

An Assessment of the State of Voluntary Sector Research and Current Research Needs

August, 2000

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Executive Summary

Growing recognition of the importance of voluntary organizations to Canadian society has helped fuel interest in obtaining a better understanding of these complex and diverse set of organizations. This report assesses the current state of research on the voluntary sector in Canada and identifies a number of gaps and areas where further research may be needed. Our assessment is based on a review of the literature regarding the voluntary sector in Canada and a series of interviews that were conducted with 25 voluntary sector and academic key informants in July 2000.

The literature reviewed is confined to that which addresses issues pertaining to the voluntary sector as a whole and that is either national in scope or, addresses issues that are relevant to an understanding of the voluntary sector in Canada. In addition, we have excluded from this study, the large body of prescriptive ('how to') literature on such things as fundraising and management.

We uncovered over 110 studies that relate to the voluntary sector in Canada. Some areas of research, quite naturally, receive more attention than others. There appear to be a relatively larger number of studies that provide overviews of the voluntary sector and address issues such as its size, scope and sources of funding; although most of these are confined to studies of charities. Other areas that receive attention in the literature include: accountability, governance and evaluation; legal and regulatory issues pertaining to charities; relationships with government; giving and volunteering; and boards. Areas where the amount of research is much more limited include: human resource issues and partnerships.

The literature, on the whole, appears to be relatively recent (most of it being conducted in the 1990's), atheoretical and focused upon a small number of topic areas. In addition, much of it does not appear to address the needs for research that were identified by the voluntary sector representatives and academics that we interviewed. Gaps in the research, from the perspective of key informants, include a lack of research on: how voluntary organizations are funded (i.e., processes and mechanisms); capacity issues, management information, evaluation, partnerships and governance. Other gaps that are apparent in the research but were not identified by key informants include a lack of research on the: size, scope and funding of voluntary organizations that are not registered charities; the contributions that voluntary organizations make to society and relationships between the business sector and the voluntary sector.

There also appear to be weaknesses in the research infrastructure for the voluntary sector. For example, a substantial portion of the research is attributable to the financial support of a single funder, the Kahanoff Foundation Nonprofit Sector Research Initiative, which is a time-limited initiative that is near the end of its mandate. Finally, much of the research has been produced by a small number of researchers and research organizations.

Introduction

As views about the roles that governments should play in meeting collective needs have shifted, there has been increasing recognition of the potential importance of voluntary and nonprofit organizations to Canadian society. Public policy interest in the voluntary sector^{1[1]} has highlighted the need for a better understanding of the sector, its roles, potential roles, contributions, strengths and weaknesses and has drawn attention to the need for voluntary sector research. The following provides an assessment of the current state of voluntary sector research in Canada and the areas where further research may be needed.

Our review indicates that there is a growing body of literature on the voluntary sector in Canada. Much of it is concentrated in a small number of topic areas many of which do not correspond to the research needs identified by our key informants. In addition, our analysis suggests that the voluntary sector research infrastructure may not be as robust as one would hope. There appear to be a small number of funders of voluntary sector research and only a modest complement of voluntary sector researchers.

We begin by providing a review of the research literature on the voluntary sector.^{2[2]} We focus primarily on research that pertains to the voluntary sector as a whole and that is either national in scope or, addresses issues that are relevant to an understanding of the voluntary sector in Canada. We also provide an outline of current research-in-progress^{3[3]} and discuss briefly the sponsors of voluntary sector research. Next, we present the results of interviews with key informants regarding their views on voluntary sector research in Canada and areas where further research is needed. Finally, we compare existing research to the needs for research identified by voluntary sector key informants to identify current gaps in the research. In addition, we have excluded from this study, the large body of prescriptive ('how to') literature on such things as fundraising and management.

¹ There are numerous terms used to refer to and identify voluntary and nonprofit organizations such as: the third sector, the voluntary sector; the not-for-profit sector. For this review the term voluntary sector is used most often and includes both registered charities and nonprofit organizations that do not have registered charity status.

² For example, literature related to issues of accountability in Canada has been included but a study of evaluation practices in community recreation organizations has not. Key works discussing the size and scope of the nonprofit/voluntary sector in Canada have been presented here but resource manuals on how to improve volunteerism among youth have not.

³ Our review of research in progress is based on entries in the Canadian Centre for Philanthropy's Research-in-Progress Catalogue that is available online at www.nonprofitscan.org.

A Review of the Research Literature

Our review of the research literature pertaining to the voluntary sector includes over 110 voluntary sector studies. We have organized the review according to the following themes:

- Definitional and classification issues
- Overviews of the voluntary sector: size, scope, value and funding
- Accountability and governance
- Legal and regulatory issues
- Relationships between the voluntary sector and government
- Charitable giving and volunteering
- Human resources
- Boards: management and leadership: and,
- The commercial activities of nonprofits

Each of these is discussed, in turn, below.

Definitional and Classification Issues

The need for better definitions and classification systems for studies pertaining to the voluntary and nonprofit sector has been recognized by a number of researchers. Febraro, Hall and Parmegiani (2000), for example, note that the variety of labels, dimensions, and classificatory systems currently in use constrains policy dialogue and the advancement of knowledge.

There has been some work on the definitional issues. Thayer-Scott (1995; 1997), for example, discusses the origins and definitional nuances associated with the use of terms such as “voluntary organizations”, “nonprofit organizations”, “not-for-profit organizations”, and “third sector” organizations. Davidman, Betcherman, Hall, & White (1998), Febraro, Hall, & Parmegiani (2000), and Hall & Banting (2000) broaden the discussion to include terms such as “social economy”, “civil society”, and “non-governmental organizations.” Klatt (1997) also discusses some of the definitions employed to describe voluntary organizations.

Associated with the challenge of adequately defining the field of study is the issue of determining which organizations should be included or excluded in studies of the voluntary/nonprofit/third sector. As Hall & Banting (2000) note, some organizations such as hospitals and universities are formally incorporated as nonprofit organizations but are so strongly influenced by government that they could be considered government institutions. In addition, many nonprofits engage in commercial activities to generate revenues while some for-profits include social missions along with their for-profit mandates. Both Febraro, Hall, & Parmegiani (2000) and Davidman, Betcherman, Hall, & White (1998) offer some proposals about the appropriate boundaries for the sector

noting, however, that different studies may appropriately make different choices about the types of organizations to include in the voluntary sector.

Davidman, Betcherman, Hall, & White (1998) and Febbraro, Hall, & Parmegiani, (2000) propose classification systems that are based, in part, upon the International Classification of Nonprofit Organizations developed by the Johns Hopkins Comparative Nonprofit Sector project (Salamon & Anheier, 1992). Sharpe (1994) developed a classification system for charities that has been broadened by Hall & Macpherson (1997) for use in studies by the Canadian Centre for Philanthropy.

Overviews of the Voluntary Sector: Size, Scope, Value and Funding

There have been a number of attempts to assess the size, scope, and/or value of the voluntary sector in Canada. Most have restricted their focus to charitable organizations, those nonprofit organizations that are registered as charitable organizations by the Canada Customs and Revenue Agency (CCRA)^{4[4]}. This restriction in focus of the studies is due in part to the fact that the most readily available information on nonprofit organizations are the T3010 tax returns that all charitable organizations are required to annually file with the CCRA.^{5[5]}

For example, Ross (1983) analyses data from two Statistics Canada survey reports – a 1979-1980 survey of volunteer activity in Canada and a survey of financial statements of registered charities in Canada from 1980 – to provide a “first-step” representation of the voluntary sector in terms of its financial and human resources, including paid staff and volunteers.

Martin’s (1985) seminal book, *An Essential Grace: Funding Canada’s health care, education, welfare, religion, and culture* provides information about the ways and methods that Canadians have of resourcing the ‘humanistic’ or charitable organizations, this book also provides an historical perspective of resource allocation and challenges to the sector in decades preceding publication including economic and funding issues.

Quarter’s book, *Canada’s Social Economy* (1992) examines the voluntary/nonprofit sector from the perspective of the “social economy”, which emphasizes both its social and economic attributes and provides an overview of economic aspects of the sector and case studies. Quarter provides the often quoted estimate that there are over 100,000 nonprofit organizations in Canada in addition to those registered as charities.

⁴ formerly Revenue Canada

⁵ It is worth noting that data from T3010 tax returns are acknowledged to be subject to serious limitations and potential biases (Sharpe, 1994; Day & Devlin, 1997).

Smith (1992) compiles data from a number of sources including the 1987 Voluntary Activity Study and Revenue Canada to develop an economic analysis of human (volunteers) and financial (donations) resources to the sector. His findings emphasize the interconnectedness of the public sector, commercial activities, private households, and the nonprofit/voluntary sector or charitable economy.

Perhaps the most widely cited study is Sharpe's (1994) *A Portrait of Canada's Charities* which outlines the number of charities, their revenues, expenditures and their roles as employers using estimates derived from 1991 T3010 data. Sharpe's study produced the often quoted estimates that Canadian charities received \$86 billion in revenues, account for around 13% of GDP and employ nine percent of the total Canadian labour force. Building on Sharpe's work, Hall & Macpherson (1995; 1997) provide estimates of the size and scope of the charitable sector in each of the provinces.

The Canadian Centre for Philanthropy has produced a number of reports that examine the funding that charitable organizations receive using data from the T3010 tax returns that charities file annually. Hall (1995) examined the dependency that different types of charities have on government funding and their vulnerability to cutbacks in government. Macpherson (1995) reports on the granting practices of charitable foundations to charities using T3010 data and information from the Centre's database for the Directory to Foundations. Hall & Macpherson (1996b) examine which types of charities receive corporate donations using data from a survey of charities.

Other studies that have examined, the size, scope and financing of the sector include Campbell's work (1993, 1994) which highlights the significance of the size of the charitable sector in Canada using data from the 1987 Survey of Volunteer Activity; the 1990 T3010 data of registered charities, and the taxation data for receipted individual donations from 1985-1990 offers some comparisons with the United States. Using a slightly different lens, Belfall (1995) examines associations in Canada and, although the term associations is not clearly defined, it appears to denote nonprofit organizations. Although focused on the future impact and influence of these organizations, it reports data from a survey of members of the Canadian Society of Association Executives regarding their financing, activities, governance, and government relations.

Day & Devlin (1997) attempted to examine the size and scope of both nonprofits that are registered charities and those that are not by analyzing data from 1994 T3010 returns and a limited number of tax returns that other nonprofits filed with Revenue Canada. They estimated that the nonprofit organizations account for at least 4 percent of GDP in Canada.

There have been a number of studies that have provided general discussions of the voluntary sector and highlighted some of the contributions and the challenges they face. The Advisory Board on the Voluntary Sector for Ontario (1997) produced a report (*Sustaining Civic Society: Voluntary Action in Ontario*) based, in part, on a series of consultations that presents a general discussion of voluntary action that can be applicable country as a whole. Much earlier on the National Advisory Council on Voluntary Action

(1977) explored the subject of voluntary action in Canada as well as the possibilities for enhancing the relationship between the voluntary sector and the public sector (*People in Action: Report of National Advisory Council on Voluntary Action to the Government of Canada*). The Council relied upon meetings and consultations with voluntary sector members, upon data collected from volunteers, and examinations of voluntary organizations to develop a picture of the “current state of the ‘voluntary sector’”. Picard (1997) explores the changing nature of the voluntary sector in Canada, its challenges and limitations, and the impact of funding issues on the sector. His report is based on secondary data and interviews with voluntary and private sector representatives, and funders.

With a focus on the situation in Alberta, the Canadian Centre for Social Entrepreneurship (2000) discusses the challenges facing the voluntary sector in a period of “intense scrutiny”. Such challenges include accountability and questions about organizations’ fundraising practices; whether the voluntary sector can meet demands around government downloading; increased competition for funding; and the voluntary sector’s role in the development and progress of civil society.

More recently, Hall & Banting (2000) provide a current review of literature about the nonprofit sector in Canada regarding such things as their size, scope and contributions as well as the issues surrounding definition and classification. While much of this work summarizes other research, it does attempt estimate the number of grass-root (i.e., non-incorporated non-profit organizations) organizations in Canada. Based on U.S. estimates of the prevalence of grass-roots organizations, they estimate that there are as many as 870,000 grass-roots organizations in Canada. Hall (1999) reviews changes in voluntary action and voluntary organizations over the past decade and outlines some of the challenges that voluntary organizations may face in the near future.

Accountability and Governance

Although there are a number of publications that provide advice on governance and accountability practices of voluntary organizations, there appears to be very little research on these topics. Perhaps the best-known work in this area has been conducted by the Panel on Accountability and Governance in the Voluntary Sector (PAGVS), established to conduct research, promote discussion and make recommendations about how to promote accountability and governance in the voluntary sector. The Panel produced a discussion paper that provides a comprehensive overview of the issue of accountability and the roles of the voluntary sector and the government in addressing this issue (PAGVS, 1998). After a series of consultations with the voluntary sector, the panel issued its final report, *Building on Strength: Improving Governance and Accountability in Canada’s Voluntary Sector* (PAGVS, 1999).

Accountability in the area of charitable fundraising practices has received perhaps the most attention in the research. Palmer (1997) provides recommendations and suggestions for policies to encourage good fundraising practices in a review of current standards and codes of ethics in fundraising as well as current regulations in Canada and in other countries. There has been much research conducted by the Canadian Centre for Philanthropy. Hall's (1996) study of charitable fundraising practices outlines how charities raise money; the fundraising methods employed; the use of third-party fundraising firms; the costs of fundraising and fundraiser's opinions about the need for standards and regulations; evaluation practices and the roles that boards play in monitoring fundraising (see also Hall & Bozzo, 1998; Hall & Macpherson, 1995; 1996). Using data from the National Survey of Giving, Volunteering, and Participating (NSGVP), Hall & Febraro (1999a) demonstrate that donors have concerns about fundraising practices and how charities use their money. Hall & Parmegiani (1998) report similar findings from a qualitative study of donor opinions and attitudes towards charities.

Finally, Phillips and Graham (2000) examine the intersection of accountability and collaboration in the voluntary sector and discuss why these have become central issues, as well as their interconnections. They discuss the emerging challenges to organizations within the context of growing pressures to work collaboratively and offer solutions by presenting eight case studies from the health and social services fields.

The Canadian Centre for Philanthropy (2000) study of public attitudes towards charities, commissioned by The Muttart Foundation, examines the public's perceptions and opinions of charitable organizations and their activities. The survey of 3,863 Canadians focused on several areas: the perceived importance of charities; the advocacy of charities; the need that charities have for funding and the sources of funding; the business activities of charities; the way charities spend their revenues; and trust and confidence in charities and opinions about the need for greater accountability.

Evaluation

As PAGVS (1999) points out the ability for organizations to be accountable for the programs, goods, and services that they produce depends upon their ability to evaluate their work. Although there exists a significant amount of literature on evaluation and performance measurement, much of it consists of practical manuals about how to conduct an evaluation and much of it is restricted to particular types of voluntary organizations (e.g., health, social service). Work that concerns the sector more broadly is quite limited. The Broadbent Panel (PAGVS, 1999) offers recommendations about outcome evaluation for voluntary organizations. Murray and Balfour (1999) provide a general overview of evaluation and a critical review of a variety of evaluation systems and demonstrates the connectivity between voluntary sector performance evaluation and accountability from a sector-wide perspective. Bozzo and Hall (2000, 1999) review current evaluation tools and manuals that can be used by voluntary organizations, provide an assessment of the current state of evaluation resources and offer recommendations for improvements to these resources. Legowski and Albert (2000) address the issue of

performance and outcome measurement for the health sector and provide a review of the literature on health sector outcomes measurement. Although focused on health organizations, their work generalizes well to other types of voluntary organizations.

Legal and Regulatory Issues

There are a number of recent publications that address legal and regulatory issues for the sector. The Ontario Law Reform Commission (1996) prepared a two volume report that examines federal and provincial law that governs charitable organizations. It also provides recommendations regarding the regulation of charities and presents proposals for reform. This report addresses many current issues including: the determination of charitable status; advocacy; business activities; and regulation of fundraising practices.

In a study conducted by Canadian Policy Research Networks (CPRN), Hirshhorn & Stevens (1997) examine the need for improvements in the organizational law of nonprofits (i.e., the laws under which nonprofit organizations are incorporated) and in supervisory law and offer recommendations to facilitate the establishment of nonprofit organizations and to improve their accountability. Also as part of the CPRN project, Scharf, Cherniavsky, & Hogg (1997) assessed the main economic arguments regarding the tax treatment of charities, compare the Canadian tax system with that of the U.S and critically assess the options for reform in Canada.

Focusing on federal regulatory frameworks, Boyle (1997) prepared a background paper for the Voluntary Sector Roundtable, "*Charitable Activity*" under the Canadian Income Tax Act: *Definition, Process and Problems*, which discusses the issues pertaining to the definition of "charitable activity" in Canada, specifically as it relates to the Income Tax Act. Drache's (1998) review of Canadian tax laws that pertain to the definition of charity and the ability of charities to engage in political activity and advocacy, offers recommendations for reform in these areas. He provides an in-depth discussion, from a current and historical perspective, of Canadian tax law and its implications for Canadian charities. A main objective of the work is to clarify a more appropriate approach for identifying which charitable organizations in Canada qualify for tax relief. Within the context of reform, this paper pragmatically addresses the complexities of the Income Tax laws in relation to organizations' engagement in advocacy and what are considered political activities. Indeed, it includes a draft legislative proposal.

Drache (2000) reviews the work and recommendations of recent government-voluntary sector Joint Tables (see Working Together: A Government of Canada/Voluntary Sector Joint Initiative) and provides a critical examination of the current role of the Charities Division at Revenue Canada and proposes the creation of an independent charity tribunal or commission that would determine which organizations will be registered as charities. Finally, Monahan & Roth (2000) review existing federal regulation of charities and the performance of Canadian courts with regard to charities and evaluate proposals that have been advanced for regulatory reform.

Phillips, Chapman, & Stevens, (in press) is a compilation of several commissioned papers that provide varying viewpoints on four main subject areas. Topics include an empirical and theoretical approaches to understanding the sector; other papers discuss the legal meaning of charity; various aspects of charities law in Canada; and an additional section of papers is devoted to issues related to regulation of charities in Canada.

Relationships with Government

As studies such as Sharpe (1994) and Martin (1985) demonstrate, the voluntary sector and government are closely entwined. Voluntary organizations depend heavily on government funding to finance their activities and governments depend on voluntary organizations for the provision of public goods and services.

Rekart (1993) confronts the complexities of provincial and federal government-voluntary sector relationships with regard to funding. In her analysis of British Columbia voluntary organizations, she illustrates some of the challenges that voluntary organizations face when governments restructure their relationships with voluntary organizations. Phillips (1995) discusses the voluntary sector's capacities and limitations in the context of increasing demands upon the sector to expand its services and roles as government downloads services and cuts funding. Her paper reviews existing qualitative research and provides an overview of the sector and how it is resourced through funding and volunteerism. It considers "the three essential roles of the sector: representation, citizen engagement and service delivery."

Browne (1996) suggests that the increasing use of fee-for-service contracts between the government and the voluntary sector as a means of service delivery is imposing upon the voluntary sector's ability to manage its own agenda. Hall and Reed (1998) outline some of the impacts that government retrenchment can have on voluntary organizations and discusses some of the limitations that voluntary organizations face as providers of public services. Evans and Shields (1998) provide a theoretical overview of the voluntary sector in relation to the "new public administration of a post-welfare state". Evans and Shields (1998) raise questions about the impact of the new public administration on the governance of voluntary organizations. Reed & Howe (2000) studied voluntary organizations in Ontario and their response to budget cuts, new public policies and changing community demands.

The Canada West Foundation has produced a number of publications through their Alternative Service Delivery project which was designed to increase understanding of the nonprofit sector in Canada, its relations with the state, and its role in the delivery of social services. Roach (2000) analyzes data collected through interviews and roundtable discussions with non-profit social service agency staff members and makes several recommendations for better working partnerships between social service agencies and the government. McFarlane & Roach (1999a, 1999b, 1999c) report the results of a survey of 72 executive directors of social service agencies that demonstrates the attributes of nonprofit social service organizations, the role that volunteers have in nonprofit

organizations and the influence of government cutbacks on the use of volunteers, as well as the pros and cons of nonprofits delivering social services on the state's behalf. Orr (1999) examines the relations between government and non-profit organizations and discusses issues regarding the transfer and regulation of tax dollars from government to social service agencies. Orr identifies recent key trends in the area of policy and suggests that these trends influence the environment in which social service agencies and other nonprofit organizations function. Hiemstra (1999) examines the impact of government on religious non-profit organizations in Alberta and offers several conclusions that can be considered at a sector-wide level.

Charitable Giving and Volunteering

The growing literature on giving and volunteering has been included in this review because of its importance as key resources for voluntary organizations. Much of the literature is based on analyses of two surveys the 1987 Voluntary Activity Survey (VAS) (see Duchesne, 1989) and the 1997 National Survey of Giving, Volunteering and Participating (NSGVP) (see Hall, Knighton, Reed, Brussières, McRae & Bowen, 1998). The major exception is the work of Arlett, Bell, & Thompson (1988) who report findings about individual charitable giving and volunteering, and corporate philanthropy using data from personal income tax returns, a survey by Decima Research (1987) of individual Canadians' attitudes toward giving and volunteerism.

Studies Based on the 1987 VAS

Duchesne (1989) provides highlights of the 1987 Voluntary Activity Survey, which examined individual volunteering in Canada. The Voluntary Action Directorate also produced a series of 34 monographs based on the 1987 survey in 1989. With the general title, *A Profile of Volunteers based on the 1987 National Survey of Volunteer Activity*, each monograph is focused upon a particular area of volunteer activity and deal with both the general characteristics of volunteers (e.g., youth (Cumyn, 1989); women (Brennan, 1989), urban and rural (Faid, 1989) and the characteristics of volunteers for specific types of organizations (e.g. social service organizations (Prince, 1989); health organizations (Kent, 1989).

Other reports based on the VAS include Ross and Shillington's (1987) study that summarizes findings with a focus on the sociodemographic characteristics of volunteers and Day & Devlin's (1995) that examines whether government spending "crowds out" or has a negative impact on people's volunteering.

Studies Based on the 1997 NSGVP

The NSGVP examines both volunteering and charitable giving. *Caring Canadians, Involved Canadians: Highlights from the 1997 National Survey of Giving, Volunteering and Participating*, provides a general overview of and introduction to the results of the first in-depth survey of Canadian's giving and volunteering and civic participation patterns (Hall, Knighton, Reed, Brussières, McRae & Bowen, 1998). The bulk of the NSGVP research to-date has been conducted by the Canadian Centre for Philanthropy

and Volunteer Canada and is available on-line on their a web site (www.nsgvp.org). Their research includes:

1. A series of fact sheets presenting national descriptive statistics on giving and volunteering on topics such as: gender differences in giving and volunteering (Febbraro, 1999); the demographic profiles of volunteers (Parmegiani, 1999), and the benefits of volunteering (Greenberg, 2000)
2. Monographs that examine giving and volunteering to social service organizations (Heinz, 2000), giving and volunteering to health organizations (Heinz, 2000), and the role of religion in giving and volunteering (Bowen, 1999).
3. Provincial monographs that outline survey findings for: Alberta (Greenberg, 2000), British Columbia (Saunders, 2000), and Ontario (Greenberg & Bozzo, 1999)
4. A series of fact sheets providing provincial-level highlights of NSGVP findings. For example, charitable giving in Alberta (Saunders, 2000), volunteering in British Columbia (Saunders, 2000), and giving and volunteering in Ontario (Parmegiani, 1999)
5. Fact sheets highlighting survey findings regarding giving and volunteering for the urban centers such as Hamilton (Parmegiani, 1999), Calgary (Saunders, 2000), and Victoria (Saunders, 2000)

The Canadian Centre for Philanthropy's has also produced a number of research bulletins that are based on the NSGVP. These include Hall & Febbraro (1999) who address the reliance of voluntary organizations on a small number of major donors and volunteers who provide the bulk of all giving and volunteering; and Parmegiani & Hall (1998) who provide provincial statistics on giving as well as demographic profiles of donors by province.

Finally, there are reports produced by Statistics Canada. Jones (2000a) examines what types of volunteer organizations attract young people the factors that encouraged growth in youth volunteering including changes in the labour market, and the influence of early experience on volunteering (Jones 2000b). Reed and Selbee (2000) attempt to determine the characteristics that distinguish active volunteers from other volunteers.

Research Based on Individual Tax Returns

The charitable donations that individuals claim on their T1 tax returns provide another source of data on charitable giving. Duern (1991) analysed Revenue Canada taxation statistics from the years 1986 and 1987. The Canadian Centre for Philanthropy produces an annual bulletin that examines trends in individual giving since 1987 (e.g., Heinz, 2000). Macpherson (1996) provides an analysis regional variations in charitable donations claimed and Hall (1996) examines the role that age and income play in claimed donations.

Human Resources

There is very little research on the human resources needs or capacities of the voluntary sector. There has been some work that demonstrates its importance as an employer. Sharpe (1994), for example, estimates that charities alone employ 1.3 million Canadians (about 9% of the labour force) and Browne (1996) reports the results of a survey that shows that nonprofits provided 1.6 million jobs in 1994-95.

Davidman et al. (1998) discussed research needs in the context of the lack of data and knowledge regarding the human resources capacity of the sector. This article acknowledges that “we currently know very little about work in the nonprofit sector” (pg. 45). The article draws on Statistics Canada data and secondary data from (Sharpe, 1994), (Day and Devlin, 1997), the 1997 NSGVP, a salary survey conducted in British Columbia in 1995 (Volunteer Vancouver, 1995), and data from Browne’s (1996) paper for Human Resources Development Canada on the “third sector” and employment.

Two studies provide some information about voluntary sector salaries. A KPMG report (1998) of a study commissioned by The Muttart Foundation examines the salaries and compensation to CEOs, second-level managers and volunteer service managers in the provinces of Alberta and Saskatchewan. Armstrong & Cuthbertson (1995) discuss findings from a Volunteer Vancouver survey of voluntary organizations’ staff salaries and benefits in British Columbia.

Finally, Browne and Landry (1996) analyze Statistics Canada 1995 labour force data and the results from a survey (Ekos) of “nongovernmental groups and agencies” which asked questions about “full-time and part-time employment, term and contract employment, the employment of women, staff distribution according to occupational category, salaries, changes of employment levels, reasons for increases and decreases in employment, expectations of future increases or decreases in employment, training, and volunteers.”

Boards: Management and Leadership

The boards of directors of voluntary organizations have been the subject of a number of research studies. Bradshaw, Murray & Wolpin (1992) report the findings of research focused on “the question of power in and around boards” and the extent to which organizations fit into “five common patterns of board power relations”. Murray and Bradshaw (1992) identify the importance of “core groups” of committed board members to the effectiveness of an organization. Murray, Bradshaw, & Wolpin (1992) argue that power is an important, largely neglected aspect of board governance in the nonprofit sector and propose five patterns of board governance based on the distribution of power in and around boards of nonprofit organizations.

Bradshaw, Murray & Wolpin (1996) explore the factors that might explain the participation patterns of women on nonprofit boards and the impacts of this participation on how the boards operate. Brudney & Murray (1998) analyzed recent board change efforts in a survey of Canadian nonprofit organizations and the effectiveness of these efforts. Finally, Dart, Bradshaw, Murray, & Wolpin (1996) use data from a survey of Canadian nonprofit organizations to empirically test hypotheses derived from models of nonprofit board “life cycles.”

The Commercial Activities of Nonprofits

There have been two studies that examine the commercial activities of voluntary organizations and their consequences. Zimmerman and Dart (1998) present an analytic framework for understanding the commercial activities of nonprofits and the potential impact of these activities on the organization, the voluntary sector and society that is based on a review the literature regarding commercial activities by nonprofit/voluntary organizations and a series of interviews with key informants. Dart & Zimmerman (2000) build on their earlier work by presenting two case studies that help to illustrate how voluntary organizations use business activities and what effects these activities have on the organizations, particularly its mission-related service.

Research-in-Progress

Published literature provides one indication of the current state of voluntary sector research. However, because it usually takes some time for research to be published it is also useful to have some sense of the amount and type of research that is currently “in-progress” and has yet to be published. Information about current research-in-progress is available on-line via the Canadian Centre for Philanthropy’s Catalogue⁶. The Catalogue has been developed to provide timely access to information and is updated annually by surveying Canadian academics and researchers about their research on nonprofit sector topics.

Although the Catalogue probably does not capture all of the research-in-progress in Canada because it relies on researchers to return our surveys, it does provide us with some sense of which topics are receiving the greatest attention in current research projects or those for which the results have yet to be published. As with the literature review, the current research has been organized by themes. Out of the 215 entries in the Catalogue we have identified 33 projects that meet our criteria of being focused on the voluntary sector as a whole. Table 1 summarizes the number of projects currently underway by topic and shows that relationships between the voluntary sector and government are currently receiving the most attention, followed by research that

⁶The Catalogue can be accessed at www.ccp.ca or www.nonprofitscan.org.

addresses the issue of the funding of voluntary organizations. Research on boards is the third most frequent area of activity.

Table 1. Subject Matter of Current Research-in-Progress

Research Topic	Number of Studies Addressing the Topic
Definitional and Classification Issues	1
Overviews of the Voluntary Sector: Size, Scope, and Value	3
Funding of Voluntary Organizations	5
Accountability and Governance	3
Evaluation	2
Legal and Regulatory Issues	1
Inter-Relationships between the Voluntary Sector and Government	8
Charitable giving and volunteering	3
Human Resources	
Boards Management and Leadership	6
The Commercial Activities of Voluntary Organizations	1
Partnerships/Collaboration	5
Social Capital	2

Sponsors of Voluntary Sector Research

Any discussion of the state of research on the voluntary sector would not be complete if it did not provide some picture of the environment in which research is conducted. There are few consistent sponsors of voluntary sector research. A number of federal government ministries such as Canadian Heritage, Human Resources Development Canada and Health Canada fund occasional studies. For example, Canadian Heritage (then the Secretary of State) funded the 1987 Voluntary Activity Survey and a variety of monographs that reported the results of the study. Health Canada funded studies on the definition and classification of voluntary organizations (Febbraro, Hall, & Parmegiani, 2000) and on the measurement of outcomes (Legowski & Albert, 2000). Human Resources Development Canada provided funding for Rekart's (1993) study of nonprofit organization in British Columbia. All three government ministries contributed funding for the 1997 NSGVP and provided support for disseminating the findings of the study.

The Kahanoff Foundation Nonprofit Sector Initiative (NPSRI) has probably been the biggest supporter of voluntary sector research. It is a five-year initiative that was established in 1995 with three objectives:

1. To improve the formal knowledge base and data on activities within the sector;
2. To enlarge the research community interested in ongoing research within and about the sector; and

3. To broaden the understanding of the role that the nonprofit sector plays in civic society and to inform the public policy process dealing with the sector.

The NPSRI has helped to stimulate a substantial amount of research on the voluntary sector in Canada, most notably:

- A series of projects conducted by Canadian Policy Research Networks studies of the nonprofit sector that examined the size and scope of the sector as well as exploring a number of legal issues. (e.g., Day & Devlin, 1997; Hirshorn, 1997; Hirshorn & Stevens, 1997; Sharf, Cherniavsky & Hogg, 1997).
- The Statistics Canada Nonprofit Knowledge Base project (e.g., Reed & Howe, 2000; Reed & Selbee, 2000)
- The Canada West Foundation Alternative Service Delivery Project (e.g., McFarlane & Roach, 1999a; Roach, 2000).
- A variety of research on legal and regulatory issues (Drache, 1998, 2000; Monahan & Roth, 2000; Phillips, Chapman, & Stevens (in press).
- Over twenty research projects funded through Queen University's School of Policy Studies. These studies are being released in a series of edited volumes (e.g., Banting, 2000); and,
- The 1997 National Survey of Giving, Volunteering and Participating

It is important to note that the NPSRI is in the process of winding down which raises the question about whether or not there will be alternative sources of funding to continue to support voluntary sector research.

Concluding Observations

Our review of the literature on the voluntary sector in Canada enables us to assess what kinds of topics are being researched, what kinds of topics that information is available on and what topics for which there is little information. One of the first observations that can be made about the state of research on the voluntary sector is that most of it is relatively recent. Research on these topics appears to have really only begun in the 1990's. Another notable feature is that a large portion of the research pertains to charitable organizations. This is particularly the case for research that attempts to examine its size and scope and how it is funded and research on legal and regulatory issues. There is substantially less information available about voluntary organizations that are not registered charities. Most of the research has been produced by a relatively small number of researchers and research organizations. In addition, much of the research is applied in nature and is not guided by theory, which suggests that voluntary sector research is still in its early stages, and has not yet matured as a field of research.

There are also some obvious gaps in the literature. For example, there doesn't appear to be any research that demonstrates the contributions that nonprofits make in society with the exception of research on the economic contributions of charities. There is also a paucity of work about the human resources the sector relies upon and surprisingly little

research that examines the relationships that voluntary sector organizations have with business⁷.

⁷Phillips and Graham (2000) discuss accountability within the context of the changing nature of philanthropy including partnerships with business.

Perceptions of the State of Voluntary Sector Research

Our assessment of the state of voluntary sector research is based on an analysis and review of the literature as well as a series of interviews with key informants. The literature review provides a picture of the type of research that is being conducted and the research topics that are being addressed. The key informant interviews provide information about the voluntary sector's views on the state of research and the needs for additional research.

Interviews were conducted with twenty-five key informants in July 2000. The key informants consisted primarily of voluntary sector representatives from national voluntary organizations and foundations and a small number of (four) academic researchers. Each of the key informants was asked to provide information about the state of the voluntary sector research in Canada, and the key issues that research should address in the voluntary sector.

General Perceptions

Overall, the key informants indicate quite strongly that research on the voluntary sector is severely underdeveloped. Several respondents suggest that other countries such as the United States, the United Kingdom, and Europe are much more committed to research issues in the voluntary sector than Canada. Informants' impressions of the state of voluntary sector research range from very negative to slightly positive. The majority of those interviewed indicated that research in the sector is "minimal," "weak," "immature," "dismal ... and almost non-existent," or "woefully inadequate". However, a significant minority (five) suggested that there was "some progress" and "more interest now than in the past," but that it was "just in the beginning stages."

Voluntary sector key informants noted a number of limitations of current research. Many noted the need for better definition and classification of the voluntary sector and the need for research that had practical applications. Other limitations identified include the lack of research that has sector-wide implications and the lack of an institutional infrastructure to support research and, in particular, the collection of sector-wide data.

In contrast, academic researchers often identified the need for greater attention to theory in the research and for more comprehensive research. However there was some recognition of the need for research that had practical applications for voluntary sector organizations. The need for more sector-wide research was also identified.

Another theme that emerged was the perceived gap between voluntary sector "practitioners" and academic researchers. Clear differences emerged between the views of voluntary sector representatives and academic researchers as to what constitutes research and how it should be done. Some voluntary sector key informants suggest that

the research that is done at the organizational level is often dismissed or ignored by academics who see themselves as the only group doing concrete research. Others argue that academics are not attentive enough to the research work that is being done in the sector by its own members. The following responses illustrate some of the views expressed on this issue:

- “research is being done on the ‘frontlines’ but this work is either overlooked or not given adequate respect by either the general public or academics. There is a disconnect between the two groups.” (voluntary key informant)
- “members of the voluntary sector are looking for a “generic workbook” to solve problems when what is needed is to bridge the gap between the two groups [academics and sector organizations] and ensure that credible practical research is being done and that the research has a practical application within the sector.” (academic key informant)

Areas in Need of Additional Research

The key informants had little difficulty identifying a multitude of issues that they thought required more research. However, many had difficulty identifying a single area where research was most needed. The identified needs for additional research can be grouped into six areas: 1) financing/funding, 2) capacity issues, 3) management practices, 4) evaluation for accountability purposes, 5) partnerships; and 6) governance. Each of these is discussed in some detail below.

Financing/Funding

Seven of the twenty-five key informants identified financial issues as the most important area for research. The most pressing issues appear to be related to problems associated with funding voluntary organizations on a project basis. The types of issues that need to be addressed include the efficiency of current patterns of funding voluntary organizations and the effects and impacts of funding only short-term programs have on the community. As one respondent noted, while a particular community project might be lauded as a successful endeavour, governments for one reason or another may have moved on to address new demands in the community. Hence, sector organizations continually find themselves coping with the residual fall-out effects of a beneficial program that is without financial aid and that needs to be terminated.

A need was also expressed for research that would demonstrate how to obtain greater commitment on the part of government to sustain successful and necessary programs and ensure that sector organizations are more capable of fulfilling their responsibilities to their mandate and hence, to the community.

One respondent indicated that primary data collection is needed on a continuing basis in such areas as: funding sources, ratios of private to public funding, average budgets, staffing and volunteer costs.

Capacity Issues

The next important area of need appears to be for research that addresses the capacity of the voluntary sector. Capacity is a large and potentially broad research topic. For the purposes of this paper, it is defined as “the human and financial resources, technology, skills, knowledge and understanding required to permit organizations to do their work and fulfill what is expected of them by stakeholders.” (from Report of the Joint Tables (1999, 29). A need for research in the following areas was identified: 1) measuring the capacity of organizations to become more self-sufficient; b) how to promote and implement systemic changes; c) the efficiency of organizations and the development of tools to help organizations to operate more effectively; d) measuring the capacity of the voluntary sector to conduct research and utilize research information.

Management

The voluntary sector often finds itself subject to the whims and fads of the latest practice model according to key informants. It also frequently finds itself being shaped by “management practices used in business and not-for-profit groups.” The following topics were identified as needing further research: 1) management models that can be applied successfully to the sector; 2) the development of appropriate management priorities around issues of education and training for volunteers and staff; 3) evaluations of the pros and cons of accreditation; 4) approaches to accreditation; 4) the needs of volunteers in the future (e.g., appropriate definitions, recruitment needs, retention, training and, the value of volunteering); and 5) research on the impact of the professionalization of management, volunteers and staff in the sector. With regard to the latter research area, one respondent noted “In many ways, the sector has been ‘professionalized’ [using business methods and nonprofit business methods as models to run the voluntary sector] and no one is clear about what this means to sector organizations.”

Evaluation

Key informants suggest that evaluation should not be reserved only for the voluntary sector. Research is needed around evaluation methods and accountability mechanisms and the sector. The need for evaluation methods that generalize across sectors to ensure that organizations in each sector are achieving excellence was identified as well as the need for research that would enable the measurement of impact of the voluntary sector on the community.

Partnerships

According to those interviewed, partnerships are becoming more and more essential to the voluntary sector to ensure excellence in service delivery. As government downloading continues to effect voluntary sector organizations, new and innovative methods are being sought to provide needed funding sources, new avenues for linking to the community and access to resources that might be available in the private sector. Key informants indicated that research was needed that would show how to develop successful partnerships and collaborations that ensure effective service delivery. It was suggested that research should not only examine partnerships among voluntary organizations; but, also partnerships with all levels of government, corporations, the academy, and the community.

Governance

Key informants point to issues of board/staff/volunteer relations as a prominent focus for the voluntary sector. Boards are being required to take on more active roles in organizations and board/staff relations are seen as an essential research area because they are so complex. Suggested areas for further research include: best practices for managing board/staff/volunteer issues; best practices for “multi-tiered organizations; and work that clarifies and codifies what are appropriate rules of governance in the voluntary sector.

The Gaps Between Existing Research and the Needs Identified by Key Informants

Our key informants identified a need for further research in the areas of: the funding of voluntary organizations, the capacity of voluntary organizations, the management of voluntary organizations, evaluation and accountability, partnerships, and governance. Our review of the literature confirms that there is indeed a lack of available information on many of these topics. We address each of these in turn below.

The Funding of Voluntary Organizations.

Although there has been some research on how voluntary organizations are funded, this has primarily examined the source of funds for organizations (i.e., it addresses the question of who funds voluntary organizations). However little research exists that has examined the funding mechanisms and how funds are provided to voluntary organizations.

Capacity. There is very little empirical research that has addressed the capacity issues of voluntary organizations.

Management. Although identified as an issue by key informants, the literature review that was conducted excluded the prescriptive management literature (i.e., the “how to” books and reports) because of its focus on literature that addressed the voluntary sector rather than the management of voluntary sector organizations.

Evaluation. Better research in the area of evaluation was identified by key informants in the context of the need for organizations to improve their accountability. Although there is an abundant literature on evaluation techniques (i.e., ‘how to’ literature), there does appear to be a scarcity of research on models and approaches that can help organizations in the area of accountability

Partnerships. Key informants identified the need for better research on partnerships between the voluntary sector, government, corporations and the academy. The literature review uncovered very little in the way of Canadian literature that addresses this issue.

Governance. Governance issues appear to be addressed to some degree in the research literature, although much of the literature is based on academic research which may not be of sufficient practical value to voluntary sector organizations.

Conclusion

This assessment of the state of voluntary sector research reveals a number of limitations in the current Canadian body of knowledge on the voluntary sector as well as some apparent weaknesses in the research infrastructure. Our review reveals a body of knowledge that is relatively new, atheoretical and focused upon a small number of topic areas. In addition, much of it does not appear to address the needs for research that were identified by the voluntary sector representatives and academics that we interviewed.

Research on the voluntary sector in Canada appears to be a relatively recent phenomenon with most of it being the product of the 1990's. In addition, most of it is applied in nature and designed to address practical questions. The "newness" of the research and its lack of grounding in theory are both indicative of a field of study that is in its infancy in Canada and in the early stages of development.

There are obvious gaps in the literature, some of which were identified by our key informants and others, which were apparent in the literature review itself. Some of the biggest gaps between the available literature and the needs for research identified by key informants pertain to the funding of voluntary organizations and capacity issues. There is very little research that examines the mechanisms for funding voluntary organizations or their capacity. Key informants also expressed a need for more research on evaluation within the context of accountability, partnerships and governance. Our review reveals that there has been a modest amount of research done on these topics.

Other gaps that are apparent in the research but were not identified by key informants include a lack of research on the size, scope and funding of voluntary organizations that are not registered charities and, with the exceptions of a few studies that assess the economic contributions of charities, an almost complete absence of research on the contributions that voluntary organizations make to society. There is also little information about human resources issues in the sector or about relationships between the business sector and the voluntary sector.

There are also apparent weaknesses in the research infrastructure. The base of financial support for voluntary sector research may be quite narrow. Indeed, a substantial portion of the research is attributable to the financial support of a single funder, the Kahanoff Foundation Nonprofit Sector Research Initiative, which is a time-limited initiative that is near the end of its mandate. Finally, much of the research has been produced by a small number of researchers and research organizations.

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