

**Third Sector, Second Thoughts?
Key Issues and Challenges Facing Canada's
Voluntary Organizations**

Voluntarism symbolizes the antithesis of impersonality, bureaucracy, materialism, utilitarianism, and many of the other dominant cultural trends we worry about in our society.

- Robert Wuthnow

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Think of society as a stool supported by three legs: Successful societies feature a vibrant private sector; a savvy public sector; and a voluntary sector which is supple, responsive, and diverse. For the stool to carry any real weight, the legs have to brace and mutually support one another. All three sectors have to work together...

- Mel Cappe, Clerk of the Privy Council and Secretary to the Cabinet, in a speech to the Third Canadian Leaders' Forum on the Voluntary Sector

Introduction

Canada's not-for-profit sector is a hearty stew of more than 77,000 registered charities, big and small, as well as some 100,000 nonprofit organizations. The annual revenue of registered charities alone is a staggering \$90 billion. The sector employs over 1.3 million Canadians, about 9 per cent of the entire labour force, and pays out over \$40-billion in salaries and benefits. In addition, more than four million Canadians (roughly 15 per cent of the population) perform some type of volunteer work each year, donating over one billion hours of service in activities ranging from door-to-door canvassing to caring for the terminally ill.¹

As governments the world over restructure how they deliver vital services to citizens, the voluntary sector's role in this shift is becoming increasingly important. Not only has the sector had to respond to the new challenges vis-à-vis service delivery, it has done so under increasing strain. Like a trusted friend, the sector and its network of volunteers have responded where the need is greatest, and has been proactive in providing a consistent and sustained support system. When disaster strikes, whether it be an ice storm (Quebec), massive flooding (Manitoba), or water contamination

¹ Figures taken from Warren Dow, "The Voluntary Sector: Trends, Challenges and Opportunities for the New Millennium." Published by Volunteer Vancouver. September, 1997.

(Walkerton), few can dispute the speed and intensity with which the sector has responded and worked collaboratively with governments, not to mention the concrete changes it has meant in individuals' lives.

But there is a growing crisis in Canadian society with regard to the respective roles of the public, private, and voluntary sectors in attending to the needs of vulnerable populations. It is, of course, multi-layered, and not amenable to quick-fix solutions or stopgap measures. It requires nothing less than a radical rethinking of what we do, how we do it, and how we communicate what we do. Recent events, including the role of the Canadian Red Cross in the tainted-blood scandal, have damaged the well-worn image of the "helping profession."

In advanced industrial societies such as Canada, the voluntary sector faces an enduring paradox, one identified by Tocqueville more than a century and a half ago. "To combat totalitarianism from above," he wrote, "voluntary associations must achieve some success in solving societal problems, even if this means large bureaucracies and instrumental programs. But to combat the withdrawal of individuals from public life itself, voluntary associations need to remain small, informal, personal, and diverse."² Add to this the retreat of the state from the funding and delivery of social programs, donor fatigue, and the pressures to adopt concrete models of accountability, and you have a dizzying, not to mention daunting, set of challenges. The following is a brief overview of some of the challenges/issues identified in some of the literature and in interviews with key informants from across the three sectors. A list of informants is appended to this report. This list is by no means exhaustive, but represents a snapshot of the crosscutting

issues that command our immediate attention. They include issues specific to the sector itself, and to the sector's changing relationships with the private and public sectors.

Key Challenges/Issues

1. Strengthening Capacity in the Sector

Putnam's influential work on "social capital" hammered home the message that civil society in general is under increasing pressure. His thesis is encapsulated in the aptly titled essay, "Bowling Alone: America's Declining Social Capital." While specific to the U.S., Putnam's ideas resonate in other countries such as Canada, where we have been grappling with how best to encourage citizens to get involved, and to take charge of their organizations and communities. Although the sector has benefitted from a dedicated roster of volunteers, there are still millions of Canadians who continue to profit from the hard work of dedicated volunteers without lifting a finger. This indeed poses a serious challenge to efforts by the voluntary sector to increase its volunteer base, while ensuring at the same time that it maintain its current members. Finally, in recent years we have witnessed a shift in the sector's traditional volunteer base of middle-class homemakers, or what the British have referred to as "Dorothy Donor." This is due partly to an increase in the participation rate of women in the labour force. A portrait of the new "volunteer" is only now beginning to emerge. He or she may be an immigrant, younger than the traditional volunteer, or unemployed.³ Although there is some dispute regarding this changing age demographic, "it appears that the under-25 generation will be a rich

² Quoted in Robert Wuthnow, "Tocqueville's Question Reconsidered: Voluntarism and Public Discourse in Advanced Industrial Societies," in *Between States and Markets: The Voluntary Sector in Comparative Perspective*, Princeton, NJ: Princeton University Press, 1991, p. 305.

³ See Dow, 1997.

resource for the sector, especially if a concerted effort is made to recruit them.”⁴

Voluntary organizations in Ontario, for instance, are getting the opportunity to reach out to young people, as a result of the Progressive Conservative government’s decision to make 40 hours of voluntary work mandatory for all high school students. Organizations recognize that it’s particularly crucial that they make every effort to provide a memorable, meaningful, and safe experience for these students, as many of them are indeed the volunteers of tomorrow; a negative experience may discourage them from getting involved in the future. At the same time, however, some worry that the idea of forcing or mandating people to volunteer runs against the altruistic spirit of volunteering. In what sense, for instance, is a mandatory program voluntary? How will sector organizations accommodate these so-called unwilling ‘volunteers’, not to mention deal with the capacity issue of training and supervising student volunteers?

Some sector leaders caution that not only is the volunteer base changing, the nature of what volunteers are willing to do is changing, as well. One sector member noted, for instance, that the enormous volunteer force emerging in Ottawa’s rapidly expanding high-tech community might not be as passive as the previous generation. Individual volunteers want to take an active role in providing direction to the organizations for which they have volunteered their time. The same challenge is facing the voluntary sector in its dealing with funders, some of whom want a greater say in how and which programs are delivered. In the words of Tim Brodhead, the president of the J.W. McConnell Family Foundation, Canada’s largest: “It is not that it is bad for donors to take an active interest in what they choose to support, quite the contrary, but the

⁴ Dow, p. iii.

current view of ‘partnership’ seems to be that each has an equal right to control the tiller; to us, it seems rather that the pilot should be left to steer while we make sure there is fuel in the tank and together that we reach our destination.”⁵

A related problem is the current trend toward “legislative voluntarism”, or the increasing practice of giving volunteers the work of otherwise paid professionals, such as social workers. This raises a host of ethical issues around what constitutes paid or unpaid work, what organizations can rightly demand of their volunteers and paid staff in terms of work, not to mention the expanding training resources necessary to meet these challenges. Some volunteer centres must grapple with the ethical issues stemming from requests for volunteers from the for-profit sector. What is a volunteer centre to do, for instance, when faced with a request from a corporate-run nursing home that is looking for a hairdresser or a handyman? Should the sector be asked to pick up this slack, when the work might otherwise be going to paid personnel? Situations such as these threaten to eclipse the progress made by the voluntary sector in its dealings with organized labour.

In addition, organizations face pressure in trying to recruit and encourage emerging leaders within their ranks. Strong, inspiring leaders often beget strong volunteers. With the increasing attention paid to the importance of public and private sector partnerships, the challenge will be to recruit leaders who have greater expertise, and a more sophisticated understanding of policy and government practices. That being the case, the demand for leaders with such expertise will require that the sector offer more substantial remuneration to these employees, or risk losing them to the private and public sectors. “It’s a myth to think that if you work in the sector, you should accept

⁵ Taken from a presentation by Tim Brodhead at the Ketchum Breakfast Forum (Montreal), February 16, 1999.

cheap wages,” according to Susan Phillips, an associate professor of Public Administration at Carleton University who served as research director for the Panel on Accountability and Governance in the Voluntary Sector.

Leadership is also an issue for the voluntary sector as a whole. Given the diversity of organizations present in the sector itself and the blurring of boundaries between the three sectors, the voluntary sector requires strong organizations to lead at the national level. This is especially important given the Canadian realities of decentralization, geographic size, cultural diversity and federalism, which have a greater potential to divide rather than unite. The national organizations that currently perform these tasks are relatively impoverished, and will require a strong injection of funding to meet these rapidly expanding resource needs. If the sector wants to be taken seriously – by the public and private sector alike – “it will need to start acting like a sector,” Phillips added.

And, finally, the question of Board governance looms large. At a time in which the Board’s role is becoming increasingly crucial, organizations are facing a potential problem in recruiting and maintaining Board members, some of whom may feel their involvement could expose them to personal liability should a scandal arise. Not only do Board members have to contend with traditional fiduciary responsibilities, they are increasingly vulnerable to charges of “vicarious liability”. In some cases, the spectre of “vicarious liability” may threaten the existence of the organization itself, as in the recent case involving the Anglican Church’s potential exposure to liability arising from its treatment of Aboriginals in residential schools.

2. Coping with Increased Demand for Services

Members of the voluntary sector have long argued that their client base has been expanding, and there is a great deal of scholarly research to support these claims, especially with regard to the increase in vulnerable populations (women, children, and the elderly). There are several reasons for this, not the least of which is the increasing reluctance of states to deliver social service supports. The current trend toward “alternative service delivery” (the devolution of government services to the voluntary sector) not only has overburdened the sector, it has raised the thorny issue of how to advocate against government policy while under contract by government to deliver a service.

Analysts have pointed to several economic and demographic trends that may help to explain this surge in demand for services. Dow (1997) identified five specific trends. The first concerns the increase in Canada’s aging population. Positive medical developments mean that people are living longer, and “will require increasing amounts of health care and home support programs.”⁶ Who will take care of the elderly? One Ottawa-area member of the sector noted that she was shocked at the response to a recent ad she placed in the newspaper: one was for a volunteer to help a frail, elderly woman and another was to help take care of injured birds. She received approximately 40 calls from people interested in helping the birds, but not one to assist the elderly woman.

The second relates to stresses in families, including the necessity of juggling work and family, the lack of family support services such as child care, and the various behavioural and emotional difficulties faced by children of families who may lack

⁶ Dow, p. ii.

essential social service supports. The third relates to the increasing incidence of poverty, which is partly related to the second issue, but also connected to broader macroeconomic problems. Fourth, the introduction of new diseases “has required the development of new agencies and programs to meet these needs.”⁷ Related to the issue of service delivery is the fifth issue, the changing demographic of clients themselves. Organizations are discovering that diversity is less a buzzword than a way of life in the new millennium. The challenge of diversity is not simply one of cultural sensitivity: it raises profound questions regarding representation, cross-cultural and linguistic communication, and giving voice to the disenfranchised. Programs must not only reflect Canada’s diversity, they must find ways to deliver services that best meet the needs of this rapidly changing population.

3. Building a Stronger and More Diversified Donor Base

Contrary to public perception, the private sector’s share of contributions to the voluntary sector represents less than two per cent of pre-tax profits. Observers note that this situation is only worsening as the corporate sector shifts from traditional philanthropy to “strategic investment”. In recent years, it was noted in a key informant interview, the relationship between the private and voluntary sectors in Canada has become more strained than the sector’s relationship with government. With regard to the latter, there is at least a willingness to begin forging a mutually beneficial relationship, and to commit government funds to help strengthen the sector’s role. Within the private sector, however, there remains a stubborn insistence that corporate giving must contribute

⁷ Dow, p. ii.

in some way to shareholder value. “They don’t want to talk about the broader social responsibilities of the corporation,” according to one seasoned observer. Educating the private sector about the positive economic spinoffs derived from its contributions to alleviating social problems, has been an uphill battle at the best of times. And, even when the private sector has responded, it has gravitated toward “sexy” issues, leaving the less-glamorous but equally vital programs struggling to stay afloat. What is needed, according to some, is a concerted public relations campaign around corporate social responsibility, as well as a strong statement on the limitations of strategic investment.

The majority of funding for the voluntary sector derives from government sources (60 per cent), foundations (10 per cent), with the remainder made up by individual donations, and various fundraising activities. In recent years, many agencies have turned to various forms of gaming revenue to sustain funding and to make up for shortfalls in government, individual, and private sector support. For those organizations or groups that are fortunate enough to enjoy strong support from key private sector partners, there are some words of warning. An organization that ties program funding to a key private sector donor or donors must be mindful of the fact that corporations “can change themes on a dime.” Organizations such as the AIDS Committee of Toronto (ACT), the largest AIDS service organization in the country, believe that it’s key to diversify the donor base, so as to ensure that an organization is not left in the lurch should one of its key funders suddenly withdraw funding at the eleventh hour. ACT has relied on funding from Molson Breweries, Glaxo Wellcome, and MAC Cosmetics, among others.

The increasing competition for funding threatens also to drive wedges among organizations that otherwise should be working together. Moreover, in some cases, the

sector is facing stiff competition from the state and from universities for the almighty shrinking donor dollar. Voluntary organizations face the added problem of building support for core activities in an environment in which governments, donors, foundations, and corporations are all part of a trend toward targeted or project-oriented short-term funding.

4. Whither Advocacy?

There is a general agreement, as expressed by Mel Cappe, Clerk of the Privy Council, that advocacy is a cornerstone of a healthy democracy. Not only does it engage citizens in developing and seizing control of their respective communities, “the sector can act as an early warning system with respect to emerging policy issues.” Given the issues jockeying for attention, organizations are rightly concerned that the increased concerns regarding accountability may threaten or eclipse the sector’s advocacy role. A recent controversy involving Barnardo’s, a U.K. based children’s charity, raised the issue of just how far the sector can go in its advocacy efforts. Barnardo’s, which conducts preventative work with at-risk children, was initially reprimanded for one in its series of advertisements depicting children in bleak, adult situations. The Committee of Advertising Practice initially urged newspapers not to run an advertisement depicting a toddler in the process of injecting himself with heroin. Eventually, the Advertising Standards Authority rejected complaints that the ad was “shocking and offensive,” but the issue is far from resolved.

Giving voice to and empowering disenfranchised members of society is a key piece of the advocacy puzzle, not to mention the sector’s role in valuing diversity. Organizations which purport to speak for less-advantaged members of society, some of

whom may be difficult to mobilize, need to address in a concerted way questions of representation beyond mere token gestures, such as allocating a seat or two on the board to community members. If they do not, they run the risk of being discredited publicly as unrepresentative of their constituency. For instance, in the fallout from the violent confrontation on Queen's Park in Toronto between anti-poverty protesters and the police, a significant amount of media attention centered on the fact that a majority of the protesters did not allegedly "represent" the community for whom they were protesting.

The current trend toward empowering communities, especially in low-income neighbourhoods, tends also toward overestimating the extent to which communities can succeed if left to their own devices. It is incorrect to assume that communities can succeed in isolation, and that any government or sector "interference" is inherently bad. Communities need social infrastructure, resources and support to succeed, not to mention the help of governments and intermediary voluntary-sector organizations. The sector must be at the forefront in communicating this message.

5. Accountability and Increasing Public Scrutiny: Threat or Opportunity?

Few members of the voluntary sector are unfamiliar with the term "accountability," which has crept into all corners of the corporate and government world. Increasingly, the sector is being called upon to demonstrate that the services provided by member organizations are making a quantifiable difference in the lives of clients. In some cases, the task of evaluating or measuring outcomes is relatively straightforward. This task is made increasingly difficult in interventions, especially within the human services, with only long-term benefits. Not only it is difficult to "prove" the link between an intervention and its intended outcome, the sheer complexity of what affects human

development makes it difficult to “prove” that change results from one specific intervention. The pressures also stem from citizens and volunteers, many of whom want concrete evidence that their contributions have made a difference. The challenges are to assess long-term impact, and to locate the capacity to do the research, since often the funding is not there and neither are the human resources.

In addition, accounting pressures can often stretch organizations, many of which are operating with bare-bones staff, to the brink, and such activities sometimes divert their attention from the main task at hand: serving their clients. It changes also the level of professionalism that is required by staff, not to mention the role of boards. And, finally, the devolution of state-run programs to the sector means that the sector is not only accountable to the state, but by extension, to the public, on behalf of whom the sector is delivering services. This blurring of the lines previously separating the state from the third sector has also the potential to confuse public cynicism with state institutions to new found distrust of the sector itself.

There is a clear recognition that nothing less than the integrity of the sector depends upon its ability to closely monitor projects and outcomes. In both Canada and the U.S., Dow notes, “a number of high-profile scandals involving organizations such as the United Way of America and the Canadian Red Cross” have led to “allegations of excessive greed, mismanagement, inefficiency, and outright fraud in connection with executive salaries, fundraising practices, and lobbying activities. These challenges have the potential to erode the public’s confidence in and support of the sector until it can be assured that the organizations seeking their support are adhering to high standards of

accountability.”⁸ Some observers have noted that we need to shift the discourse of accountability from how it serves the funder, to how evaluation can be better used to serve the organization and its clients. In other words, accountability need not be seen as the enemy, but as a tool to harness the potential of the sector. That being said, there is a pressing need to distill the complexity of evaluation into language that is understandable to the public.

6. Forging Mutually Beneficial Partnerships with the Private, Public Sectors

Private Sector: Building strong, lasting relationships with the private sector may be an important priority for the sector in the coming years. It represents also an area in which there is room for significant improvement. Not surprisingly, the sector’s success in meeting this challenge may be affected greatly by its ability to deal with the fifth challenge we identified (the dilemma of accountability). The sector indeed recognizes that the current trend sweeping the world of corporate giving is to award funding only to those organizations that carefully monitor and evaluate outcomes.

The sector may have to develop innovative strategies for attracting private sector support. For instance, *The Globe and Mail* remarked recently on a “new style of corporate giving,” in which the corporate sector tries to marry charity with business. Public acts of beneficence are now becoming part of an overall business strategy. Of the many companies that donated to victims of the Walkerton tragedy, a handful also took the time to announce their generosity to the media. Sensing a possible photo opportunity, Zellers alerted the press that it was sending its mascot to the Walkerton arena to deliver

⁸ Dow, p. iii.

5,000 jugs of bleach. The days of anonymous benefactors, it seems, are long gone. Many companies that donate to charity want it known that they do.

The voluntary sector must also recognize that the motivations behind private-sector giving are also changing to reflect a concern with attracting and retaining valuable employees. In a survey of its members, the Business Council on National Issues (BCNI) found that the single most important reason for corporate involvement had to do with human resource management. Corporations, especially those in the emerging high-tech community where employee retention is a critical challenge, realize the increasing importance of being seen as the employer of choice. In the high-tech sector, for instance, employers recognize that employees want to belong to firms that not only pay good wages, but that are good corporate citizens. “If you want to attract employees, you have to behave in ways that are consistent with employees’ values,” according to David Stewart-Patterson, senior vice-president, policy and communications, with the BCNI.

Employee involvement in voluntary work has also some positive spinoffs for the corporation. For instance, Edinburgh-based Standard Life surveyed employees who were active in the voluntary sector to reflect on how their involvement had increased their skills as an employee. When Standard Life asked managers to evaluate the employees’ performance, they found a perfect match with the employees’ own assessments of their improved performance. Standard Life was able to demonstrate, in a quantifiable way, that engaging employees in the sector could ‘pay off’ for the company.

Patterson had some advice for the voluntary sector in its dealings with corporations: “Have a clear idea of what you’re trying to do, why you’re in the best position to do it, and be creative about what you ask for.” In some cases, it may be best

for voluntary organizations to collaborate in bringing a potential request to the private sector.

Public Sector: Tony Blair's Labour government recently signed a compact with the sector in Wales, Northern Ireland, Scotland, and England, which outlines the terms of a fruitful partnership among the various actors. The Canadian government is also studying the possibility of forging a similar accord with the sector, as expressed in the recent Speech from the Throne. But according to one senior government official, before such an accord can be struck, the government, in tandem with its partners, will have to sort out some fundamental accountability issues with regard to these partnerships. Accountability is not only an issue for the sector. The government, too, must account for its spending. "At the end of the day," said Kathy O'Hara of the Treasury Board Secretariat, "we have to account to taxpayers with regard to how their money was spent."

The idea of an accord or compact with the sector is an important first step because it has tremendous symbolic value, but it must be matched by an institutional commitment from government. The creation of a new federal body that could operate at arm's length from government is one possible solution. It could demonstrate to the sector and to society at large that enhancing the role of the sector is an important government priority, as well as go some way toward addressing the concerns regarding the blurring of boundaries among the three sectors. Without such "mechanisms for dialogue", it may become increasingly difficult to address the larger, overarching issues around restructuring.

7. The Forces of Globalization

The effects of globalization are far-reaching and, admittedly, difficult to grasp. Globalization is a shorthand term to describe a phase of profound change underway in the social, economic, political, and technological composition of societies. Nonetheless, it does have some concrete manifestations for the sector. At the economic level, for instance, we have witnessed an increase in the number of truly 'global' firms. The increasing presence of multinational firms in Canada – where local owned firms once flourished – means that the corporate community can lose its sense of connectedness to the local community. This may have a negative impact on the ability of agencies to enlist the support of such firms, some of which may not feel a link to the community in which they do business.

8. Tapping the Potential of the Internet

For the voluntary sector 'getting wired' means much more than creating a Web site to post current information and/or resources. Increasingly, the most media savvy and resource-rich organizations are beginning to see the Internet's potential as a source for expanding their volunteer base, raising funds, and forming innovative partnerships. The United Nations Development Programme (UNDP) recognized this when it collaborated with high-tech firm Cisco Systems to develop Net.Aid, which raises money for international third-world development. In its recent report, *e-Philanthropy, Volunteerism, and Social Changemaking: A New Landscape of Resources, Issues, and Opportunities*, the U.S. based W.K. Kellogg Foundation found numerous examples in the U.S. of intersectoral partnerships among non-profits and the public and private sectors. One of

the most publicly visible was the launch of 'helping.org', which was founded by America Online in partnership with the Benton Foundation, Impact Online, Guidestar, Points of Lights Foundation, and the Urban League, among others. The project seeks to build a non-commercial portal (network of sites) that provides a full spectrum of services, opportunities, and information related to philanthropy, volunteerism, and social development efficacy. One of the non-profits involved in the project found that in the first month of operations alone, it had received thousands of requests for volunteering opportunities.

Of course, such partnerships, not to mention the general thrust toward all things 'cyber', have their share of pitfalls. Far from being the great panacea, such partnerships will require nothing short of innovation – “new solutions, new ways of using capital, different ways of conceptualizing partnerships – and an underlying common commitment by the leaders developing these sites that they serve the common good and are not simply commercial opportunities.”⁹ In addition, it is quite possible that such online partnerships are not a 'one-size-fits-all' solution. Establishing a presence on the Internet or exploiting the potential of 'e-giving' may be, for various sound reasons, not feasible for smaller organizations. For those organizations that lack the technical know-how to create snappy web pages, there is a potential to call on the corporate sector to provide in-kind support, in the form of assistance with web-page design and the like. Corporations who may be unable to provide financial assistance may nonetheless be willing and able to provide this type of invaluable support.

⁹ W.K. Kellogg Foundation, “*e-Philanthropy, Volunteerism, and Social Changemaking: A New Landscape of Resources, Issues, and Opportunities*,” February 2000, p. 12.

Conclusion

Responding to the challenges that lay ahead will require a heady mixture of determination, creativity, and energy. The sector faces not only the challenge of continuing to provide high-quality existing services in the face of shrinking or stretched resources, but also the added task of responding to rapidly emerging issues as they unfold. To summarize, the preliminary research and key informant interviews identified at least eight general issues that require attention. First, we noted a number of pressing concerns with respect to the capacity of the sector itself, including the ability to attract new volunteers and to retain old ones, the need for strong leadership within the member organizations and within the sector itself. Second, we discussed some of the forces that are driving the increased demand for services. Third, we identified the challenge of building a stronger, diversified donor base, which may require the sector to look to less-traditional sources of support, and to expand upon existing ones. Fourth, we examined why we need to engage the sector in discussions of the role of advocacy. Organizations are rightly concerned that the struggles to stay afloat financially and to meet the demand for services often steer them away from advocacy, which is the cornerstone of an engaged and active citizenry. Part of the answer may rest with strengthening the sector's voice at the national level, so it can respond to and sound off on important public policy issues for which a strong national voice is required. Another component of the response may involve a serious consideration of how organizations are representing their clients or constituencies, or how they can best involve the people for whom they are advocating. Fifth, the question of accountability and how to measure outcomes looms large. For the most part, however, organizations and the sector itself have been loath to consider how

they can make accountability work for them, concentrating instead on the funder's needs. Sixth, more attention will need to be paid to forging mutually beneficial partnerships among the three sectors, not to mention intra-sectoral partnerships among voluntary organizations. Seventh, the effects of globalization on the sector need to be explored in a more concerted manner, with an eye to understanding its impact on the ground. And finally, we examined the explosive potential of the Internet, both as a tool to foster partnerships among the sectors and as a way to attract new volunteers. There are numerous developments in the U.S. and elsewhere to suggest the Internet could be just what the sector needs.

List of Key Informants

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