

Imagine Canada's Sector Monitor

August, 2011

Highlights from the Sector Monitor, Vol.2, No.1

The percentage of organizations reporting difficulty carrying out their mission has dropped from mid-2010.

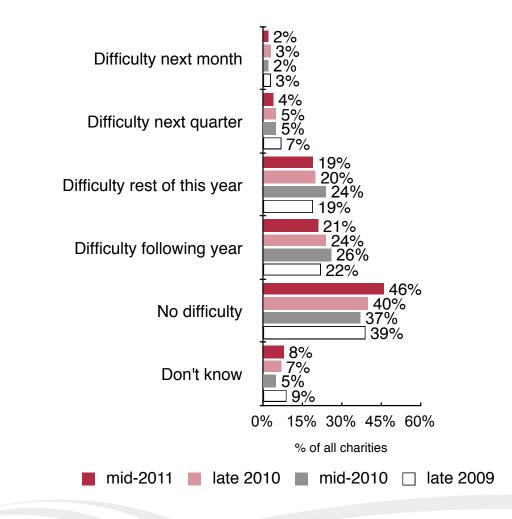
	mid-2011	33%	22%
Experiencing an increase in demand for	late 2010	33%	22%
products and services	mid-2010	33%	22%
	late 2009	28%	17%
	mid-2011	29%	15%
Difficulty fulfilling	late 2010	34%	15%
mission	mid-2010	32%	20%
	late 2009	33%	16%
	mid-2011	16% _ <mark>7%</mark>	
Existence is at risk	late 2010	15% <mark>8%</mark>	
	mid-2010	21% <mark>8%</mark>	
	late 2009	16% <mark>6%</mark>	I
	0	% 15% 30%	% 45% 60%
		% of all c	harities
	Agree	e 📕 Strong	gly Agree

Over half of organizations report increased demand, while almost onequarter are at risk.



Just under half of organizations forecast difficulty covering expenses at some point in the next two years.

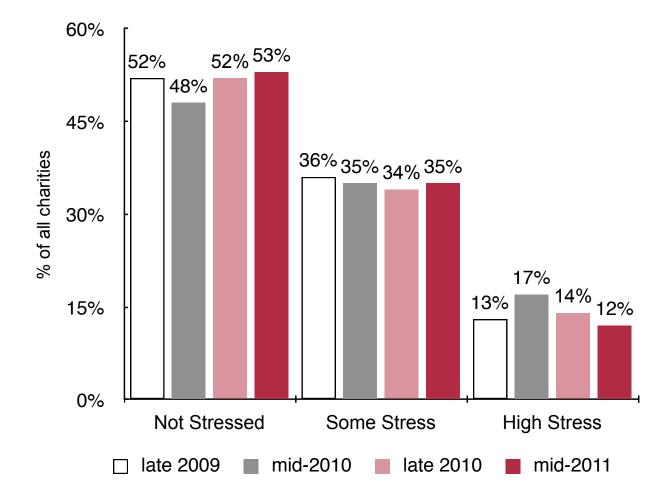
More organizations foresee no difficulty covering expenses over the near- to medium-term.



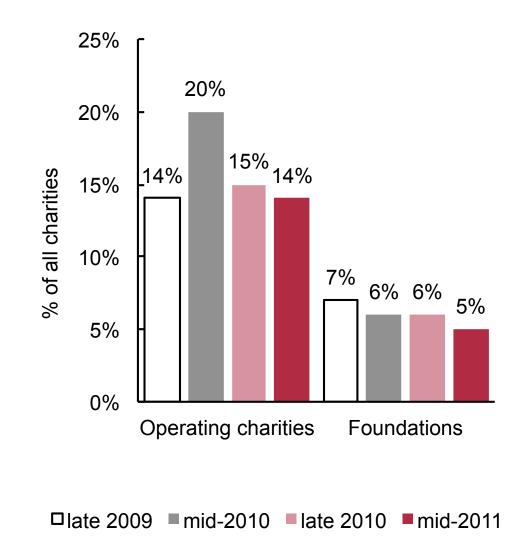


About one in eight charities is under high stress.

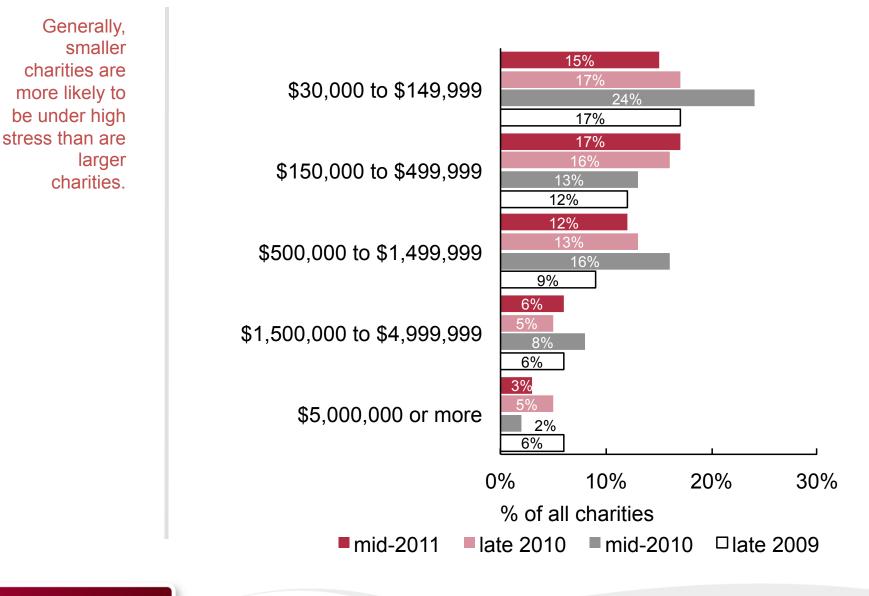
The percentage of organizations with high levels of stress has decreased from mid-2010.



The percentage of operating charities under high stress has receded to late 2009 levels.

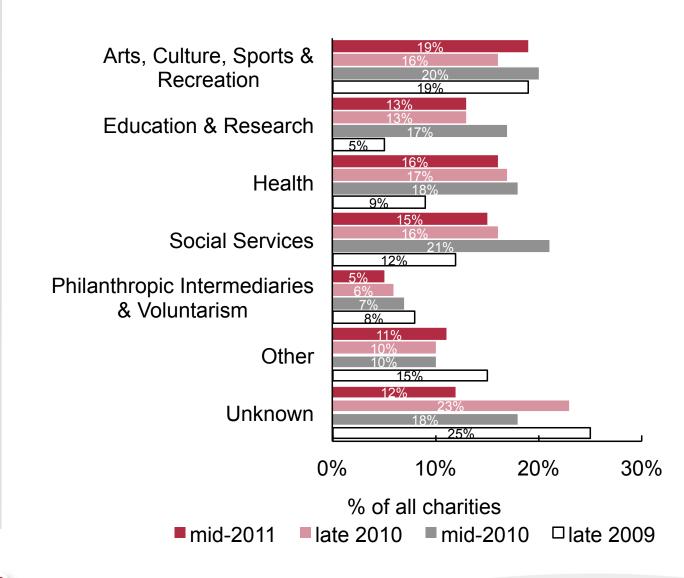






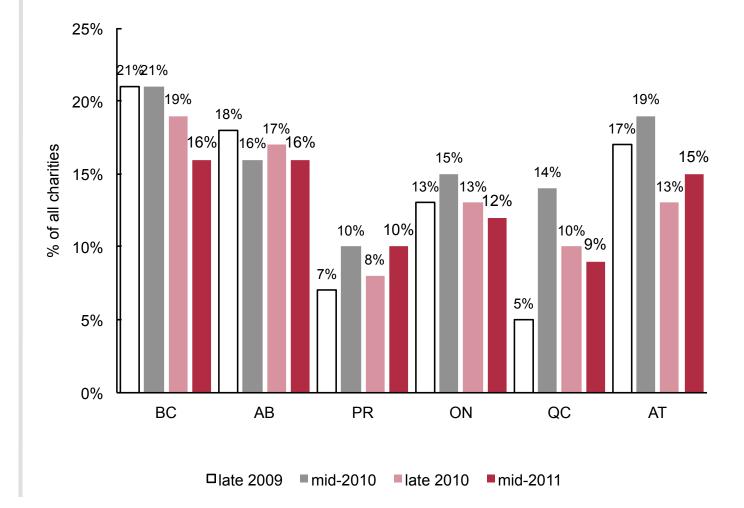




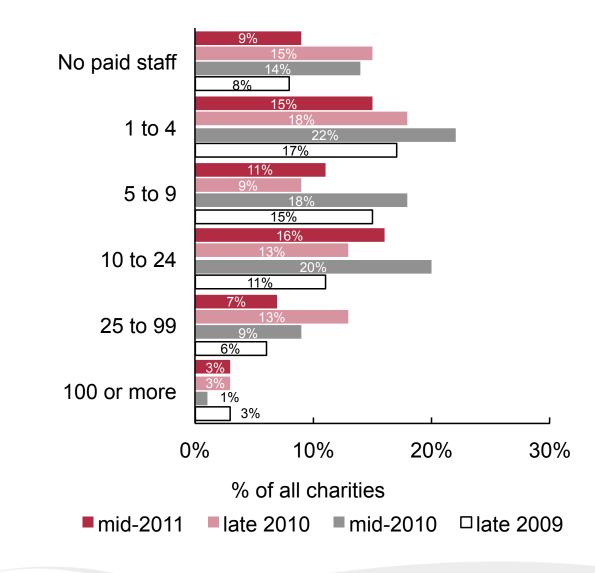




British Columbia and Alberta organizations are most likely to be under high stress. Quebec charities least likely.



Charities with 25 paid staff or more are less likely to be under high stress.





Foundations are much more likely than operating charities to report increased revenues.

Charities are more likely to report increased revenues.

mid-2011	Operating Charities	31%	43%	27%			
mid-	Foundations	24%	38%	38%			
2010	Operating Charities	32%	45%	23%			
late	Foundations	24%	51%	26%			
mid-2010	Operating Charities	37%	41%	22%			
mid-	Foundations	24%	46%	30%			
late 2009	Operating Charities	32%	36%	32%			
late	Foundations	34%	44%	22%			
	0'	% 25%	50%	75% 100	0%		
	% of all charities						

Decreased

Remained about the same

Increased



Operating charities are more likely than foundations to report that expenditures have increased. Charities are more likely to report increased expenditures than in mid-2010.

		_			
2011	Operating Charities	12%	39%	49%)
mid-2011	Foundations	12%	57%	3	1%
2010	Operating Charities	19%	35%	46%	6
late 2	Foundations	10 <mark>%</mark>	48%	429	%
mid-2010 late 2010	Operating Charities	17%	40%	439	%
mid-:	Foundations	18%	58%	6	24%
late 2009	Operating Charities	22%	33%	46%	6
late 2	Foundations	23%	57	7%	21%
	0	% 2	25% 50	% 75%	100%
	(% of a	II charitie	S	

Decreased

Remained about the same

Increased



Operating charities are more likely than foundations to report that paid staff numbers have increased. The paid staff change picture continues to remain largely stable.

			-				
	mid-2011	Operating Charities	17%	58%	26	3%	
	mid-	Foundations	11%	68%	2	1%	
-	2010	Operating Charities	20%	59%	2	1%	
	late 2	Foundations	14%	60%	26	6%	
-	mid-2010 late	Operating Charities	21%	57%	2	3%	
	mid-2	Foundations	16%	65%	1	9%	
-	2009	Operating Charities	21%	56%	23	3%	
	late 2	Foundations	9 <mark>%</mark>	72%	2	0%	
•		C	0% 25%	50%	75%	100%	
	% of all charities						
De	cre	ased Remained	d about the	e same	Incr	eased	



Operating charities are more likely than foundations to report that volunteer numbers have increased. Similarly, the volunteer change picture has largely held steady from mid-2010.

			-					
	2011	Operating Charities	11%	60%	29%			
	mid-2011	Foundations	<mark>6</mark> %	73%	21%			
	2010	Operating Charities	14%	62%	24%			
	late 2	Foundations	7%	76%	18%			
	2010	Operating Charities	15%	59%	26%			
	mid-2010	Foundations	17%	65%	19%			
	2009	Operating Charities	9%	57%	33%			
	late 2	Foundations	6%	71%	23%			
		0	%	25% 50%	75% 100%			
	% of all charities							
De	ecre	ased Remained	l abc	out the same	Increased			
					meredeed			



Fewer organizations are predicting that demand will increase and more are saying they will be better able to carry out thei missions

The level of confidence in the future, already high, has increased.

	mid-2011	5 <mark>%</mark>	51%	43%	
Demand for products	late 2010	2%	47%	51%	
and services in 3 to 4 months	mid-2010	6%	43%	52%	
	late 2009	5 <mark>%</mark>	48%	48%	
	mid-2011	7%	61%	32%	
Performing mission in	late 2010	1 <mark>0%</mark>	63%	27%	
3 to 4 months	mid-2010	14%	57%	29%	
	late 2009	13%	58%	28%	
	mid-2011	1 <mark>0%</mark>	42%	48%	
Performing mission in 12 months	late 2010	14%	41%	44%	
	mid-2010	18%	6 38%	44%	
	late 2009	17%	<mark>6</mark> 39%	44%	ļ
		0%	25% 50 % of all o		0%
Weaker	About the same Strop				



CANADIAN DIRECTORY TO FOUNDATIONS & CORPORATIONS

\$1 billion is available funding.



Promotion of good corporate citizenship.



Essential tax information for Canada's charities.



Governance and financial accountability.



Knowledge about the sector and how Canadians support it.

Insurance & Liability RESOURCE CENTRE for Homesofies

Risk management support for the sector.



Canada's largest collection of charitable and nonprofit resources.



Acknowledgements

We would like to acknowledge the generous financial support of The Muttart Foundation and the Government of Canada's Social Development Partnerships Program. The opinions and interpretations in this report are those of the authors and do not necessarily reflect those of the Government of Canada.

About Imagine Canada

Imagine Canada is a national charitable organization whose cause is Canada's charities and nonprofits. We reinforce the sector's collective voice, act as a forum and meeting place and create an enabling environment in which organizations contribute to building stronger communities.

Imagine Canada Toronto 2 Carlton Street Suite 600 Toronto, Ontario M5B 1J3 Tel.: (416) 597-2293 Toll free: 1-800-263-1178 Imagine Canada Ottawa 1705 – 130 Albert Street Ottawa, Ontario K1P 5G4 Tel.: (613) 238-7555 Toll free: 1-800-263-1178 Imagine Canada Calgary 635 8th Ave. SW, Suite 600 Calgary, Alberta T2P 3M3 Toll free: 1-800-263-1178

©2011, Imagine Canada This presentation is licensed under a <u>Creative Commons Attribution-Noncommercial-No Derivative Works 2.5 Canada</u> <u>License.</u> Please contact the copyright holder if you would like permission to use these resources in a manner which is not covered under the current license.

