

Towards a Better Understanding of Our Complex Environment:

An Environmental Scan for the Calgary Voluntary Sector

September 2008



Environmental Scan Introduction

Following a growing number of requests and recognition of a value that extends beyond its original intent, CCVO is pleased to publish this Environmental Scan. This document was recently prepared to inform our Strategic Planning process.

We invite you to use this in your organization's own planning processes. It has been adapted to be more relevant to the needs of organizations across the nonprofit sector.

Please note that some of the information in this document may be time sensitive and may not reflect the environment past September 2008. As well, additional information on the various topics covered in this scan, is available in the full list of sources on pages 24-26.

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The Big Picture

Globalization

What we know

- Canada has the 5th most competitive economy in the world
- Canada is ranked 4th on the Human Development Index which measures three dimensions of human development: living a long and healthy life, being educated and having a decent standard of living.
- Technology plays a significant role in creating a global village.
- Calgary is in a unique position, drawing from and contributing to the global village through the oil and gas industry- we work around the world and draw people to our city from around the world

Technology and Communications

What We Know

- In Canada, 68% of the population has access to the internet at home.
- New “Web 2.0” applications including podcasts, social utility sites such as Facebook and myspace, online communities, etc, offer new ways to reach audiences.
- The sector, members, volunteers and the public are Tech saavy and use technology to access information and resources
- Technology is changing how people develop relationships, how they interact with one another, how leaders are defined and how they can work together

Snapshot of Canadians, Albertans and Calgarians

Demographics

What We Know

Canada

- The population of Canada is approximately 33 million
- 30% of Canadians are “baby boomers”
- After the baby boomer generation was born, fertility rates fell and current rates are less than half those seen at the start of the baby boomer generation
- Life expectancy of Canadians has increased
- Population ageing affects all areas of public policy: health care, education, taxation, housing
- In 2007, 238,000 immigrants came to Canada. However, 41,000 emigrated or left Canada for other countries
- There are 1.2 million people of Aboriginal identity in Canada

Alberta

- 3.4 million people live in Alberta
- Our population is growing quickly: from 2002 and 2007, Alberta’s population grew by 11%, compared to 5.1% for all of Canada
- 82% of Albertans live in urban areas
- Alberta received a net gain of 81,480 people in 2006 through migration. Of these, 58,166 were interprovincial migrants, the highest number in the past 25 years
- Interprovincial migration is projected to be Alberta’s greatest source of population growth
- While 10% of the population is currently over 65, it is projected that by 2031, 21% of Alberta’s population will be over 65.
- We have lower rates of immigrants than other provinces. In 2007, 8.4% of immigrants chose to come to Alberta, as compared to 15% who went to BC
- Aboriginals make up 5.8% of Alberta’s population and 60% of Alberta’s Aboriginals live in urban areas

The Labour Force

What We Know

Canada

- In 2007, 67% of Canadians were employed
- The majority of Canadians work in services-producing sectors, including health care; accommodation and food; and professional, scientific and technical services.
- 72% of men are employed, compared to 62% of women
- 87% of Canadians between the ages of 25-44 work, as compared to 53% of those aged 45 and older

Alberta

- 74% of Albertans participated in the labour force in 2007- this is the highest participation rate in Canada
- Alberta has the lowest unemployment rate in Canada at 3.5% (considered “full employment”)
- Alberta was responsible for ¼ of all the new jobs in Canada in 2006 and 2007
- Employment for the off-reserve Aboriginal population rose to 65,900 in 2007, an increase of 3,100 from 2006.
- The Services-Producing industries in Alberta experienced more job growth than the Goods-Producing industries in 2007. Industries that led employment gains were: construction; mining, oil and gas extraction; and management, administrative and other support.
- In 2007, 63.4% of the Alberta’s labour force had a university degree, a postsecondary certificate or diploma, or some post-secondary education, up from the 61.3% in 2006.

The Economy

What We Know

The World

- In early 2008, global commodity prices surged. Oil prices are reaching record highs, and analysts predict the price will continue to rise.
- Weather patterns have reduced crop production and growing demands for food products for fuels such as ethanol mean global agriculture markets are experiencing unprecedented prices.
- The U.S. economy is in a recession. Job losses continue, new home sales growth is negative. Much of the slowdown in GDP growth in the U.S. is a result of a reduction in consumer spending.

Canada

- The economy is expected to slow down due to low US exports, but we will avoid a recession.
- Inflation varies across the country and it is anticipated the Bank of Canada is considering interest rate hikes to stem inflation
- Ontario and Quebec have seen recent job losses and an economic slowdown

Calgary

- The economy is slowing down to a more manageable rate
- Oil prices are at record levels, and investment and related spin off activity continues in the oil sector
- Job creation sits at 2.2%
- Inflation is lower than last year's 5%, sitting at 4%
- Calgary has the lowest unemployment rate in Canada and job creation growth is higher than labour force growth. With restricted employment growth, economic growth will be constrained

Calgary: Rising Costs of Doing Business

What We Know

- Calgary is the second most expensive Canadian city in which to run a business
- In the past year, prices for goods and services, (the Consumer Price Index- CPI), rose by 4%
- Increases in the shelter component of the CPI were 11%, with the price of water, fuel and electricity increasing by 32%
- With increased competition for workers, Alberta's average hourly wages increased 5.7% over the past year to \$23.23 an hour.
- Calgary's downtown is the third tightest downtown office market in Canada and continues to be a landlord's market, with vacancy rates more than doubling in the past year
- Organizations such as Meals on Wheels and those offering driving services for seniors' medical appointments are already losing volunteers due to the rising cost of fuel

Government

The Government of Canada

What We Know

- There are 28 Members of Parliament from Alberta serving in the Minority Conservative Government- 8 of whom are from Calgary
- The federal government has full jurisdiction over defence, foreign affairs, interprovincial and international trade and commerce, criminal law, citizenship, central banking and monetary policy. They share responsibility for transportation, agriculture, immigration and certain aspects of natural resource management with the provinces
- Current priorities include protecting Canada's sovereignty and security; strengthening the federation; tax relief; tackling crime and strengthening security; and improving the environment and health of Canadians.
- There continues to be a focus on accountability measures

Policy Approaches to the Sector

- Conflicting messages from different areas of government:
 - on the one hand, efforts to reduce administration and reporting requirements (Efforts to reduce unnecessary administrative burdens on the sector. For example: new Action Plan based on Independent Blue Ribbon Panel; new *Canada Not-For-Profit Act* to eliminate unnecessary regulation and provide flexibility to the sector
 - on the other, policies requiring new administrative and reporting (CRA proposed policy on fundraising by charities).

The Government of Alberta

What We Know

- In the last election, the Conservatives increased their share of the popular vote and their number of seats to 72
- The opposition in Alberta is small, with Liberals holding 9 seats and NDP with 2.
- The electoral boundaries will be redrawn before the next election, and will reflect the shift to larger urban populations. This may lead to a shift in election priorities and strategies
- New focus on the sector:
 - New department of Culture and Community Spirit
 - Enhanced Charitable Tax Credit to stimulate personal philanthropy, and \$20 million Community Spirit Fund (proportional grants)
- Signed the Alberta Nonprofit/Voluntary Sector Initiative's (ANVSI) Collaboration Committee and beginning to take action on key sector issues including HR
- New levels of government: Parliamentary Assistants means both opportunities and challenges
- 5 priorities focus on developing energy resources in an environmentally sustainable way, increase access to health care and efficiency/effectiveness of health system; promote strong and vibrant communities and reduce crime; increase innovation and build a skilled workforce; and provide public infrastructure to meet growing needs.

The City of Calgary Municipal Government

What We Know

- New multi-year budget and planning process (2009-2011)
- ImagineCalgary plan for long ranged urban sustainability is being integrated into City business plans and budgets. ImagineCalgary's vision is to make Calgary a place where we are each connected to one another; we are each connected to our places; we are each connected to our communities; and we are each connected beyond our boundaries.
- City facing unprecedented growth, planning and land use challenges, ageing population, increasing costs, staffing challenges, social and environmental issues, revenue pressures, and tax resistance.
- Projecting an operating funding shortfall totals more than \$1 billion from 2008-2017.
- Projected revenues and expenditures for 2008-2017 see increasing annual operating shortfalls after 2008 culminating in a shortfall of \$230 million in 2017. Dealing with the infrastructure maintenance deficit could increase that shortfall significantly.

The Corporate Sector

What We Know

- Oil and gas continues to be the predominant industry in Calgary, but other sectors are growing including technology, manufacturing, financial and business services, transportation and logistics, and film and creative industries.
- Issues business face include lack of affordable housing, difficulty attracting and retaining employees, and slow growth of infrastructure
- Companies rated the following as very important for economic development in Calgary: access to venture capital, adequate space available for lease; and *arts*, entertainment and cultural amenities
- Calgary has the second most head offices (109 in 2006), second to Toronto with 275 but well above Montreal with 89

Corporate Community Investment

- In Canada, corporate donations are directed to Sports and Recreation (33%); Grantmaking, Fundraising and Voluntarism Promotion (15%); and Arts and Culture (10%)
- Most Canadian businesses donate to the sector for four reasons: it helps market the company's brand; the success of the company depends on having strong communities; they need a social license to operate; and because it improves the ability to recruit and retain employees
- Three challenges to corporate community investment include limited staff and resources to enable them to respond to requests for support; a lack of adherence to corporate community investment policies within their organization; and difficulties balancing and managing the expectations of multiple stakeholders.
- In Alberta, 4% of funding for the sector comes from corporate donations, sponsorships and grants

Social Responsibility

What We Know

- Perception that wealthy, “developed” countries need to address the systematic need of the poor “developing” countries
- Perception that the wealth nations (G8 countries) are largely responsible for global issues such as poverty in Africa and developing countries due to debt and trading policy, global warming due to carbon dioxide emission, the AIDS problem due to strict medicine patent policy and other issues related to globalization.
- More pressure on corporations to be “socially responsible”
- 47 of the 265 companies listed on the Toronto Stock Exchange issue CSR reports
- Climate change is currently the hot topic in the CSR field
- There are calls for CSR to be improved by better engaging stakeholders in selecting issues to report on, and to include stakeholder comments in CSR reports
- The imagineCALGARY Plan is being implemented by organizations across the community including The University of Calgary, The Calgary Board of Education, The Calgary Public Library, The City of Calgary and other imagineCALGARY’s community Partners.
- The City of Calgary has implemented a ‘Triple Bottom Line’ approach that measures the environmental, social and economic impact of proposed policies

The Voluntary Sector

Civic Participation & Engagement

What We Know

- Civic participation includes community service (volunteering and charitable work); political participation (voting, attending public meetings, etc.); and cultural participation (participating in arts and crafts guilds or cultural groups, communal storytelling, etc.).
- Canada has not suffered the same decline in civic participation and social capital that Robert Putnam (*Bowling Alone*) found among American citizens over the last few decades.
- Over 18,000 Calgarians participated in the imagineCALGARY process, making it the largest community visioning process of its kind anywhere in the world

Voting Patterns

- Worldwide, many industrialized countries are experiencing a decline in voter participation.
- 65% of Canadians who were eligible to vote in 2006 cast their ballot. There has been a steady decline in Canadian voter turnout over the past decade. In 1998, 75% cast a ballot.
- Voter turnout in the last Alberta Provincial election was at a record low of 41%. This was the lowest turnout recorded in Canada

Cultural Participation

- Canadians 15 years of age or older occasionally participated in: theatrical performances (17%), popular music performances (19%), and public galleries or art museums (22%). At the same time, about 5% of adult Canadians were frequent audiences of at least one of: theatrical plays (5.1%), popular music (4.4%), historic sites (4.9%), and public galleries or art museums (4%).
- Calgarians spend over \$3 billion on cultural-related products and services annually. We spend 10% more on cultural products and services than residents in any other province.
- Major cultural events draw over three million in attendance to downtown festivals annually.
- Calgary ranks third among major Canadian cities for attracting cultural migrants.

Snapshot of the Voluntary Sector

What We Know

Canada

- There are 161,000 charities and nonprofits across Canada
- In the face of government cutbacks in the 1990's, the number of registered charities in Canada grew by 19% (12,500 organizations). Half of the growth was in social service agencies.

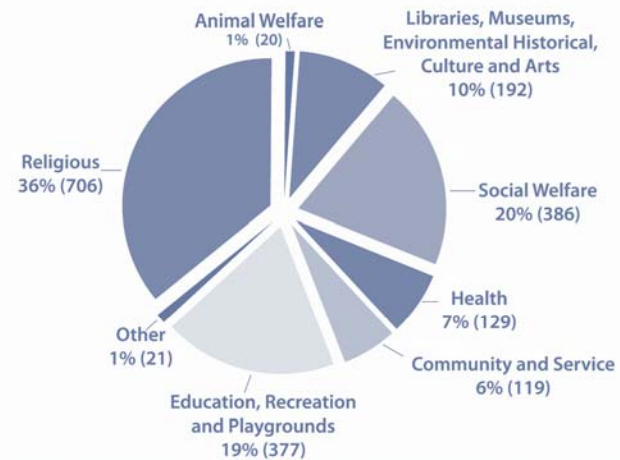
Alberta

- There are 19,000 nonprofits and charities in Alberta (2003 numbers), 12% of the total number across Canada
- 42% of organizations in Alberta have paid staff

Calgary

- There are 5,153 distinct groups in Calgary (Distinct groups – registered charities and incorporated nonprofits- (accounts for the 981 groups that are both registered charities and incorporated nonprofits
- There is speculation that organizations and initiatives that are not registered or incorporated are numerous, forming the base of a 'sector iceberg', but there is currently no mechanism for counting these organizations.
- Trends of restructuring in the sector include shared service arrangements, shared spaces, joint ventures and other types of collaboration.

Registered Charities in Calgary by CRA-identified Sub-sector
July 2007²



The number in parenthesis indicates how many individual organizations there are in each category. The religious category includes congregations and the promotion of faith and religion.

The Sector's Workforce

What We Know

- 1.2 million employees across Canada, representing 7.2% of the national paid work force
- \$22 billion annual payroll
- Majority of employers are small organizations with 75% have fewer than 10 employees
- Larger organizations employ half of total labour force
- 74% are women; 39% are over the age of 45; 14% are immigrants; More than 60% have post-secondary education
- Top sub-sector employers: Social Services (26%); Health (17%); Development & Housing (16%); and Sports & Recreation (11%)
- Overtime is common and not all workers are compensated for the extra hours

Alberta

- total paid staff of 176,000 (\$9 billion revenue and 105,000 in staff when hospitals, universities and colleges are excluded) in 2003
- A study of Alberta Executive Directors found that 36% of Executives indicated that they planned to leave within the next two years. Over the next 5 years, 82% of current top executives predict that they will be seeking a new challenge.

Workforce Issues

- Human Resource issues are the most pressing concern of member organizations
- Recruitment and retention of staff is a critical issue facing the sector and is reaching the point where parts of the sector are unable to meet their contractual obligations. Organizational failure is becoming an imminent reality for some agencies.
- The tight labour market, increasing demand for services, insufficient levels of funding and restrictive funding practices, are the core pressures creating the staffing issue.
- The economic and demographic forces facing the nonprofit sector are expected to continue and increase in the foreseeable future.
- Addressing the human resource issues in the nonprofit sector requires collaborative effort from all partners – the sector, governments, and funders.

Trends in the Relationship between the Sector and Government

What We Know

The Sector and The Federal Government

- The 1999 Speech from the Throne recognized the need for an active partnership with a strong and vital voluntary sector to meet its goal of improving the quality of life for Canadians and launched the Voluntary Sector Initiative (VSI).
- VSI looked at the relationship between the government and the sector, funding issues, policy development, regulations, sector identity, working and volunteering, and research about the sector.
- VSI included both vertical work between government and the voluntary sector and horizontal work across government and within the voluntary sector.
- Funding for the VSI ended in 2005, but the legacy of its work is still visible today both in terms of the relationship with government; and the relationships and connections within the sector
- The VSI gave rise to the emergence of other organizations and initiatives such as the Federation of Voluntary Sector Networks, and the HR Council for the Nonprofit/Voluntary Sector.
- The end of the VSI and Voluntary Sector Forum has left a gap in the sector leadership at the national level, exacerbated by funding cuts to national umbrella organizations such as Imagine Canada and Volunteer Canada

The Sector and the Provincial Government

- The Alberta Nonprofit/Voluntary Sector Initiative (ANVSI) has roots extending back to 2004 and it reached a critical milestone in August 2007 when the Framework for Collaboration was signed by Government of Alberta and Voluntary Sector leaders
- ANVSI brings together voluntary sector leaders and representatives from government departments to work collectively on issues.
- Working side-by-side has developed strong relationships between government and sector leaders, and both have a better understanding of the other's perspectives and limitations on various issues.
- Concrete results of this ongoing dialogue and collaboration can already be seen in policy development, and in efforts to address human resources and funding challenges.

Inter-Provincial

- Various provincial governments are looking to learn from the experiences of other jurisdictions in addressing voluntary sector issues. For example, the HR Council has been approached by a number of provincial governments for information about how other provinces are addressing workforce issues.
- Provinces across Canada are undertaking joint initiatives that bring together government and the voluntary sector to address issues of joint concern. The February 2008 Counterparts Summit co-hosted by ANVSI and the Federation of Voluntary Sector Networks provided an opportunity for organizations and provincial government to share and leverage from each other's experiences. Planning is underway for a second summit tentatively scheduled for early 2009

Financing the Sector

What We Know

- Across Canada, 49% of funding for the sector comes from various levels of government, 35% from earned income, and 13% from gifts and donations, and 3% from other income.
- A number of organizations are investigating possibilities for social finance in Canada- Social finance includes community investing, social enterprise finance, micro-lending, sustainable business, and philanthropic program-related investments.
- Organizations who face funding shortfalls for programs or service delivery fundraise; defer expenditures on facility or equipment maintenance; have unpaid overtime, salaries and benefits that may be well below market and may not even equate to a living wage; and hire staff that will work for the wages but might not have the required qualifications.
- The amount of endowment funds in Canada has increased from \$13.6 billion in 1997 to \$41 billion in 2007

Alberta

- Alberta-based organizations have total annual revenues of \$10 billion (\$9 billion when Hospitals, Universities and Colleges are excluded).
- Most Alberta organizations are small, reporting annual revenues of less than \$100,000 (66%) with only 5% reporting annual revenues in 2003 of \$1,000,000 or more.
- Governments account for 33% of revenues and earned income accounts for 49%. The remaining 18% comes from gifts and donations (16%) and other sources (2%). Charitable gaming brings in 3% of the revenue for Alberta's organizations
- In 2006-07, over \$1.5 billion of gaming proceeds was provided to volunteer groups and public and community-based initiatives through the Alberta Lottery Fund.

Government Funding

- In Alberta, organizations get the following from each level of government for payments for goods and services and grants and contributions: 6% from the Federal Government, 25% from the Province, and 2% from Municipalities, for a total of 33% from all levels of government.
- Compared to the rest of Canada, Alberta generated less revenue from government – the national average is 49%

Foundations

- Growth in number of foundations in Canada- from 1,350 in 1997 to close to 3,000 in 2007
- Federal tax changes encourage the creation of new foundations (ie. Elimination of tax on the donation of listed securities)
- Increase in “donor activists” who strategically focus on particular issues is leading to an increase in private foundations
- Organizations in Calgary have access to 221 publically identified foundations with over \$400 million in assets providing at least \$20 million in grants each year

Financing the Sector: Donors Trends

What We Know

- Canadians give an estimated \$8.9 billion in financial donations; the average annual donation is \$400.
- While the number of donors in Alberta dropped by 0.2%, the amount of donations went up 15.5%
- Canadians gave the most money to religious organizations (45% of all donations) followed by health (14%), and social services (10%) organizations.
- Giving increases with age, household income, and higher levels of education. Canadians who are employed and married or common law give more.
- In Alberta, individual donations bring in 10% of organizations' revenue
- New category of "donor activists" who bring their own priorities and visions to their charitable giving- strategic philanthropy.

Tax Measures and Donating

- More than ½ (53%) of Canadian donors say they would contribute more to their communities if the government provided them with an enhanced tax incentive for giving
- The federal government's elimination of capital gains tax on the donation of securities has increased donation levels. Both the number and value of individual donations of securities increased.
- Donations of securities went from \$215.5 million in 2003 to \$718.6 million in 2006.
- Most donations of securities went to the largest charities, but the amount going to the smallest charities has increased
- Donations of securities may be replacing other types of donations

Volunteering

**Please note that the national data from the Canada Survey of Giving, Volunteering and Participating from 2004. The Calgary Data is from Volunteer Calgary's 2006 report: Research Report on Volunteering in Calgary*

What We Know

Canada

- 11.8 million Canadians (45% of the population aged 15 or older), volunteered in 2004 each year and contribute more than 2 billion hours to community life.
- Canadian volunteers contributed an average of 168 hours in 2004.
- 11% of Canadians (the 25% of volunteers who contributed 180 hours or more) accounted for 77% of volunteer hours.
- Canadians volunteered most often with sports and recreation, social services, education and research, and religious organizations.
- Immigrants were somewhat less likely than native-born Canadians to volunteer (41% vs.48%)
- The percentage of Canadians who volunteer generally decreases with age. Over half (55%) of all youth (15 to 24 year olds) volunteered, compared to one-third (32%) of seniors (65 years and older).
- Volunteer participation declines when people reach 55 and older. It is anticipated that with the aging of baby boomers, there will be a decline in volunteerism rates
- Organizations in small and rural communities where populations are disproportionately older report trouble finding enough volunteers to keep their doors open

Alberta

- The 2004 Canada Survey of Giving, Volunteering and Participating (CSGVP), found that 1.2 million Albertans volunteered their time to charitable and nonprofit organizations with an average of 175 hours
- The 2003 National Survey of Nonprofit and Voluntary Organizations (NSNVO) found that collectively, Alberta-based organizations have approximately 2.5 million volunteers – rather than counting discrete individuals, this data reflects the number of volunteer positions that are filled by Albertans, and individuals who volunteer for more than one organization would have been counted multiple times.

Calgary

- 71% of Calgarians spend an average of 14.6 hours volunteering per month
- Over 1 in 5 volunteers have stopped volunteering. On average “lapsed” volunteers have not volunteered in the past 4.8 years.
- The top activities listed as volunteer work tend to be those that have a “personal” connection – school, places of worship, coaching/teaching.
- Those most likely to volunteer are middle-aged (36-55), have a post-secondary degree, middle to upper annual household income, English home language, regular attendance at a place of worship (once a week), and married.
- 66% of all hours volunteered in Calgary came from 28% of volunteers; this is a similar pattern to the Canadian population in 2000 (73% of hours from 25% of volunteers)
- Calgary is Volunteer Capital of Canada ~ 71% v.s.27% National average



Sector Issue: Accountability & Transparency

What We Know

- There is an increased push for accountability from federal government, but this may be tempered by their new *Action Plan on Grants and Contributions* that identifies the need for reporting and accountability that is proportional to the history of the organization and the amount of funding
- A proposed Canada Revenue Agency (CRA) policy on Fundraising by Charities seeks to increase transparency but leads to an increase administrative burden for organizations
- Increased scrutiny by media- for example, the Toronto's Star's series of articles on the charitable sector, media coverage of the MADD scandal, Banyan Tree Foundation issues
- Imagine Canada's of a revised Ethical Fundraising and Financial Accountability Code sets a framework for best practice in fundraising and financial reporting and now addresses online giving, the need for enhanced security with respect to door-to-door canvassing, and increases compliance measures to respond to donor calls for greater transparency and accountability.
- In 2007, Imagine Canada's Accountability Reference Group released a discussion paper to start a dialogue in the charitable sector about standards and their link to accountability, transparency and public trust. This has resulted in standards for good governance and ethical practices developed in consultation with the nonprofit community.

Regulation of Charities: Canada Revenue Agency

What We Know

- There are approximately 80,000 charities in Canada with 1,952 registered in Calgary
- CRA is seeking to address compliance issues (ie- filing T3010s) through increased education of the sector about regulatory requirements: Charities File project, other funded projects across Canada
- Responsive to needs of the sector: action plan for small and rural charities, proposed policy on fundraising by charities
- Revising policies to provide more clarity: draft policy on fundraising by charities included stakeholder outreach across Canada, and CRA was responsive to calls for more consultation before the policy is accepted
- CRA audits are prompted partly by random selection, by complaint and by an internal file selection process. The most common problems for the auditors are that organizations are not reporting on their political activities and organizations are not reporting their fundraising correctly
- A high percentage of audits result in “no change” afterwards because once the area of confusion or concern is explained the CRA is satisfied that the charity is in compliance with the Act.
- 10 or fewer charities lose their status “for cause” each year, but in future this number may be higher. The CRA will be conducting more audits and have been given more resources from the Treasury Board to make sure that charities comply with the Act
- The rate of non-filing used to be about 2000 per year but this number is declining,
- Approximately 3,500 charity registrations are approved each year.
- About 1,500 charities have their status revoked and of that, 500 re-apply for status.

Public Awareness and Perceptions of the Sector

What We Know

What Canadians think about charities

- 79% trust charities, with 27% who trust them a lot
- 93% agree charities are important, with 51% strongly agreeing
- 86% agree charities improve our quality of life

Meeting the needs of Canadians

- 76% think that charities understand the needs of Canadians better than government and 70% think they do a better job of meeting those needs
- 57% think that charities should be expected to deliver programs and services the government stops funding. However, only 49% of Albertans share this view.
- 60% recognize the costs of running a charity and feel it is appropriate for a reasonable amount of funds raised to go to operating expenses

Advocacy

- 63% think the opinions charities express on issues of public concern do have value as they represent a public interest perspective
- 73% think that laws should be changed to allow charities to advocate more freely

Public Perception about Charity Regulation

- 31% of Canadians are aware that there is an agency that watches over charities
- 60% believe that there are no organizations that monitor charities
- 65% believe that an organization independent of the government and charities should monitor charities' activities

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