the province. Funding for the project was provided by the Government of Alberta.

The Canada West Foundation was commissioned to perform the core research components of the project. The project was managed by CCVO's Director of Workforce Development Michael Grogan.

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→ QUESTIONS?

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CCVO
CALGARY CHAMBER *of* VOLUNTARY ORGANIZATIONS

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Contents

Executive Summary	2
Preface	3
Introduction 1	4
Methodology 2	5
Existing Research 2.1	6
The State of the Alberta Nonprofit Sector Survey 2.2	6
Limitations of the Survey 2.3	7
Diversity Within the Sector 2.4	8
Survey Results 3	9
Key characteristics 3.1	10
How many organizations are there?	10
What do organizations do?	11
How many years have organizations been operating?	12
Who do organizations serve?	13
	14
Size of Annual Revenues	15
Sources of Revenue	16
	16
Human Resources 3.2	17
Paid Staff	17
Staff Recruitment and Retention	18
	18
	19
Staff Development	20
Staff Salaries	21
Volunteer Resources	22
	23
	23
	24
Stability of Revenue Sources 3.3	25
	26
	26
	28
Conclusion 4	29
Climbing Out of the Dark 4.1	30
Current State of the Sector 4.2	31
References	32
	33
	36
	38
	39
	40
	40

Figures / Appendices

Figure 1	Percentage of Organizations by Primary Activity Area
Figure 2	Age of Organizations
Figure 3	Geographic Reach of Organizations
Figure 4	Groups Served
Figure 5	Percentage of Organizations by Annual Revenues
Figure 6	Revenue Sources (Percentage of Respondents Reporting Funding from Each Source)
Figure 7	Revenue Sources 2003 (NSNVO) (excluding Hospitals, Universities and Colleges)
Figure 8	Number of Paid Staff
Figure 9	Change in Staff Size (compared to three years earlier)
Figure 10	Trouble Retaining Paid Staff
Figure 11	Difficulty Attracting and Retaining Staff
Figure 12	Average Salary of Nonprofit Managers by Annual Operating Budget 2005 – 2010 (in Thousands of Dollars)
Figure 13	Board Member Time Commitment (average annual hours per board member)
Figure 14	Number of Volunteers
Figure 15	Volunteer Time Commitment (average annual hours per volunteer)
Figure 16	Direction of Volunteer Support (number of volunteers compared to three years prior)
Figure 17	Change in Annual Revenue
Figure 18	Difficulty Raising Revenue
Figure 19	Is Demand for Services Rising?
Figure 20	Revenue Changes by Source
Appendix 1	Methodological Lessons
Appendix 2	Major Secondary Sources
Appendix 3	Percentage of Organizations by Primary Activity Area
Appendix 4	US "State of the Sector" Reports
Appendix 5	About the Calgary Chamber of Voluntary Organizations
Appendix 6	About the Canada West Foundation

Executive Summary

→ KEY FINDINGS The nonprofit sector, for all its immense contributions to our communities, is a difficult sector to fully understand. This report provides insight and findings into the current state of the nonprofit sector in Alberta. We find a group of very diverse organizations involved in a wide range of activities that touch on virtually all aspects of life in the province. We find a sector that is a major employer, a facilitator and outlet for volunteerism, and in so many ways, the glue that holds our society together.

We also find a sector that is chronically low on financial resources, facing rising demands for services without equivalent increases in resources, and unable to pay enough to attract and retain the skilled workers that it needs to do the good work – the essential work – that it does.

One way to summarize the state of Alberta's nonprofit sector is to describe it as vital and resilient but stressed-out and slightly hobbled by the challenges it faces.

The report presents the findings of the largest online survey of Alberta nonprofits that we are aware of being conducted. While not a fully representative sample of the sector, the responses of the 954 organizations that took part provide a snapshot of key features of the Alberta nonprofit sector and how it is doing in the face of a number of key challenges. The survey results do a good job of describing what is perhaps the most established and visible part of the nonprofit sector, but may or may not reflect the situation of smaller and less established organizations.

Key findings include:

- → There are over **23,000** nonprofits operating in Alberta.
- → Alberta nonprofits are active in areas such as sports and recreation, religion, grant-making, arts and culture, social services, education and research, economic development and housing, professional associations, health, the environment, law and politics, and international aid and relations.
- → Notwithstanding several key similarities, there is no standard profile of nonprofit organizational characteristics. Annual revenues, staff size, volunteer support and mission all vary greatly across organizations.
- → **77%** of organizations report rising demand for services.
- → **64%** of organizations report difficulty raising revenue.
- → **38%** of organizations report increased revenue while **27%** report revenue decreases.
- → **14%** of organizations have seen their staff size decrease in the last three years compared to **34%** who have seen it increase.
- → **95%** of organizations engage volunteers in addition to board members.
- → **32%** of organizations saw their volunteer support increase over the last three years; **19%** saw it decrease.

Preface

Methodological Challenges and Lessons for Further Research

The nonprofit sector in Alberta is exceptionally diverse and far reaching. Some organizations are big, some are small. Some have no paid staff, others have hundreds of employees. Some serve children, some serve animals, some serve the general public. Many are found in Alberta's two largest cities, but others dot the countryside.

On top of this inherent complexity, and even after the large online survey and gleaning of existing sources presented in this report, high quality statistical information that represents the full width and breadth of the sector is severely lacking. Sector-wide time series data that can establish trends is almost nonexistent. Governments collect only the most basic information about nonprofits, and even this is often incomplete. Regular surveys that provide representative findings for Alberta nonprofits are expensive – the last (and only one) was conducted in 2003.

Is nonprofit revenue up or down? How many staff do nonprofits currently employ, how much do they make and how many are unemployed? How many people are served by nonprofits? Though we cannot fully answer these or a host of similar questions, there are pieces of information coming in from the front lines all the time that give us insight into the full picture and how it changes over time.

The lessons learned while preparing this report will improve future efforts to do so and, at the same time, highlight the need for more and better information about Alberta's nonprofit sector. To this end, there is a critical role to be played by the provincial government in facilitating the ongoing collection of consistent and meaningful data on Alberta's nonprofit sector. There are opportunities for the province to collect more data directly from nonprofits at the time of annual registration and to support regular and robust surveys of the sector.

Appendix 1 provides a list of the lessons learned about how to go about conducting a state of the nonprofit sector study that will hopefully inspire and improve future survey work and, in turn, lead to a better picture of Alberta's nonprofit sector. The ultimate goal is to use this knowledge to make informed decisions, identify trouble spots and areas of strength, and ensure that the sector thrives over the long-term. After all, if we let the nonprofit sector languish, we all suffer.

In the movie "Scent of a Woman," a blind army officer played by Al Pacino laments that he is "in the dark." The same can be said of Albertans (and Canadians in general) when it comes to the thousands of nonprofit organizations that operate in our midst. We know that these organizations do a tremendous amount of good things and that our society would be devastated if they did not exist. Despite this, the last (and only) comprehensive survey of nonprofits was conducted over seven years ago. The National Survey of Nonprofit and Voluntary Organizations was led by a consortium of concerned nonprofits and conducted by Statistics Canada in 2003. The survey was a massive undertaking that required the full resources of our national statistical agency to complete. Unfortunately, there appear to be no plans to repeat the survey. A complementary attempt by Statistics Canada to measure the nonprofit sector's contribution to gross domestic product (the Satellite Account of Nonprofit Institutions and Volunteering) does not provide the information on a provincial basis.

We are indeed in the dark. There is, of course, anecdotal information about how the sector is doing and numerous small-scale surveys have been conducted, but we don't have a good database of consistent, sector-wide information about nonprofit organizations. This makes it very difficult to get a sense of "the state of the sector" and even harder to make informed public policy decisions about it.

To help address this information gap, the Calgary Chamber of Voluntary Organizations teamed up with the Canada West Foundation to put together a current portrait of Alberta's nonprofit sector. Inspired in part by "state of the sector" reports conducted by other jurisdictions, the goal was two-fold: to test the options for preparing a state of the sector report for Alberta with an eye to assessing the viability of doing a report on a regular basis; and to produce an inaugural edition of the report that would be useful to stakeholders and the general public.

We certainly learned a great deal about the trials and tribulations of putting together a report of this nature with a limited budget and within a reasonable timeframe. We pass along what we learned about the process in Appendix 1.

We were also able to gather enough quality information about Alberta's nonprofit sector to prepare this report. In addition to existing information, we are extremely thankful for the over 950 nonprofit organizations that took time from doing the good things they do to complete our online survey.

This report is not a complete portrait, but it does provide a fresh look at the nature and activities of the thousands of "points of light" that do so much to make life better in Alberta. If only we had a little more light to shine back onto the sector to see how it works and how it is doing.

Robert Roach, February 2011.

Introduction 1

"Thank you for this opportunity. We hope it will give the appropriate people some idea how difficult it can be to serve your community." – Survey Participant

According to the National Survey of Nonprofit and Voluntary Organizations (NSNVO) conducted in 2003, Alberta has over 19,000 nonprofit organizations[1] operating within its borders, or approximately 610 nonprofits per 100,000 people. Over half of these (57%) are registered as charitable organizations with the Canada Revenue Agency.[2] The NSNVO also found that the nonprofit sector in Alberta generated $9.6 billion in revenue, harnessed 2.5 million volunteers and employed over 175,000 people in 2003.

These findings showcase the sector's significant economic and social contributions to the province. Despite this, more recent sector-wide information of the sort found in the NSNVO is lacking and there are no official plans afoot to repeat the NSNVO anytime soon.

In 2010, the Calgary Chamber of Volunteer Organizations (CCVO) commissioned the Canada West Foundation (CWF) to conduct a survey of Alberta's nonprofit organizations and to prepare a pilot report on the state of the sector that could serve as a template for future (or perhaps even annual) sector report updates. The goal was to begin building an information base on the Alberta nonprofit sector.

While we did not have the resources to replicate the methodology of the NSNVO, we are able to provide a sense of the current health of the sector and the challenges it faces as Albertans move into the second decade of the 2000s.

The findings reinforce the image of the sector as large, diverse, volunteer-driven and active in a wide range of areas from social services and health care to religion and amateur sport. The survey excluded hospitals and universities. The sector continues to be faced with a range of challenges including demand outstripping resources and intense competition for skilled labour. This financial pressure has impacts on the ability of nonprofits to fulfill their mandates, and on their ability to recruit and retain qualified employees. The survey results generally demonstrate that, while Alberta has a vibrant and active nonprofit sector, it is under a great deal of strain, which is an ongoing barrier to achieving its full potential.

Despite these challenges, the sector remains resilient and continues to play its vital role. As always when interacting with the people who work and volunteer in the nonprofit sector, we were impressed by the passion, hardiness and commitment they possess. This report is dedicated to them.

1 The nonprofit sector is composed of a diverse array of organizations, including social service organizations, hospitals, universities, museums, sports and recreation organizations, shelters for the homeless, arts councils, food banks, organizations that raise funds to support medical research, self-help groups, places of worship, social clubs, trade associations, and advocacy groups. Although widely disparate in their areas of activity, all nonprofit and voluntary organizations share a common set of characteristics that distinguish them from government and private organizations. Organizations are considered to be part of the nonprofit sector if they are:

- Organized (i.e., have some structure and are institutionalized to some extent, but not necessarily legally incorporated).
- Nongovernmental (i.e., are institutionally separate from governments).
- Nonprofit distributing (i.e., do not return any profits generated to their owners or directors).
- Self-governing (i.e., are independent and able to regulate their own activities).
- Voluntary (i.e., benefit to some degree from voluntary contributions of time or money). (Hall et al. 2003a).

2 Charitable status is a concept that dates back to the Elizabethan era. Today, it is important because it allows nonprofit organizations to issue receipts that allow donors to claim a tax deduction. The courts have identified four categories of charity: the relief of poverty; the advancement of education; the advancement of religion; and certain other purposes that benefit the community in a way the courts have said is charitable.

Points of light as a title for this report is derived from a speech given by US President George H. W. Bush in his inaugural address on January 20, 1989.

Methodology 2

Two methods were used to prepare this report: the mining of existing studies; and an online survey of Alberta nonprofit organizations.

2.1 Existing Research

2.2 The State of the Alberta Nonprofit Sector Survey

2.3 Limitations of the Survey

2.4 Diversity Within the Sector

Existing Research 2.1

The secondary research involved collecting existing studies that include information on nonprofit organizations in Alberta, evaluating their applicability and quality, and then integrating this information into the report where appropriate. The main existing studies are outlined in Appendix 2.

The State of the Alberta Nonprofit Sector Survey 2.2

The only comprehensive and statistically representative survey of nonprofits operating in Alberta took place in 2003. The National Survey of Nonprofit and Voluntary Organizations (NSNVO) was conducted by a consortium of groups including Statistics Canada, Imagine Canada and the Canada West Foundation. The national sample included over 13,000 incorporated nonprofit organizations (i.e., formally incorporated or registered under specific legislation with provincial, territorial or federal governments) representing an estimated 161,000 nonprofit organizations operating in Canada in 2003.

The Canada West Foundation was given the task of preparing a summary of the results for the Alberta sub-sample (see Roach 2006). The survey involved extensive telephone interviews with 1,639 respondents representing an estimated 19,356 nonprofit organizations operating in Alberta in 2003.

Replicating the method used for the NSNVO proved to be impractical for the State of the Alberta Nonprofit Sector Survey. Without the resources of Statistics Canada and a very large budget, compiling a list of Alberta nonprofits with up-to-date contact information from which a truly random (and therefore truly representative) sample could be drawn combined with the effort required to conduct in-depth telephone interviews was not a viable option.

As a result, it was decided to conduct an online survey. An invitation to complete the survey was sent via email to over 3,600 organizations. The invitation was also posted on the CCVO and CWF websites and project contacts were asked to distribute the invitation to their networks.

The online survey was open from mid-July to mid-October 2010. A total of 954 organizations took part.

Limitations of the Survey 2.3

Although steps were taken to ensure that the survey was sent to the full spectrum of nonprofits in the province, the final sample of 954 is neither random nor stratified based on known characteristics of the sector such as type, size and location of organizations. A random sample would have required the initial invitation list to be randomly selected from the total population of nonprofits and a higher response rate. Stratification would have required fulfilling quotas for specific categories of nonprofits in order to ensure that the sample accurately reflects the main features of the sector as a whole. This was not compatible with the online survey method we used. Under-represented subsectors include very small organizations with no paid staff, sports and recreation organizations and religious organizations. Social service organizations, on the other hand, are overrepresented in the results as are organizations with charitable status. It is important to note that, although nonprofit in nature, hospitals/health authorities, universities and colleges were omitted from the survey.

As a result, the findings are not "representative" of the Alberta nonprofit sector in a strict statistical sense. Nonetheless, the feedback received from the 954 respondents comes from a wide range of organizations and provides a reasonable snapshot of the nature of the sector and some of the key issues it currently faces. The 2003 NSNVO survey results, while dated, can be used to fill in gaps related to certain characteristics of the sector while the new results provide an updated diagnosis of some key aspects of the sector's health.

Assuming that the NSNVO results are more representative of the sector as a whole and that there have been no major shifts in the type of nonprofits operating in Alberta since 2003, we can identify where the 2010 State of the Alberta Nonprofit Sector Survey differs from the actual situation on the ground. In particular, social service agencies are overrepresented while sports and recreation and religious nonprofits are underrepresented. It is unclear why religious organizations were less likely to respond whereas the lack of sports and recreation organization participation is likely the result of their tendency to be run by volunteers whose contact information changes on a regular basis.

In addition, according to the NSNVO, 57% of Alberta's nonprofits were also registered charities in 2003. However, 57% of the 23,152 nonprofits registered with the Alberta government yields 13,197 charities, which is much higher than the actual figure of 9,100 (39% of Alberta's nonprofits). This discrepancy is likely due to differences between how the NSNVO list was generated compared to the list kept by the Alberta government rather than the result of a major shift in the proportion of charities in Alberta's nonprofit sector since 2003. This illustrates both the need for extreme caution when comparing nonprofit data from different sources and the ongoing lack of definitive data on the sector.

Regardless of which proportion is more accurate, the fact that 78% of respondents to the State of the Alberta Nonprofit Sector Survey identified their organization as a registered charity means that charities are over-represented in the survey. This is not surprising given that charitable status usually means that an organization is relatively well-established and, therefore, easier to contact.

Given the above, the results of the State of the Alberta Nonprofit Sector Survey are more likely to reflect that part of the nonprofit sector that has been operating for some time, has paid staff, and provides social services. *As such, the survey results do a good job of describing what is perhaps the most established and visible part of the nonprofit sector, but may or may not reflect the situation of smaller and less established organizations.*

For this reason (and the methodological differences that stand behind it), we cannot use the State of the Alberta Nonprofit Sector Survey to update the NSNVO (i.e., identify changes over time). As such, the more comprehensive NSNVO will be used as the basis for establishing broad sector characteristics (with the caveat that they date back to 2003), but the 2010 survey will be used to explore how Alberta's nonprofits are faring today in terms of the challenges they are experiencing.

Diversity Within the Sector 2.4

There are many things that link nonprofits together including their use of volunteer labour and the fact that they do not distribute earnings to owners/investors. It is, however, a mistake to think of the sector as homogeneous. The sector is, in fact, extremely diverse. Just as humans share key traits but are also very different from one another, so too are nonprofits.

Take two calgary nonprofits for example: the Economics Society of Calgary (ESC) and Wood's Homes. Both are nonprofits. But the ESC is small, volunteer-run (with the exception of one part-time student employee), focused on putting on lunches with economic speakers, and not registered as a charity. Wood's Homes, conversely, helps children in need, has a budget in the millions, a large paid staff and is a registered charity. It is important to remember the diversity that characterizes the sector when interpreting the results that follow.

Survey Results 3

3.1 Key Characteristics

- How many organizations are there?
- What do organizations do?
- How many years have organizations been operating?
- Who do organizations serve?
- Size of Annual Revenues
- Sources of Revenue

3.2 Human Resources

- Paid Staff
- Staff Recruitment and Retention
- Staff Development
- Staff Salaries
- Volunteer Resources

3.3 Stability of Revenue Sources

Key Characteristics 3.1

→ How many organizations are there?

As of March 2010, there were 23,152 nonprofit organizations registered with Service Alberta.[3] According to the list of registered Alberta charities kept by Canada Customs and Revenue, there were 9,100 charitable organizations in the province as of January 11, 2011. While there are differences between the two lists, the majority of the organizations on the federal charities list appear on the list of provincial registered nonprofits (as one would expect since all charities are nonprofits and should be registered as nonprofits with the Government of Alberta).[4]

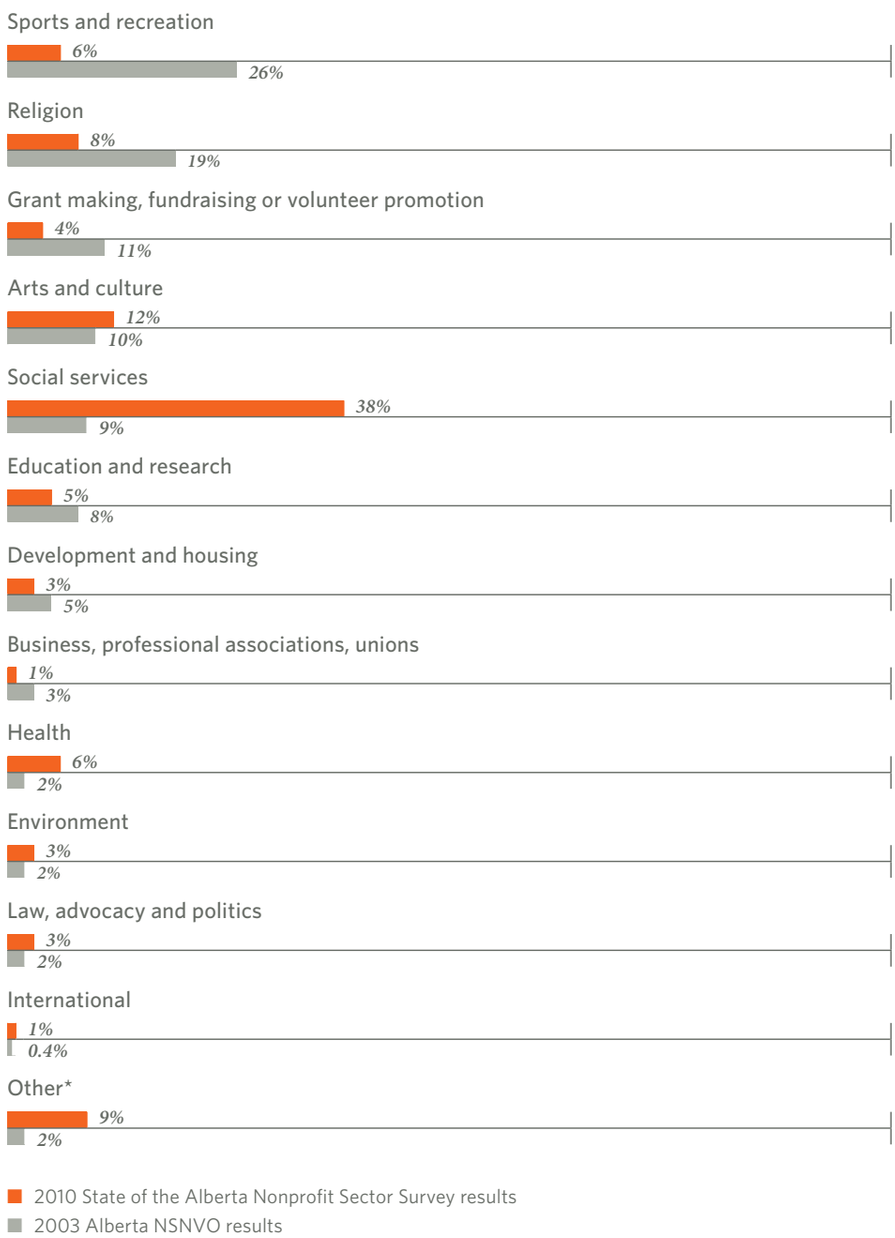
3 This list includes "societies," "religious societies," and "nonprofit companies." As with the NSNVO, groups that are not formally incorporated or registered are not included. It is, however, possible that some unincorporated groups that are not on the Service Alberta list may have slipped into the State of the Alberta Nonprofit Sector Survey sampling frame for it was not possible to cross reference all groups who may have received an invitation to participate against the Service Alberta list.

4 The charities list includes health authorities, school boards and public libraries that do not appear on the list of registered Alberta nonprofits. In the case of health authorities (a single health authority was created in 2008 after the data on the nonprofit list was collected) and school boards, the large annual revenues of these organizations skew the revenue data available from the charities database. (Missing revenue data for many charities also has a skewing effect.)

What do organizations do?

Nonprofit organizations in Alberta touch on virtually all aspects of life from leisure time to medical care. Using the Canadian version of the International Classification of Nonprofit Organizations (ICNPO), survey respondents can be grouped into 12 primary activity areas plus a catch-all "other" category.

Figure 1 Percentage of Organizations by Primary Activity Area



Notes Numbers may not add to 100 due to rounding. Changes between the two surveys cannot be seen as trends as the methods used yielded results that are NOT directly comparable. The NSNVO data are more representative of the Alberta nonprofit sector while the State of the Alberta Nonprofit Sector Survey data provide a sense of the organizations it was able to reach and the issues those organizations see as important. *The "other" category is most likely higher for the State of the Alberta Nonprofit Sector Survey because NSNVO interviewers pressed respondents over the phone to select a primary activity. The difference between these two surveys does not indicate that the sector characteristics have changed, but rather that different data have been gathered as a result of different methodological processes.

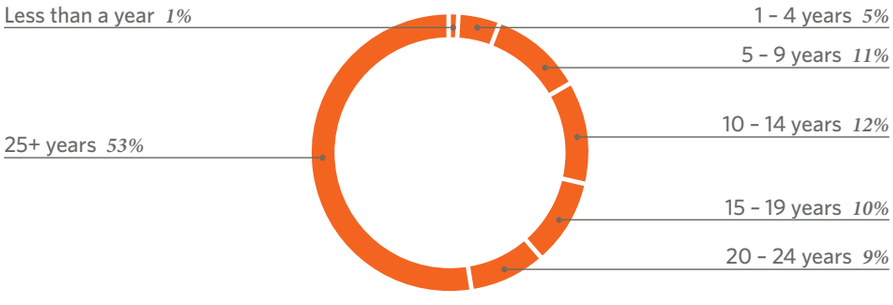
Survey Question *What is the primary area of activity of your organization? If your organization operates in multiple areas, please select the category that best represents your primary area of activity.*

Sources State of the Alberta Nonprofit Sector Survey 2010 and NSNVO 2003. See Figure 2 in Roach 2006.

How many years have organizations been operating?

In some ways, the nonprofit sector is a moving target. Each year, new organizations spring to life while others close their doors. However, most organizations have been serving their communities for many years. Just over half (53%) of the organizations surveyed have been operating for more than 25 years and 30% have been operating for between 10 and 24 years. Less than 1% indicated that they had been operating for less than a year.

Figure 2 Age of Organizations



Notes Numbers may not add to 100 due to rounding.

Survey Question *Approximately how many years has your organization been operating? The NSNVO reports "years of operation" for the full national sample, but does not provide provincial break-outs. The national findings confirm that most nonprofits operate for many years, with 78% of NSNVO respondents indicating that their organization has been operating for at least 10 years (compared to 84% in the State of the Alberta Nonprofit Sector Survey). See Table 1.8 in Hall, et al. 2005a.*

Sources State of the Alberta Nonprofit Sector Survey 2010.

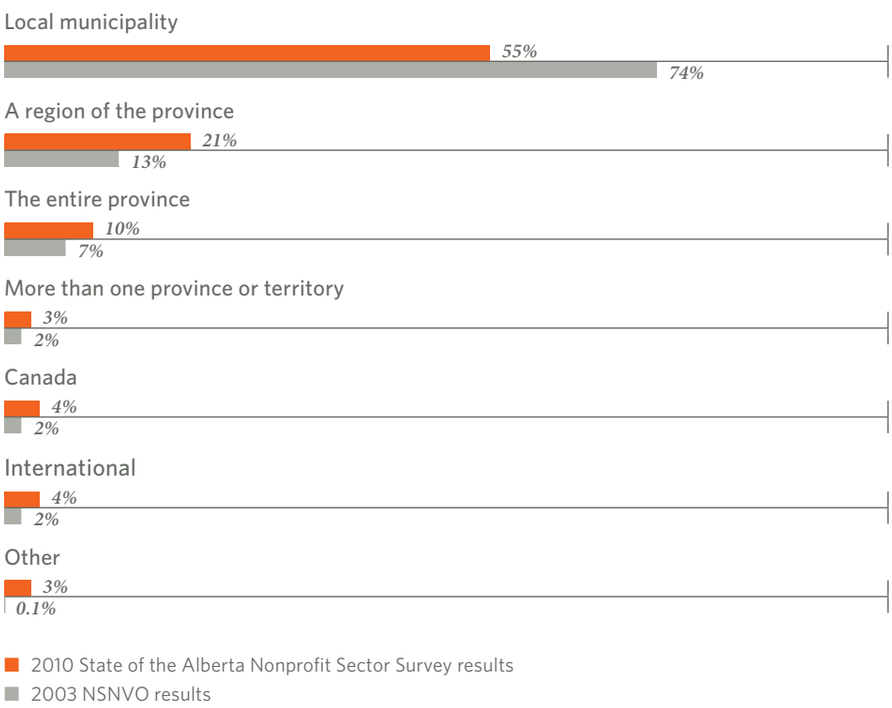
→ Who do organizations serve?

The importance of the Alberta nonprofit sector is illustrated by the variety of needs, groups and communities it serves.

Nonprofits operate in Alberta's large cities, smaller centres and rural areas. Survey respondents hail from Barrhead, Camrose, Coaldale, Didsbury, Fort McMurray, Grande Prairie, Kneehill County, Lethbridge, Onoway, Raymond, Slave Lake, Three Hills, Westlock, and many other places as well as the main centres of Calgary and Edmonton.[5]

A quarter of survey respondents indicated that their organization has more than one location operating in Alberta. The organizations with more than one location tend to be older and registered as charities. Almost half of Alberta's nonprofit and voluntary organizations (46%) serve their local municipal area (city, town or rural municipality). Significant proportions serve either a region of the province (21%), the entire province (10%), or a particular neighbourhood or community (9%).

Figure 3 Geographic Reach of Organizations



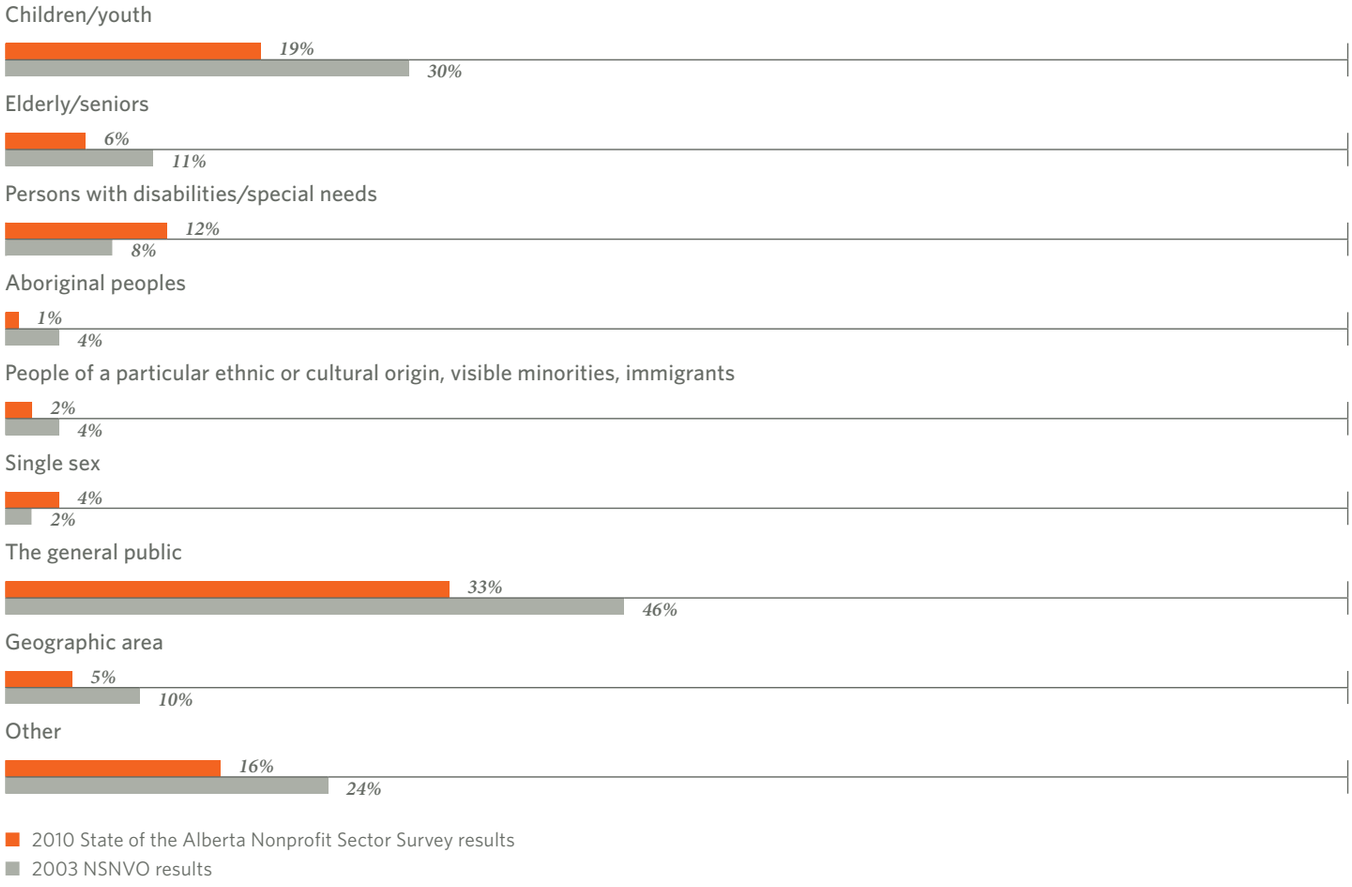
Notes Numbers may not add to 100 due to rounding. Changes between the two surveys cannot be seen as trends as the methods used yielded results that are NOT directly comparable

Survey Question *Which of the following best describes the geographic area that your organization primarily serves?*

Sources State of the Alberta Nonprofit Sector Survey 2010 and NSNVO 2003.

5 Because we do not have information on the finances, human resources, etc. of the full list of Alberta nonprofits (as they do in, for example, many US states), and because the State of the Alberta Nonprofit Sector Survey sample is not sufficiently representative of Alberta's regions to provide accurate regional analysis, we are unable to present a regional breakdown of the results. Additional data collection at the time of annual registration with Service Alberta would be the easiest way to overcome this lack of data as the challenges related to sampling the full width and breadth of Alberta are extensive.

Figure 4 Groups Served



Notes Numbers may not add to 100 due to rounding. The NSNVO allowed respondents to select more than one category of group served. As a result, the NSNVO column adds to greater than 100%. Changes between the two surveys cannot be seen as trends as the methods used yielded results that are NOT directly comparable.

Survey Question *Which groups of people does your organization MAINLY serve through its programs and activities? (Although your organization may serve more than one group, please select the group that is the MAIN one served by your organization.)*

Sources State of the Alberta Nonprofit Sector Survey 2010 and NSNVO 2003. See Figure 4 in Roach 2006.

→ Size of Annual Revenues

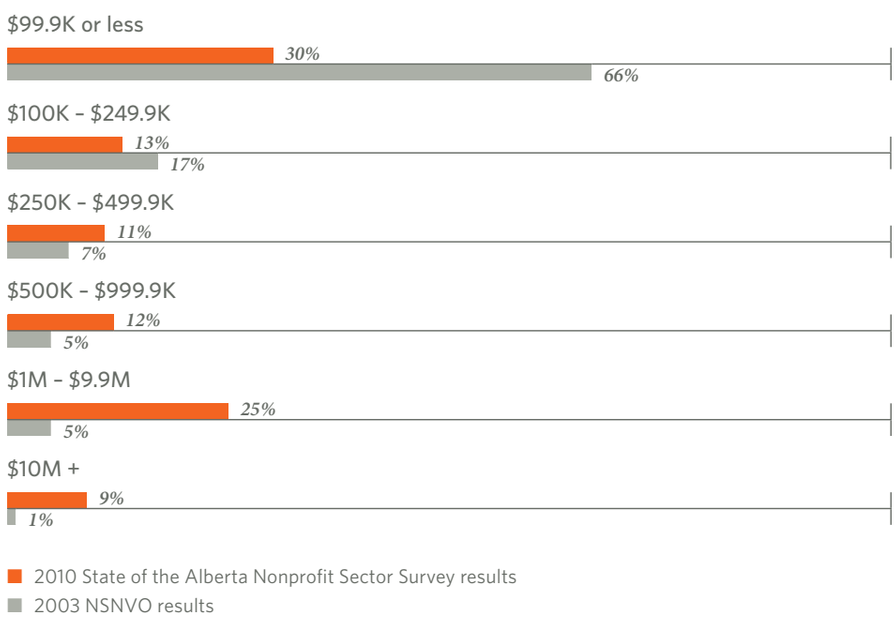
"While revenues have increased, they in no way match the increase in operating costs that we have experienced in the last two years and expect to face in the next three years." – Survey Participant

We know there is a huge range in the annual revenues of nonprofit organizations; some organizations run on just a few dollars while others are big operations with budgets in the millions. As is true in the private and government sectors, there exists a tremendous degree of heterogeneity in the nonprofit sector.

In 2003, the total revenue of nonprofit and voluntary organizations (not including hospitals and universities) in the province totaled $8.6 billion, which illustrates the significant economic presence of the sector in the province.[6] The 2003 NSNVO highlights the variability of revenue size in voluntary organizations in Alberta. According to the NSNVO data, the majority of organizations are quite small, and operate on annual revenues of less than $100,000, whereas only 6% of organizations have revenues of $1,000,000 or more. The State of the Alberta Nonprofit Sector Survey reinforces the diversity of revenue size in the sector, but captures fewer of the smaller organizations included in the NSNVO.

The organizations surveyed in the 2010 State of the Alberta Nonprofit Sector Survey have somewhat larger operating revenues (on average) than those in the NSNVO. This is perhaps unsurprising as organizations that are large enough to have paid employees are more likely than small, volunteer-based organizations to respond to a survey about Alberta's nonprofit sector. The larger operating revenues in the 2010 survey may also, in part, be attributed to the growth of individual organizations over the intervening years.

Figure 5 Percentage of Organizations by Annual Revenues



Notes Numbers may not add to 100 due to rounding. Changes between the two surveys cannot be seen as trends as the methods used yielded results that are NOT directly comparable. Note: The "don't know" responses (n=105) were removed from the State of the Alberta Nonprofit Sector Survey results as the NSNVO results do not include this category.

Survey Question *In the last year (last 12 months, 2009, or the organization's fiscal year), approximately what was the total amount of revenue that your organization received from all sources?*

Sources State of the Alberta Nonprofit Sector Survey 2010 and NSNVO 2003. See Figure 9 in Roach 2006.

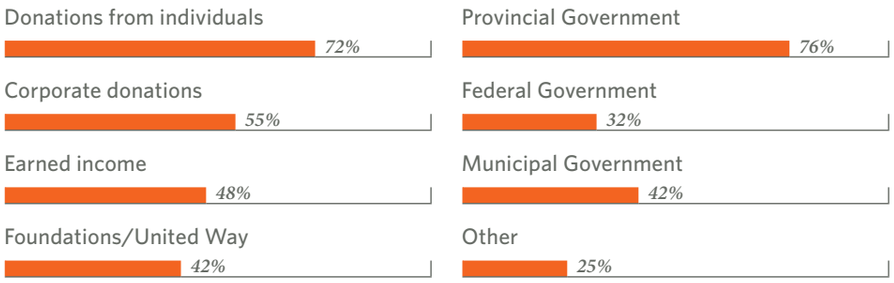
6 An updated estimate is not possible without replicating the NSNVO's methodology. Unfortunately, Statistics Canada's Satellite Account of Nonprofit Institutions and Volunteering does not provide provincial breakdowns. The charitable database contains some income data but it is subject to errors, missing values and contains quasi-governmental organizations such as health authorities and school boards that skew the data.

→ Sources of Revenue

"The biggest funding issue we face is sustainable funding. Too much of the funding available is program-based (i.e., pilot projects or one time funding). We need sustainable funding for long-term planning." – Survey Participant

Using data from the Calgary Chamber of Voluntary Organization's Economic Climate Survey of May 2010, we can see the range of funding sources upon which Alberta nonprofits rely.[7] It is not unusual for a nonprofit to have to seek funding from multiple sources in order to raise enough revenue to meet its commitments. Three-quarters (76%) of the organizations in the CCVO survey report receiving funding from the province with almost as many (72%) reporting donations from individuals.

Figure 6 Revenue Sources (Percentage of Respondents Reporting Funding from Each Source)

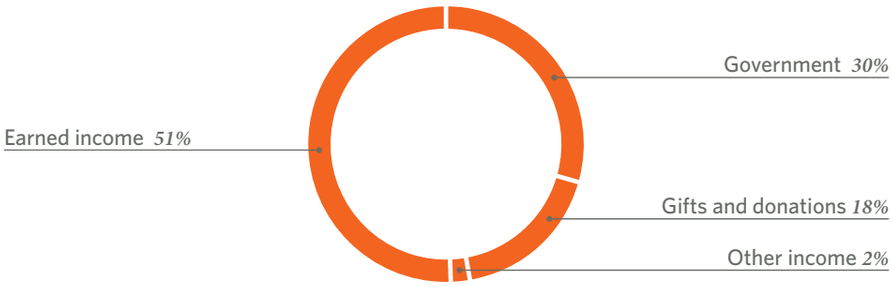


Survey Question *What are the sources of funding for your organization (check all that apply)?*

Sources Calgary Chamber of Voluntary Organization's Economic Climate Survey May 2010 (n=575).

The NSNVO includes data on four categories of revenue sources (government; earned income; gifts and donations; and other income) that allow us to assess the relative value of each source. The results show that government sources supply just under a third of the sector's total funding (30%) and that earned income is the largest source at 51% of total revenue (see Figure 7).

Figure 7 Revenue Sources 2003 (NSNVO) (excluding Hospitals, Universities and Colleges)



Notes Numbers may not add to 100 due to rounding.

Sources NSNVO Survey 2003. See Figure 11 in Roach 2006.

7 The State of the Alberta Nonprofit Sector Survey originally included a question about sources of revenue but it was cut during pre-testing because it was a stumbling block to respondents who did not have sufficient information on hand to accurately answer it.

Human Resources 3.2

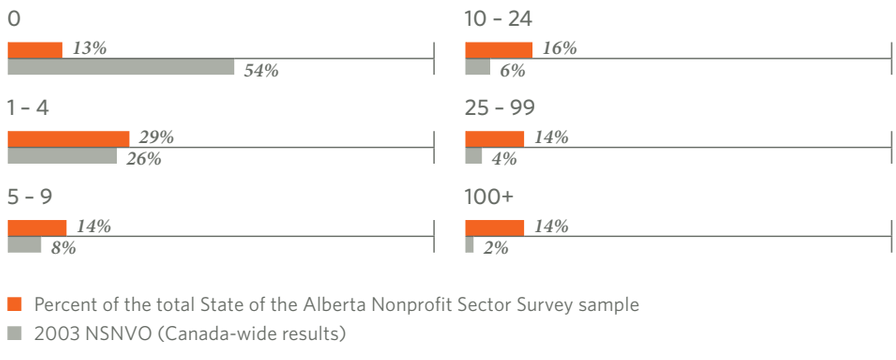
As with the private and government sectors, the most important component of the nonprofit sector is the people involved. Paid staff and, in the case of nonprofits, volunteers are the lifeblood of the sector. Once again, we see that the sector is characterized by diversity; in this case it is the variation in paid staff and volunteers. Some Alberta nonprofits are run entirely by volunteers while others have paid staff complements of over 500 people. All nonprofits harness volunteers. Some have only a handful of volunteers sitting on their board while others have hundreds of people pitching in to help them do the good things that they do.

→ Paid Staff

"In our sector, we are unfortunately competing with government-delivered services in that staff in a government-operated facility earn 30 – 50% more than our frontline staff doing the same job." – Survey Participant

According to the NSNVO, 105,375 were paid employees of an Alberta nonprofit in 2003 if hospitals, universities and colleges are excluded.[8] Looking at the organizations in the State of the Alberta Nonprofit Sector Survey that have paid staff, we find that 33% have between one and four staff and 49% have less than 10 staff. While not a perfect reflection of the sector, the State of the Alberta Nonprofit Sector Survey results reinforce the findings of the NSNVO in that Alberta nonprofits tend to have less than 10 paid staff.

Figure 8 Number of Paid Staff



Notes Numbers may not add to 100 due to rounding.

Survey Question *Approximately how many paid employees does your organization have (both full-time and part-time)?*

Sources State of the Alberta Nonprofit Sector Survey 2010 and NSNVO 2003. See Table 3.9 in Hall, et al. 2005a.

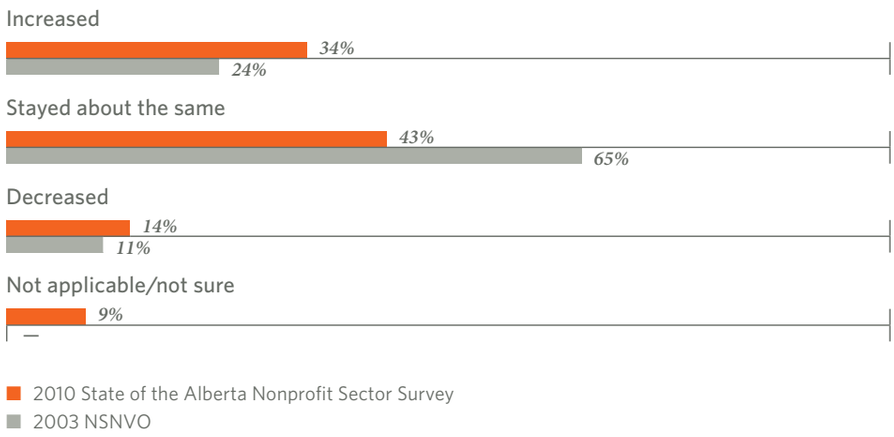
8 See Table (not Figure) 5 in Roach 2006. Because the NSNVO captured a larger number of very small organizations, it estimates that 58% of Alberta nonprofits have no paid staff. Conversely, the State of the Alberta Nonprofit Sector Survey sample includes 122 organizations (13%) with no paid staff. Hence, the State of the Alberta Nonprofit Sector Survey reflects the experiences of organizations with paid staff more so than the NSNVO.

Staff Recruitment and Retention

"We are very concerned about staff retention, recruitment and succession planning as funding decreases." – Survey Participant

The number of paid staff is a stable or growing aspect of most organizations. Survey respondents indicate that, compared to three years ago, their number of employees has either stayed the same (43%) or increased (34%). A small, but still notable, percentage (14%) decreased their number of staff (5% said this "did not apply" presumably because they only have part-time staff while 4% said that they were not sure).

Figure 9 Change in Staff Size (compared to three years earlier)



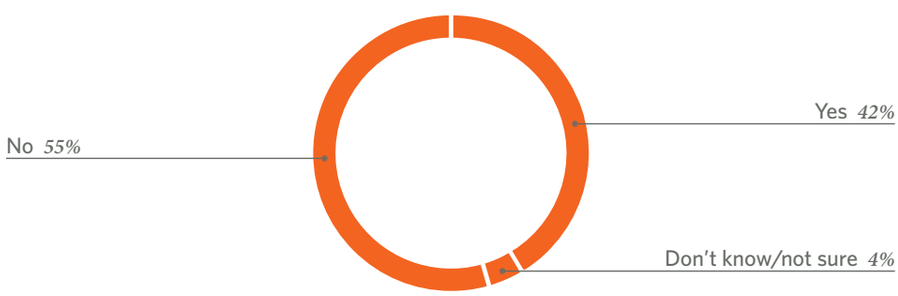
Notes Numbers may not add to 100 due to rounding. Changes between the two surveys cannot be seen as trends as the methods used yielded results that are NOT directly comparable.

Survey Question *Compared to three years ago, has the number of employees that work 30 hours or more per week for your organization increased, stayed about the same or decreased? (question asked only of organizations that indicated they had paid staff).*

Sources State of the Alberta Nonprofit Sector Survey 2010 and NSNVO 2003. See Figure 31 in Roach 2006.

The survey shows that mass layoffs are not happening across the sector. Nonetheless, a red flag is raised by the fact that 42% of organizations report that they have had trouble retaining paid employees in the last three years.[9]

Figure 10 Trouble Retaining Paid Staff



Notes Numbers may not add to 100 due to rounding.

Survey Question *Has your organization had trouble retaining paid employees in the last three years? (question asked only of organizations that indicated they had paid staff).*

Sources State of the Alberta Nonprofit Sector Survey 2010.

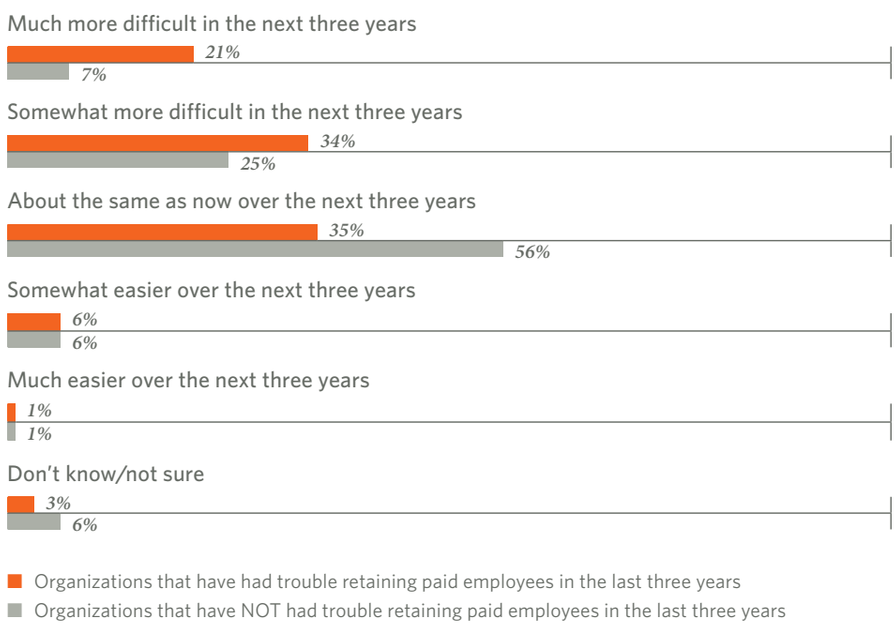
9 The NSNVO found that 18% of Alberta nonprofits had difficulty retaining paid staff (see Table [not Figure] 8 in Roach 2006). Even given the differences in methodology, we cannot account for why the results are so different.

"The recruitment and retention of staff is very difficult, a position has been vacant for almost six months. The lack of staff medical, dental, short-term, and long-term benefits is also a factor." – Survey Participant

Overall, organizations are somewhat pessimistic about their ability to attract and retain qualified staff in the years ahead. Although 47% of the organizations indicate that they believe this issue will be about as big of a challenge today as in the future, 29% indicated it would be somewhat more difficult and 13% thought it would be much more difficult. Comparatively, only 6% thought it would be somewhat or much easier in the future.[10]

When we break these responses down by organizations that report difficulties retaining staff and those that do not, we find that 35% of the organizations with current staff retention problems predict that these will continue, 34% are worried that it will get somewhat more difficult and 21% fear that it will get much more difficult to attract and retain qualified staff. Not being able to pay enough was cited by many organizations as a reason why it is difficult to attract staff with the appropriate skills and experience.

Figure 11 Difficulty Attracting and Retaining Staff



Notes Numbers may not add to 100 due to rounding.

Survey Question *Do you expect attracting and retaining qualified staff will become...? and Has your organization had trouble retaining paid employees in the last three years? (questions asked only of organizations that indicated they had paid staff).*

Sources State of the Alberta Nonprofit Sector Survey 2010.

→ **STAFF TURNOVER** According to the HR Council for the Voluntary and Non-profit Sector's Canada-wide Surveys of Employers and Employees, the estimated employee turnover rate for Alberta in 2007 was 21% (HR Council for the Voluntary and Non-profit Sector 2008, Figure 16). The Council notes that this is a conservative estimate because it does not include dismissals (only voluntary resignations). Peter T. Boland and Associates calculate a turnover rate for 2010 of 34% for the organizations that participated in the Boland survey. This is down from a whopping 42% in 2008. The lower number for 2010 likely reflects the effects of the recession, but it is still quite high and suggests a fair degree of disruption within the nonprofit sector workforce. (It should also be noted that there are methodological differences between the HR Council estimate and the Boland estimate that make it unwise to directly compare the two results.)

10 According to the HR Council for the Voluntary and Non-profit Sector's Canada-wide Surveys of Employers and Employees, 66% of Alberta nonprofits reported difficulty recruiting qualified paid staff in 2007. See HR Council for the Voluntary and Non-profit Sector 2008, Figure 11.

→ Staff Development

Alberta nonprofits are proactive about providing their employees with human resource development opportunities, with over three-quarters (77%) reporting that they do this. The most common types of training available to employees include on-the-job training and work-related courses, seminars and workshops. These include both basic training (computer skills) and mandated courses (food safety, first aid). Some organizations are able to offer employees paid time off to take these courses, while other organizations indicate that they accommodate professional development by being flexible with scheduling.

There is great diversity in the capacity of nonprofit organizations to provide training opportunities and workplace benefits to their employees. A minority of presumably smaller organizations indicate that they cannot provide any training opportunities or benefits to their employees. A similarly small minority lists comparatively extensive packages that include annual professional development budgets, health and wellness funds, birthdays off with pay, merit bonuses, flexible family/personal days, scholarship programs, pensions and benefits.

Taken as a whole, respondents indicate that the majority of nonprofit organizations in Alberta are able to offer at least some training opportunities to their employees – particularly training that encourages professional development and directly relates to the position.[11]

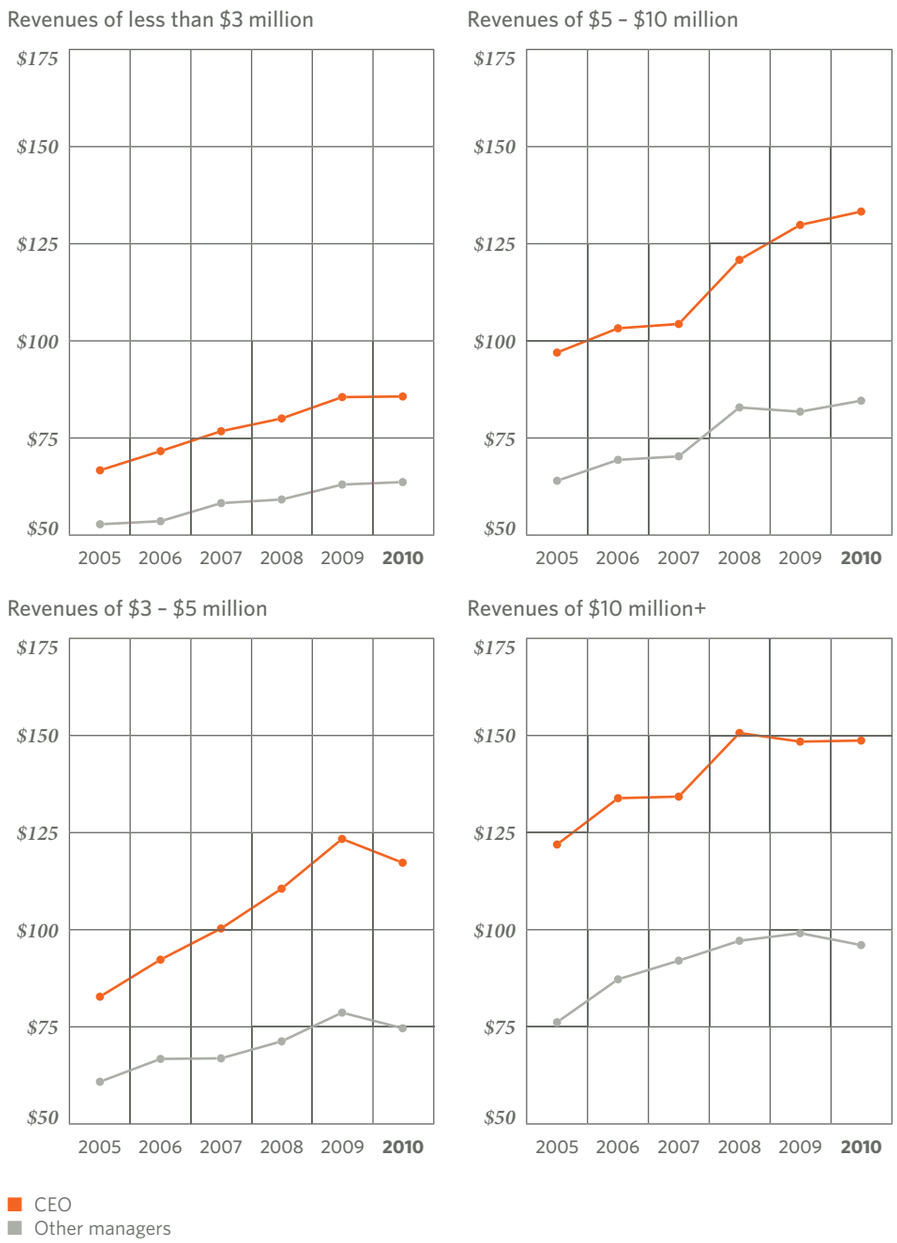
11 According to the HR Council for the Voluntary and Non-profit Sector's Canada-wide Surveys of Employers and Employees, 73% of Alberta nonprofits have a budget for staff training and development. See HR Council for the Voluntary and Non-profit Sector 2008, Figure 21.

→ Staff Salaries

"I do not work [in this sector] for the money." – Survey Participant

Not surprisingly, larger organizations (measured by annual operating budget) pay their CEOs and managers more than smaller organizations (see Figure 12). CEO salaries in the nonprofit sector are lower than those typically paid in the private or government sector. Between 2005 and 2010, the trend is generally up for the salaries of nonprofit CEOs and managers.

Figure 12 Average Salary of Nonprofit Managers by Annual Operating Budget 2005 – 2010 (in Thousands of Dollars)



Notes The "other manager" values were calculated as the weighted average of four positions: Top Finance and Administration (CFO); Director of Operations; Department Manager; Top Fund Development Executive. Results are not representative of all nonprofit organizations but they do provide a sense of the level and direction of salaries among established organizations.

Sources Peter T. Boland and Associates, Survey of Not For Profit Sector Salaries and Human Resource Practices, various years, used with permission.

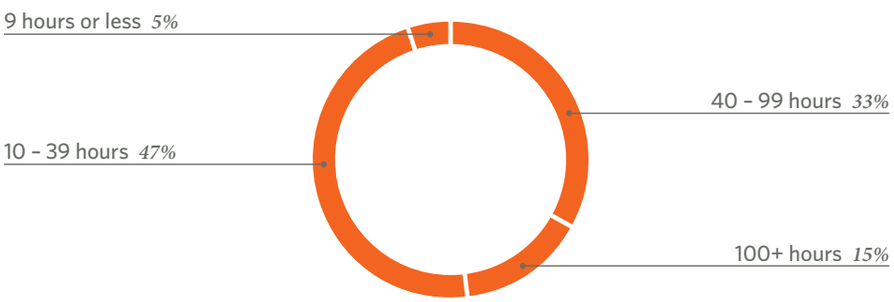
Volunteer Resources

"We are proud of the volunteers who have supported the vision of our organization." – Survey Participant

One of many valuable characteristics that nonprofit organizations possess is volunteer labour. According to the NSNVO, the Alberta nonprofit sector engaged 2.5 million volunteers in 2003 who in turn contributed 448.7 million hours of their time.[12]

Virtually all nonprofits have some sort of board or council or executive that is staffed by volunteers. About half (52%) of the organizations in the State of the Alberta Nonprofit Sector Survey have boards of between 5 and 9 people and 30% have boards of between 10 and 14 people. The average annual number of hours of volunteer time per board member varies greatly across organizations. Some 15% of organizations report that their board members contribute over 100 hours each per year, 33% report a time commitment of between 40 and 99 hours, and 47% report that their board members contribute between 10 and 39 hours.

Figure 13 Board Member Time Commitment (average annual hours per board member)



Notes Numbers may not add to 100 due to rounding.

Survey Question *On average, approximately how many hours did each board member contribute to the organization last year?*

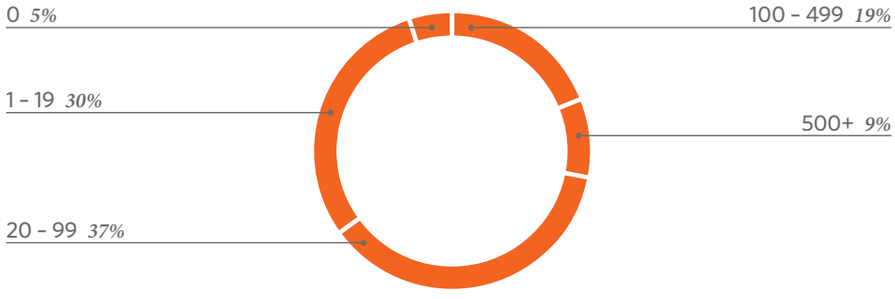
Sources State of the Alberta Nonprofit Sector Survey 2010.

Excluding board members, respondents to the State of the Alberta Nonprofit Sector Survey report a wide range of volunteer complements. A small proportion (5%) have no volunteers other than board members, 30% report between 1 and 19 volunteers, 37% report between 20 and 99, 19% report between 100 – 499, and 9% report having over 500 volunteers. Here again we see the variation that characterizes the sector as well as the immense volunteer army that the sector is able to mobilize.

12 See page 31 in Roach 2006. This does not mean that 2.5 million different Albertans served as volunteers as many people volunteer for more than one organization. According to the Canada Survey of Giving, Volunteering and Participating, there are 1,445,000 individual volunteers in Alberta in 2007.

"It is a very tough business. Staff burnout is very high. Board members are also harder to find and have less time. It's not a pretty picture" – Survey Participant

Figure 14 Number of Volunteers



Notes Numbers may not add to 100 due to rounding.

Survey Question *Excluding board members, approximately how many people volunteered for your organization over the past year?*

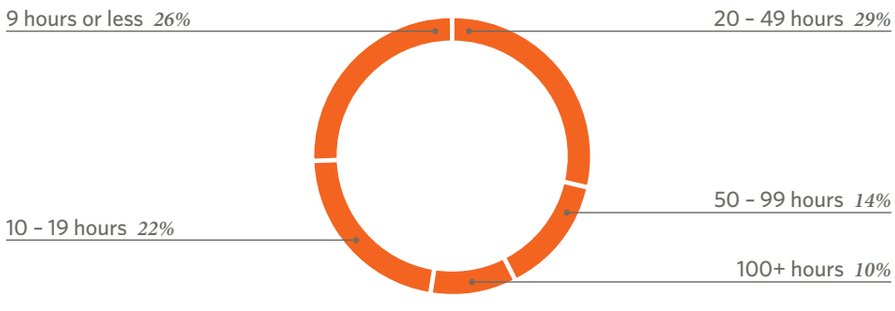
Sources State of the Alberta Nonprofit Sector Survey 2010. The NSNVO used slightly different categories, but the results are roughly the same and illustrate a similar pattern of volunteer support across organizations: 11% of Alberta participants in the NSNVO reported no volunteers other than board members, 70% reported between 1 and 99, and 19% reported over 100. See Figure 21 in Roach 2006.

Volunteers contribute anywhere from one hour of their time to more than 100 hours over the course of a year. A number of organizations (10%) report volunteers who contribute 100 hours or more to their cause; this translates into 2.5 work weeks of time or more (based on a 40-hour work week). Almost a quarter (22%) report time commitments of between 10 and 19 hours and 29% report commitments of between 20 and 99 hours.

"The volunteer pool of people with values that contribute to community is diminishing." – Survey Participant

→ **VOLUNTEER RATE** According to the Canada Survey of Giving, Volunteering and Participating, the volunteer rate for the population age 15 and over in Alberta was 52% in 2007 (up from 48% in 2004). The average number of hours donated in 2007 was 172, down from 175 in 2004. See Charts 2.9 and 2.10 in Hall et al. 2009.

Figure 15 Volunteer Time Commitment (average annual hours per volunteer)



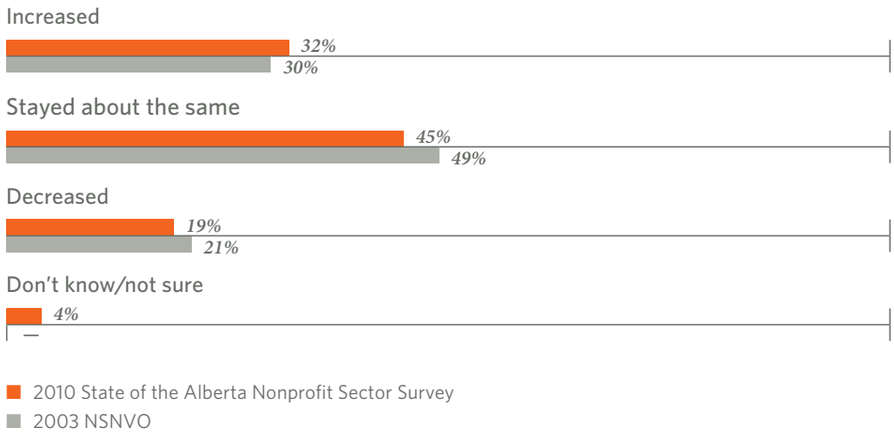
Notes Numbers may not add to 100 due to rounding.

Survey Question *On average and excluding board members, approximately how many hours did each volunteer contribute to the organization last year?*

Sources State of the Alberta Nonprofit Sector Survey 2010.

The news is relatively good in terms of the direction in which the number of volunteers is going, with 77% of respondents reporting that the number of volunteers available to their organization has either stayed the same or increased compared to three years ago. Nonetheless, given that 19% indicate that their number of volunteers has decreased, a fifth of respondents have less volunteer support today than three years ago. The results of the NSNVO show the same trend with 30% of Alberta organizations reporting an increase in their number of volunteers and 21% reporting a decrease.

Figure 16 Direction of Volunteer Support (number of volunteers compared to three years prior)



Notes Numbers may not add to 100 due to rounding. Changes between the two surveys cannot be seen as trends as the methods used yielded results that are NOT directly comparable.

Survey Question *Compared to three years ago, has the number of volunteers serving your organization increased, stayed about the same or decreased?*

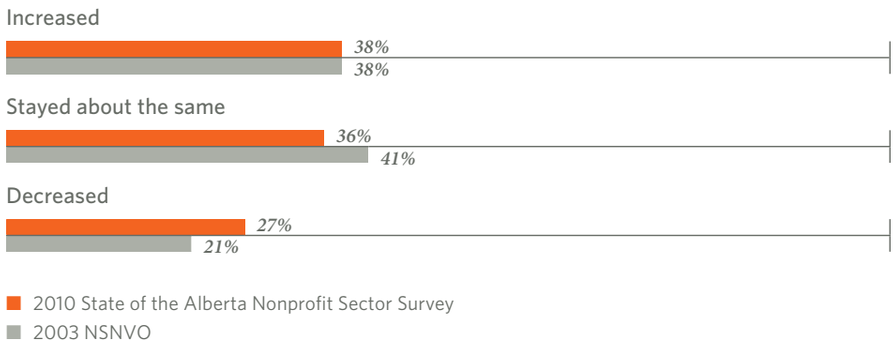
Sources State of the Alberta Nonprofit Sector Survey 2010 and NSNVO 2003. See Figure 24 in Roach 2006.

Stability of Revenue Resources 3.3

Revenue stability provides a proxy of organizational and sector health. The good news is that more organizations (38%) report that their revenue increased compared to three years prior than those that report that it decreased (27%).

"Due to the recession and the huge amount of nonprofits fighting for the same funding, it is a year-to-year battle to keep our doors open!" – Survey Participant

Figure 17 Change in Annual Revenue



Notes Numbers may not add to 100 due to rounding. Changes between the two surveys cannot be seen as trends as the methods used yielded results that are NOT directly comparable. The "don't know" responses (n=62) were removed from the State of the Alberta Nonprofit Sector Survey results to be more comparable to the NSNVO results that do not include this category.

Survey Question *To what extent have your organization's total revenues changed over the past three years: have they increased, stayed the same or decreased?*

Sources State of the Alberta Nonprofit Sector Survey 2010 and NSNVO 2003. See Figure 18 in Roach 2006.

Revenue ebbs and flows as circumstances change (e.g., a program may end naturally or it may end because of a funding cut). Unfortunately, these results do not provide us with all the context that we need. We do not, for example, know if the increases were sufficient to meet rising demands and we do not know if the decreases were greater than the increases in dollar value. However, it is safe to assume that less revenue coming in means less capacity for the organization to carry out the work they do. For over a quarter of nonprofits, this is their reality.

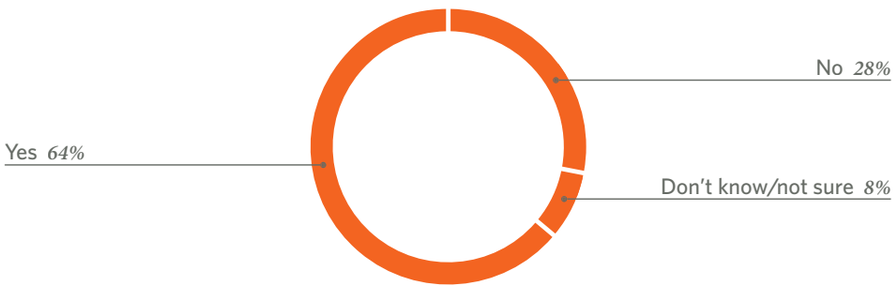
As anyone who has worked in the nonprofit sector can attest, the normal state of affairs is that money is tight and a struggle to raise. It is not surprising, therefore, that 64% of organizations report difficulty raising revenue. It is unfortunate that we cannot use the two surveys to establish trends, because the NSNVO found that 41% of Alberta nonprofits had trouble earning revenue in 2003 (see Table 6 in Roach 2006). We cannot say if this is due to the different samples or if raising money has become that much more difficult in the last few years. What we do know is that the results reinforce the often noted stress that nonprofit organizations are under to bring in the money that they need to operate. In addition, the more time and energy spent raising scarce dollars, the less time and energy there is to pursue the actual missions of organizations.

→ **INDIVIDUAL DONATIONS** According to the Canada Survey of Giving, Volunteering and Participating, 85% of Albertans age 15 or older report making at least one donation of money (excluding putting change into a coin collection box located beside cash registers) to a nonprofit in the 12 months before the survey (the donation rate). This was up from 79% in 2004. The average annual donation in Alberta was the highest in the country at $596 in 2007, up from $500 in 2004. See Charts 1.15 and 1.16 in Hall et al. 2009.

According to the NSNVO, donations from individuals added up to 17% of total nonprofit revenue in 2003 (see Figure 11 in Roach 2006).

Of the respondents to the State of the Alberta Nonprofit Sector Survey who received funding from individual donations, 21% say this funding increased since the prior year and 35% say it decreased. Of those who say it decreased, 45% see it as a moderate problem and 27% see it as a serious problem.

Figure 18 Difficulty Raising Revenue



NOTES Numbers may not add to 100 due to rounding.

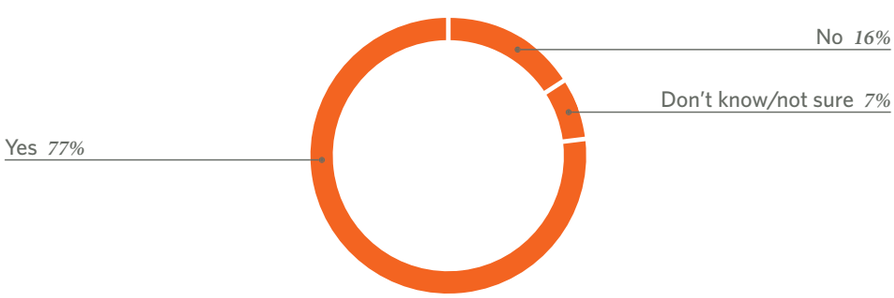
SURVEY QUESTION *Has your organization had difficulty earning revenues from any sources in the past three years?*

SOURCES State of the Alberta Nonprofit Sector Survey 2010.

One indication of the financial stress organizations are facing is the rising demand for nonprofit services. Revenue increased for 38% of organizations, but 77% report that demand for their services increased. How much of the rise in demand is due to the recession and its lingering effects is unclear, but the gap created by revenue falling or staying the same for 63% of organizations while demand has increased for 77% is clearly a major concern.[13]

"Our concern is an increase in demand for services without an increase in funding. Our volunteer board does a lot of work because we cannot afford to hire regular paid staff." – SURVEY PARTICIPANT

Figure 19 Is Demand for Services Rising?



NOTES Numbers may not add to 100 due to rounding.

SURVEY QUESTION *Has the demand for your organization's services increased in the last three years?*

SOURCES State of the Alberta Nonprofit Sector Survey 2010.

13 The Calgary Chamber of Voluntary Organization's May 2010 survey of Alberta nonprofits found that almost 70% of organizations were experiencing increased demand for programs and services, over half saw their operating costs increase, while only 25% reported a revenue increase.

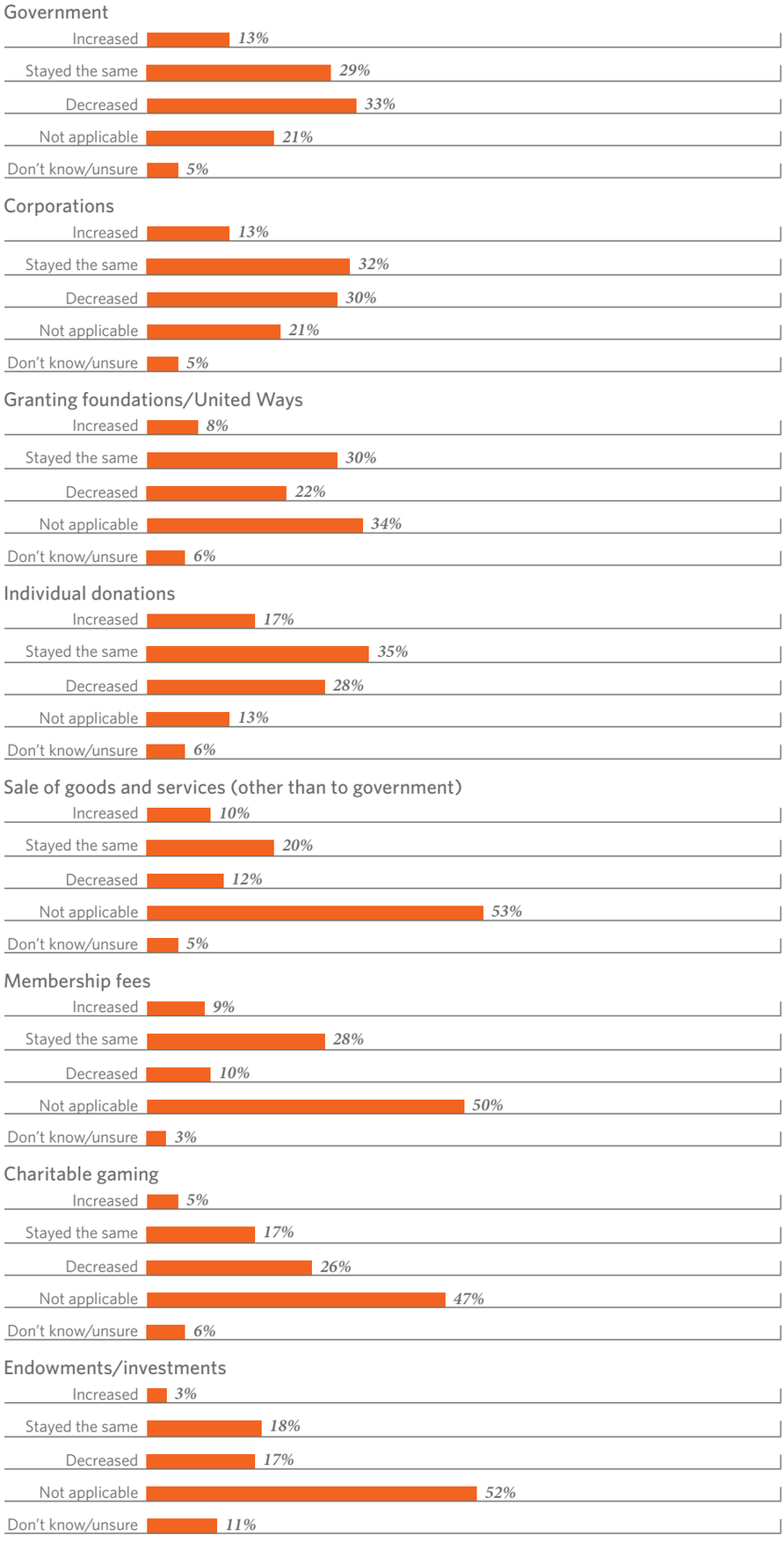
"When you add all of the small funding decreases together, you find an organization that is struggling financially. Cash flow has become more of an issue for us, as the bulk of our expenses are paid over a short period of time." – Survey Participant

"Two continuing trends are causing increasing concern and stress in our ability to utilize available resources to deliver our mission: 1) the progressive and continued increase in accountability demands from stakeholders (e.g., fiscal audit, outcome measures, budgeting and reporting detail) without additional grants or other resources to fulfill the demands; and 2) the tendency of funders and grantors to prefer short-term grants for 'new and innovative' approaches over sustained grants for proven effective (and often longer-term) practices works against achievement of desired outcomes that they claim to want." – Survey Participant

One of the reasons it is difficult to raise money lies in the fact that there are a lot of nonprofits seeking the same scarce dollars from governments, casinos, corporations, donors and clients. When asked if competition with other organizations to obtain funding is a problem, 21% say it is a small problem, 36% a moderate problem and 15% a serious problem.

A third of organizations report that they have experienced a decrease in government funding compared to 13% that report an increase and the situation is roughly the same for corporate funding. Overall, there is no category of funding in which the number reporting an increase is greater than the number reporting a decrease. Figure 20 highlights the volatility in nonprofit revenue streams from year-to-year.

Figure 20 Revenue Changes by Source



Notes Numbers may not add to 100 due to rounding.

Survey Question *Compared to the previous fiscal or calendar year, has your organization experienced a change in overall funding from _____?*

Sources State of the Alberta Nonprofit Sector Survey 2010.

Conclusion 4

4.1 Climbing Out of the Dark

4.2 Current State of the Sector

Climbing Out of the Dark 4.1

Alberta's nonprofit organizations are a fundamental component of the province's social fabric and economy. They are part of the bedrock of our communities, they contribute to a healthy democracy and civil society, and they are a key piece of the puzzle that is our long-term economic success. Alberta's nonprofit organizations deliver a range of services to their communities and to the people of Alberta and beyond. They also contribute significantly to the provincial economy, employ thousands and harness the volunteer power of millions.

Despite all this, there is little awareness of the nonprofit "sector" in the daily discourse of average Albertans. We know a lot, for example, about the oil patch, about the education sector, about how farmers are doing and how many people are texting each other, but we know comparatively little about the web of organizations that sustain so much of our social exchange.

Part of the reason for this is that we tend to take nonprofits, and the work they do, for granted. Another reason is that we have relied for years on anecdotal evidence and one-off studies rather than invest as a society in a consistent, methodologically rigorous, and regular examination of the sector. Building on the information found in the 2003 NSNVO and the 2010 State of the Alberta Nonprofit Sector Survey, we have the capacity to begin to accurately tell the story of Alberta's nonprofit sector and the challenges it faces. The next step is to continue assessing the sector in order to better understand how its challenges and opportunities change over time.

The value of this information to policy-makers, funders, nonprofit organizations and the general public points to a role for the provincial government in ensuring that consistent and meaningful data on the nonprofit sector is collected on a regular basis. Collecting more basic information through annual reporting processes and supporting future surveys of the sector are two ways that the province can greatly improve our understanding of nonprofits.

Current State of the Sector 4.2

"The system is broken. The old models upon which the sector was built, both the benevolent benefactor (15/16th century thinking) and the business model (nonprofit is an oxymoron to the business model) no longer work. Funders, organizations and individuals need to adopt a new model of cooperation dedicated to creating great communities." – Survey Participant

The findings outlined in this report show that the Alberta nonprofit sector is performing well but also has some challenges to overcome. Because of the complexity of the sector and the imperfect state of the information we have about it, it is difficult to present a comprehensive diagnosis of the sector's health. On the bright side, there are lots of organizations, doing lots of things, raising lots of money, employing lots of people and, generally, making life in Alberta better. On the dark side, the results raise a number of long-standing red flags: revenue is tight for many organizations with many reporting that service demands are rising while revenues are either staying put or decreasing. This is a bad sign and relying on the "get it done" perseverance that characterizes the sector is not a good long-term strategy.

We also see a sector that faces a number of human resources challenges. We know anecdotally that many nonprofit sector workers are there because they want to make a difference and want to help others in some way. Relying on this as a recruitment and retention strategy, however, only goes so far. Children, mortgages, and all sorts of other bills (not to mention the burnout that can occur when working in an area like social services) often mean that nonprofit staff move on for higher pay or more security. As skilled labour shortages intensify in Canada, the ability of the nonprofit sector to attract qualified staff will become an even bigger issue.

Overall, the thousands upon thousands of points of light in the nonprofit sector continue to shine, with some organizations doing better, but too many reporting tough slogging. More information is critical, in part because it will make it harder to take the sector for granted and in part because we need tailor-made solutions that reflect the diversity of the sector rather than one-size-fits-all approaches. But information is only part of the way forward; we also need to make sure we fully appreciate the work of the sector as donors, volunteers and voters.

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Sampling Frame

The first step we took was to determine if there was an existing source of data from which we could pull some, or all, of the information needed to create a state of the sector report. Once we confirmed that this Holy Grail was not available (more on this below), we knew that we had to collect the data ourselves through a survey of nonprofit organizations. The best method in terms of accuracy and for revealing trends would have been to replicate the method (though not necessarily all of the questions) used by the National Survey of Nonprofit and Voluntary Organizations (NSNVO) that was conducted in 2003.

The NSNVO was able to use the resources of Statistics Canada to create a master list (sample frame) of Alberta nonprofits that included telephone numbers and information on the primary activity of the organizations based on the International Classification of Nonprofit Organizations (ICNPO). A random and stratified sample was drawn from this list. The statistical representativeness of the survey respondents (n=1,639) meant that the results could be extrapolated to the entire nonprofit sector in Alberta (see Hall et al. 2005a for a detailed account of the NSNVO's methodology).[14]

We considered replicating the NSNVO, but we ran into a number of barriers that prevented this. We did not have the resources to build a master list of nonprofits from the same sources used by Statistics Canada for the NSNVO. We were, however, able to obtain a list of all nonprofits registered with the provincial government. The list was graciously provided by Service Alberta.

With the list of registered nonprofits in hand, we set out to see if we could use it to develop a stratified random sample as in the NSNVO. The first problem we encountered was that the list does not include information on type of organization or annual revenue, so it was not possible to stratify the sample using ICNPO categories or by revenue size. The second problem we found was that the list does not include telephone numbers or email addresses. Mailing addresses are available, but we were told that many of these are for lawyers representing the organizations and that contacting these lawyers can lead to a fee being charged to the nonprofit organization for services rendered. In either case, a mail-out survey was rejected because of the very low response rates associated with this method.

We tested the option of tracking down phone numbers and email addresses for a random sample of organizations on the list. We found that this is a very slow process that did not guarantee accurate results, especially for small organizations. In a test, it took one staff member five days to get the contact information for 250 randomly selected organizations from the list of registered Alberta nonprofits. Using the internet to search for contact information, the return rate (the number of organizations we found information for vs. the number of organizations we attempted to get information for) was roughly 60% when looking for either phone or email information; when looking for just email information, the return rate was about 37%; when looking for just phone information the return rate was roughly 48%.

If we had continued with this method, it would have somewhat improved the randomness of the sample, but we would still have been unable to stratify by type or revenue. It was therefore decided to abandon the effort to replicate the NSNVO's methodology. If a much larger budget was available, it may have been possible to work with Statistics Canada and overcome the above barriers, but one of the goals of the project was to see if there was a less expensive option than spending the large sums needed to conduct the NSNVO.

Because we did not have the resources to conduct a telephone survey, we opted to gather email addresses for a large number of nonprofits in anticipation of conducting an online survey. We were assisted in this by the Calgary Chamber of Voluntary Organizations (CCVO) as it was able to send an invitation to participate in the survey to an existing list of about 1,600 nonprofits. We supplemented this by compiling a list of an additional 2,052 organizations. Because the CCVO list contained relatively few small organizations, sports and recreation organizations, religious organizations, and rural organizations, we focused our efforts on ensuring that these organizations were represented in the supplementary list.

It is important to note that when acquiring information from existing lists or from the internet, researchers should take care to double check that all organizations on the list are nonprofits. You must be particularly cautious when looking for contact information for arts and culture groups, specifically theatre and dance groups, because while some are nonprofits, others are not. We were able to determine this by cross referencing the organizations on our list with the master list of registered nonprofits.

It is very difficult to get contact information for certain groups of nonprofits, particularly small, grassroots organizations (e.g., parent groups, homeowner associations, non-mainstream churches and organizations in small communities). When attempting to acquire information for groups that tend to be underrepresented (e.g., religious groups, sports organizations, arts and culture groups, and environmental organizations), it is usually easiest to get lists of local organizations from a parent group (e.g., a list of all local swim clubs and their contacts from the Swim Alberta website).

Overall, data mining for contact information is very time consuming. Unless using an already established list with accurate contact information, it is important to leave a considerable amount of time to build a database. In the end, it took about a month to compile the database of organizations to which the survey was sent.

14 It is important to remember that, while the gold standard of national surveys of the Canadian nonprofit sector, the NSNVO methodological is also subject to critique and its results do not always mesh with other sources of statistical information. In other words, all surveys of the sector suffer from methodological limitations and, in this regard, the Alberta Nonprofit Sector Survey is not unique.

The Web Survey

We selected Survey Monkey (www.surveymonkey.com) to construct the online survey because of its ease of use and previous experience with it. Every organization on the two lists received an initial invitation to complete the survey by clicking a link that would take them to the survey on the Survey Monkey website. All organizations also received reminder notices. More passive forms of advertising the survey were also conducted such as posting the information on the Canada West Foundation website and asking key contacts to spread the word about the survey.

Despite these efforts, the final list of 954 participating organizations over represents larger, more established organizations (particularly social service agencies) and under represents sports and recreation and religious organizations. One challenge with conducting surveys of the nonprofit sector is that it is, despite the lack of comprehensive data, a sector that is asked to complete a lot surveys and participate in things like roundtables. These requests tend to go the same list of "usual suspects" (i.e., established, highly visible and easy-to-contact organizations). This can lead to confusion as organizations that receive multiple requests may think they have already completed a survey and even fatigue as executive directors and other staff decide that they don't have time to complete yet another survey or go to another meeting on the sector's future. Luckily, nonprofit leaders understand the critical importance of better information about the sector and, in turn, the value of taking part in research exercises. For this, we thank the organizations that participated in the State of the Alberta Nonprofit Sector Survey of 2010.

Questionnaire Design

When it came to designing the survey instrument, the NSNVO once again loomed large in our thinking. The NSNVO questionnaire was created by a consortium of organizations working over a two-year period and informed by a qualitative research phase that explored the key issues facing the sector in terms of its capacity to act. It therefore made sense to take advantage of this work instead of "reinventing the wheel." Early on, it was also hoped that we could (as noted above) replicate the NSNVO's method and use its results as a baseline against which to compare the new results. This made repeating questions from the NSNVO even more attractive (even though our goal of replicating the NSNVO's method was not achieved).

Because it was a telephone survey conducted by trained staff who could press the interview subjects to be more specific and guide them through difficult questions, the NSNVO questionnaire could be more detailed and complex than what we felt was reasonable for a web survey. A chief aim was to keep the time needed to complete the online survey to a minimum and the questions relatively simple in order to encourage completion. We estimated that the survey would take about 15 minutes to complete – the maximum length we felt a survey of this sort should be.

One advantage of the online method (at least in theory) is that respondents can look up information such as annual revenue and number of staff that would be difficult to do over the phone. It is unclear whether this advantage was realized. In fact, we discovered that a question that asked respondents to breakdown their organization's revenue into percentages by source was sufficiently complex that it was deterring completion of the survey. (The question was dropped early in the field work for this reason.)

Unfortunately, we had little control over who completed the survey or over how much effort they put into it (skipped questions were common). We were hoping that the survey would be completed by executive directors with intimate knowledge of their organizations, but this may not have always been the case or even the norm.

Given the above, committing the resources needed to do the interviews by phone might yield a better overall result in terms of specifically asking for executive directors, pressing respondents to answer all of the questions, guiding them through difficult ones, and ensuring that quotas are met (e.g., sufficient numbers of small organizations, rural organizations or types of organizations). For example, a question on the survey asked about the primary area of organizational activity using the standard ICNPO categories. The question is often met by skepticism on the part of respondents who argue that their organization does not fit into any one of the tidy ICNPO peg holes. In a telephone interview, the surveyor can stress the need to slot an organization's activities into a standard category and to focus on the primary area of activity in ways that are difficult to do in an online survey. As a result, 83 organizations responded by saying "other" and another 139 skipped the question altogether. Of course, telephone interviews introduce their own problems (e.g., the need to answer then and there rather than having the option to stop and look things up).

In addition to the above challenges, many of the factors that determine the "state of the sector" (i.e., how it is doing rather than just information about its size and structure) are qualitative in nature. Asking good questions that probe qualitative issues is a challenge regardless of the method used. For this pilot test, we opted to err on the side of simplicity in order to ensure reliable results and a higher response rate. Future investigators may, however, want to revisit this and commit more time and effort to the qualitative side of the equation. One option here would be to supplement the survey data with focus group feedback or case studies.

Perhaps the most important factor for future investigators to consider is the establishment of a baseline against which changes in the sector can be tracked over time. Time series data is crucial to getting a solid sense of the "state of the sector" as change in variables such as revenue, revenue sources, number of staff, staff salaries, number of volunteers, and demand for services is a key measure of the sector's overall health. Because we could not replicate the NSNVO and use its findings as a baseline, we attempted to capture change in the sector by asking respondents about the circumstances of organizations three years prior to the survey, but a better option is to repeat the survey (or at least a subset of key questions) every year or every second year.

In terms of questions that could have been added, a workable question on sources of revenue, more information about staff salaries and turnover, more detail regarding full-time versus part-time staff, additional feedback on the nature of what volunteers do and greater emphasis on how exactly demand is changing are all worthy of serious consideration. If more data on characteristics such as revenue, number of staff and number of volunteers and volunteer hours was collected at the time of registration (including more detailed contact information), future surveys could devote more questions to these sorts of issues and to more qualitative measures of the state of the sector.

Data Quality and Margin of Error

Because the sample is not representative according to the science of statistical sampling and analysis, it is moot to talk about the sample's margin of error. Although we feel confident that the survey captured an important subset of nonprofits and, in turn, the characteristics they exhibit and the circumstances that they currently face, we cannot say with any confidence that the results match the characteristics and circumstances of the general population of Alberta nonprofits. In addition, we know that there are inaccuracies inherent in the data due to skipped questions and impossible-to-track response errors – both related to the online survey method.

Nonetheless, the results come from a broad group of organizations that "represent" strong trends in the sector that have been identified over and over again such as the greater pace of demand growth compared to revenue growth and the ongoing challenge of attracting and retaining qualified staff. The precise percentages and some of the details are likely wrong, but the general parameters as well as the direction of change are likely accurate. The diversity of the sector, however, means that the general picture formed by these results does not apply to all nonprofits in Alberta and that some nuances may have been missed. The results apply best to the large number of organizations that are well-established (registered as charities with paid staff and in existence for an extended period) and active in, most particularly, the social services sector.

It is important to explain why the pilot report does not provide analysis of how variables interact. For example, we do not examine how revenue size, type of organization or geographic location affects changes in volunteers or difficulty retaining staff. The reason for this lies in the non-representative nature of the sample. If the sample as a whole is not truly representative, these distortions are multiplied when two variables are cross-tabulated. To say, for example, that small organizations are more likely to have trouble retaining staff when you have only a limited number of small organizations that may or may not represent the actual population of small organizations intensifies the appearance of accuracy while actually reducing it. For this reason, and as noted in the analysis, the results should be read with caution and the safest interpretations are for the sample as whole rather than for smaller slices of it.

Summary

A basic state of the sector report along the lines of the one prepared each year for the state of Minnesota would be relatively easy if the information needed for a basic overview was collected at the time of annual provincial registration or in some other direct way. This information would also make it much easier to construct a sampling frame and to contact organizations via email and phone. Contact information and basic data that can be used to stratify the population of Alberta nonprofits are the keys to better survey results.

Once these challenges have been met, several years of repeated surveying is necessary to establish clear trends lines that can be supplemented by qualitative "temperature checks" and other follow-up research on the sector.

A web survey is a viable and low cost option but would be a much better method if the basic information noted above was available. If more resources can be obtained, testing the pros and cons of a telephone survey would be very worthwhile.

Another key factor is creating awareness among nonprofit senior staff that participation in surveys and other research is vitally important to understanding the good work done by the sector and informing decision-making on the part of funders and government. Even the best survey methodology will fail to yield good results if nonprofits do not see the value of participating and do so in large numbers and with gusto.

A Portrait of Canada's Charities: The Size, Scope and Financing of Registered Charities. The report was published in 1994, but the Canada Customs and Revenue data date back to 1991.

Conducted by the Canadian Centre for Philanthropy (now Imagine Canada), the report examines basic information about registered charities such as revenues and expenditures, and type of organization.

→ LIMITATIONS Very old information; only covers charities; source of information (the T3010 form submitted by charities to Canada Customs and Revenue) is unreliable due to significant reporting errors.

Boland Survey of Not for Profit Sector Salaries and Human Resource Practices. Ongoing.

www.ptbaconsulting.com

Peter T. Boland & Associates Inc. has been conducting research on nonprofit sector salaries and human resources practices for over a decade. The reports are available to subscribers and provide information on, for example, salaries by position, turnover and vacancy rates, salary adjustments, vacation and sick leave, and benefits.

→ LIMITATIONS Focus is on salaries and human resources; non-random sample.

Calgary Chamber of Voluntary Organizations Economic Climate Survey of Alberta's Nonprofits and Charities. Economic Impact Survey: October 2009 (third in a series). Economic Climate Survey May 2010.

www.calgarycvo.org

Surveys of the financial health of Alberta nonprofits.

→ LIMITATIONS Non-random sample; focus on financial issues.

Canada Survey of Giving, Volunteering and Participating (CSGVP) (formerly the National Survey of Giving, Volunteering and Participating). Most recent is 2007. Also ran in 2004, 2000, and 1997.

www.givingandvolunteering.ca/files/giving/en/csgvp_highlights_2007.pdf

Conducted by Statistics Canada, the survey is designed to collect national data to fill a void of information about individual contributory behaviours including volunteering, charitable giving and participation.

→ LIMITATIONS Focused on individual donations and volunteering.

Canadian Policy Research Networks (CPRN) Research Series on Human Resources in the Nonprofit Sector. Data drawn from the 1999 Workplace and Employee Survey (WES) conducted by Statistics Canada – WES has been inactive since 2006.

www.cprn.org

An attempt by the now defunct CPRN to provide baseline data about the size and nature of Canada's nonprofit sector and the human resources it employs.

→ LIMITATIONS Information is dated; provincial information is limited; sample excludes nonprofits without paid staff and religious organizations.

Giving and Volunteering in Alberta: Findings from the Canada Survey of Giving, Volunteering and Participating. 2007 data.

Reports also available for health organizations, sports and recreation organizations, religious organizations, and social service organizations.

www.givingandvolunteering.ca/reports/2007

Derived from findings from the Canada Survey of Giving, Volunteering, and Participating (CSGVP), these reports from Imagine Canada provide insight into the Albertans who support sports and recreation organizations. They detail how much people contribute, how they make donations, how they came to volunteer, what they do as volunteers, other causes they support, their motivations for making contributions, and the barriers they face.

→ LIMITATIONS As with the CSGVP, focused on individual donations and volunteering.

Imagine Canada's Sector Monitor Survey Reports. First survey conducted between November 24, 2009 and January 11, 2010; future surveys are planned.

www.imaginecanada.ca

The Sector Monitor survey program was launched to regularly monitor the state of charities across the country and their ability to deliver their missions. Their reports provide information on the impacts of the economic climate on charities, levels of stress, human resources trends, organizations' responses to the economic climate, and overall confidence for the future.

→ LIMITATIONS Only includes registered charities; non-random sample; limited number of respondents from Alberta.

National Survey of Nonprofit and Voluntary Organizations. 2003 data.

www.statcan.gc.ca/pub/61-533-s/61-533-s2005001-eng.htm

ALBERTA SUMMARY:
http://www.imaginecanada.ca/files/www/en/nsnvo/f_alberta_sector_report.pdf

Conducted in 2003, the survey provides the only statistically sound and comprehensive profile of nonprofit organizations in Canada. The findings are based on the responses of approximately 13,000 incorporated nonprofit organizations and registered charities across the country.

→ LIMITATIONS Information is getting old. Methodology is solid but difficult to replicate with a limited budget.

Satellite Account of Non-profit Institutions and Volunteering 2007. Latest report has 2007 estimates.

www.statcan.gc.ca/bsolc/olc-cel/olc-cel?catno=13-015-XIE&lang=eng

Collecting information from 1997 to 2007, this report from Statistics Canada provides information about nonprofit organizations in Canada. It explores the contribution and role of the nonprofit sector in macro-economic terms.

→ LIMITATIONS Information is for Canada as a whole; no provincial break-outs; focused on economic factors only.

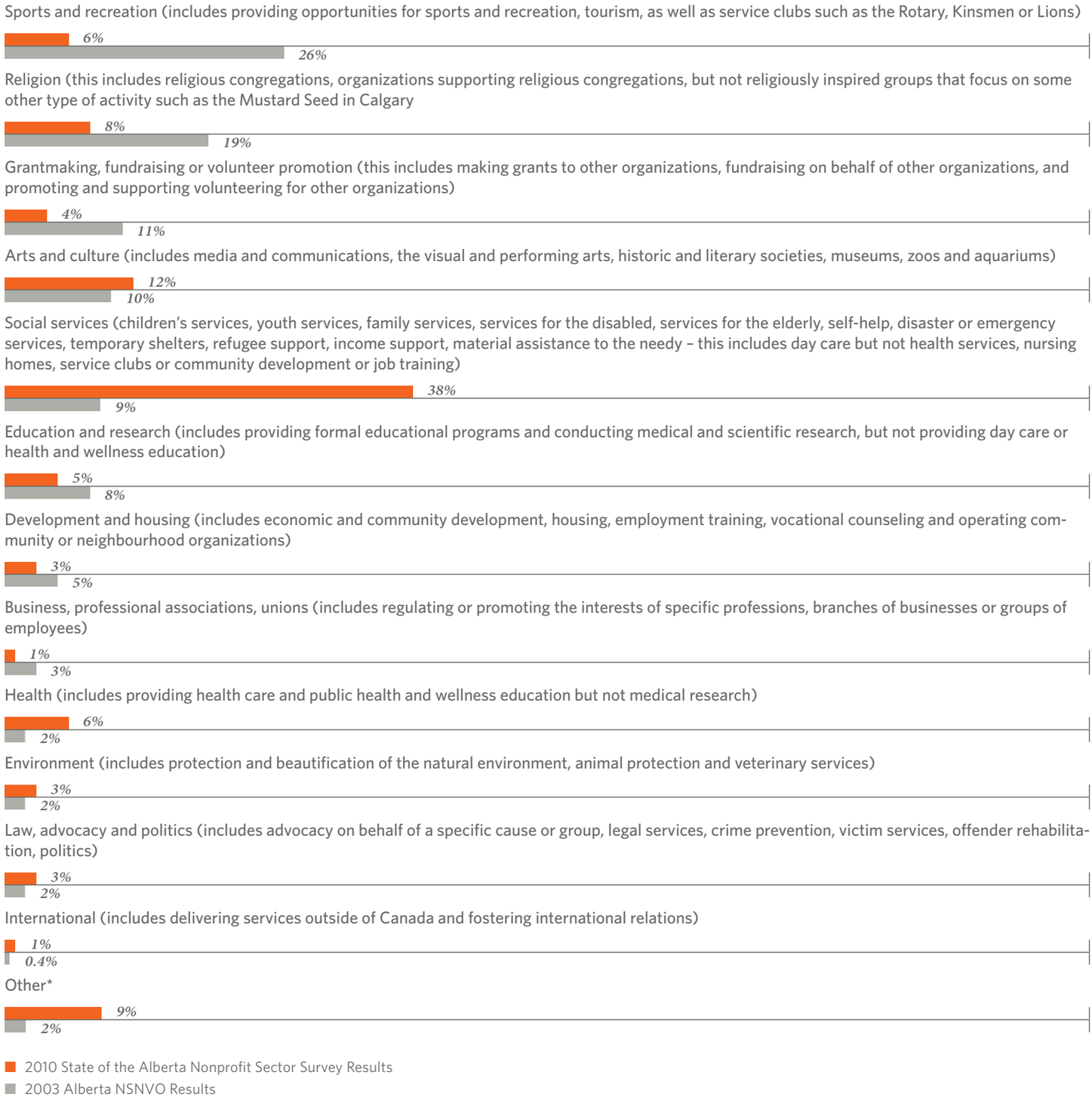
Toward a Labour Force Strategy for Canada's Voluntary & Non-profit Sector. Data collection took place between December 2007 and January 2008 by Ipsos Reid.

http://hrcouncil.ca/about/documents/HRC_LFS_Report3.pdf

A three part series released by the HR Council for the Voluntary & Nonprofit Sector contains the key findings from Canada-wide surveys of employers and employees. These reports provide information on characteristics of organizations, recruitment and retention practices and challenges, demographic characteristics of the people who work in the sector, and employee plans and expectations for the future.

→ LIMITATIONS Expensive methodology to replicate; focus on human resources only.

Appendix 3 Percentage of Organizations by Primary Activity Area



- A handful of US states produce reports which provide a snapshot of the nonprofit sector, although most of the information is on economic and labour force characteristics.
- Information for most American state nonprofit sector reports is taken from state revenue agency databases.
- In all of the reports, information is broken down at the state level.
- Many of the reports also further break down key information at the county/sub-state level.
- All of the reports include information on employees and wages.
- Most of the reports include information on assets and expenditures, and about half report revenue information.
- Most of the information is categorized by activity area (sports and recreation, social services, etc.).
- There is little done overall in the way of multi-year or multi-sector comparisons.

Minnesota Nonprofit Economy Report (2009)

Key Tables:

- Number of Nonprofit Employers and Employment Locations in Minnesota
- Number of Nonprofit Employees in Minnesota as Percentage of State's Total Workforce
- Average Weekly Wages in Minnesota by Sector (nonprofit, government, private)
- Average Weekly Wages for Nonprofit Employees by Industry
- Revenue Sources for Small Nonprofits (assets under $1 million)
- Revenue Sources for Medium-Sized Nonprofits (assets between $1 and $10 million)
- Revenue Sources for Large Nonprofits (assets over $10 million)
- Minnesota Nonprofit Assets, Revenues and Expenses by Selected Activity Areas (most current fiscal year)
- Expenditures by Nonprofit Organizations located in Minnesota

For Each Region:

- Number of Nonprofit Employment Locations in the Region
- Number of Nonprofit Employees in the Twin Cities and Nonprofit Percentage of All Employees in the Region
- Median Hourly Wages for Full-Time Employees in the Region
- Average Weekly Wages in the Region by Sector
- Assets, Revenues and Expenses by Selected Activity Areas for Nonprofits in the Region
- Assets, Revenues and Expenses by Size of Organization for Nonprofits in the Region

Wisconsin Nonprofit Sector Report (2009)

Key Tables:

- Charitable Nonprofits in Montana, Expenditures and Assets
- Reporting Charitable Nonprofits in Wisconsin by Field
- The Wisconsin Nonprofit Sector
- Number, Expenditures, and Assets of Reporting Charitable Nonprofits in Wisconsin by Field
- Reporting Charitable Nonprofits in Wisconsin by Expenditure Level
- Wisconsin Foundations by Foundation Type
- Wisconsin Foundations by Country

Nonprofits by the Numbers: Maryland Association Nonprofit Organizations (2009)

Part I: Statewide Data

- Types of Nonprofits
- Nonprofits by Size of Annual Income
- Nonprofits by Service Delivery Area
- Maryland Nonprofit Employees and Payroll
- Counties with the largest % growth in nonprofit employment from 1998 to 2008
- Counties with the largest % of persons employed by the nonprofit sector 2008
- Nonprofit Employment by County

Part II: County by County Analysis

- Nonprofits by County

For Each Country:

- Types of Nonprofits
- Nonprofits by Size of Annual Income
- A Sample of Nonprofits in Your County
- Nonprofits by Service Delivery Area
- Nonprofit Employees and Payroll

Partners in Prosperity: The Maine Nonprofit Sector Impact (2008)

Key Tables:

- Percent of Reporting Nonprofits
- Percent of Total Expenditures by Activity Group
- Revenues in Maine Nonprofits with Budgets < $5
- Revenues in Maine Nonprofits with Budgets $5m or More
- Overview of Maine Foundations
- Top 10 Maine Foundations by Total Giving
- Average Charitable Contribution of Itemizers
- Percent of Income Contributed by Itemizers

The Montana Nonprofit Sector (2007)

Key Tables:

- Charitable Nonprofits in Montana, Expenditures and Assets
- Sources of Revenue for Reporting Charitable Nonprofits in Montana
- Reporting Charitable Nonprofits in Montana by Field
- Number, Expenditures, Assets, and Revenues of Reporting Charitable Nonprofits in Montana by Field
- Reporting Charitable Nonprofits in Montana by Country
- Reporting Charitable Nonprofits in Montana by Expenditure Level
- Nonprofit Wages by Country
- Total Wages by Industry
- Average Charitable Contribution of Itemizers
- Percent of Income Contributed by Itemizers
- Overview of Montana Foundations
- Top 10 Montana Foundation by Assets
- Top 10 Montana Foundations by Total Giving

Appendix 5 About the CCVO

The Calgary Chamber of Voluntary Organizations gives voice to the nonprofit and voluntary sector. CCVO's insight and leadership generate results for the sector to be able to thrive and contribute to strong, healthy communities. CCVO promotes and strengthens the nonprofit and voluntary sector by developing and sharing resources and knowledge, building connections, leading collaborative work, and giving voice to critical issues affecting the sector.

For more information visit www.calgarycvo.org.

Appendix 6 About the Canada West Foundation

The Canada West Foundation is the only think tank dedicated to being the objective, nonpartisan voice for issues of vital concern to western Canadians. Through our research and commentary, we contribute to better government decisions and a stronger Canadian economy.

The West is in. And the Canada West Foundation helped put it there. Over the past 40 years, our research and commentary has improved government policy and decision making. Today, the West is on the national agenda and is at the forefront of the most important debates that will shape our country.

We give the people of British Columbia, Alberta, Saskatchewan and Manitoba a voice. A voice for their dreams, interests and concerns. As westerners, we understand the people and the places of the West. We know our history and how it influences our future. Whether it is the economy, energy, environment, education, healthcare, taxes, social services, urban issues, provincial-federal relations or any other policy area of importance to the West, we have researched it, commented on it, stimulated debate about it and recommended practical options for improving the policy response. Democracy lives.

Our credentials are impressive. We have the policy and economic experts you need. Our Board of Directors represent the who's who of the four western provinces. Our list of projects is long. We're just like the West. Absolutely essential. Absolutely part of Canada's success.

More information can be found at www.cwf.ca.

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ORGANIZATIONS

www.calgarycvo.org