APPLEGROVE COMMUNITY COMPLEX

60 Woodfield Road, Toronto, Ontario M4L 2W6
Tel: 416-461-8143   Fax: 416-461-5513
www.ApplegroveCC.ca

"TOGETHER, BUILDING OUR COMMUNITY"

Board of Directors Meeting
AGENDA – Monday, September 27, 2010

If you cannot attend, please call the office with your regrets.

A neighbourhood partnership fostering community
through social and informative programs for individuals and families.

Note: There is no committee meeting this month.

6:45 Optional Supper

7:00
1. Welcome/Call to Order/Adoption of Agenda
2. Declaration of Conflicts of Interest
3. Volunteer Hours
4. Donation Envelope

7:05
5. Minutes
   - 5.1. June 21 Board of Directors Meeting (*White*)
   - 5.2. August 16 Special Board Meeting *(White)*

7:10
6. Finance and Fundraising
   - 6.1. Follow-up on August discussion of reports *(Green)*
   - 6.2. August Financial Report *(to be distributed at the meeting)*
   - 6.3. Admin Budget Update

7:30
7. Program Presentation: Helping Our Babies Grow (Louise)

7:40
8. Membership Follow-up *(Yellow)*

8:00
9. Program Updates
   - 9.1. Edgewood
   - 9.2. HAIG
   - 9.3. After-School

8:10
10. Applicious Comments
11. Event Planning for 2010/11
12. Board Recruitment

8:35

13. Directors' Concerns
14. Adjournment

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"TOGETHER, BUILDING OUR COMMUNITY"

Board of Management Meeting
AGENDA -- Monday, September 27, 2010

8:40
A. Call to Order/Adoption of Agenda

B. Declaration of Conflicts of Interest

C. Minutes of June 21 Board of Management Meeting *(White)*

D. Hiring Reports
- D.1. Summer Staff
- D.2. Outreach and Involvement Staff
- D.3. After-school and Youth Program Staff

8:50
E. Executive Director's Report *(Pink)*

8:55
F. Correspondence/Information
- F.1. Correspondence List *(To be distributed at the meeting)*
- F.2. Imagine Canada's "Sector Monitor" *(Cream)*

8:59
G. Adjournment

Next Meetings
Monday, October 25
Monday, November 29

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Minutes of the Board of Directors Meeting
August 16, 2010

A neighbourhood partnership fostering community
through social and informative programs for individuals and families.

Present: Sandra Bussin, Natalie Coulter, Estelle Halbach, Alana Honsch, Carmita Magnaye, Ann McKechnie, Sydney Schultz, Pierre Trudel (Chair), Lynn Wyminga.
Staff: Jennifer Arima, Anna Durante, Susan Fletcher (Recorder), Monica Kelly, Clifford Price, May Seto, Franki Tang, Barb Woodhouse.

Dates of Next Meetings
Monday, September 27 – Board Meeting
Thursday, Sept. 9 – Applicious Committee Meeting at 6:30 p.m.

1. **Call to Order/Adoption of Agenda/Introductions**
At 5:30, Lynn called the meeting to order due to late arrival of the Chair. Quorum of 5 Directors (6 with the Coucillor) was achieved. The agenda was adopted as circulated by concensus.

2. **Declaration of Conflicts of Interest**
None.

3. **Discussion of Membership Fees**
Discussion took place about implementing membership fees. Feedback and comments were recorded. The Board gave staff direction to investigate further and make a decision about it at a later date.

4. **Staff Code of Conduct**
Staff group reviewed the policy and made some changes for clarity.

5. **Financial Reports to the Board**
Franki explained the proposed financial reports circulated electronically and distributed at the meeting. Board members appreciated the additional information and asked for an additional detailed report on fundraising income. Susan and Franki will prepare and circulate a draft before the next Board meeting.

   The discussion included an outline of the relevant program funding and minimal success in foundation and corporate funding for the Applegrove Parent/Child program. Board members stressed the importance of communicating this situation to program participants and the parents of children who attend with caregivers.

6. **Admin Budget**
Susan circulated a draft budget and highlighted the issues. The Board requested further work on the proposed rent increase.

7. Edgewood Update
Susan reported that staff had had no success in locating alternative space, but that the funder would consider allocating the program's resources to one of Applegrove's other locations. Staff will continue to search for appropriate space.

8. Applicious
Next Applicious committee meeting is set for Thursday, September 9 at 6:30 pm.

9. Executive Directors' Report
In addition to the issues in her report, Susan informed the Board that Estelle resigned. The Board accepted Estelle's resignation with regret and asked Susan to post the 2 vacancies on BoardMatch.

MOTION *(McKechnie/Magnaye)*
To accept the Executive Director's Report.
Carried.

10. Directors' Concerns
None

11. Information
Members appreciated the fundraising information included in their packages.

12. Adjournment
The meeting was adjourned on a motion by Ann McKechnie, seconded by Estelle Halbach.

________________________ Chair

________________________ Secretary

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"TOGETHER, BUILDING OUR COMMUNITY"

Minutes of the Board of Directors Meeting
June 21, 2010

A neighbourhood partnership fostering community
through social and informative programs for individuals and families.

Present: Natalie Coulter, Estelle Halbach, Alana Honsch, Carmita Magnaye, Ann McKechnie, Pierre Trudel (Chair)
Regrets: Sandra Bussin, Elena Nielsen, Sydney Schultz, Lynn Wyminga.
Staff: Claudia Filici-McMullan, Susan Fletcher, May Seto (Recorder)

Dates of Next Meetings
Monday, August 16 – Board Meeting at 5:30 pm
Thursday, September 9 – Applicious Committee Meeting at 6:30 pm

1. Call to Order/Adoption of Agenda/Introductions
At 7:00, Estelle called the meeting to order due to late arrival of the Chair. Quorum of 5 Directors was achieved. The agenda was adopted with the addition of a new report to the agenda.

2. Declaration of Conflicts of Interest
None.

3. Volunteer Hours
Members provided their volunteer hours.

4. Donation Envelope
The donation envelope circulated.

5. Minutes of the May 31 Board of Directors Meeting.
MOTION *(McKechnie/Magnaye)*
To accept the minutes of May 31.
Carried*.*

6. Finance and Fundraising
Fundraising report not available this month.

6.1. APER (Seniors Funding reconciliation)
Susan provided information and an overview of the report.
MOTION *(Coulter/Trudel)*
To accept the Annual Program Expenditure Reconciliation.
Carried*.*

Pierre assumed the duties as Chair from this point forward.

6.2. Applicious
Susan and Claudia provided a brief overview from the Applicious committee meeting held earlier. Discussion from board members resulted in a decision to keep the event at Woodbine Park. It was also agreed to hire an Event Planner due to busy summer schedules and uncertainty of Outreach and Involvement staff start dates and skills.

6.3. City Report on 2008 AOCC Variance (added to agenda)
The report is going to the Budget Committee at the end of June. Susan provided an overview and answered questions from board members.

7. Edgewood Update

Edgewood's last day was June 9th and Louise is packing and preparing for the move which will take place early next week. Susan provided an update on the search for a new location and informed the Board that staff will follow up on both Corpus Christi and the Taiwanese Church. Alana provided information about potential space on Kingston Rd; staff will visit and make an appointment to speak to site contact if space is appropriate.

The Board directed staff to make decisions regarding a new location for Edgewood. The Board also recommended contacting media. Susan will prepare a press release and Alana will connect with her media contact.

8. Directors' Concerns

With Elena's resignation effective at the end of July, the board thanked her for her years of service on the board and wished her well in Denmark.

9. Adjournment

The meeting was adjourned on a motion by Alana Honsch, seconded by Natalie Coulter.

________________________ Chair

________________________ Secretary

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TORONTO
An Agency of the City of Toronto

Minutes of the Board of Management Meeting
June 21, 2010

A neighbourhood partnership fostering community through
social and informative programs for individuals and families.

Present: Natalie Coulter, Estelle Halbach, Alana Honsch, Carmita Magnaye, Ann McKechnie, Pierre Trudel (Chair).
Regrets: Sandra Bussin, Sheila Cary-Meagher, Elena Nielsen, Sydney Schultz, Lynn Wyminga.
Staff: Susan Fletcher, May Seto (Recorder).

A. Call to Order/Adoption of Agenda
Pierre called the meeting to order. Quorum of 5 members was achieved. The agenda was adopted with the addition of the correspondence list.

B. Declaration of Conflicts of Interest
None.

C. Minutes of the May 31 Board of Management Meeting
MOTION *(McKechnie/Magnaye)*
To accept the minutes of May 31.
Carried.

D. Lease
Susan provided an update.

E. Collective Agreement Update
Susan outlined new issues in the collective agreement and answered questions from board members.

F. Executive Director's Report
The August board meeting will be held on August 16^{th} at 5:30 p.m. at Applegrove. Childcare and dinner will be provided.

MOTION *(McKechnie/Coulter)*
To accept the Executive Director's Report.
Carried.

G. Correspondence/Information
MOTION *(Honsch/Halbach)*
To accept the suggested actions.
Carried.

H. Adjournment

The meeting was adjourned on a motion by Carmita Magnaye, seconded by Alana Honsch.

Next Meetings:
Monday, August 16 – Board Meeting at 5:30
Monday, July 5 – Applicious committee meeting at 7

___________________________ Chair

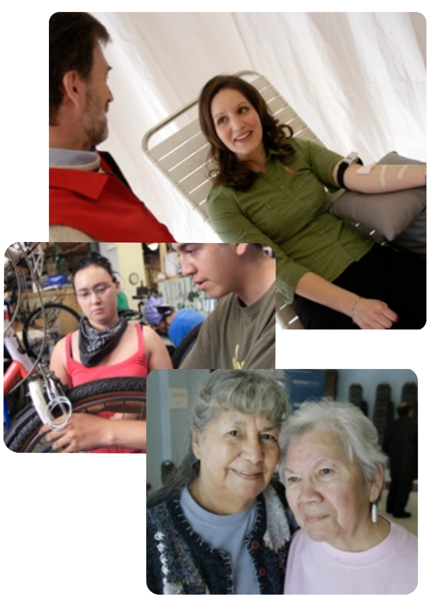
___________________________ Secretary

Imagine Canada's Sector Monitor

David Lasby, MPhil, Senior Research Associate
Cathy Barr, PhD, Vice-president, Operations and Director of Research

Vol. 1, No. 2

IN THIS REPORT



Foreword

I am very pleased to present the results of Imagine Canada's second *Sector Monitor*. All of us at Imagine have been extremely gratified by the interest you have shown, both in the results of the first report and in the *Sector Monitor* program as a whole. The success of this program ultimately rests on the willingness of sector leaders such as yourselves to make your views known by responding to the survey and on the uses you put the findings to. Thank you for that support.

This second version of the *Sector Monitor* is largely about comparing current conditions to the baseline established by the first survey. The primary focus of this report is on exploring how the effects of the economic downturn have continued to unfold since 2009.

A key question currently facing our sector is whether the worst effects of the downturn have passed or if worse is yet to come. Overall, this *Sector Monitor* indicates that we continue to face considerable challenges. Although a few of the most acute challenges related to the economy have slackened for many organizations, many other challenges remain or have increased. Although the broader economy is showing signs of slow recovery, this does not appear to be the case for the sector as a whole and we collectively need to watch this closely in coming months and even years.

In reading this report you will note that it is considerably shorter than the previous *Sector Monitor* report. Instead of producing one large report, we have shifted to producing a series of smaller, more topically focused reports. We believe these reports will be more timely than larger reports and will allow our most important constituency—you, our reader—to more easily find and apply the findings that are most important to you. Additionally, all of our reports will be accompanied by free-to-download PowerPoint presentations that will be available in the *Sector Monitor* section of the Imagine Canada website. We encourage you to use these various tools to disseminate *Sector Monitor* findings to your stakeholders.

As always, if you have any comments about the *Sector Monitor*, please let us know so that we can continue to strengthen the program in the months and years ahead.

Marcel Lauzière
President & CEO Imagine 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.

ISSN 1923-3647

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Acknowledgements

We would like to thank the following partner organizations for their assistance with the *Sector Monitor*:

- Big Brothers Big Sisters of Canada
- Boys and Girls Clubs of Canada
- CanadaHelps
- Canadian Conference of the Arts
- Community Foundations of Canada
- Food Banks Canada
- Habitat for Humanity Canada
- Health Charities Coalition of Canada
- Philanthropic Foundations Canada
- The Salvation Army Canada
- TechSoup Canada
- United Way of Canada
- United Way of Winnipeg
- Vancouver Foundation
- Volunteer Canada
- YMCA Canada
- YWCA Canada

Additionally 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.

Finally, we would like to thank the more than 1,500 charity leaders from across Canada and from across the sector who responded to the *Sector Monitor* and the thousands who downloaded the previous *Sector Monitor*. The success of this research is due to your contributions and we are very grateful for the time you took to participate and to consider our findings.

Photos featured on the cover of the *Sector Monitor* courtesy of Imagine Canada members: Canadian Blood Services, PEDAL, Earn-a-bike (funded by the Vancouver Foundation), and Alzheimer Society, London and Middlesex.

Highlights

More charities are experiencing challenges due to economic conditions.

- More than half of charities are experiencing increased demand for their products and services and/or difficulty fulfilling their mission.
- Compared to 2009, more charities are reporting that their existence is at risk (29% vs. 22%) and/or increased demand (54% vs. 45%).

More charities are experiencing high stress.

- The percentage of charities under high stress has increased to 17%, from 13% in late 2009.

The financial situation of many charities has stagnated or deteriorated slightly.

- On average, charities report that revenues have dropped by 1.1% while expenditures have increased by 3.8%.

The previous picture, dominated by marked declines in key sources of revenue, has shifted to one of more generalized stagnation.

- Although charities are less likely to report decreases in key revenue sources such as corporate contributions and investment income, fewer charities are reporting increases in almost all sources of revenue.

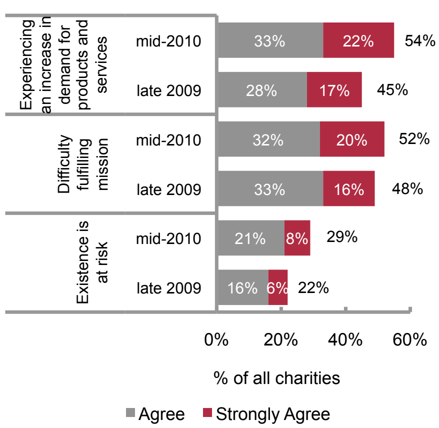
The human resources picture is challenging.

- Operating charities report that the average number of paid staff has decreased by 4.4% - this is a significant departure from the average increase of 1.8% reported in late 2009.

In spite of these challenges, the level of confidence in the future remains high.

- As a group, charity leaders are remarkably confident in the future and their level of confidence is essentially unchanged from late 2009.

Figure 1: Over half of organizations face challenges carrying out their mission and more than one-quarter are at risk.



Introduction

The *Sector Monitor* is a survey program designed to regularly take the pulse of Canada's charitable and nonprofit sector. This version of the *Sector Monitor* focuses on the ongoing effects of the economic downturn. Throughout this report, findings are compared to those from the first *Sector Monitor*, which covered the period from the onset of the economic downturn in late 2008 until late 2009.

This report summarizes the responses of 1,523 leaders of registered charities from across Canada and across the sector who answered our online survey between June 16 and July 18, 2010.[1] Responses have been weighted by region, organization size and activity area to produce estimates that are more representative of Canadian charities overall.

Impact of Current Economic Conditions

This version of the *Sector Monitor* shows a sector struggling with the after effects of the economic downturn. Although economic conditions have improved, charities continue to report

1 The survey was sent to the leaders of 3,923 registered charities with annual revenues of $30,000 or more that were not religious congregations. We received responses from 1,523 of these leaders, for a total response rate of 39%. We limited the survey to registered charities to allow for direct comparison with information available from the Canada Revenue Agency.

Figure 2: Most organizations forecast difficulty covering expenses at some point in the next two years.

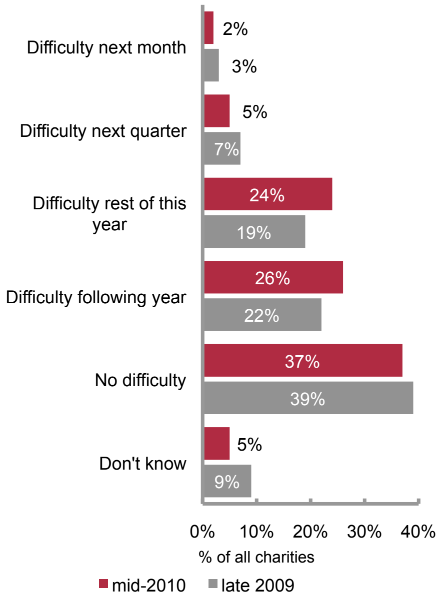
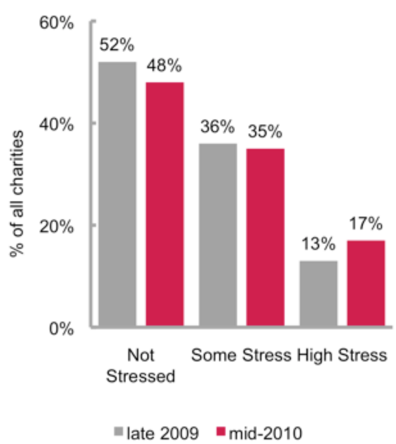


Figure 3: More than half of organizations are under stress; nearly one-fifth are under high stress.



significant challenges. Compared to the first survey period, charitable leaders are more likely to report that their organizations are experiencing increased demand and that their existence is at risk.[2] Over half of charitable leaders report increased demand and difficulty fulfilling their mission because of economic conditions (see Figure 1). Similarly, 29% report that their organization's existence is at risk, up from 22% at the end of 2009.

Compared to the first *Sector Monitor*, charity leaders are slightly more likely to predict difficulty covering expenses over the medium- to long-term (i.e., at some point in the next four to 24 months). Almost one-third forecast that their organization will have difficulties covering expenses at some point within the next 12 months, with a significant minority forecasting difficulty within the next three months (see Figure 2). Another quarter of leaders predict difficulty during the subsequent year (i.e., at some point between 13 and 24 months from now). Most of the balance (37%) say they will not have problems covering their expenses.

STRESS LEVELS

As in the first *Sector Monitor*, we used responses to four questions to assess the degree of stress charities are experiencing.[3] Our results indicate that the percentage of charities under high stress has increased, with 17% currently under high stress compared to 13% at the end of 2009 (see Figure 3).

As in the first *Sector Monitor*, some types of charities are more likely to be under stress than others. For instance, one in five operating charities[4] is under high stress, compared to just over one in twenty foundations (see Table 1). Similarly, organizations with smaller annual revenues and comparatively small numbers of paid staff are more likely to be under high stress. Conversely, the very largest organizations and those with the largest paid staff complements are much less likely to report being under high stress. With one or two notable exceptions (organizations from the Prairies and/or working in the areas of Philanthropic Intermediaries & Voluntarism), there is comparatively little variation according to region or activity area.

A number of groups of charities are more likely to report high stress than they were in the first *Sector Monitor*. These include:

- operating charities (20% vs. 14% in 2009);
- charities with annual revenues between $500 thousand and $1.5 million (16% vs. 9%);
- charities working in the areas of Education & Research (17% vs. 5%) and Social Services (21% vs. 12%); and

2 Unless otherwise noted, in this report we discuss only differences between the first and second *Sector Monitors* that are significant at the 0.05 level. However, not every significant difference is discussed in the text.

3 Those strongly agreeing they had difficulty fulfilling their mission, strongly agreeing that they were experiencing increased demand and agreeing that their existence was at risk were assigned points for each of these responses. Organizations that forecast difficulty covering expenses within the next 12 months were assigned points based on how immediate the difficulty was. Based on how many points they amassed, charities were assessed as having no significant stress, some stress or high stress. The criteria for assigning points and level of stress are identical to those used in the first *Sector Monitor*, though the latest questions refer to "economic conditions" rather than to "the economic downturn".

4 The term operating charity is used in this report to refer to charities that are neither public nor private foundations. The overwhelming majority (88%) of the approximately 85,000 registered charities in Canada are operating charities.

TABLE 1: Some charities are more stressed than others.

	Not Stressed	Some Stress	High Stress
All Charities	**48%**	**35%**	**17%**
DESIGNATION			
Operating charity	45%	35%	20%
Foundation	62%	32%	6%
ANNUAL REVENUES			
$30,000 to $149,999	45%	31%	24%
$150,000 to $499,999	41%	46%	13%
$500,000 to $1,499,999	53%	31%	16%
$1,500,000 to $4,999,999	54%	38%	8%
$5,000,000 or more	76%	22%	2%
ACTIVITY AREA			
Arts, Culture, Sports & Recreation	47%	33%	20%
Education & Research	48%	35%	17%
Health	54%	28%	18%
Social Services	39%	40%	21%
Philanthropic Intermediaries & Voluntarism	62%	30%	7%
Other	56%	34%	10%
Unknown	44%	38%	18%
REGION			
BC	44%	35%	21%
AB	45%	39%	16%
PR	58%	32%	10%
ON	49%	37%	15%
QC	50%	35%	14%
AT	56%	25%	19%
PAID STAFF SIZE			
No paid staff	63%	23%	14%
1 to 4	42%	36%	22%
5 to 9	41%	41%	18%
10 to 24	43%	37%	20%
25 to 99	48%	43%	9%
100 or more	79%	20%	1%

- charities with between 10 and 24 paid staff (20% vs. 11%).

Conversely, charities with annual revenues of $5 million or more are less likely to report high levels of stress than they were in late 2009 (2% vs. 6%).

THE BOTTOM LINE: FINANCIAL AND HUMAN RESOURCES

While the Canadian economy appears to be slowly recovering from the economic downturn, this has not yet translated into increased resources for charities. Although preliminary estimates show the national unemployment rate dropped by an estimated 0.4% and total employment increased by almost 300 thousand Canadians in the first half of 2010, respondents to the *Sector Monitor* report that, on average, the number of people they employ dropped slightly over the same period (Statistics Canada, n.d.-a). Similarly, although Canadian businesses reported that seasonally adjusted operating revenues increased by approximately 1% in the first quarter of 2010, *Sector Monitor* respondents say that, on average, their revenues decreased slightly (Statistics Canada, n.d.-b).

Financial resources. Generally speaking, the financial situation among charities seems to be stagnating or deteriorating slightly. Charities are most likely to report that revenues have remained about the same or decreased, while expenditures have remained about the same or increased (see Table 2). On average, charities report that revenues have dropped by approximately 1.1%, while expenditures have increased by 3.8%.

Compared to the previous *Sector Monitor*, fewer operating charities are reporting increased revenues (22% vs. 32% in

TABLE 2: Charities report that expenditures are generally increasing while revenues are generally decreasing.

	All Charities	Operating Charities	Foundations
REVENUES			
Increased	24%	22%	30%
Remained about the same	42%	41%	46%
Decreased	35%	37%	24%
Average change	**-1.09%**	**-1.68%**	**1.83%**
EXPENDITURES			
Increased	40%	43%	24%
Remained about the same	43%	40%	58%
Decreased	17%	17%	18%
Average change	**3.79%**	**3.85%**	**3.47%**

2009) and more are reporting decreased revenues (37% vs. 32% in 2009).[5] The figures for average change in revenues and expenditures are largely unchanged since 2009. Compared to operating charities, foundations appear to be in a somewhat better position. Foundations are more likely to report increased revenues and less likely to report increased expenditures. On average, their revenues have increased by an average of 1.1% which, though slight, compares favourably to the average decrease of 3.8% they reported in 2009.

5 Significance =0.053.

Figure 4: Charities reported decreases in many sources of revenue.

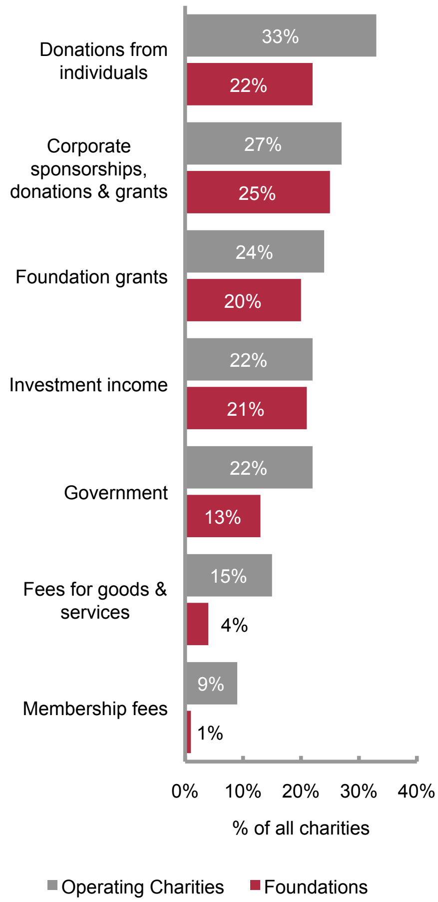
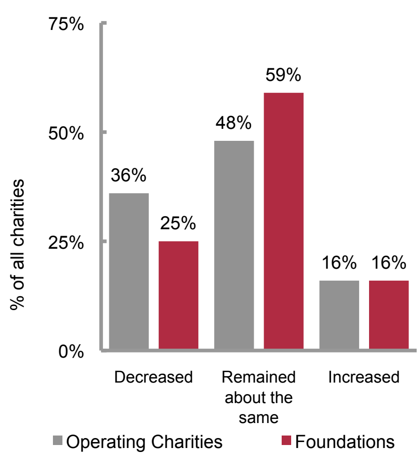


Figure 5: Most organizations report that the amount of cash they have on hand has remained about the same or decreased.



Looking at change in individual sources of revenue we again see a sector which continues to struggle with the lingering effects of the recession. The good news is that fewer charities are reporting decreases in sources that had previously been hard hit, such as corporate funding and investment income. The bad news is that fewer charities are reporting increases in almost all sources of revenue. Where the previous picture had been dominated by striking reports of declines in key areas, the picture now is of a more widespread stagnation.

As in the first *Sector Monitor*, charities are most likely to report decreases in donations from individuals, corporate support, foundation grants and investment income (see Figure 4). Operating charities are as likely or more likely than foundations to report decreases in almost all sources. Foundations are much less likely to report decreases in investment income (21% reported this, compared to 62% in 2009). Operating charities were also less likely to report decreases in investment income (22% vs. 40%) and corporate funding (27% vs. 34%).

Around half of both operating charities and foundations report that the amount of cash they have on hand is about the same, since January 2010 (see Figure 5). About a third of operating charities and a quarter of foundations report that their cash on hand has decreased. Only a small number of organizations report that cash on hand has increased. These figures are essentially unchanged from the first *Sector Monitor*.

Human resources. Superficially it might seem that the human resources picture is largely stable in that charitable leaders were

TABLE 3: Change in paid staff and volunteers.

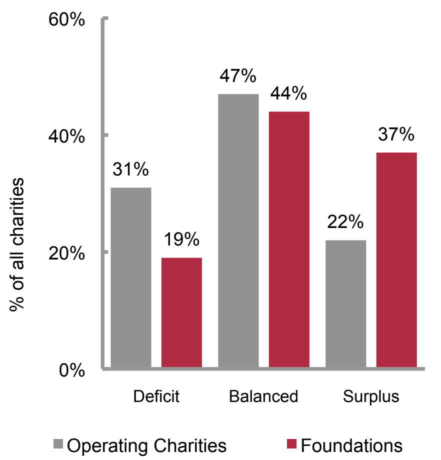
	All Charities	Operating Charities	Foundations
PAID STAFF			
Increased	22%	23%	19%
Remained about the same	58%	57%	65%
Decreased	20%	21%	16%
Average change	**-3.44%**	**-4.41%**	**1.88%**
VOLUNTEERS			
Increased	24%	26%	19%
Remained about the same	60%	59%	65%
Decreased	16%	15%	17%
Increased reliance on volunteers	**35%**	**36%**	**27%**

most likely to report that both paid staff and volunteer numbers have remained about the same. However, other signs suggest potentially significant change for some charities.

In terms of paid staff, the fact that roughly equal percentages of both operating charities and foundations report increases and decreases would support the notion of stability (see Table 3). However, the size of the change in paid staff complement paints a somewhat different picture. Operating charities report that the number of paid staff they employ has decreased by an average of 4.4%. This is a departure from late 2009 when operating charities reported an average paid staff increase of 1.8%. Foundations appear to be doing somewhat better, reporting that the number of paid staff they employ has increased by an average of 1.9%.

In terms of volunteers, charities are most likely to report that numbers have remained about the same. They are somewhat more likely to report increases in volunteers than decreases, reflecting a somewhat positive trend. However, although the trend is positive, it is not as positive as previously reported. When compared to the previous *Sector Monitor*, the percentage of charities reporting increases in volunteers has dropped (to 24% from 32%), while the percentage reporting decreases has climbed (to 16% from 9%).

Figure 6: Budget predictions remain largely unchanged since late 2009.

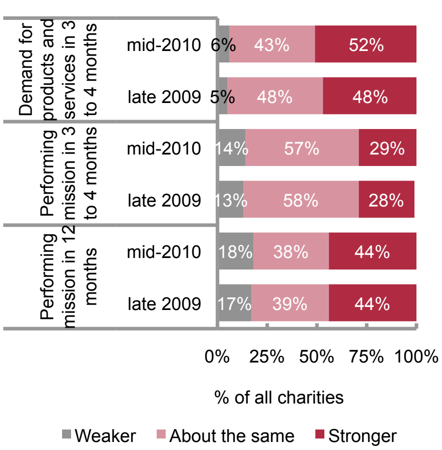


Confidence in the Future

Charitable leaders continue to show a remarkable degree of confidence in the future. Faced with increased challenges and a financial situation that has not improved over the past six months, their confidence remains essentially unchanged.

About half of charity leaders predict that their organizations will end the year with a balanced budget (see Figure 6). Leaders of operating charities are more likely to predict that they will end the year in a deficit position (about one-third predict this), while foundation leaders are more likely to foresee a surplus (just over one-third make this prediction). These predictions were virtually unchanged from those made by charitable leaders in the first *Sector Monitor*.

Figure 7: Overall levels of confidence for the future were unchanged since late 2009.



In considering the future of their organization, just under half of leaders predict that their organization will be stronger, in terms of its ability to carry out its mission, in twelve months (see Figure 7). They are somewhat more conservative in their predictions for the next three to four months, with slightly more than one-quarter predicting that they will be stronger. About half predict that demand for their products and services will increase in the next three to four months. These figures are essentially unchanged from those reported in the first *Sector Monitor* in late 2009.

TABLE 4: Operating charities were more likely to predict increased demand while foundation leaders were more optimistic about their ability to perform their mission.

	All Charities	Operating Charities	Foundations
DEMAND IN 3 TO 4 MONTHS			
Stronger	52%	53%	44%
About the same	43%	41%	50%
Weaker	6%	5%	6%
PERFORMING MISSION IN 3 TO 4 MONTHS			
Stronger	29%	27%	42%
About the same	56%	59%	46%
Weaker	14%	15%	12%
PERFORMING MISSION IN 12 MONTHS			
Stronger	44%	42%	52%
About the same	38%	40%	27%
Weaker	18%	18%	21%

Leaders of operating charities are somewhat more likely to predict that demand for their organization's products and services will increase in the next three to four months than are foundation leaders (see Table 4). Conversely, foundation leaders are somewhat more confident that their organization will be stronger, in terms of its ability to perform its mission, in the future. This is particularly true of predictions for the next three to four months. However, while leaders are generally optimistic, a significant minority (up to one-fifth) believe that their organization will be weaker in the future. In terms of meaningful differences from the first *Sector Monitor*, leaders of operating charities were somewhat more likely to predict increased demand in 3 to 4 months.

Conclusion

This second version of Imagine Canada's *Sector Monitor* shows that the effects of the economic downturn continue to echo through the charitable and nonprofit sector. The percentage of charities experiencing high levels of stress has increased. While some revenue sources appear to be under less threat than they were previously, revenues are generally flat and expenditures are increasing. Most individual charities are reporting that their paid staff and volunteer complements have remained about the same but there has been an overall decrease in the number of staff. At this point, it is unclear whether the number of volunteers has increased enough to make up for the loss of paid staff.

Imagine Canada's programs that support the sector include:

CANADIAN DIRECTORY TO FOUNDATIONS & CORPORATIONS

$1 billion in available funding.

Imagine Caring Company Une entreprise généreuse

Promotion of good corporate citizenship.

Charity Tax Tools

Essential tax information for Canada's charities.

Imagine Canada Ethical Code

Governance and financial accountability.

GIVING& VOLUNTEERING

Knowledge about the sector and how Canadians support it.

Insurance & Liability RESOURCE CENTRE for Nonprofits

Risk management support for the sector.

Nonprofit Library

Canada's largest collection of charitable and nonprofit resources.

Interestingly, despite these challenges, sector leaders remain remarkably confident about the future.

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Statistics Canada. (n.d.-a). "Labour force characteristics by age and sex, Canada, seasonally adjusted." Labour Force Information. Last updated August 6, 2010. http://www.statcan.gc.ca/pub/71-001-x/2010007/t001-eng.htm (accessed August 10, 2010).

Statistics Canada. (n.d.-b). "Summary table — Operating revenue and operating profit, seasonally adjusted." Quarterly Financial Statistics for Enterprises, First Quarter 2010. Last updated June 30, 2010. http://www.statcan.gc.ca/pub/61-008-x/2010001/t028-eng.htm (accessed August 10, 2010).

AOCC Membership Summary September 2010

Centre	Categories	Fee	Notes	# of members	approximate membership income	If membership provides a decreased fee for programs (any programs), do you issue membership cards and require them before people register? If not,	What program do you use to track membership? If it is Access, who designed the membership database and who maintains it (not the data entry, but the updates, new reports, etc.)?
Eastview	children and youth	$5	Eastview members have access, free of charge to all of our programs and activities with the exception of our Day Camp programs and 3 specific Newcomer Service's programs	400 adults	$5,000 (inc. Youth/children)	don't use membership cards anymore--we used to, but it was a nightmare keeping track, and re-issuing lost ones. We belive what people tell us, and if compelled to check we look at our database (computer or hard copy)	Access software. We have self -designed it several times now--used KidTrax for a while to try to monitor usage stats with our children/youth database and there are membership cards to that system--but whatever we try its really problematic for record-keeping. On the surface it is simple enough, but there is a ongoing challenge updating regularly and correctly, as well as having program staff submit paper forms.
	adults and seniors	$8					
	families	$20					
Cecil	single	$5		600	not enough to cover mailing costs	N/A	Access. Have made no significant changes to the structure since we did this years ago. Receptionists are responsible for entering membership data, generating reports, etc.
	family	$8					
Swansea		$2		40 (in the separate associaton)			Excel
Central Eglinton	Family	$35	CECC memberships are available, renewable annually (and please note, memberships are non-refundable). Family members can attend all drop-ins for free. CECC Family membership is required for registration in FRC and day camp programs. Membership entitles members to a discount in the 50+ and Community programs.	742 (families and individuals)	$15,000 +	Use membership cards. People need the card OR their membership number to register.	Income Manager (membership, registration, mailing and donation database)
	Individual	$25					
	Older Adult (50+)	$25 single, $30 for couple					
	Groups	$75					
Centre 55		no fee	Membership is open to everyone. You will receive a charitable tax receipt for your fee. If you are currently not able to pay the $10 fee, our front desk staff would be happy to assist you in making other arrangements.			Membership card	
519	Member or Community Member	$10					
Harbour-front	Family	$11 / $15	Avoid paying the 10% surcharge on all programs for non-members.				
	Adult	$7 / $10					
	Youth	$5 / $7					
	Child	$4 / $5					

Centre	Categories	Fee	Notes	# of members	approximate membership income	If membership provides a decreased fee for programs (any programs), do you issue membership cards and require them before people register? If not,	What program do you use to track membership? If it is Access, who designed the membership database and who maintains it (not the data entry, but the updates, new reports, etc.)?
	Senior	$5 / $7					
Scadding	Family	$8 / $15	May join adult athletic program for a low seasonal fee May join all our free activities May participate in early morning swim for a low seasonal fee				
	Adult	$5 / $10					
	Youth(13-17)	$2 / $4					
	Senior	$1 / $2					
	Child	$1 / $2					
Thornton							

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TORONTO
An Agency of the City of Toronto

"TOGETHER, BUILDING OUR COMMUNITY"

Executive Director's Report
September 16, 2010

It is 2 days before Applicious (about 40 hours actually) and everything is really coming together!

Almost everything is ready for the games and contests, crafts and food, etc. We had a great meeting with volunteers last night.

Looking ahead to the Board meeting, I have included a program presentation (Helping Our Babies Grow) as well as updates on the Edgewood, HAIG and After-school programs. The agenda also includes follow-up on the fundraising reports and membership discussion at the special Board meeting in August.

Please note that with the 2 resignations, we must still have quorum of 5 directors from the current total of 7 Board members.

Respectfully submitted,

Susan Fletcher.

Revised Board Workplan for 2010

Meeting	Main Issue	Additional Issues	Program Presentation	Results
September 27		Admin Budget Membership Fundraising Reports Applicious	Helping Our Babies Grow	
October 25		Program Budgets		
November 29			Therapeutic Play	
December 20?				
January 31, 2011	Review Risk Management			

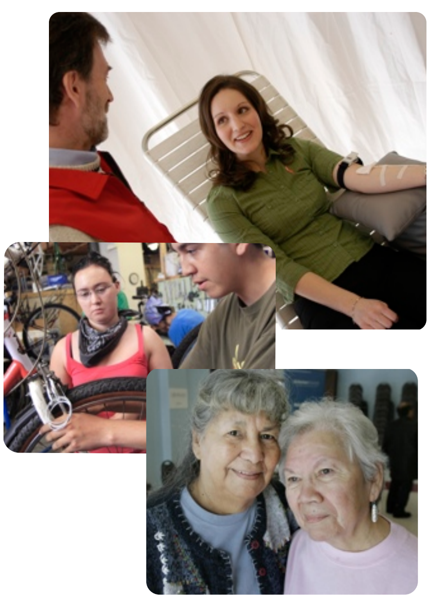
Imagine Canada

Imagine Canada's
Sector Monitor

David Lasby, MPhil, Senior Research Associate
Cathy Barr, PhD, Vice-president, Operations and Director of Research

Vol. 1, No. 2

IN THIS REPORT



Foreword

I am very pleased to present the results of Imagine Canada's second *Sector Monitor*. All of us at Imagine have been extremely gratified by the interest you have shown, both in the results of the first report and in the *Sector Monitor* program as a whole. The success of this program ultimately rests on the willingness of sector leaders such as yourselves to make your views known by responding to the survey and on the uses you put the findings to. Thank you for that support.

This second version of the *Sector Monitor* is largely about comparing current conditions to the baseline established by the first survey. The primary focus of this report is on exploring how the effects of the economic downturn have continued to unfold since 2009.

A key question currently facing our sector is whether the worst effects of the downturn have passed or if worse is yet to come. Overall, this *Sector Monitor* indicates that we continue to face considerable challenges. Although a few of the most acute challenges related to the economy have slackened for many organizations, many other challenges remain or have increased. Although the broader economy is showing signs of slow recovery, this does not appear to be the case for the sector as a whole and we collectively need to watch this closely in coming months and even years.

In reading this report you will note that it is considerably shorter than the previous *Sector Monitor* report. Instead of producing one large report, we have shifted to producing a series of smaller, more topically focused reports. We believe these reports will be more timely than larger reports and will allow our most important constituency—you, our reader—to more easily find and apply the findings that are most important to you. Additionally, all of our reports will be accompanied by free-to-download PowerPoint presentations that will be available in the *Sector Monitor* section of the Imagine Canada website. We encourage you to use these various tools to disseminate *Sector Monitor* findings to your stakeholders.

As always, if you have any comments about the *Sector Monitor*, please let us know so that we can continue to strengthen the program in the months and years ahead.

Marcel Lauzière
President & CEO Imagine 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.

ISSN 1923-3647

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Acknowledgements

We would like to thank the following partner organizations for their assistance with the *Sector Monitor*:

- Big Brothers Big Sisters of Canada
- Boys and Girls Clubs of Canada
- CanadaHelps
- Canadian Conference of the Arts
- Community Foundations of Canada
- Food Banks Canada
- Habitat for Humanity Canada
- Health Charities Coalition of Canada
- Philanthropic Foundations Canada
- The Salvation Army Canada
- TechSoup Canada
- United Way of Canada
- United Way of Winnipeg
- Vancouver Foundation
- Volunteer Canada
- YMCA Canada
- YWCA Canada

Additionally 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.

Finally, we would like to thank the more than 1,500 charity leaders from across Canada and from across the sector who responded to the *Sector Monitor* and the thousands who downloaded the previous *Sector Monitor*. The success of this research is due to your contributions and we are very grateful for the time you took to participate and to consider our findings.

Photos featured on the cover of the *Sector Monitor* courtesy of Imagine Canada members: Canadian Blood Services, PEDAL, Earn-a-bike (funded by the Vancouver Foundation), and Alzheimer Society, London and Middlesex.

Highlights

More charities are experiencing challenges due to economic conditions.

- More than half of charities are experiencing increased demand for their products and services and/or difficulty fulfilling their mission.
- Compared to 2009, more charities are reporting that their existence is at risk (29% vs. 22%) and/or increased demand (54% vs. 45%).

More charities are experiencing high stress.

- The percentage of charities under high stress has increased to 17%, from 13% in late 2009.

The financial situation of many charities has stagnated or deteriorated slightly.

- On average, charities report that revenues have dropped by 1.1% while expenditures have increased by 3.8%.

The previous picture, dominated by marked declines in key sources of revenue, has shifted to one of more generalized stagnation.

- Although charities are less likely to report decreases in key revenue sources such as corporate contributions and investment income, fewer charities are reporting increases in almost all sources of revenue.

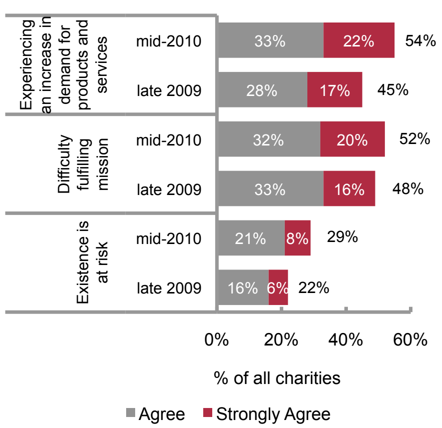
The human resources picture is challenging.

- Operating charities report that the average number of paid staff has decreased by 4.4% - this is a significant departure from the average increase of 1.8% reported in late 2009.

In spite of these challenges, the level of confidence in the future remains high.

- As a group, charity leaders are remarkably confident in the future and their level of confidence is essentially unchanged from late 2009.

Figure 1: Over half of organizations face challenges carrying out their mission and more than one-quarter are at risk.



1 The survey was sent to the leaders of 3,923 registered charities with annual revenues of $30,000 or more that were not religious congregations. We received responses from 1,523 of these leaders, for a total response rate of 39%. We limited the survey to registered charities to allow for direct comparison with information available from the Canada Revenue Agency.

Introduction

The *Sector Monitor* is a survey program designed to regularly take the pulse of Canada's charitable and nonprofit sector. This version of the *Sector Monitor* focuses on the ongoing effects of the economic downturn. Throughout this report, findings are compared to those from the first *Sector Monitor*, which covered the period from the onset of the economic downturn in late 2008 until late 2009.

This report summarizes the responses of 1,523 leaders of registered charities from across Canada and across the sector who answered our online survey between June 16 and July 18, 2010.[1] Responses have been weighted by region, organization size and activity area to produce estimates that are more representative of Canadian charities overall.

Impact of Current Economic Conditions

This version of the *Sector Monitor* shows a sector struggling with the after effects of the economic downturn. Although economic conditions have improved, charities continue to report

Figure 2: Most organizations forecast difficulty covering expenses at some point in the next two years.

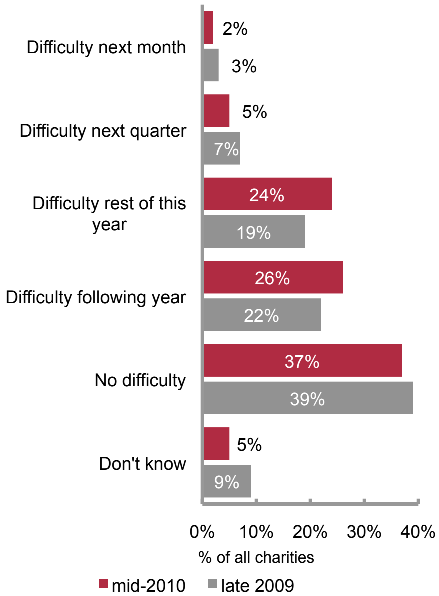
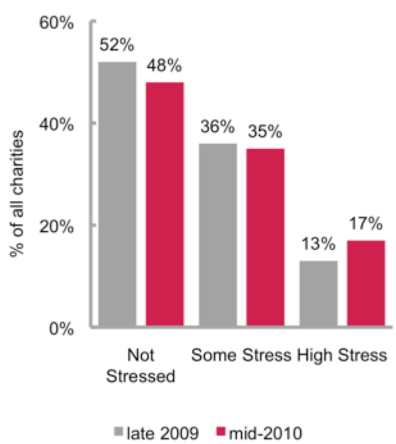


Figure 3: More than half of organizations are under stress; nearly one-fifth are under high stress.



significant challenges. Compared to the first survey period, charitable leaders are more likely to report that their organizations are experiencing increased demand and that their existence is at risk.[2] Over half of charitable leaders report increased demand and difficulty fulfilling their mission because of economic conditions (see Figure 1). Similarly, 29% report that their organization's existence is at risk, up from 22% at the end of 2009.

Compared to the first *Sector Monitor*, charity leaders are slightly more likely to predict difficulty covering expenses over the medium- to long-term (i.e., at some point in the next four to 24 months). Almost one-third forecast that their organization will have difficulties covering expenses at some point within the next 12 months, with a significant minority forecasting difficulty within the next three months (see Figure 2). Another quarter of leaders predict difficulty during the subsequent year (i.e., at some point between 13 and 24 months from now). Most of the balance (37%) say they will not have problems covering their expenses.

STRESS LEVELS

As in the first *Sector Monitor*, we used responses to four questions to assess the degree of stress charities are experiencing.[3] Our results indicate that the percentage of charities under high stress has increased, with 17% currently under high stress compared to 13% at the end of 2009 (see Figure 3).

As in the first *Sector Monitor*, some types of charities are more likely to be under stress than others. For instance, one in five operating charities[4] is under high stress, compared to just over one in twenty foundations (see Table 1). Similarly, organizations with smaller annual revenues and comparatively small numbers of paid staff are more likely to be under high stress. Conversely, the very largest organizations and those with the largest paid staff complements are much less likely to report being under high stress. With one or two notable exceptions (organizations from the Prairies and/or working in the areas of Philanthropic Intermediaries & Voluntarism), there is comparatively little variation according to region or activity area.

A number of groups of charities are more likely to report high stress than they were in the first *Sector Monitor*. These include:

- operating charities (20% vs. 14% in 2009);
- charities with annual revenues between $500 thousand and $1.5 million (16% vs. 9%);
- charities working in the areas of Education & Research (17% vs. 5%) and Social Services (21% vs. 12%); and

2 Unless otherwise noted, in this report we discuss only differences between the first and second *Sector Monitors* that are significant at the 0.05 level. However, not every significant difference is discussed in the text.

3 Those strongly agreeing they had difficulty fulfilling their mission, strongly agreeing that they were experiencing increased demand and agreeing that their existence was at risk were assigned points for each of these responses. Organizations that forecast difficulty covering expenses within the next 12 months were assigned points based on how immediate the difficulty was. Based on how many points they amassed, charities were assessed as having no significant stress, some stress or high stress. The criteria for assigning points and level of stress are identical to those used in the first *Sector Monitor*, though the latest questions refer to "economic conditions" rather than to "the economic downturn".

4 The term operating charity is used in this report to refer to charities that are neither public nor private foundations. The overwhelming majority (88%) of the approximately 85,000 registered charities in Canada are operating charities.

TABLE 1: Some charities are more stressed than others.

	Not Stressed	Some Stress	High Stress
All Charities	**48%**	**35%**	**17%**
DESIGNATION			
Operating charity	45%	35%	20%
Foundation	62%	32%	6%
ANNUAL REVENUES			
$30,000 to $149,999	45%	31%	24%
$150,000 to $499,999	41%	46%	13%
$500,000 to $1,499,999	53%	31%	16%
$1,500,000 to $4,999,999	54%	38%	8%
$5,000,000 or more	76%	22%	2%
ACTIVITY AREA			
Arts, Culture, Sports & Recreation	47%	33%	20%
Education & Research	48%	35%	17%
Health	54%	28%	18%
Social Services	39%	40%	21%
Philanthropic Intermediaries & Voluntarism	62%	30%	7%
Other	56%	34%	10%
Unknown	44%	38%	18%
REGION			
BC	44%	35%	21%
AB	45%	39%	16%
PR	58%	32%	10%
ON	49%	37%	15%
QC	50%	35%	14%
AT	56%	25%	19%
PAID STAFF SIZE			
No paid staff	63%	23%	14%
1 to 4	42%	36%	22%
5 to 9	41%	41%	18%
10 to 24	43%	37%	20%
25 to 99	48%	43%	9%
100 or more	79%	20%	1%

- charities with between 10 and 24 paid staff (20% vs. 11%).

Conversely, charities with annual revenues of $5 million or more are less likely to report high levels of stress than they were in late 2009 (2% vs. 6%).

THE BOTTOM LINE: FINANCIAL AND HUMAN RESOURCES

While the Canadian economy appears to be slowly recovering from the economic downturn, this has not yet translated into increased resources for charities. Although preliminary estimates show the national unemployment rate dropped by an estimated 0.4% and total employment increased by almost 300 thousand Canadians in the first half of 2010, respondents to the *Sector Monitor* report that, on average, the number of people they employ dropped slightly over the same period (Statistics Canada, n.d.-a). Similarly, although Canadian businesses reported that seasonally adjusted operating revenues increased by approximately 1% in the first quarter of 2010, *Sector Monitor* respondents say that, on average, their revenues decreased slightly (Statistics Canada, n.d.-b).

Financial resources. Generally speaking, the financial situation among charities seems to be stagnating or deteriorating slightly. Charities are most likely to report that revenues have remained about the same or decreased, while expenditures have remained about the same or increased (see Table 2). On average, charities report that revenues have dropped by approximately 1.1%, while expenditures have increased by 3.8%.

Compared to the previous *Sector Monitor*, fewer operating charities are reporting increased revenues (22% vs. 32% in 2009) and more are reporting decreased revenues (37% vs. 32% in 2009).[5] The figures for average change in revenues and expenditures are largely unchanged since 2009. Compared to operating charities, foundations appear to be in a somewhat better position. Foundations are more likely to report increased revenues and less likely to report increased expenditures. On average, their revenues have increased by an average of 1.1% which, though slight, compares favourably to the average decrease of 3.8% they reported in 2009.

TABLE 2: Charities report that expenditures are generally increasing while revenues are generally decreasing.

	All Charities	Operating Charities	Foundations
REVENUES			
Increased	24%	22%	30%
Remained about the same	42%	41%	46%
Decreased	35%	37%	24%
Average change	**-1.09%**	**-1.68%**	**1.83%**
EXPENDITURES			
Increased	40%	43%	24%
Remained about the same	43%	40%	58%
Decreased	17%	17%	18%
Average change	**3.79%**	**3.85%**	**3.47%**

5 Significance =0.053.

Figure 4: Charities reported decreases in many sources of revenue.

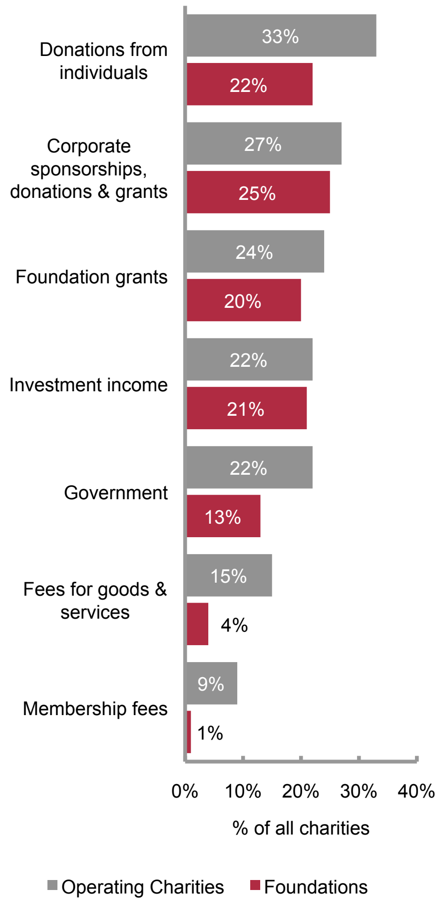
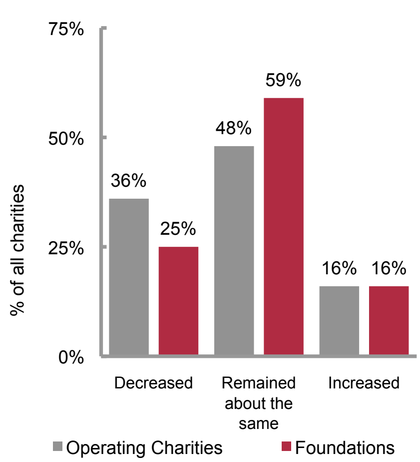


Figure 5: Most organizations report that the amount of cash they have on hand has remained about the same or decreased.



Looking at change in individual sources of revenue we again see a sector which continues to struggle with the lingering effects of the recession. The good news is that fewer charities are reporting decreases in sources that had previously been hard hit, such as corporate funding and investment income. The bad news is that fewer charities are reporting increases in almost all sources of revenue. Where the previous picture had been dominated by striking reports of declines in key areas, the picture now is of a more widespread stagnation.

As in the first *Sector Monitor*, charities are most likely to report decreases in donations from individuals, corporate support, foundation grants and investment income (see Figure 4). Operating charities are as likely or more likely than foundations to report decreases in almost all sources. Foundations are much less likely to report decreases in investment income (21% reported this, compared to 62% in 2009). Operating charities were also less likely to report decreases in investment income (22% vs. 40%) and corporate funding (27% vs. 34%).

Around half of both operating charities and foundations report that the amount of cash they have on hand is about the same, since January 2010 (see Figure 5). About a third of operating charities and a quarter of foundations report that their cash on hand has decreased. Only a small number of organizations report that cash on hand has increased. These figures are essentially unchanged from the first *Sector Monitor*.

Human resources. Superficially it might seem that the human resources picture is largely stable in that charitable leaders were

TABLE 3: Change in paid staff and volunteers.

	All Charities	Operating Charities	Foundations
PAID STAFF			
Increased	22%	23%	19%
Remained about the same	58%	57%	65%
Decreased	20%	21%	16%
Average change	**-3.44%**	**-4.41%**	**1.88%**
VOLUNTEERS			
Increased	24%	26%	19%
Remained about the same	60%	59%	65%
Decreased	16%	15%	17%
Increased reliance on volunteers	**35%**	**36%**	**27%**

most likely to report that both paid staff and volunteer numbers have remained about the same. However, other signs suggest potentially significant change for some charities.

In terms of paid staff, the fact that roughly equal percentages of both operating charities and foundations report increases and decreases would support the notion of stability (see Table 3). However, the size of the change in paid staff complement paints a somewhat different picture. Operating charities report that the number of paid staff they employ has decreased by an average of 4.4%. This is a departure from late 2009 when operating charities reported an average paid staff increase of 1.8%. Foundations appear to be doing somewhat better, reporting that the number of paid staff they employ has increased by an average of 1.9%.

In terms of volunteers, charities are most likely to report that numbers have remained about the same. They are somewhat more likely to report increases in volunteers than decreases, reflecting a somewhat positive trend. However, although the trend is positive, it is not as positive as previously reported. When compared to the previous *Sector Monitor*, the percentage of charities reporting increases in volunteers has dropped (to 24% from 32%), while the percentage reporting decreases has climbed (to 16% from 9%).

Figure 6: Budget predictions remain largely unchanged since late 2009.

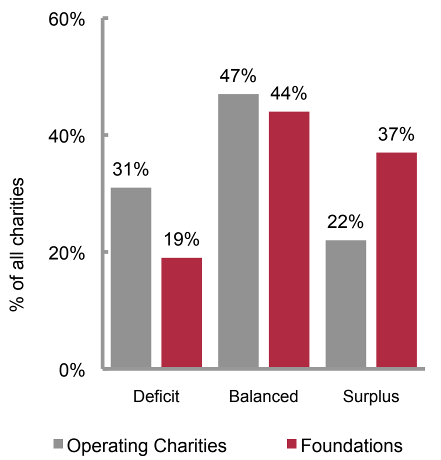
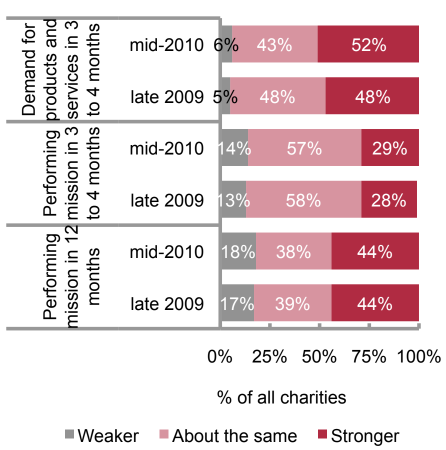


Figure 7: Overall levels of confidence for the future were unchanged since late 2009.



Confidence in the Future

Charitable leaders continue to show a remarkable degree of confidence in the future. Faced with increased challenges and a financial situation that has not improved over the past six months, their confidence remains essentially unchanged.

About half of charity leaders predict that their organizations will end the year with a balanced budget (see Figure 6). Leaders of operating charities are more likely to predict that they will end the year in a deficit position (about one-third predict this), while foundation leaders are more likely to foresee a surplus (just over one-third make this prediction). These predictions were virtually unchanged from those made by charitable leaders in the first *Sector Monitor*.

In considering the future of their organization, just under half of leaders predict that their organization will be stronger, in terms of its ability to carry out its mission, in twelve months (see Figure 7). They are somewhat more conservative in their predictions for the next three to four months, with slightly more than one-quarter predicting that they will be stronger. About half predict that demand for their products and services will increase in the next three to four months. These figures are essentially unchanged from those reported in the first *Sector Monitor* in late 2009.

TABLE 4: Operating charities were more likely to predict increased demand while foundation leaders were more optimistic about their ability to perform their mission.

	All Charities	Operating Charities	Foundations
DEMAND IN 3 TO 4 MONTHS			
Stronger	52%	53%	44%
About the same	43%	41%	50%
Weaker	6%	5%	6%
PERFORMING MISSION IN 3 TO 4 MONTHS			
Stronger	29%	27%	42%
About the same	56%	59%	46%
Weaker	14%	15%	12%
PERFORMING MISSION IN 12 MONTHS			
Stronger	44%	42%	52%
About the same	38%	40%	27%
Weaker	18%	18%	21%

Leaders of operating charities are somewhat more likely to predict that demand for their organization's products and services will increase in the next three to four months than are foundation leaders (see Table 4). Conversely, foundation leaders are somewhat more confident that their organization will be stronger, in terms of its ability to perform its mission, in the future. This is particularly true of predictions for the next three to four months. However, while leaders are generally optimistic, a significant minority (up to one-fifth) believe that their organization will be weaker in the future. In terms of meaningful differences from the first *Sector Monitor*, leaders of operating charities were somewhat more likely to predict increased demand in 3 to 4 months.

Conclusion

This second version of Imagine Canada's *Sector Monitor* shows that the effects of the economic downturn continue to echo through the charitable and nonprofit sector. The percentage of charities experiencing high levels of stress has increased. While some revenue sources appear to be under less threat than they were previously, revenues are generally flat and expenditures are increasing. Most individual charities are reporting that their paid staff and volunteer complements have remained about the same but there has been an overall decrease in the number of staff. At this point, it is unclear whether the number of volunteers has increased enough to make up for the loss of paid staff.

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Essential tax information for Canada's charities.

Imagine Canada Ethical Code

Governance and financial accountability.

GIVING & VOLUNTEERING

Knowledge about the sector and how Canadians support it.

Insurance & Liability RESOURCE CENTRE for Nonprofits

Risk management support for the sector.

Nonprofit Library

Canada's largest collection of charitable and nonprofit resources.

Interestingly, despite these challenges, sector leaders remain remarkably confident about the future.

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