2024 ONN State of Ontario's Nonprofit Sector Survey

Survey Landing Page:

[Ontario Nonprofit Network (ONN)](#) has engaged Environics Research to conduct our 2024 State of the Sector survey.

Why do we ask you to do this every year? Change is constant, whether that's political, social, or policy related. Our advocacy for the sector's changing realities needs to be built upon high-quality data; the well-being of our sector, and the communities we serve depends on it.

Without data from ALL nonprofits, including charities, grassroots groups, volunteer-run organizations, nonprofit social enterprises, and nonprofit co-operatives in Ontario with a mission to serve a public benefit - we cannot paint an accurate picture of our shared struggles and opportunities for progress.

No matter where you are in this province, or who you serve, we urge you to fill out this survey. In our numbers lies a story that is informative and inspiring, and most importantly it can be used to demand and shape a different future. One that works for all of us.

About the survey:
- Survey is bilingual
- Scope is organizational
- 10-15 minutes long
- Confidential and anonymous
- The survey will be available between June 11, 2024 until July 5, 2024 5pm EST.

Who can fill out the survey?
- Any nonprofits, charities, and grassroots groups in Ontario with a mission to serve a public benefit. This includes volunteer-run organizations, nonprofit social enterprises, and nonprofit co-operatives.
- A senior representative from your nonprofit who can best estimate and provide organizational operational, financial, and HR information. If you require accommodations to complete the survey please email ONN Policy Analyst, Javil Joujoute at javil@theonn.ca.

ONTARIO NONPROFIT NETWORK

We have tried our best to ensure the survey is as lean as possible, while still capturing crucial information to identify and share the current state of the sector and how it's changing. Hence, we request your patience and time as we gather the information we need to serve the sector best. Organizations who complete the survey can enter a draw to win 1 of 4 gift cards, valued at $50.00.

Data Privacy and Confidentiality

Privacy and confidentiality is important to ONN and our partners and so below are the steps we are taking to protect respondents' data.

- Environics Research will:
    - Host the data collected in servers located in Toronto, Canada.
    - Only collect IP addresses to detect fraud and not share IP addresses with ONN.
    - Enable password protection and encryption for the data stored.
    - Share de-identified individual responses (i.e. raw data) with ONN and de-identified individual responses from Toronto with the Toronto Foundation.
    - Raw data will be transmitted using secure file transfer mechanisms.
- ONN will:
    - Report survey results only in aggregate form with the objective to identify the common experiences of nonprofit organizations during a moment in time. Survey results will sometimes be illustrated with anonymous verbatim comments from the survey.
    - Work with Environics Research to publish the survey data as an open data set, taking care to ensure that respondents cannot be identified. For example, breakdowns will be provided for regions of Ontario, subsectors (e.g., nonprofit housing or the arts), and for organizational budget size, but if there are fewer than 4 respondents in a given category, the data will not be published at that level to ensure confidentiality. Comments from open-ended questions will be included in the open data set after being depersonalized and coded for themes.
    - Enable password protection for the raw data stored.

Click "Continue" to begin the survey. [Button]

Survey Questions

[Programming note: No questions are mandatory – respondents should be allowed to click through without responding, and they should be allowed to go back.]

Screening

S1. Does your organization operate on a nonprofit or unincorporated grassroots basis (this includes charities, grassroots groups, volunteer-run organizations, nonprofit social enterprises, and nonprofit co-operatives in Ontario with a mission to serve a public benefit)? Yes / No

      [If No, TERMINATE: This survey is for nonprofit organizations.]

S2. Is your organization based in Ontario? Yes / No

      [If No, TERMINATE: This survey is for organizations based in Ontario.]

S3. Are you able to estimate and provide organizational operational, financial, and HR information on behalf of your organization? Yes / No

      [If No, TERMINATE: This survey includes questions that may require detailed knowledge of your organizations operations. Please share the survey invitation with someone else at your organization who will be able to answer these questions.]

Main Survey

	Questions	**Response Options**
1	**Share three words that describe how your organization is feeling right now.**	3 short text boxes
A. The following questions ask about your organizational information.		

2	**In which Ontario region is your organization's main Ontario office/headquarter located?**
	
	To see a map of Ontario regions if you're not sure, [click here.](#)
	
	    A. Central Ontario
	        ○ Muskoka
	        ○ Simcoe
		-Select one region or city within region

	○ Peel Region
	    ○ York Region
	    ○ Durham Region
	    ○ Toronto
	    ○ Halton Region
	    ○ Another community in Central Ontario
	B. Western Ontario
	    ○ Kitchener-Waterloo
	    ○ London
	    ○ Windsor
	    ○ Hamilton
	    ○ Niagara Falls Region
	    ○ Another community in Western Ontario
	C. Eastern Ontario
	    ○ Peterborough
	    ○ Belleville
	    ○ Kingston
	    ○ Ottawa Region
	    ○ Another community in Eastern Ontario
	D. Northern Ontario
	    ○ Timmins
	    ○ Sudbury
	    ○ Sault Ste. Marie
	    ○ Thunder Bay
	    ○ Another community in Northern Ontario	

3	**What is the primary language of operation of your organization?** A. English B. French C. Bilingual (i.e. French and English) D. Other, please specify:	Select one
4	**Is the location of your organization in a rural, remote, northern or small community?** ***Rural/small communities are those with a population of fewer than 20,000 people**	Select one

	A. Yes B. No	
5	**What nonprofit subsector does your organization primarily belong to?** **For multi-service organizations please indicate your priority area.** ***Based on International Classification of Nonprofit Organizations** A. Arts, culture, heritage and tourism B. Business associations, professional associations and unions C. Community development and housing D. Education and research E. Environment F. Faith group G. Grantmaking, fundraising, and volunteerism promotion H. Health (e.g. nursing homes, mental and crisis intervention) I. Hospitals, universities and colleges J. International K. Law, advocacy, politics L. Social services (e.g. multi-service agencies, child care, settlement services, services for seniors) M. Sports, recreation, and other social clubs (e.g. leisure clubs, fitness and wellness, amateur sports)	Select one
6	**Is your organization any of the following:** *Click here for definitions: CEE Centre for Young Black Professionals* A. Black-led (A governance structure where a majority of board members are Black; A majority of senior management staff are Black) B. Black-serving (The main population or service users are Black; An organization that explicitly, through vision, mission, or strategic plan, serves the Black community; an organization that uses an African-centered, cultural approach)	Select all that apply

	C. Black-focused (Supports causes that impact the Black community; Has Black service users; Identifies itself as a Black organization serving the Black community) D. All of the above E. None of the above	
7	**Is your organization any of the following:** *Click here for definitions: [The Circle on Philanthropy and Aboriginal Peoples in Canada for full I4 Definitional Matrix](#)* A. Indigenous Benefiting; (Interest or mandate to serve Indigenous communities but no ongoing connection with Indigenous-led organizations and/or communities) B. An Indigenous Partnership; (Driven by Indigenous peoples with Indigenous ways of knowing that inform the work and values) C. Indigenous informed; (Driven by Indigenous peoples with Indigenous ways of knowing that inform the work and values) D. Indigenous-led; (Indigenous leadership at all levels of decision making within the organization) E. All of the above F. None of the above	Select all that apply
8	**Is your organization any of the following:** *Click here for definitions: [The Enchante Network](#)* A. 2SLGBTQIA+ - led; (Organization or collective ensures that 2SLGBTQIA+ individuals are at the centre of your structure, governance, policies and/or operations) B. 2SLGBTQIA+ - serving; (Organization or a collective that aims to support 2SLGBTQIA+ communities as your principal objective through your programs, services and/or activities e.g: Peer support programs, queer sports leagues, art and interdisciplinary collectives, 2SLGBTQAI+ specific networks)	Select all that apply

	C. 2SLGBTQIA+ -focused; (An organization or a collective that aims to support 2SLGBTQIA+ communities through your programs, services and/or activities.) D. All of the above E. None of the above	
9	**What is your organization's annual operating budget in fiscal 2023-2024?** A. 0 - $99,999 B. $100,000 - $249,999 C. $250,000 - $499,999 D. $500,000 - $999,999 E. $1,000,000 - $2,999,999 F. $3,000,000 - $9,999,999 G. $10,000,000 + H. Do not wish to answer	Select one -If answer "A-C" in question 9, go to question T1
T. Only for organizations with budget $499,000 or less		
T1	**Which of the following challenges apply to your organization?** A. We are entirely volunteer-driven B. We have specific needs for additional staff but do not have the resources to hire them. C. We rely on part-time staff or consultants for roles we would like to be full-time. D. We are sustained on project funding and do not have funding for operations. E. We lack resources for investments in technology systems. F. We are not a registered charity and are not eligible for many funding opportunities. G. We do not know how to find funding opportunities to grow our organization. H. We are not well-known by funders or donors outside of the immediate community we serve.	Select all that apply

B. Operations

10	**Does your organization own land and/or buildings?**
	   A. Yes
	   B. No
		-Select one
		-If answer "Yes" go to question 11

11	**How does your organization use the land and/or buildings it owns?**
	   A. Hold assets in trust
	   B. Use as primary space for operations
	   C. Use for programming and service delivery
	   D. Lease to others nonprofits and/or community groups
	   E. Lease to businesses
	   F. Lease to individuals (e.g. affordable housing)
	   G. Other, please specify:
		-Select all that apply
		-Skip if answer "No" at question 10

12	**In terms of the primary space your organization currently operates in, please indicate one of the following:**
	   A. Lease at or near market rates
	   B. Lease at nominal/subsidized rates
	   C. Lease in a coworking/shared space
	   D. Sublease at or near market rates
	   E. Sublease at nominal/subsidized rates
	   F. Have space gifted by another organization/business/government
	   G. Our primary space is in a building we own
	   H. We operate 100% remotely and access space when needed.
	   I. We do not have space but need it
	   J. Other, please specify:
		-Select one
		-Hide option "G" for those who answer "B" in question 10

13	**Do you have any of the following space related issues?**
	   A. We are at risk of losing our space due to the rising cost of rent.
	   B. We are at risk of losing our space due to the building being developed, demolished or sold.
	   C. We are at risk of losing our space due to the rising cost of mortgages.
	   D. We want to own our space but are facing barriers.
	   E. We want to expand current ownership of our spaces but are facing barriers.
	   F. We do not have space and need it.
	   G. Our current space does not meet our needs.
		Select all that apply

	H. We don't have issues. [Exclusive] I. Other, please specify:	
14	**Has your organization seen an <u>increase in demand</u> for programs and services between April 1, 2023 - March 31, 2024?** A. Yes, our organization has experienced increased demand for programs and services. B. No, our organization has not experienced increased demand for programs and services. C. Not sure	-Select one -If answer "A" go to question 15
15	**Please estimate the percentage of increased demand for your programs and services compared to the previous fiscal year using the following ranges:** A. 25% or less B. 26% to 50% C. 51% to 75% D. 76% to 100% E. More than 100%	-Select one -Skip if answer "No" to question 14
16	**How well is your organization meeting the increased demand for your programs and services?** A. We are unable to meet the demand. B. We can somewhat meet the demand. C. We can meet the demand. D. Not sure.	-Select one -Hide "increased" for those who answer "No" in question 14
C. Finances **In this section, some questions are on a fiscal year basis (between April 1 2023 and March 31 2024) as it aligns with both provincial and federal government and the majority of the nonprofit sector fiscal years. If your year end is a different date, please answer the questions to the best of your ability.**		
17	**What is your current financial forecast?** A. We are able to sustain our organization for 1-3 months. B. We are able to sustain our organization for 4-6 months. C. We are able to sustain our organization for 7-12 months.	Select one

	D. We are able to sustain our organization for the next 12 months or more. E. Not sure	
18	**How has your revenue changed between April 1, 2023 - March 31, 2024?** A. Increased by more than 100% B. Increased by 75% to 100% C. Increased by 50% to 74% D. Increased by 25% to 49% E. Increased by 1% to 24% F. Stayed the same G. Decreased by 1% to 24% H. Decreased by 25% to 49% I. Decreased by 50% to 74% J. Decreased by 75% to 100%	Select one
19.	**What trends are you seeing in your actual revenues?** A. Revenue from earned income (e.g., sales of goods and services, membership fees) B. Revenue from special events C. Revenue from other fundraising D. Revenue from individual donations E. Revenue from foundation grants F. Revenue from corporations/businesses G. Revenue from municipal funding H. Revenue from provincial funding I. Revenue from federal funding	Radio buttons with decreased, stayed the same, increased
20.	**Have your <u>expenses</u> changed between April 1, 2023 - March 31, 2024?** A. Increased by more than 100% B. Increased by 75% to 100% C. Increased by 50% to 74% D. Increased by 25% to 49% E. Increased by 1% to 24% F. Stayed the same	Select one

	G. Decreased by 1% to 24% H. Decreased by 25% to 49% I. Decreased by 50% to 74% J. Decreased by 75% to 100%	
21	**What trends are you seeing in your actual expenses?** A. Capital B. Professional Fees C. Salaries and benefits D. Programs, services, and activities E. General administration costs F. Office space expenses G. Programming space expenses H. Investments in equity related professional development and/or education	Radio buttons with decreased, stayed the same, increased
22	**Has your organization had to access its reserve fund between April 1, 2023 - March 31, 2024?** A. Yes, our organization has had to use our reserves. B. No, our organization has not had to use our reserve fund. C. Our organization does not have reserves. D. Our organization is resorting to other measures (e.g., pay cuts, selling assets). E. I'm not sure	-Select one -If answer "B-E", skip to question 24
23	**If yes, can you estimate how much of your reserve fund has your organization had to <u>access</u> between April 1, 2023 - March 31, 2024?** A. Our organization has accessed less than 25% of our reserves. B. Our organization has accessed 25% to 50% of our reserves C. Our organization has accessed 50% to 75% of our reserves. D. Our organization has accessed 75% to 100% of our reserves.	Select one
24	**Do you receive funding from the Ontario provincial government?** A. Yes B. No	-Select one -If answer "A" go to question 25-26
25	**If yes, which ministry?**	-Select all that apply

	A. Agriculture, Food & Rural Affairs B. Attorney General C. Children, Community & Social Services D. Citizenship & Multiculturalism E. Colleges & Universities F. Economic Development, Job Creation and Trade G. Education H. Energy I. Environment, Conservation and Parks J. Finance K. Francophone Affairs L. Health M. Indigenous Affairs N. Infrastructure O. Intergovernmental Affairs P. Labour, Immigration, Training and Skills Development Q. Legislative Affairs R. Long-Term Care S. Mines T. Municipal Affairs & Housing U. Natural Resources & Forestry V. Northern Development W. Public and Business Service Delivery X. Red Tape Reduction Y. Seniors and Accessibility Z. Solicitor General AA. Tourism, Culture & Sport BB. Transportation CC. Treasury Board Secretariat	-Skip if answer "No" to question 24
26	**Does your organization have any of the following issues with their provincial transfer payment agreements?** A. Difficulty moving money between budget lines B. Less than 15 percent for administration costs C. Excessive or burdensome reporting requirements D. Difficulty renewing funding agreements E. Receiving funding payments late	-Select all that apply -Skip if answer "No" to question 24

	F. Short term/project based funding agreements G. Restrictions on carrying forward money year over year H. Additional auditing (e.g separate schedule for the funding or government audit of financials) I. 2 or more cash flow and financial reporting annually, apart from the audits J. I don't have any issues [Exclusive] K. Other, please specify:	
T2	**To what extent do you agree or disagree with the following statements that may describe your funding history from public and/or private foundations:** A. We received a significant public and/or private foundation grant within the past year that enabled us to scale programs. B. We received a significant public and/or private foundation grant within the past year that enabled us to grow our organization's internal capacity. C. We have not received a significant public and/or private foundation grant in the past year. D. We have never received a significant public and/or private foundation grant. E. We are receiving more public and/or private foundation grants than we have in previous years. F. We are receiving less public and/or private foundation grant than we have in previous years.	-Rating (1 = strongly disagree, 3 = neutral, 5 = strongly agree)
27	**In the next 6-12 months, do you expect your organization's financial situation will:** A. Improve B. Remain the same C. Worsen D. Do not know	Select one
T3	**How would you describe your organization's risk of not existing in the next 3 years on a scale of 1 (low risk) to 10 (high risk)?**	Rating matrix
D Staff & Volunteers		

28	**Does your organization have paid staff?** A. Yes B. No, our organization is entirely volunteer driven	-Select one -If answer is "No" skip to question 36
29	**What is your organization's current job vacancy rate? It's okay if this is just an estimate.** ***Job vacancy rate = number of vacant positions <u>divided by</u> the total number of staff if all vacancies were filled <u>multiplied by</u> 100.**	-Short text -Skip if answer "No" to question 28
30	**Did your organization experience challenges with recruitment and/or retention of paid staff between April 1, 2023 - March 31, 2024?** A. Yes B. No C. Not sure	-Select one -Skip if answer "No" to question 28 -If answer "B-C", skip to question 32
31	**What factors affected your nonprofit's ability to recruit and/or retain staff?** A. Lack of affordable accessible child care services for staff B. Lack of paid learning/advancement opportunities C. Lack of candidates in your region D. Short-term precarious contracts E. Skills shortage (Lack of candidates with the skill sets sought by the organization) F. Staff burnout and stress G. Staff pushback to return to in-person work H. Demanding and difficult nature of the work I. Turnover J. Uncompetitive compensation packages (e.g. pension plan, health benefits) K. Wage disparity for similar/same jobs across sectors L. Other, please specify:	-Select all that apply -Skip if answer "No" at Q28 -Skip if answer "No or Not Sure" to question 30
32	**Thinking about team members who left your organization in the past year, what are they doing now?** A. Working at another nonprofit for the same/similar role B. Working in the public sector for the same/similar job	-Select all that apply -Skip if answer "No" to question 28

	C. Working in a for-profit for the same/similar job D. Self-employed or doing freelance work E. Changed careers F. Went back to school G. Not working H. Retired I. Not sure J. Other, please specify:	
33	**Is your organization currently using any of the following to fill staffing gaps?** A. External Consultants B. Splitting roles C. Combining roles D. Changing full-time roles to part time roles E. Changing part-time roles to full-time roles F. Temporary Staffing Agencies G. Volunteers (including board members) H. Other, please specify:	-Select all that apply -Skip if answer "No" to question 28
34	**Has your organization implemented any of the following strategies to recruit and retain staff?** A. 4-day work week B. Increased benefits (e.g. health and dental insurance, pension or other retirement benefits etc.) C. Enhanced perks (e.g reimbursement for cell phone use, transportation support etc.) D. Career advancement opportunities (training, mentorship, etc.) E. Equity trainings and strategies F. Flexible working hours G. Mental health support (e.g. expanded benefits, counseling, etc.) H. One-time bonuses I. Remote work options (e.g. hybrid, full-time, etc.) J. Raised salary K. Signing bonuses L. Succession Planning	-Select all that apply -Skip if answer "No" to question 28

	M. Wellness programs (additional time off, retreats, sabbaticals, etc.) N. We have not implemented any of these strategies. [Exclusive] O. Other, please specify:	
35	**What specific skills are lacking in your organization's candidates/staff?** A. Communications B. Data C. Digital D. Evaluation E. Finance F. Fundraising G. Government Relations (GR) H. Grant Writing I. Human Resources J. IT/Tech K. Public policy and advocacy L. Public Affairs M. Program design and delivery N. Senior management O. Volunteer management/coordination P. We are not facing a skills shortage [Exclusive] Q. Other, please specify:	Select all that apply -Skip if answer "No" to question 28
36	**Did your organization experience challenges with recruitment and/or retention of volunteers between April 1, 2023 - March 31, 2024?** A. Yes B. No C. Not sure	-Select one -Ask all -If answer "B -C", skip to question 38
37	**What factors affected your nonprofit's ability to recruit and/or retain volunteers?** A. Difficulty attracting youth volunteers B. Difficulty convincing previous volunteers to return C. Difficulty recruiting new volunteers D. Volunteers concerned about health and safety	-Select all that apply -Skip if No or no answer at Q36

	E. Volunteers retiring F. Burden of police record checks for volunteering G. Lack of dedicated individual(s) responsible for volunteer recruitment and/or retention H. Other, please specify:	
F. Impact		
38	**How are staffing and/or volunteer challenges affecting your organization's mission or mandate?** A. Programs or services discontinued B. Programs or services scaled back C. Programs or services have increased waitlists D. Other, please specify:	Select all that apply
39	**To your knowledge, gauge the health of nonprofits:** A. Across Ontario B. Across your local community C. Across your subsector D. Across nonprofits either led-by, focused on, and/or serving equity-deserving communities	Rating with not applicable option (1 Very unhealthy, 2 Somewhat unhealthy, 3 Somewhat healthy, 4 Very healthy, 5 Not applicable)
G Digging Deeper **This section probes a few significant challenges in detail. You can expect to spend around 4 to 5 minutes on this section.**		
40	The next Ontario election is tentatively scheduled for the spring of 2026, but the government could call an election sooner. **Thinking specifically about the upcoming Ontario election (not the federal election or local elections), does your organization plan to engage in any of the following types of election advocacy and/or readiness activities?** A. Get out the vote B. Analysis and communications (e.g of party platforms, candidates etc.)	Select all that apply

	C. Report Cards based on issues/platforms/candidates/parties D. Debates E. Mock Elections F. Government Relations (e.g. candidate engagement, political party engagement) G. Develop election asks H. Build other nonprofits' capacity to engage in election advocacy and/or readiness activities I. Build capacity of community members/clients/individuals to engage in election advocacy and/or readiness activities J. No K. Unsure L. Other, please specify:	
41	**What successes, priorities and supports are you grateful for or are making your organization stronger? In other words, what is helping you thrive?**	-Text box -Long answer – allow 200 words
42	**Looking ahead from now into the next 12 months, what concerns or challenges are top of mind for your organization?**	Text box -Long answer – allow 200 words
43	**What value does your organization bring to your communities?**	Text box -Long answer – allow 200 words
F. Wrap-up		
44	**Respondents who complete the survey are eligible to enter a draw for one of four gift cards ($50).** **Please indicate below if you wish to enter the draw. You will be asked to provide your contact information so Environics Research can reach you if you win.** **Environics Research will conduct the draw. Your contact information will not otherwise be connected to your survey responses or shared with the Ontario Nonprofit Network.**	-Select one -If answer "A-B" go to question 45

	A. Yes, I wish to enter my name into a draw for 1 of 4 $50 gift cards. B. I do not wish to enter the draw.	
45	**Please include your contact information for the draw - Name, organization, email.** Name: Organization: Email:	Text box -Skip if answer "No" to question 44
46	**We are looking for representatives from organizations who would be interested in speaking to the media on issues impacting nonprofits and the communities they serve.** **Please indicate below if you are willing to do this. If you say yes, Environics Research will share your contact information with the Ontario Nonprofit Network who may contact you about media opportunities.** **Your contact information will not be connected to your survey responses in the data that is shared with ONN.** A. Yes, I would like ONN to contact me about opportunities to speak to the media about issues facing nonprofit organizations. B. No, I do not wish to be contacted.	
47	**Please include your contact information for media opportunities - Name, organization, email.** Name: Organization: Email:	Text box -Skip if answer "No" to question 46
48	**Any last comments or concerns?**	Text box