THE NONPROFIT SECTOR IN NOVA SCOTIA

A Statistical Portrait

Report prepared by Imagine Canada

Imagine Canada

for
Volunteerism and the Non-Profit Sector Division
Department of Labour and Advanced Education
Government of Nova Scotia

EXECUTIVE SUMMARY

Size and Scope of the Core Nonprofit Sector in Nova Scotia

- Currently, the core nonprofit sector is estimated to have about 5,900 organizations - about two thirds charities and one third nonprofits.
- Total core nonprofit sector revenues for 2012 are estimated to be between $1.9 and $2.2 billion.
- The total number of staff positions for 2012 is estimated to be between 34,400 and 37,400, evenly split between full-time and part-time positions.
- In 2010, volunteers contributed hours equivalent to 41,000 full-time positions.
- The number of organizations in the core sector has increased just 4% since 2003. Over the same period, revenues are estimated to have increased by a third and paid and volunteer resources (as measured by number of staff positions and volunteer hours) by about a fifth.
- A group of nonprofits and charities that make up roughly two thirds of the core sector accounted for approximately 1.7% of provincial GDP in 2012.

- Many organizations are small - 45% have annual revenues less than $30,000 and 51% have no paid staff.

Financial Resources of Core Charities

- Resources are not uniformly distributed across the sector. Core charities with annual revenues of $1 million or more accounted for nearly three quarters of total reported revenues. Similarly, Health and Social Services organizations represent about one quarter of core charities, but account for over half of total revenues.
- About three in five core charities depend on gifts, donations and grants for more than half of their revenues. Just over one in seven rely primarily on government and one in eight on earned income. The balance rely on some other source or mix of sources.
- Reliance on gifts donations and grants is highest among small charities, while reliance on government is highest among large charities.
- The vast majority government revenue comes from the provincial government and the bulk of earned income comes from the sale of goods and services.
- Since 2003, total revenues reported by core charities have increased by approximately one third.

Paid Human Resources of Core Charities

- The vast majority of charities draw on small or no paid staff resources - one third have between one and four paid staff; half have none at all. Just 1% have 100 or more paid staff.
- Most positions are with larger charities – roughly three quarters of positions are with the 6% of charities that have 20 or more staff.
- Compared to businesses, charities are more likely to have between one and four paid staff, but less likely to have between five and 49 staff.

- Among charities, more positions are among smaller organizations than with business – organizations with less than 20 paid staff account for over a quarter of charity positions, but less than a fifth of business positions.
- Since 2003, reliance on volunteers and part-time paid staff has increased notably – the percentage of charities with no paid staff has gone from 44% to 53% and the average number of part-time positions reported by charities has gone from 2.6 to 3.8 (the average number of full-time positions remained constant).
- While the total number of staff positions has increased from approximately 20,000 to 25,000, nine-tenths of this increase has been in part-time positions.

Supports from Individual Nova Scotians

- The vast majority of Nova Scotians support core sector organizations in some way. In 2010, 86% of those aged 15 and over donated and 52% volunteered.
- In 2010, Nova Scotians donated just under $238 million to core charities and nonprofits and volunteered approximately 78.7 million hours (the equivalent of 41,000 full-time jobs).
- Not all groups of Nova Scotians are equally likely to give and volunteer for core organizations. Variations in likelihood and level of support are related to demographic factors such as age, sex, education level, income, and frequency of religious attendance.
- In terms of how total support is apportioned across sub-sectors, giving is far more focused than volunteering. Religion organizations receive approximately half the total value of donations. Volunteer hours are much more evenly distributed, with Social services, Sports & recreation and Religion each accounting for about a fifth of total hours.
- People are most likely to say that they give and volunteer for ideological or aspirational reasons and less likely to say they do so for more self-interested reasons.

- The most commonly reported barriers to giving and volunteering are scarcity (i.e., not having the time or money) and being satisfied with the level of support already offered.
- Typically, the financial role of a given donation method is driven more by how much people usually give using the method than by how many people donate using the method.

Attitudes about Charities

- Levels of trust are generally high. 81% of Nova Scotians report some or a lot of trust in charities and 76% report the same of charity leaders. Very few institutions and professions rate more highly.
- Opinions around fundraising are mixed. For example, most Nova Scotians believe charities are generally honest about how they use donations, but only a third believe charities only ask for money when they really need it.
- Many Nova Scotians believe that information provided to them by charities falls short of their needs. For example, 86% said information about programs and services charities provide is very important, but just 18% said charities were doing a good or excellent job at providing it.
- Substantial majorities of the public think that more attention should be paid to various aspects of charities' operations, including how they raise and spend their money and how much they spend on programs and on professional fundraising.

INTRODUCTION

The objective of this report is to synthesize currently available data to present a statistical portrait of what is currently known about the core charitable and nonprofit sector in Nova Scotia. The report discusses a range of topics, including:

- top line statistics and composition of the core sector,
- human and financial resources reported by organizations,
- supports contributed by individual Nova Scotians through donating and volunteering, and
- public attitudes about the sector.

Data Sources

The report draws on a number of existing surveys and administrative data sources. These include the National Survey of Nonprofit and Voluntary Organizations (NSNVO), T3010 Registered Charity Information Returns, the Canada Survey of Giving, Volunteering, and Participating (CSGVP), The Muttart Foundation's T*alking About Charities* survey, and various Statistics Canada data tabulations.

The scope and coverage of each of these data sources differs, sometimes significantly. The NSNVO covers both charities and nonprofits, but dates from 2003. T3010 returns are used to explore trends from 2003 to 2012, but cover only registered charities, excluding organizations without charitable status. Editions of the CSGVP date to 2004, 2007 and 2010 and cover supports offered by Nova Scotians to both charities and nonprofits. Editions of the *Talking About Charities* surveys date to 2000, 2004, 2006, 2008, and 2013.

While the questions in this survey specifically reference charities, given the generally low level of public knowledge regarding the distinctions between charities and nonprofits, responses probably pertain more or less equally to nonprofits. Generally, the 2012 reference year is used with Statistics Canada tabulations for ease of comparability of data.

Report Scope and Definition of the Core Sector

The focus of this report is the core charitable and nonprofit sector in Nova Scotia. By extension, this means that Hospitals, Universities, Colleges, and School Boards are beyond its scope. Although legally all of these organizations are registered charities, the analytical framework used in Canadian nonprofit studies views them as distinct from core charities, because they are more subject to government control than most other organizations, as well as highly reliant on government funding.[1] The number of non-core charities in Nova Scotia is quite small, numbering some three dozen, but they have considerable importance beyond their numbers. As an example, total reported revenues of non-core charities are approximately three times those of core charities, as is the total number of reported full-time paid staff.

Co-operatives are also beyond the scope of this report. Contrary to the situation with non-core charities, this is not due to issues of organizational independence or funding sources - instead, it is driven by the fact that co-operatives were out of scope for substantially all of the data sources drawn upon in this report, making it impossible to meaningfully integrate co-operatives into this statistical portrait. That said, the briefest summary of top line statistics for non-financial co-operatives is presented in Chapter 1 below, in hopes of providing at least some useful comparative context.

Organization of the Report

The first section of the report provides projections of key top line statistics describing the size and internal composition of the core charitable and nonprofit sector as a whole. Sections two and three draw on analysis of T3010 returns to describe the financial and human resources of core charities, including recent trends. These sections focus exclusively on charities because no equivalent information is available for nonprofits. Section four draws on the CSGVP to describe how Nova Scotians give and volunteer for the province's charities and nonprofits. Section five uses *Talking About Charities* survey results to explore Nova Scotians' attitudes about charities.

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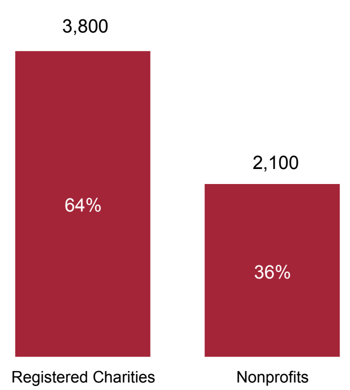
[1] In addition, the Canadian System of National Accounts classifies these organizations to the government sector.

1. A PORTRAIT OF CORE SECTOR CHARITIES AND NONPROFITS

This section presents estimates of key top line statistics for the core charitable and nonprofit sector in Nova Scotia and describes the composition of the sector across various dimensions such as size and organizational focus. The primary focus is on providing a snapshot of the "state of the sector" in Nova Scotia. It must be emphasized that the statistics presented here are projections, based on a combination of survey and administrative data. Every effort has been taken to ensure the statistics presented are as accurate as possible, but there are significant associated uncertainties. We have attempted to account for these uncertainties by reporting ranges that incorporate the uncertainties (rather than reporting point estimates), and by using simple methodologies rather than complex ones (methods are briefly described for the reader in endnotes that follow this section of the report).

Figure 1.1: Projected number of core charities and nonprofits, Nova Scotia, 2014.



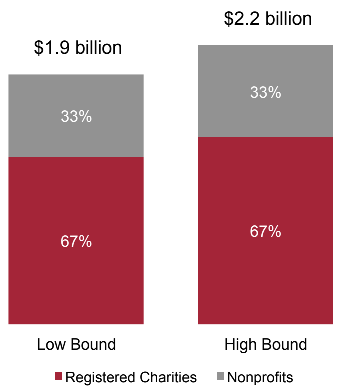
Number of Organizations

Currently, the Nova Scotia core nonprofit sector is believed to comprise approximately 5,900 charities and nonprofits. Roughly two thirds (64%) are thought to be registered charities and the remaining one third (36%) nonprofits (see Figure 1.1).[2] The number of organizations in the core sector is believed to have remained fairly constant over time. Over the previous decade, the number of charities has increased by approximately 4%, going from 3,650 in

2003, to a present (2014) total of just under 3,800. The projected number of nonprofits assumes the same trend for nonprofits.

Financial Resources

Figure 1.2: Projected revenues, core charities and nonprofits, Nova Scotia, 2012.

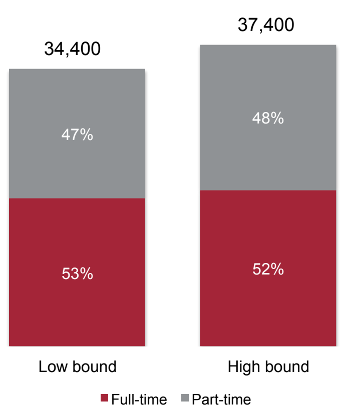


For 2012, total core nonprofit sector annual revenues are estimated to have been between $1.9 billion and $2.2 billion, with charities accounting for two-thirds of total sector revenues and nonprofits one third (see Figure 1.2).[3] By way of comparison, this is equivalent to roughly a fifth of total revenue for the manufacturing sector in Nova Scotia and a quarter of ordinary revenue for the provincial government (Statistics Canada, n.d.-c; Steele, 2012).

Assuming that revenues for charities and nonprofits have followed similar trajectories, total core sector revenues are estimated to have increased by approximately 33% in constant dollar terms (i.e., adjusting for inflation) between 2003 and 2012. This is equivalent to an average annual growth rate of approximately 3.2% over the decade as a whole. The pace of increase appears to have been highest between 2003 and 2006 (with an average annual growth rate of 6.7%) and significantly lower between 2006 and 2012 (average annual growth of 1.5%).

Human Resources

Figure 1.3: Projected paid staff positions, core charities and nonprofits, Nova Scotia, 2012.



In 2012, total paid employment in the core sector is estimated to have been somewhere between 34,400 and 37,400 paid staff positions (full-time and part-time; see Figure 1.3).[4] This is equivalent to between 7.4% to 8.0% of total jobs in the province (Statistics Canada, n.d.-d). Charities account for the majority of positions (between 67% and 73% of total positions). From 2003 to 2013, low bound estimates reflect a total growth in paid staff positions of 17%, while high bound estimates reflect total growth of 24%.

Unfortunately, given the available data, it is not possible to determine how the number of positions in the core sector translates into full-time equivalent jobs. However, based on reports from T3010 returns and projections from the NSNVO, between 18,300 to 19,400 of these positions are thought to be full-time and 16,100 to 18,000 part-time / part-year, meaning that nearly half of estimated positions (47-48%) are part-time.[5] It is somewhat challenging to draw direct comparisons with other sectors given the data available, but it seems safe to say that the core sector has a significantly higher than usual ratio of part-time to full-time employment. By way of comparison, just under a fifth (18.9%) of the employed Nova Scotia labour force was employed part-time in 2012 (Statistics Canada, n.d.-b).

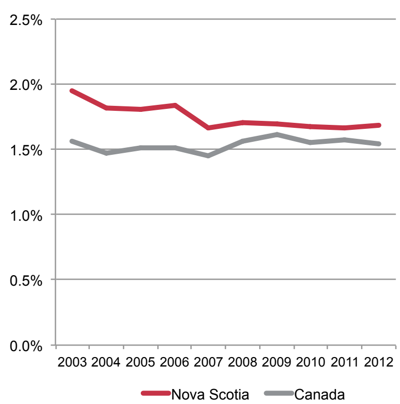
In the nonprofit sector, paid employees represent only part of the human resources organizations can draw upon. In 2010, approximately 410,000 Nova Scotians volunteered for a core charitable or nonprofit organization. Collectively, these volunteers contributed 78.7 million volunteer hours to core organizations, the equivalent of nearly 41,000 full-time positions and noticeably larger than the paid labour component of the core sector in Nova Scotia.[6] Since 2004, the total number of Nova Scotians volunteering for core organizations has increased by 13% while the total number of volunteer hours they contribute has increased by just under 20%.

Economic Contribution

Nationally, the core nonprofit sector accounted for approximately 2.4% of total Gross Domestic Product (GDP) in 2008 (Statistics Canada, 2010).[7] Provincially, the final consumption expenditure associated with goods and services produced by a subset of the core nonprofit sector known as NPISH (Nonprofit Institutions Serving Households)[8] was equivalent to approximately 1.6% of GDP in 2012 (Statistics Canada, n.d.-g).[9]

Between 2003 and 2007, the final consumption expenditure from NPISH in Nova Scotia declined from 2.0% to 1.7% of provincial GDP, but has been stable from 2007 onwards (see Figure 1.4). Nationally,

Figure 1.4: Final consumption expenditure, Nonprofit Institutions Serving Households, as % GDP, Nova Scotia and Canada, 2003-2012.



Top line statistics for General Co-operatives

Although co-operatives are beyond the scope of this report, it is useful to keep some comparative statistics describing the non-financial co-operatives sector in mind (Karaphillis, 2013; Statistics Canada, n.d.-e) (all statistics 2011):

- Number of organizations: 290
- Total revenue: $733.2 million
- Number of employees: 3,112
- Estimated direct contribution to GDP: 0.7% (approx.).

Figure 1.5: Projected distribution of organizations by sub-sector, core charities and nonprofits, Nova Scotia, 2012.

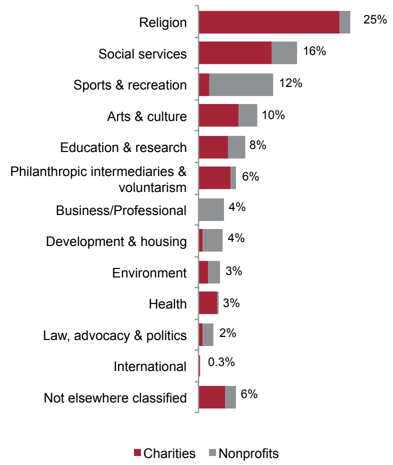


Figure 1.6: Projected distribution of core charities and nonprofits by annual revenue size, Nova Scotia, 2012.

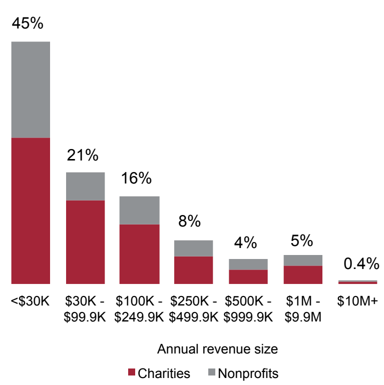
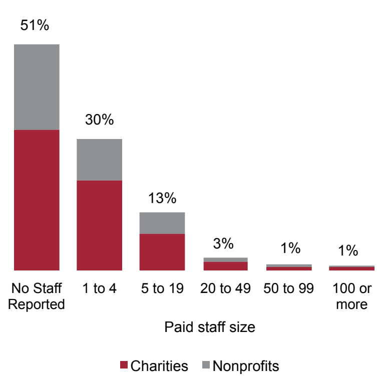


Figure 1.7: Projected distribution of core charities and nonprofits by paid staff size, Nova Scotia, 2012.



final consumption associated with NPISH has remained essentially stable at 1.5% - 1.6% of GDP since 2003.

Internal Composition

The core nonprofit sector is made up of many individual sub-sectors, defined by organizations' primary focus. The largest sub-sector, in terms of number of organizations, is Religion (25% of organizations), followed by Social services (16%), Sports & recreation (12%) and Arts & culture (10%; see Figure 1.5). The smallest sub-sectors are International (0.3%), followed by Law, advocacy & politics (2%), and Health (3%). Particular organizational forms (i.e., charities or nonprofits) tend to predominate in most sub-sectors. The vast majority of Religion organizations are registered charities, as are the vast majority of Health and Fundraising, grantmaking & voluntarism organizations. Solid majorities of both Arts & culture and Education & research organizations are also charities. Nonprofits predominate among Business & professional associations and in the Sports & recreation and Development & housing sub-sectors. About two thirds of Law, advocacy & politics organizations are also nonprofits. Environment organizations are almost exactly evenly split between the two forms.

As measured by the size of their annual revenues, most organizations are quite small. Nearly half of core organizations (45%) are believed to have annual revenues less than $30,000, with another fifth (21%) having annual revenues of between $30,000 and $99,999 (see Figure 1.6). Just 6% of core organizations are thought to have annual revenues of $1 million or more. In terms of organizational form, charities account for roughly four fifths (82%) of organizations with annual revenues of $10 million or more and about three quarters (74%) of organizations with annual revenues between $30,000 and $99,999. Nonprofits are most prevalent among organizations with annual revenues between $500,000 and $999,999 (44% of organizations) and organizations with annual revenues less than $30,000 (40%). The compositions of other revenue categories are more mixed.

Most organizations report quite small numbers of paid staff, if they employ them at all. In fact, slightly over half (51%) report no paid staff (see Figure 1.7). Just under a third (30%) report having less than five paid staff (full-time or part-time) and about one in eight (13%)

report having between five and nineteen paid staff. Just one percent of core organizations report having 100 or more paid staff. In terms of organizational forms, just over two thirds of organizations with 20 or more paid staff are registered charities, as opposed to about three fifths of organizations in most other paid staff size categories (the only exception to this generality is organizations with one to five paid staff - 68% of these are charities).

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[2] The number of core charities is taken directly from recent T3010 filings, while the number of nonprofits is an estimate that assumes that the ratio of nonprofits to charities has remained consistent since the 2003 NSNVO.

[3] The estimate of total revenues assumes that the percentage of total core sector revenues contributed by nonprofits has remained constant since the 2003 NSNVO. The range of the estimates accounts for identifiable errors in T3010 filings. The lower bound estimate includes only T3010 returns without identifiable significant revenue reporting errors, while the upper bound estimate includes total revenues, as reported (i.e., including returns with identifiable significant revenue reporting errors).

[4] The number of paid staff for core charities is taken directly from 2012 T3010 filings, while the number of paid staff employed by nonprofits is an estimate based on NSNVO data. The low bound figure assumes that the number of paid staff employed by nonprofits has remained constant since 2003, while the high bound figure assumes that the total number of paid staff has increased the same amount as among charities. This approach produces quite a large range of uncertainty - we used it because the ratio of full-time to part-time positions for charities from the 2003 NSNVO was significantly different than reported in 2003 T3010 information returns and because the ratio of full-time to part time positions among charities changed significantly from 2003 to 2012 (we do not know whether the same is true for nonprofits).

[5] The number of full-time and part-time paid staff for charities is taken directly from 2012 T3010 filings. The numbers of full-time and part-time for nonprofits are estimates based on NSNVO data. The low bound figures assume that the number of full-time and part-time paid staff have remained constant since 2003, while the high bound figures assume that total nonprofit employment has increased at the same pace as total charitable employment and that the ratio of full-time to part-time employees has shifted along the same lines (with full-time employees dropping ten percentage points, from 73% of total employment to 63%).

[6] Assuming a 40 hour work week and a 48 week work year.

[7] 2008 is the last year for which total core nonprofit sector GDP statistics were produced by the Satellite Account of Nonprofit Institutions and Volunteering. Moving forward, NPISH statistics have been integrated into the 2012 revisions to the System of National Accounts.

[8] NPISH are a sub-set of institutions in the core nonprofit sector that produce "goods and services free or at prices that are not economically significant to individual households or the community at large" (Statistics Canada, 2009). The other major components of the nonprofit sector are organizations classified to government (mainly non-core organizations that are institutionally controlled by government) and non-profit institutions classified to the corporate sector (institutionally independent organizations that produce goods and services at market prices). The most recent figures available (2008) indicate that nationally, NPISH collectively accounted for 22% of total nonprofit GDP and 63% of core sector GDP (Statistics Canada, 2009).

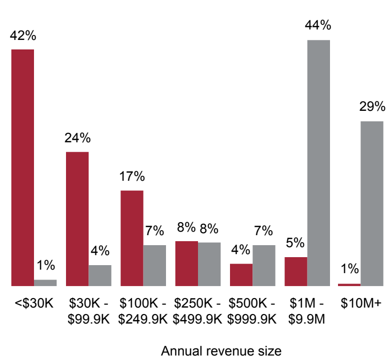
[9] Final consumption expenditure of NPISH accounts for the goods and services provided to households by nonprofits, either free or at non-market prices. User fees are specifically netted out.

2. FINANCIAL RESOURCES OF CORE CHARITIES

This section of the report uses data from T3010 information returns to describe how revenues are distributed within the core charitable sector, what revenue sources charities rely on, trends in revenue over the past decade, fundraising methods used by charities, and in-kind donations.

The T3010 contains a wealth of information on revenues for charities, although variations in reporting requirements and errors in filing make it somewhat challenging to use. As of 2012, large charities are required to report the amount of revenue they received from 13 specific sources, while smaller charities are required to report revenues from six sources.[10] These sources can be grouped into three main categories (gifts, donations and grants, government, and earned income) with a fourth catchall category to collect revenue from sources not specifically collected by the form. The analyses presented below exclude data from charity returns that appear to have significant filing errors.[11]

Figure 2.1 Distribution of core charities and total revenue by revenue size, Nova Scotia, 2012.



Distribution of revenue

Revenues are quite unevenly distributed across the core charitable sector. As one would expect, the largest charities account for disproportionately large percentages of total revenues. However, the magnitude of this is extremely striking. In 2012, the 1% of core charities with annual revenues of $10 million or more accounted for

Figure 2.2 Distribution of core charities and total revenue by cause, Nova Scotia, 2012.

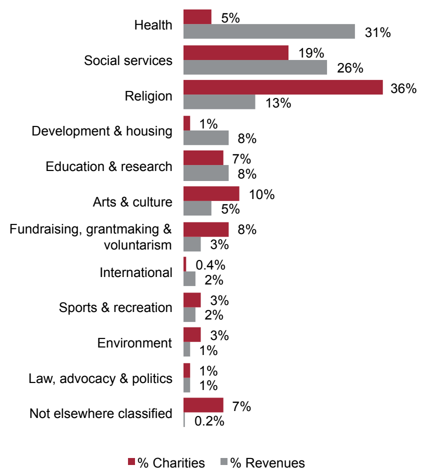
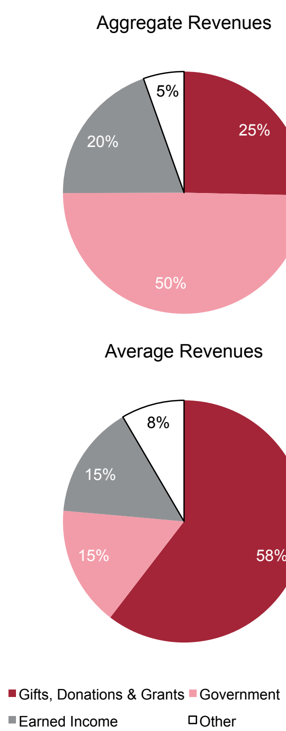


Figure 2.3: Distribution of total and average revenues by source, core charities, Nova Scotia, 2012.



29% of total revenues (see Figure 2.1). The 5% of organizations with revenues between $1 million and just less than $10 million accounted for an even larger percentage of total revenues at 44%. Conversely, the 42% of charities with annual revenues less than $30,000 collectively accounted for just 1% of total revenues, and the 24% of charities in the next largest revenue class accounted for 4%.

The distribution of revenues also varies with the causes charities seek to address.[12] Clearly, the number of organizations does not determine how revenues are distributed. For example, although charities that focus primarily on Religion are most numerous, accounting for 36% of core charities, they account for a significantly smaller percentage of total revenues at 13% (see Figure 2.2). Other causes that account for significantly smaller proportions of total revenues than their numbers would lead one to expect include the Environment, Fundraising, grantmaking & voluntarism, Arts & culture, and causes that don't fall into one of the specific categories. Conversely, Health (5% of core charities but 31% of total revenues), Development & housing (1% charities vs. 8% total revenues) and Social services (19% vs. 26%) account for significantly higher percentages of core charitable sector revenues than the number of organizations focusing primarily on these causes would suggest.

Revenue sources

In the aggregate, the largest single revenue source for core charities is government. Collectively, the three levels of government account for half of total revenues (see Figure 2.3). Gifts, donations, and grants are the second largest source, accounting for a quarter of total revenues. Earned income accounts for one fifth of total revenues and the remaining five percent come from some source that filers are unable to fit into one of these three categories.

In interpreting the above figures, it is important to understand that they are aggregates for the core charitable sector as a whole and do not reflect the revenue mix of a typical core charity. For example, the bulk of government revenues go to a relatively small number of charities, meaning that government revenues account for a much smaller piece of the pie for most organizations (in fact, 62% of core charities report receiving no government revenues at all). When seeking to understand typical funding sources for core charities, it is more appropriate to look at the average percentage of total revenues from each of the three sources. This analysis indicates that gifts, donations, and grants play a much larger role for most core charities, accounting for 58% of total revenues, on average. Government and earned income each account for an average of 15% of total revenues and other income sources account for 8%.

DOMINANT SOURCES OF REVENUE

Figure 2.4 Distribution of core charities by revenue dependency, Nova Scotia, 2012.

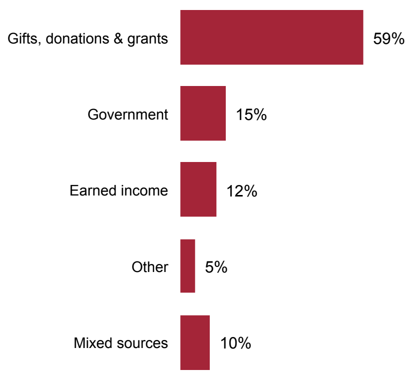
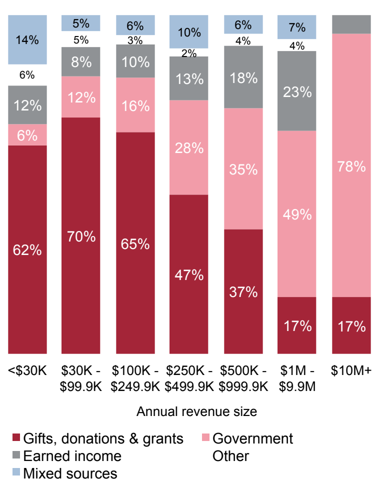


Figure 2.5: Distribution of core charities by revenue dependency and annual revenue size, Nova Scotia, 2012.



Looking at where individual organizations receive their revenue, it is clear most core charities receive the bulk of their revenue from one of the three major areas. In 2012, somewhat over half of charities (59%) reported that gifts, donations, and grants accounted for more than half of total organizational revenues (see Figure 2.4). A much smaller percentage of charities (15%) reported that the majority of their revenues came from government. A like number of charities (12%) obtained most of their revenue from various forms of earned income from non-governmental sources. One twentieth of charities reported that they received the bulk of their funding from some source not specified elsewhere on the form. One in ten (10%) did not rely on any one of these categories for the majority of their income, but instead drew from multiple sources.

The dominant source of revenue tends to vary according to how big charities are, as measured by the size of their annual revenues. Smaller charities are more likely to draw most of their revenue from gifts, donations, and grants than larger charities. For example, over two thirds of charities with annual revenues between $30,000 and $99,999 (70%) reported obtaining most of their revenues from this source, compared to less than a fifth of charities with annual revenues of $1 million or more (see Figure 2.5). Generally speaking, the likelihood of being reliant on gifts, donations and grants appears to decrease fairly consistently with increases in organization size. Conversely, reliance on other revenue sources appears to increase with organization size. This is most clearly seen with government revenues. About one in eight charities (12%) with annual revenues between $30,000 and $99,999 receive more than half of their total revenues from government. This percentage increases fairly consistently with organization size, peaking at just under four fifths of organizations with annual revenues of $10 million or more. Patterns of reliance on earned income are somewhat more difficult to evaluate. Its importance does generally seem to increase with annual revenue size, but the size of the shifts between revenue size categories are much smaller (e.g., 8% of core charities with annual revenues between $30,000 and $99,999 and nearly a quarter of charities with annual revenues between $1 million and less than $10 million). The percentages of organizations that depend on other revenue sources or draw on a mix of sources are comparatively small and do not seem to vary much with increases in total revenues. That said, one interesting fact that should be highlighted is the relatively high incidence mixed sources of funding amongst the smallest organizations.

Table 2.1: Distribution of core charities by revenue dependency and sub-sector, Nova Scotia, 2012.

	DONATIONS & GRANTS	GOVERNMENT	EARNED INCOME	OTHER	MIXED
Arts & culture	32%	23%	14%	6%	25%
Sports & recreation	32%	24%	19%	5%	20%
Education & research	44%	16%	23%	7%	10%
Health	41%	33%	9%	7%	9%
Social services	38%	37%	10%	5%	10%
Environment	57%	17%	7%	7%	13%
Development & housing	11%	62%	14%	5%	8%
Law, advocacy & politics	48%	38%	10%	2%	2%
Fundraising, grantmaking & voluntarism promotion	48%	1%	32%	7%	11%
International	69%	13%	6%	6%	6%
Religion	90%	0.5%	3%	2%	4%
Not elsewhere classified	57%	2%	23%	7%	11%

Revenue sources also tend to vary with sub-sector. For instance, a very large percentage of Religion organizations (90%) receive over half of their organizational revenues from donations and grants (see Table 2.1). Other sub-sectors where donations and grants tend to play a particularly large role include International (69% of charities), Environment (57%), Fundraising, grantmaking & voluntarism (48%) and Law, advocacy & politics (48%). Government revenues have by far their largest role in the Development & housing sub-sector (62% of these organizations receive more than half of their revenue from government), but tend to have somewhat smaller roles in other sub-sectors. Government provides more than half of revenues for about a third of Social services (37%), Law, advocacy & politics (38%), and Health (33%) organizations. Earned income plays its largest roles

Figure 2.6: Distribution of gifts, donation, and grants revenue by specific source, core charities, Nova Scotia, 2012.

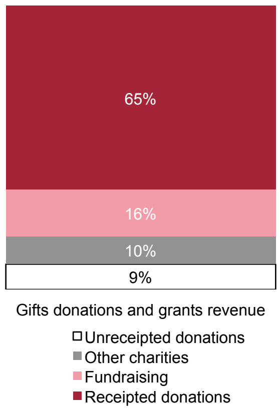
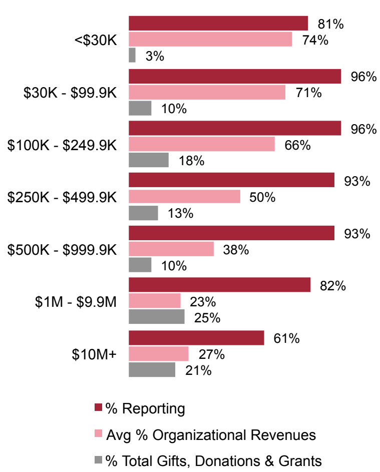


Figure 2.7: Likelihood of receiving gifts, donations & grants, typical financial role, and distribution of total gifts, donations & grants revenue by annual revenue size, Nova Scotia, 2012.



among Fundraising, grantmaking & voluntarism organizations (32%), and Education & research (23%) and Sports & recreation organizations (19%). Interestingly, Arts & culture (25%) and Sports & recreation (20%) organizations are most likely to report drawing on a mix of revenue sources.

GIFTS, DONATIONS AND GRANTS

In 2012, core charities reported that gifts, donations and grants accounted for an average of 58% of total organizational revenues. This revenue comes from four sources: receipted donations, unreceipted donations, unreceipted revenue from fundraising, and gifts or grants from other registered charities. Of these, receipted donations are the most significant, accounting for almost two thirds (65%) of the total value of gifts, donations and grants revenue (see Figure 2.6). Unreceipted income from fundraising accounts for 16% and unreceipted gifts accounts for about a tenth (9%). Grants from other charities account for another 10%.

Gifts, donations and grants play a fairly significant role in all sizes of organizations. A majority of core charities in all size categories report receiving this type of revenue (see Figure 2.7). Notably, about nine tenths of organizations with annual revenues between $30,000 and less than $1 million reported this. The very largest organizations are least likely to report receiving this type of revenue (61% reported this). The financial role of this type of income clearly tends to decrease with revenue size, at least among organizations with annual revenues less than $1 million. The smallest charities receiving this type of revenue reported that it accounted for an average of 74% of total organizational revenues, as compared to roughly a quarter of total revenues for charities with annual revenues of $1 million or more. However, although gifts and donations tend to play a smaller role in financing very large organizations, much of the total value of gifts, donations and grants went to them. Although core charities with annual revenues of $1 million or more account for just 6% of charities, they received almost half (46%) of the total value of gifts, donations and grants.

GOVERNMENT

On average, government funding accounted for 15% of organizational funding in 2012. Unfortunately, detailed understanding of government revenue is hampered somewhat by

Figure 2.8: Distribution of government revenue by specific source, core charities, Nova Scotia, 2012.

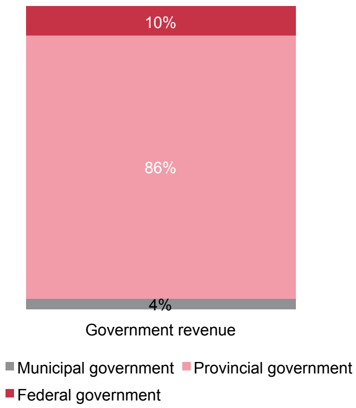


Figure 2.9: Likelihood of receiving government revenues, typical financial role of government revenues, and distribution of government revenues by annual revenue size, Nova Scotia, 2012.

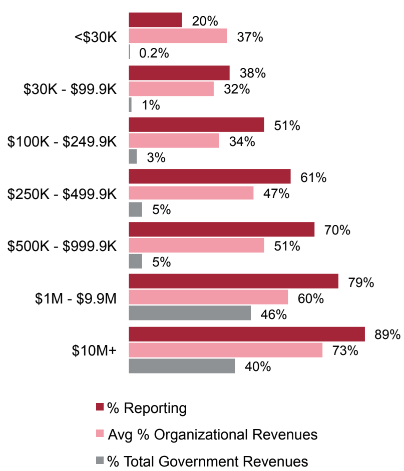
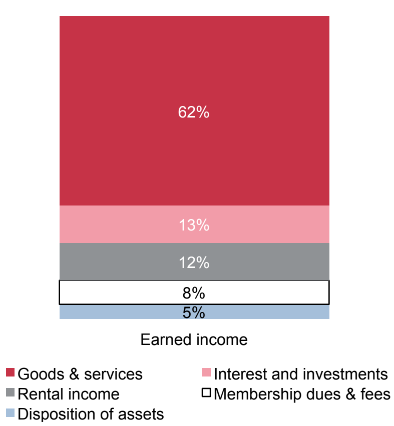


Figure 2.10: Distribution of earned income by specific source, core charities, Nova Scotia, 2012.



inconsistencies in reporting requirements. Smaller charities are not required to break down governmental revenues by level of government. Among core charities that are required to detail funding by level of government, it is clear that the provincial government provides the vast majority of funds, accounting for fully 86% of the total value of government funding (see Figure 2.8). The federal government accounts for 10% and municipal governments 4%.

As one would expect from the pattern of revenue dependency described above, the importance of government revenue increases with the size of the charity. One fifth of the smallest organizations (20%) reported receiving government revenue in 2012, compared to nearly nine tenths (89%) of the largest (see Figure 2.9). The typical role of government revenue among recipients also tends to increase with organizational size, at least among medium and large-sized charities. Among government-funded charities with annual revenues less than $250,000 government revenues account for a third of organizational revenues, on average. Amongst larger organizations, the typical role increases steadily, accounting for nearly three quarters (73%) of organizational revenues amongst core charities with annual revenues of $10 million or more. As one would expect given these patterns, government revenues are clearly not allocated uniformly across organization size categories. The vast majority of government revenues go to the small number of core charities with annual revenues of $1 million or more. The 5% of core charities with annual revenues between $1 million and less than $10 million account for 46% of total government revenues, while the 0.5% of core charities in the largest revenue category account for 40%.

EARNED INCOME

In 2012, core charities reported that, on average, just under 15% of total organizational revenues came from various forms of earned income. There are five sub-categories of earned income collected on the T3010 form. These include: sale of goods and services (other than to government); memberships, fees, and association dues; rental income; income from investments and interest; and net income from the sale of assets. Of these sources, sale of goods and services is by far the most significant, accounting for 62% of total earned income. Interest and investment income accounted for just under 13% of earned income and rental income a further 12% (see Figure 2.10).

Figure 2.11: Likelihood of receiving earned income, typical financial role of earned income, and distribution of total earned income revenues by annual revenue size, Nova Scotia, 2012.

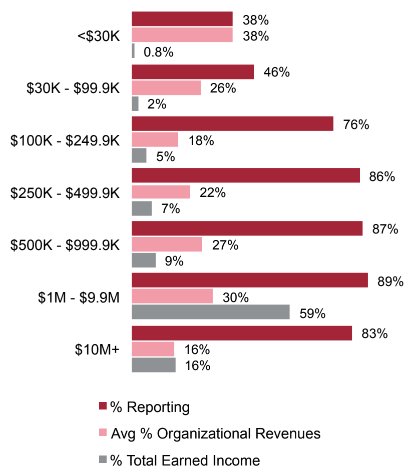
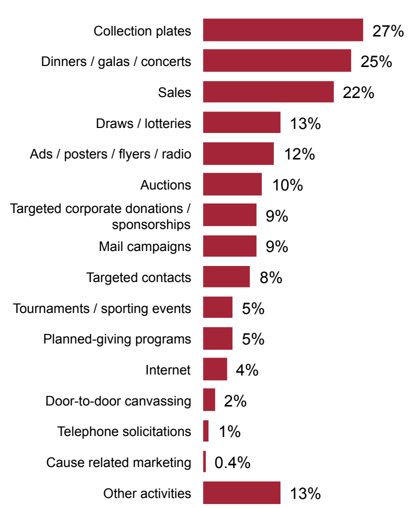


Figure 2.12: Fundraising methods, core charities, Nova Scotia, 2012.



Memberships, fees and dues (8%) and net proceeds from the disposition of assets (5%) round out the earned income picture.

As with government income, detailed understanding of the role of earned income is hampered somewhat by inconsistent reporting requirements. A significant number of charities are not required to specifically report earned income (see the criteria reported above in the government revenue section), though many do. The best that can be said about the role of earned income at present is that three quarters or more of core charities with annual revenues of $100,000 or more report having received at least some and that among these charities, the role of earned income appears to increase with organization size - except among the very largest charities where it appears to be “crowded out” by government revenue (see Figure 2.11). As with the other major revenue sources, larger organizations account for disproportionately large percentages of total earned income. The 5% of organizations with annual revenues between $1 million and just less than $10 million accounted for somewhat over half (59%) of total earned income.

FUNDRAISING METHODS

As one would expect, given the importance of gifts, donations and grants as a revenue source for core charities, fundraising activities are quite common. Fully 60% of core charities reported at least one fundraising method. The most common of the fundraising methods were collection plates or boxes (27% of core charities reported using this method), followed by fundraising dinners, galas, concerts or some similar event (25%) and fundraising sales (22%; see Figure 2.12). A middle range of methods were reported by between roughly an eighth and a twelfth of charities, ranging from draws and lotteries on the high end (13% of core charities) through to targeted contacts with potential donors on the low end (8%). No more than one charity in twenty engaged in the less common methods. Less than one half of one percent of charities reported engaging in cause related marketing (0.4%) and one percent raised funds through telephone solicitations. It should be noted that even with the wide range of methods specified on the T3010 form, just over one core charity in eight (13%) reported using some other method.

In terms of the number of fundraising methods used, most core charities tended to use a fairly modest number. Nearly a third of core charities (32%) that reported fundraising methods reported using just

Figure 2.13: Number of fundraising methods used, core charities, Nova Scotia, 2012.

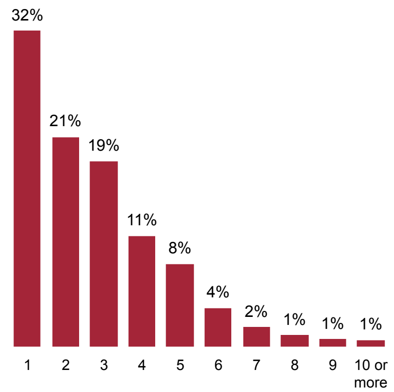


Figure 2.14 Incidence of fundraising activities by revenue dependency, core charities, Nova Scotia, 2012.

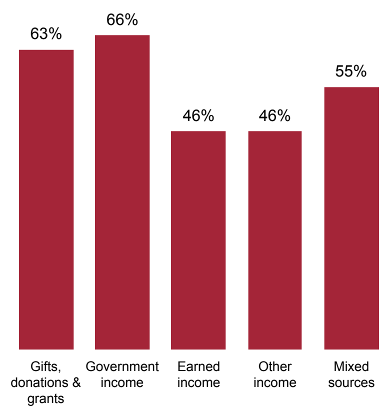
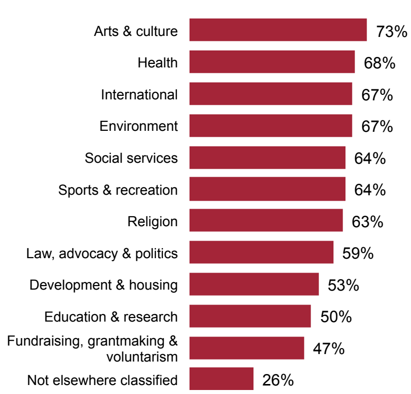


Figure 2.15: Incidence of fundraising activities by sub-sector, core charities, Nova Scotia, 2012.



one (see Figure 2.13). About another fifth used each of two (21%) or three (19%) methods. From that point, the number of methods used decreases fairly quickly, with just 3% of organizations using eight or more.

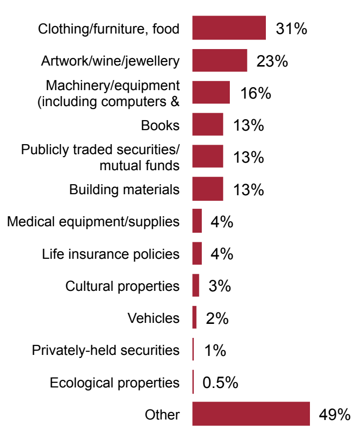
Not all charities are equally likely to report fundraising activities. As one would generally expect, core charities that depend on gifts, donations and grants for more than half of their revenues are quite likely to report fundraising activities (63% reported this), but what one might not expect is that core charities that derive more than half of their revenues from government sources are slightly more likely to report fundraising activities (66%; see Figure 2.14). Organizations that depend on earned income or some other revenue source are less likely to report fundraising (46% for both types), while charities that depend on a mix of revenue sources rank in between these extremes (55%). Interestingly, there does not seem to be much variation in the number of fundraising activities by revenue dependency. The only exception in this regard seems to be with organizations that depend on a mix of revenue sources – these organizations report a slightly higher average number of methods (3.4 vs. an average of 2.8 for all core charities).

The likelihood of reporting fundraising activities also varies by other organizational attributes, such as annual revenue size and sub-sector. The likelihood of reporting fundraising methods tends to increase with annual revenue size, from 45% among core charities with annual revenues less than $30,000 to a peak of 78% for annual revenues between $500,000 and $999,999, whereupon it decreases to 70% for organizations with annual revenues between $1 million and just less than $10 million and 47% of those with annual revenues of $10 million or more. The average number of fundraising methods that charities engage in also increases with organization size. Interestingly, the average number of activities increases even amongst the very largest organizations (going from a low average of 2.1 activities for charities with less than $30,000 in annual revenues to a high of 5.6 among organizations with annual revenues of $10 million or more). Focussing on sub-sectors, Arts & culture charities are most likely to report fundraising methods (73%; see Figure 2.15). Around two thirds of charities working in most other sub-sectors report fundraising methods, ranging from 68% of Health organizations to 63% of Religion organizations. Sub-sectors that stand out as being particularly unlikely to report fundraising methods include Philanthropic Intermediaries & Voluntarism at 47%, Education & research (50%), Development & housing (53%), and Law, advocacy & politics (59%). As with with revenue size, the average number of methods reported varies across different organization types. Sub-sectors that stand out as reporting particularly high numbers of fundraising methods include International (an average of 3.8 methods), Environment (3.7), Arts & culture (3.5) and Fundraising, grantmaking & voluntarism (3.2). Interestingly, while organizations in most of these sub-sectors are also more likely to report fundraising activities at all, Philanthropic Intermediaries are quite unlikely to do so. Sub-sectors that stand out for reporting particularly low average numbers of fundraising activities include Religion (2.5) and Education & research (2.5).

IN-KIND SUPPORT

Donations of goods and services are an important resource for many charities. T3010 returns collect information on in-kind donations for which charities issue receipts. While this means that an unknown proportion of in-kind giving is not captured (i.e., giving for which receipts are not issued), the data still provides useful insights into the range of supports charities receive, as well as a lower bound estimate of the scale of in-kind giving. In 2012, slightly over 11% of core charities reported issuing receipts for at least one type of in-kind donation. Most organizations reporting in-kind donations report just one type of donation (59%). About a fifth (22%) report two, just under a tenth (9%) three types, and the balance (9%) four or more. Contributions of clothing, furniture or food were by far the most common type of in-kind contribution reported (31% of core charities reporting in-kind donations reported this type of contribution; see Figure 2.16). Just under a quarter (23%) reported contributions of artwork, wine, or jewelry, 16% reported receiving contributions of machinery or other equipment (notably including computers and/or software) and 13% books. A number of types of contributions have particular policy relevance, including publicly traded securities or mutual funds (reported by 13% of core charities that issued receipts for in-kind contributions), privately held securities (1%), and cultural (3%) or ecological (0.5%) properties. It is clear that Nova Scotians contribute a very broad range of in-kind goods. In spite of the breadth of types of contributions mentioned, just under half (49%) of reporting charities say that they received some other type of good.

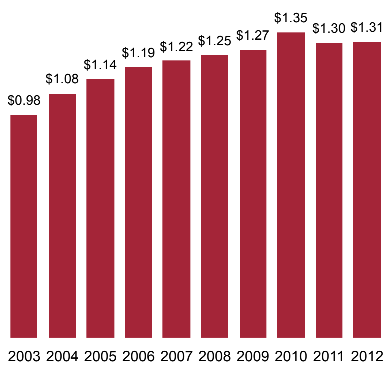
Figure 2.16: Types of in-kind gifts reported, core charities reporting issuing receipts in return for in-kind contributions, Nova Scotia, 2012.



Trends in Revenue

Looking at total revenues, focusing on core charities where reporting errors appear to be low, total revenues have increased by approximately a third (33%) in constant dollar terms since 2003. Over this period, total revenue reported by core charities with reliable financial data went from just over $980 million to $1.31 billion (see Figure 2.17). The largest year over year increases were recorded between 2003 and 2006, with the pace slowing somewhat after that. Reported revenues were unusually high in 2010 ($1.35 billion). This appears to be driven by two factors – a few charities reported unusually large revenues that year, from various sources and an unusually large number of charities (on the order of about 150) reported decreased revenues in 2011. From 2011 to 2012, revenue growth appears to have largely stagnated in real terms. Expressed as a fraction of GDP, revenues have fairly consistently been equivalent to approximately 3.5% of provincial GDP (Statistics Canada, n.d.-f).

Figure 2.17: Total revenues reported by reliable reporting core charities, Nova Scotia, 2003 to 2012.



Looking at how charities fund themselves, there appears to have been little to no change over the previous decade. As detailed above, 59% of charities reported that they derive more than half of their revenues from gifts, donations and grants in 2012. This percentage has been essentially entirely unchanged since 2003. The largest divergence seen was in 2009, when 57% of charities reported the same thing. Similar levels of consistency are seen with the other major revenue sources. The only significant divergence from the pattern was also in 2009, when 11% of charities reported depending on a mix of revenue sources rather than the more usual 9%. Given the widespread economic upheaval that was occurring in 2009, these are remarkably small shifts.

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[10] Charities with annual revenues less than $100,000 possessing less than $25,000 worth of property not used in charitable programs, and not having permission to accumulate from Canada Revenue Agency are not required to file detailed financial information. This measure is intended to reduce filing burden for these charities.

[11] Approximately 4% of 2012 returns were excluded because of filing errors. It is difficult to be certain what precise effect these returns have on total core sector revenue, but depending on whether one believes the reported total revenue or an independently calculated total revenue based on reported line items, they account for between $36.3 and $152.2 million in revenue, or between 3% and 10% of total 2012 core charity revenues.

[12] For analysis by cause area, charities are assigned to categories based on the primary focus of the organization. For example, a charity that reported devoting 70% total effort to Health and 30% to Social services would be classified as a Health charity. In contrast, revenues are allocated according to the degree of effort charities devote to a given cause area. In the example above, 70% of organizational revenues would be assigned to Health and 30% to Social services.

3. PAID HUMAN RESOURCES OF CORE CHARITIES

Figure 3.1: Distribution of organizations by total paid staff size categories, core charities, Nova Scotia, 2012.

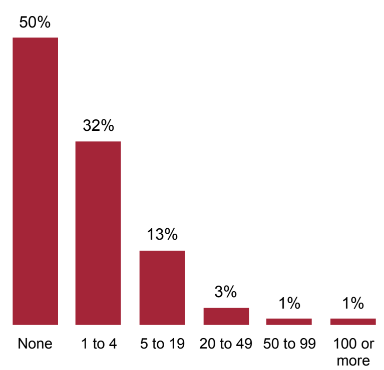
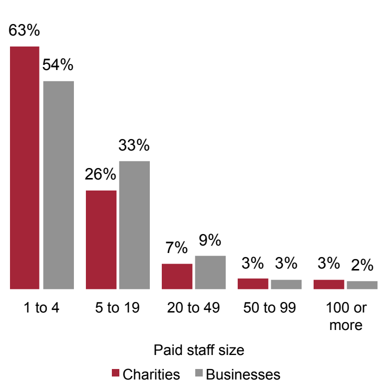


Figure 3.2: Distribution of charities and businesses by paid staff size category, core charities and businesses reporting paid staff, Nova Scotia, 2012.



This section of the report draws on T3010 information returns to describe what is known about the paid human resources of core charities.

Paid Human Resources of Charities

As of 2012, core charities reported a total of just over 25,000 paid positions. Just under half (44%) were full-time positions and the balance (56%) part-time / part-year.[13]

PAID STAFF SIZE

Although core charities collectively account for a considerable number of positions, not all organizations employ paid staff. In fact, fully half did not report paid staff (see Figure 3.1). Just under a third (32%) reported one to four paid staff positions and 13% reported between five and nineteen positions.[14] At the other end of the size spectrum, just 1% of organizations reported having 100 or more paid staff positions.

Charities are more likely than businesses to have small numbers of paid staff. Nearly two thirds (63%) of charities with paid staff reported one to four paid staff, compared to just over half of businesses (54%; see Figure 3.2). Conversely, charities are somewhat less likely to report 5 to 19 paid staff - just over a quarter (26%) of charities with paid staff are in this category, compared to one third of

Figure 3.3: Distributions of full-time and part-time positions by paid staff size category, core charities, Nova Scotia, 2012.

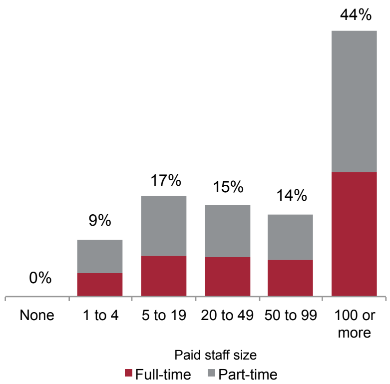


Figure 3.4: Distributions of total paid staff positions by paid staff size category, core charities and businesses reporting paid staff, Nova Scotia, 2012.

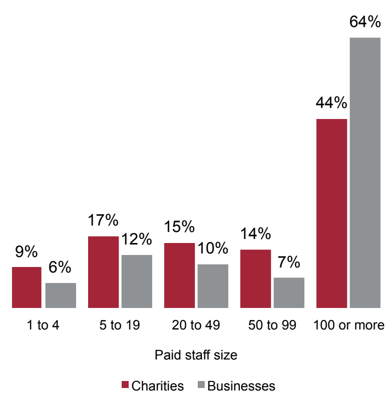
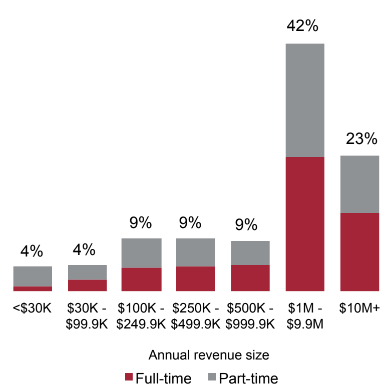


Figure 3.5: Distributions of paid staff by annual revenue size category with average full-time and part-time, core charities, Nova Scotia, 2012.



businesses. Charities are also slightly less likely to have 20 to 49 paid staff (7% of charities vs. 9% of businesses). The likelihoods of businesses and charities having 50 or more paid staff are more or less equal (Statistics Canada, n.d.-h).

Although the number of charities with large paid staff complements is small, they account for a very large percentage of total sector positions. The roughly 1% of core charities with 100 or more paid staff account for nearly half (44%) of paid staff positions (see Figure 3.3). Similarly, the 5% of core charities with 20 to 99 paid staff account for a further 29% of total positions. The net effect is that about 6% of organizations account for just under three quarters (74%) of total positions. Conversely, the third of core charities that have one to four paid staff account for just under a tenth (9%) of total positions.

The percentage of total positions that are full-time tends to increase with paid staff size. Forty-one percent of positions in core charities with less than twenty paid staff are full-time, as compared to 42% of positions in charities with 20 to 49 paid staff and 45% of positions in charities with 50 to 99 paid staff. Fully 47% of positions in organizations with 100 or more paid staff are full-time.

Compared to the business sector, larger percentages of total charity positions are associated with smaller organizations. For example, charities with one to four paid staff account for 9% of positions, compared to 6% for business (see Figure 3.4). Similarly, 17% of charity positions are in organizations with five to 19 paid staff, compared to 12% of positions in business. The greatest difference is seen with the largest organizations - charities with 100 or more paid staff account for just 44% of total positions, compared to 64% of positions for equivalently sized businesses (Statistics Canada, n.d.-a).

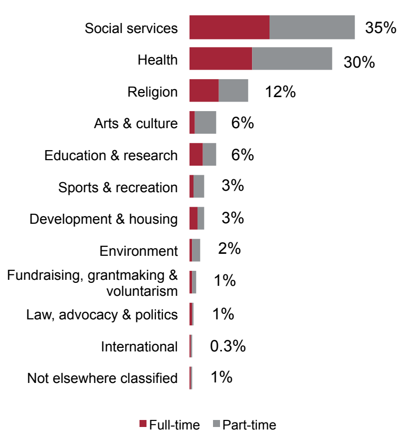
ANNUAL REVENUE SIZE

A fairly similar picture can be seen when looking at the distribution of paid staff positions by size of annual revenues. Again, the small number of larger organizations account for a disproportionate number of total positions, with the 19 core charities with reported 2012 annual revenues of $10 million or more accounting for nearly a quarter (23%) of total sector positions (see Figure 3.5). The 5% of organizations with annual revenues between $1 million to just less than $10 million accounted for another 42% of total positions. Similar to the pattern with organizational size by number of paid staff positions, the largest organizations account for around two thirds of total paid staff. Conversely, although about two thirds of core charities have annual revenues less than $100,000 they account for less than a tenth of total paid staff positions. Part-time staff positions are much more common among smaller organizations. Core charities with annual revenues of less than $30,000 report that on average 79% of their positions are part-time. An average of slightly over half of positions are part-time for core charities with annual revenues between $30,000 and $499,999. The role of full-time positions increases steadily among organizations with annual revenues of $500,000 or more, peaking at an average of 58% of positions among those with $10 million or more in annual revenues.

ORGANIZATIONAL CAUSE

Social services (35%) and Health (30%) account for the majority of total core charity paid staff positions (see Figure 3.6).[15] Other major sub-sectors include Religion (12% of positions), Arts & culture (6%), and Education & research (6%). International charities account for the smallest percentage of total positions (0.3%) followed by Law, advocacy & politics (1%), and Fundraising, grantmaking & voluntarism charities (1%).

Figure 3.6: Distribution of paid staff by sub-sector with average full-time and part-time positions, core charities, Nova Scotia, 2012.



The balance between full-time and part-time positions varies significantly across sub-sectors. International organizations are most oriented towards full-time staff (an average of 68% of positions are full-time). Development & housing organizations report an average of 52% of positions as full-time and Law, advocacy & politics organizations 50%. Part-time positions are most predominant among organizations working in the areas of Arts & culture (83%), Environment (80%) and Sports & recreation (77%). The consistently high average percentages of total paid staff that are part-time demonstrates how central part-time staff are to charities of all types.

Human Resources Trends

CHANGES IN PAID STAFF SIZE

The past decade has seen significant shifts in human resources among Nova Scotia core charities. Most importantly, the number of charities with no paid staff has increased appreciably. Since 2003, the number of organizations with no paid staff has increased by approximately 240. Over the same period, the number of

Figure 3.7: Distributions of core charities by paid staff size category, Nova Scotia, 2003 and 2012.

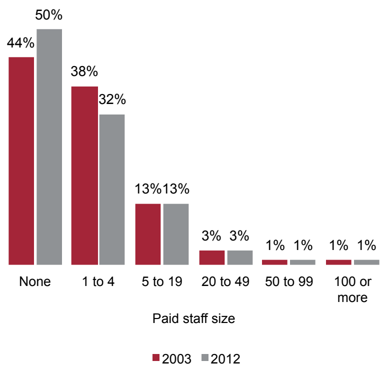


Figure 3.8: Number of paid staff positions reported by core charities, Nova Scotia, 2003 to 2012.

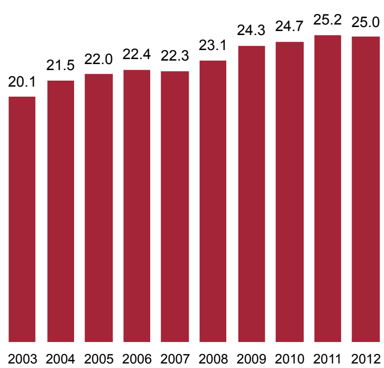
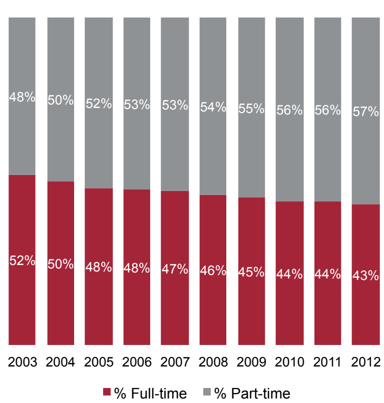


Figure 3.9 Average percentage of total positions by full-time / part-time status, core charities, Nova Scotia, 2002 to 2012.



organizations with one to four paid staff has decreased by approximately 220. The net effect has been that the number of charities with no paid staff has increased by six percentage points, from 44% in 2003 to 50% in 2012 and the percentage of charities with one to four paid staff has decreased from 38% to 32% over the same period (see Figure 3.7). Additionally, over the same period, the number of core charities employing 50 or more paid staff has increased by 24. This may sound like a small change, but it has had significant effects - in 2003, core charities with paid staffs of 50 or more accounted for 49% of total paid employment in the core sector. By 2012, that percentage had increased to 58%.

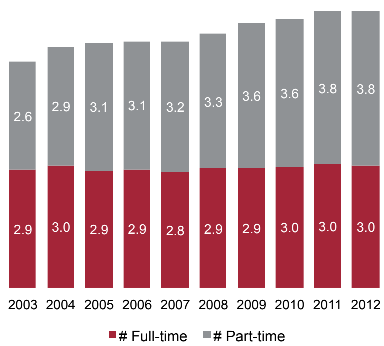
From 2003 to 2012, the total number of positions reported by core charities has increased by approximately a quarter (24%), going from just over 20,000 to 25,000 (see Figure 3.8). The pace of increase has been relatively constant, save for the period between 2005 and 2007, when the number of reported positions held more or less constant. The vast majority of the increase (approximately 88%) was in part-time positions. Over the same period, the total number of individuals employed in Nova Scotia increased by approximately 6% (Statistics Canada, n.d.-b).

CHANGES FULL-TIME VS. PART-TIME EMPLOYMENT

Since 2002, the percentage of total paid staff positions that are part-time appears to have increased appreciably. In 2003, for core charities that reported paid staff, the average percentage of positions that were full-time was 52% (see Figure 3.9). By 2012, this percentage had dropped steadily to 43%. It should be remembered that these figures refer to absolute numbers of paid staff, rather than full-time equivalents, the shift in terms of hours worked is somewhat smaller than these figures indicate. That said, the directionality of the trend is clear. It should be noted that this shift towards part-time employment does not appear to be paralleled by shifts in employment generally. The percentage of employed persons who are employed part-time in Nova Scotia has remained more or less constant since 2003 (Statistics Canada, n.d.-b).

The shift towards increased percentages of total paid staff positions being part-time appears to be driven by two factors – one, a decrease in the number of organizations with less than five full-time paid staff and two, an increase in the number of part-time employees (as opposed to a decrease in the number of full-time employees). From

Figure 3.10: Average number of part-time and full-time positions, core charities, Nova Scotia, 2002 to 2012.



2003, the percentage of core charities with one to four full-time paid staff has decreased seven percentage points, from 33% to 26% of organizations. Over the same period, the percentage of core charities with no part-time paid staff has remained quite constant, while the numbers of organizations with five or more part-time paid staff have increased. The net effect is that fewer core charities are employing full-time staff and the number of part-time staff they employ has increased. From 2003, the average number of part-time positions reported by core charities has increased from 2.6 to 3.8 in 2012 (see Figure 3.10). Over the same period, the average reported number of full-time positions has remained constant.

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[13] Compared with other available data, it seems likely that T3010 filings report a higher number of part-time / part-year positions. Statistics Canada data tabulations show only 15,800 jobs for Nonprofit Institutions Serving Households. Given the scope differences (i.e., charities only vs. the mix of charities and nonprofits that make up NPISH), this seems quite a large divergence. Looking specifically the Religious organizations sub-component of NPISH (which should be almost entirely composed of charities), it is clear that the Statistics Canada tabulations report fewer jobs than T3010 returns report positions (2,400 vs. approximately 3,100) (Statistics Canada, n.d.-d). Given that the figures reported T3010 returns are extremely consistent year over year, because they have a clear, known scope and because they provide considerably richer data, we have chosen to emphasize the core charities analysis over NPISH tabulations, but readers should be aware that other estimates with different definitions and scopes exist.

[14] Note that the number of paid staff positions includes both full-time and part-time / part-year positions.

[15] For analysis by cause area, charities are assigned to categories based on the primary focus of the organization. For example, a charity that reported devoting 70% total effort to Health and 30% to Social services would be classified as a Health charity. In contrast, paid staff positions are allocated according to the degree of effort charities devote to a given cause area. In the example above, 70% of positions would be assigned to Health and 30% to Social services. This holds true both for full-time and part-time positions.

4. SUPPORTS FROM INDIVIDUALS TO CORE CHARITIES AND NONPROFITS

This section of the report summarizes what is currently known about the contributions of time and money Nova Scotians make to organizations working in the core charitable and nonprofit sector. The objective is to provide greater insight into the level of contributions, who contributes, why they contribute, and what factors affect the level of contribution. The main focus is on describing the current situation, with any significant recent trends included as the data indicates.

The next several sub-sections are all based on data from three waves (2004, 2007, and 2010) of the Canada Survey of Giving, Volunteering, and Participating (CSGVP). Every three years, this telephone survey (conducted by Statistics Canada) asks Canadians aged 15 and over about their contributions of time and money to charitable and non-profit organizations. It covers a wide range of topics, from levels of support for organizations, to personal and economic characteristics of donors and volunteers, through methods of donating and volunteering, to motivations and barriers faced by supporters – with many other topics in between. While the survey covers all of Canada and explores supports for all charities and nonprofits, the results presented here focus specifically on Nova Scotians' support for core sector organizations (i.e., excluding Hospitals, Universities, and Colleges).[1] Because of this, readers may note that the estimates presented here differ appreciably from estimates in other CSGVP-based publications, particularly those with a national focus.

Giving

In 2010, just over 680,000 Nova Scotians made at least one donation to a core charity or nonprofit, the equivalent of 86% of the population aged 15 and over (see Table 4.1). These donors contributed an average of $348 each to core organizations, for a reported total of just under $238 million. Slightly under half of the total amount donated ($115 million) went to religious organizations (i.e., religious congregations and related organizations) and the balance to non-religious organizations.[2] Donors to religious organizations contributed an average of $423 to religious organizations, which was significantly larger than the average contribution by donors to non-religious organizations ($185). While religious organizations received significant financial support, it came from a relatively narrow population base. Only about a third of Nova Scotians (34%) reported donating to religious organizations, compared to 84% for other core organizations. For this reason, much of the analysis below will distinguish between donors to religious and non-religious organizations.

Table 4.1: Donation rate and average donation amounts, donors to core organizations, non-religious core organizations, and religious organizations, 2010.

	DONOR RATE			AVERAGE DONATION		
	All Core	**Non-religious**	**Religious**	**All Core**	**Non-religious**	**Religious**
Nova Scotia	86%	84%	34%	$348	$185	$423
Other Atlantic	89%	86%	43%	$354	$175	$383
Quebec	82%	76%	38%	$187	$155	$91
Ontario	83%	79%	32%	$490	$286	$568
Western	82%	77%	28%	$512	$286	$716

In comparison to residents of other regions, Nova Scotians are more likely to donate to non-religious core organizations than are residents of Quebec (76% donated), Ontario (79%) or Western Canada (77%). They tend to give larger average amounts than do Quebeckers ($155), but less than Ontarians and Westerners ($286 for both groups).

In terms of donations to religious organizations, Nova Scotians are less likely to donate than those who live elsewhere in Atlantic Canada

(34% vs. 43%), but more likely to give than Westerners (28%). They also give smaller donations to religious organizations, on average, than Ontarians ($568) and Westerners ($716), but larger donations than Quebeckers ($91).

GIVING AND DEMOGRAPHICS

Not all Nova Scotians are equally likely to donate to core organizations, nor do they tend to contribute equal amounts when they contribute. While personal and economic characteristics do not determine individual behaviour, at the level of the population these characteristics can have significant predictive value and provide a better understanding of the contours of support for charitable and nonprofit organizations. Table 4.2 presents a summary of how giving to both religious and non-religious core organizations varies according to the personal and economic characteristics of Nova Scotians.

Multivariate analysis of the likelihood of donating shows that a few key groups stand out from others. Those who are statistically more likely to donate to non-religious core charities and nonprofits include:

- women (86% donated), and
- those who have more than a high school education, particularly those who have some post-secondary education (95%) or a university degree (92%).

People statistically less likely to donate include those:

- aged 25 to 34 (75% donated), and
- with household incomes less than $20,000 (62%).

Turning to the amounts donated, some groups again stand out from others. Having made the decision to donate, those who tend to donate larger amounts to non-religious core organizations include those:

- 65 years of age and older ($236, on average),
- with a university degree ($288), and
- with annual household incomes of $100,000 or more ($264).

Those who stand out for donating smaller amounts to non-religious organizations include those:

aged 15 to 24 ($86*),

- who have not graduated from high school ($84), and

* Use with caution.

Table 4.2: Giving to non-religious and non-religious core organizations by key demographic characteristics, Nova Scotia, 2010.

	NON-RELIGIOUS		RELIGIOUS	
	Donor Rate	Average Donation	Donor Rate	Average Donation
Age group				
15 to 24	79%	$86*	17%*	…
25 to 34	75%	$131*	29%	…
35 to 44	87%	$223*	32%	$219*
45 to 54	90%	$180	36%	$459*
55 to 64	85%	$228	33%	$358*
65 and over	82%	$236	56%	$594
Sex				
Male	81%	$202	28%	$373
Female	86%	$170	40%	$456
Marital status				
Married or common-law	87%	$197	40%	$422
Single, never married	76%	$125	18%	$286*
Widow or widower	86%	$222	54%	$759*
Separated or divorced	75%	$253*	23%	$182*
Education level				
Less than high school	71%	$84	27%	…
Graduated from high school	75%	$148*	29%	$436*
Some postsecondary	95%	$227*	33%*	…
Postsecondary diploma	87%	$162	39%	$320
University degree	92%	$288	37%	$629*
Labour force status				
Employed	87%	$194	29%	$365
Full-time	87%	$205	28%	$364*
Part-time	86%	$144*	29%	$371*
Unemployed	89%	…	57%*	…
Not in the labour force	78%	$155	39%	$459*
Household income				
Less than $20,000	62%	$90*	30%	…
$20,000 to $39,999	82%	$118	37%	$471*
$40,000 to $59,999	80%	$156	29%	$337*
$60,000 to $99,999	89%	$207	38%	$416*
$100,000 or more	89%	$264	33%	$462*
Religious attendance				
Weekly attender	90%	$212	84%	$728
Not a weekly attender	82%	$178	25%	$240*

* Use with caution.
… Too unreliable to be published.

- with annual household incomes less than $20,000 ($90*).

With regards to the likelihood of donating to religious organizations, groups that stand out as being more likely to donate include those:

- who attend religious services on a weekly basis (84% donated),
- who are widowed (54%), and
- who have household incomes between $20,000 and $39,999 (37%) or $60,000 to $99,999 (38%).

Groups that are less likely to donate to religious organizations include those:

- who do not attend religious services on a weekly basis (25%), and
- who are single and have never been married (18%).

Having made the decision to donate, those who tend to contribute larger amounts to religious organizations include those:

- aged 65 and over ($594 on average),
- who are widowed ($759*), and
- attend religious services on a weekly basis ($728).

Groups that stand out as tending to donate smaller amounts to religious organizations include:

- those who are separated or divorced ($182*), and
- those who do not attend services on a weekly basis ($240*).

DONATING BY SUB-SECTOR

Nova Scotians are more likely to support charities and nonprofits working in some sub-sectors than others. In 2010, a majority of Nova Scotians donated to Health (58%) and Social services (51%) organizations (see Figure 4.1). About a third (34%) donated to Religion organizations, 29% to Education & research organizations and a fifth to Sports & recreation organizations. The Arts & culture and Development & housing sub sectors have the narrowest base of support at 3%*.

As previously mentioned, Religion organizations tended to receive by far the largest donation amounts from their donors ($423 on average), followed by International organizations ($188; see Figure 4.2). Supporters of Education & research ($24), Business or

Figure 4.1: Donor rate by sub-sector, core organizations, Nova Scotia, 2010.

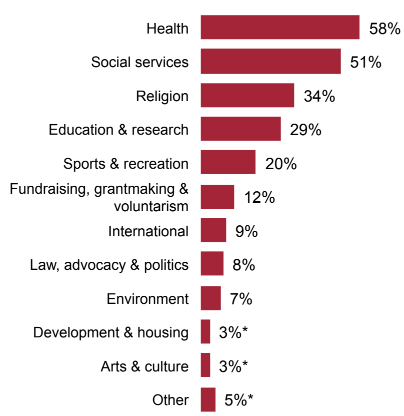
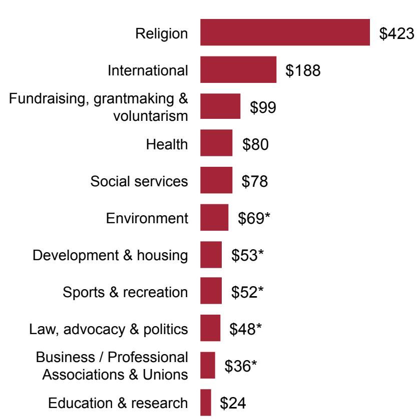


Figure 4.2: Average donation amounts by sub-sector, core organizations, Nova Scotia, 2010.



* Use with caution.

Figure 4.3: Percentage of total donation value by sub-sector, core organizations, Nova Scotia, 2010.

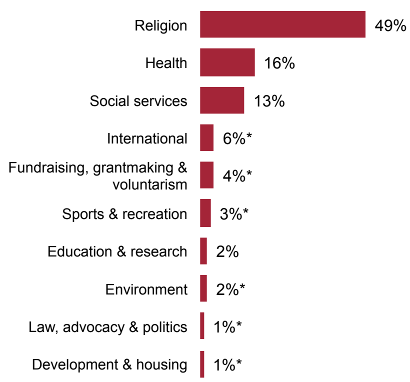


Figure 4.4: Average percentage of total core donations allocated to cause by donors to that cause, Nova Scotia, 2010.

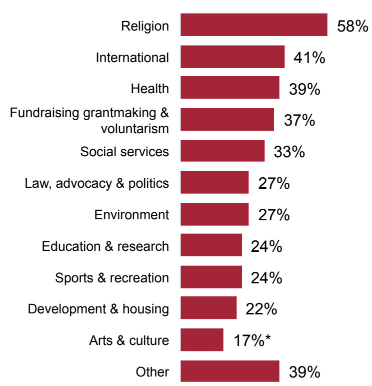
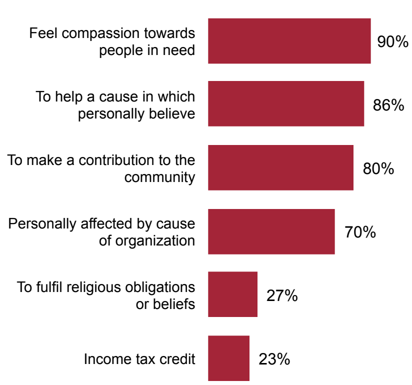


Figure 4.5: Motivations for giving, donors to core organizations, Nova Scotia, 2010.



* Use with caution.

professional associations & unions ($36*) and Law, advocacy & politics ($48*) organizations tended to contribute the smallest amounts.

In terms of the proportion of total donations, Religion organizations account for by far the largest part of total support at slightly under half (49%) of total donation value (see Figure 4.3). This is driven by the combination of very high average donation value and a fairly broad base of support. Although Health organizations have by far the broadest base of support, they receive about a third as much (16% of total donation value) due to the much smaller average donation. A very similar pattern is seen with Social services organizations (13%). Although International organizations typically receive quite large donations, their comparatively narrow base of support means they account for a fairly modest percentage of total donation value (6%*). Other sub-sectors account for even smaller percentages of total donations.

Some causes are more central objects of focus for donors than others. For example, supporters of Religion organizations are very focused on this cause, allocating an average of 58% of their total donation value to it (see Figure 4.4). Similarly, donors to International organizations allocate 41% of their total donation value on this cause. Other causes, such as Arts & culture (17%*), Development & housing (22%), and Sports & recreation (24%) tend to receive much lower percentages of their supporters' total donation dollars. Generally speaking, the lower the average percentage of total donations a given cause receives, the greater the competition it faces from other causes for donor dollars.

MOTIVATIONS AND BARRIERS TO GIVING

Potential motivations for giving are measured by asking donors if each of six potential factors was a reason for their donations over the previous year. Ideological motivations were by far the most common reasons reported. Fully nine tenths of donors to core organizations said they gave because they feel compassion towards those in need, 86% said they wanted to help a cause that they personally believe in, and 80% said they donated because they want to make a contribution to the community (see Figure 4.5). Just over two thirds (70%) say that they donate because they have personally been affected by the cause of the organizations they support. Somewhat smaller numbers of donors to core organizations say that they contribute in order to fulfill religious obligations or beliefs (27%) or because they will receive a tax credit in return for their contributions (23%).

The only significant recent trend with regards to motivations for giving in the CSGVP data is a steady decrease in the percentage of core sector donors saying they contribute in order to fulfill religious obligations or beliefs (down from 32% in 2004).

Some groups of Nova Scotians are more likely than others to cite particular motivations. For instance, women are more likely than men to say that they donate because they or someone they know is personally affected by the cause the organization supports (76% vs. 63% of men), to support a cause in which they personally believe (89% vs. 82%) and because they feel compassion for those in need (93% vs. 86%). Similarly, those who attend religious services on a weekly basis are also more likely to report most motivations for donating, particularly religious obligations and beliefs (62% vs. 20% of others). Those with higher household incomes and higher levels of formal education are also more likely to report most motivations.

Some motivations may have larger effects on the amounts donated than others. For example, those who say they donate because they feel compassion towards those in need contribute significantly more to non-religious core organizations than those who do not report this motivation ($197 vs. $89*; see Figure 4.6). Similarly, those who contribute to help a cause in which they personally believe also donate larger average amounts ($198 vs. $101*), as do those who want to make a contribution to the community ($199 vs. $129), or are personally affected by the cause the organization supports ($203 vs. $143). The differences in average donation amounts for other motivations are not large enough to be statistically significant.

The CSGVP measures the effect of common barriers to giving by asking donors if each of nine possible factors were reasons they did not give as much as they otherwise might have over the previous year. By far the most commonly reported barriers to greater giving were inability to give more (75% of donors to core organizations reported this barrier) and being satisfied with the amounts already contributed (64%; see Figure 4.7). Around two fifths of donors to core organizations said they did not give more because they gave money directly to people without going through an organization (39%) or did not like something about the way in which requests were made for donations (37%). About a third reported each of not

Figure 4.6: Average donation amount to non-religious core organizations by motivations to give, donors to non-religious core organizations, Nova Scotia, 2010.

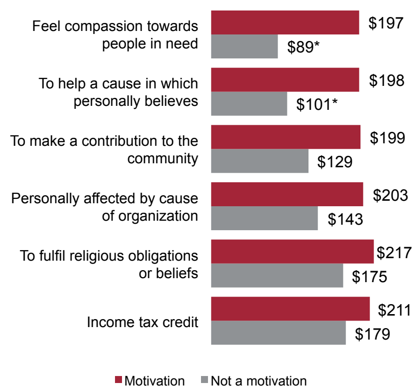
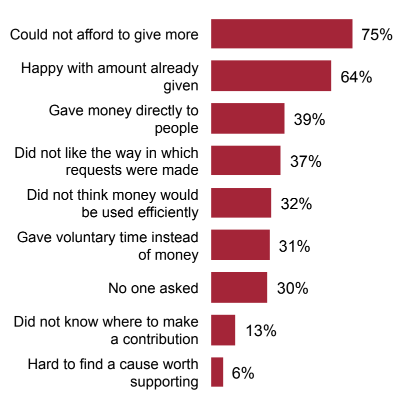


Figure 4.7: Barriers to giving more, donors to core organizations, Nova Scotia, 2010.



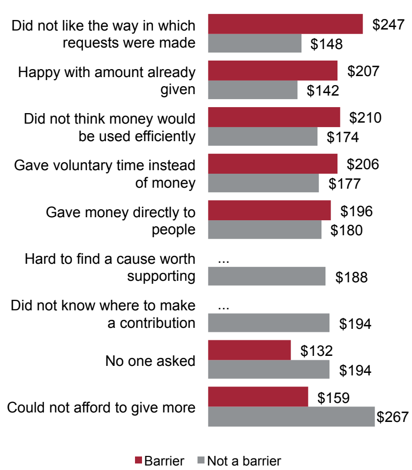
* Use with caution.

thinking further money donated would be used efficiently (32%), giving voluntary time rather than money (31%) and not having been asked to make further contributions (30%). Small number of donors to core organizations reported not knowing where to make further contributions (13%) or being unable to find a cause worth supporting (6%).

In terms of significant recent trends, the percentage of core sector donors saying that they were happy with what they had already contributed has decreased, from a high of 69% in 2004. Similarly, the number of donors saying that they did not like something about how requests for donations were made has decreased from 42% in 2004. Conversely, it appears that concerns about the efficient use of donations are on the rise as can be seen by recent increases in the percentage of donors reporting this barrier (up from 26% in 2007).

Most barriers do not appear to have strong relations with the amounts donated, in that the average amounts contributed by donors who report a given barrier are not statistically different from donors who do not report the barrier. Probably the most important of the exceptions is not being able to afford to donate more. Those who reported this barrier contributed an average of $159 to core non-religious organizations, as compared to $267 for those did not report the barrier, over $100 more (see Figure 4.8). The other two statistically significant barriers are actually correlated with higher donation amounts. Those who say they did not donate more because they did not like how requests were made gave and average of $247 vs. $148 for those who did not report the barriers. Similarly, those who are happy with the amounts they have already given gave $207 vs. $142 for those who did not report this barrier.

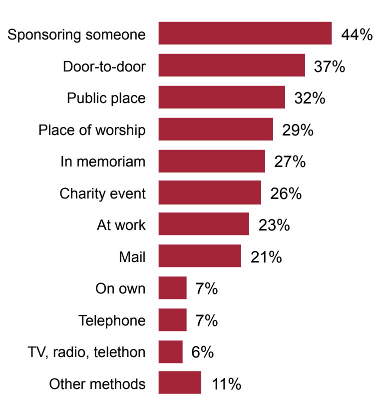
Figure 4.8: Average donation amount to non-religious core organizations by barriers to giving more, donors to non-religious core organizations, Nova Scotia, 2010.



DONATION METHODS

Nova Scotians are most likely to donate to core organizations by sponsoring someone (44% said they used this method during 2010; see Figure 4.9). They are next most likely to donate in response to an appeal at the door (37%), followed by being asked in a public place, such as in a shopping mall or on the street (32%). Slightly fewer Nova Scotians donated at a church or other place of worship (29%), in memory of someone (27%), or by attending some sort of charity event such as a dinner or gala (26%). Quite few donated in response to appeals broadcast on the television or by radio (6%) or in response to a telephone appeal (7%). The overwhelming majority of donation

Figure 4.9: Donor rate by donation method, core organizations, Nova Scotia, 2010.



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activity appears to be as a result of being approached in some way – just 7% of Nova Scotians said they made any donations on their own initiative.

In general, how common a given method of donation is does not closely correlate with the size of the individual donation. To the extent that there is a correlation, it may be more correct to say that likelihood of donating and typical donation size are negatively correlated (i.e., all things being equal, less common methods seem to be slightly more likely to be tied to larger donations). For example, some of the most common methods tend to result in quite small donations – the average value of a door-to-door donation is just $21 (see Figure 4.10). Similarly, donations to sponsor someone average $25 and donations in response to appeals made in a public place such as a shopping centre average just $17. Conversely, quite uncommon donation methods such as donating on one's own initiative ($189* on average) and in response to an appeal on television or the radio ($80*) can be associated with fairly high value donations. It is important to understand that the associations are only tendencies, but as will be seen below, they go a long way to explaining why the likelihood of donating via any given method is only loosely associated with its financial role.

In terms of financial impact, donations through place of worship dwarf all other methods, accounting for nearly half of the total value of donations to core organizations (44%; see Figure 4.11). Donations by mail, the next ranking method, are only about a fifth as large, accounting for 10% of total donation value. Quite common methods that play quite a small financial role include door-to-door canvassing (37% of Nova Scotians donated in this way, but these donations account for just 4%* of donation value) and sponsoring someone (44% of Nova Scotians, but 4% of value). Some methods that are significantly less common, such as donating on the telephone (7% of Nova Scotians vs. 1%* of value) and donating in response to a television or radio appeal (6% of Nova Scotians vs. 2%* of value) account for only modestly smaller percentages of total donation value. In interpreting these results, it is important to keep in mind that the vast majority of donations through place of worship go to Religion organizations. As such, the importance of other methods for other sub-sectors is roughly double what is shown in Figure 4.11.

Figure 4.10: Average value of donations by donation method, core organizations, Nova Scotia, 2010.

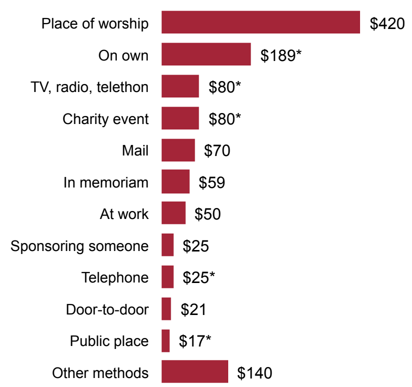
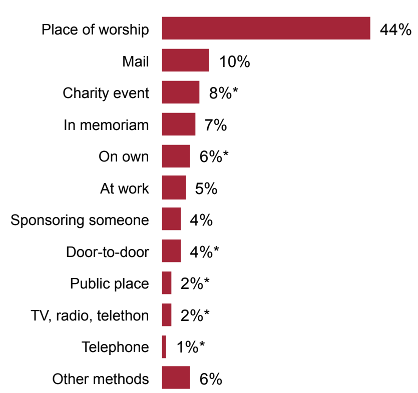


Figure 4.11: Distribution of total value of donations by donation method, core organizations, Nova Scotia, 2010.



* Use with caution.

PRIOR PLANNING AND DONATING

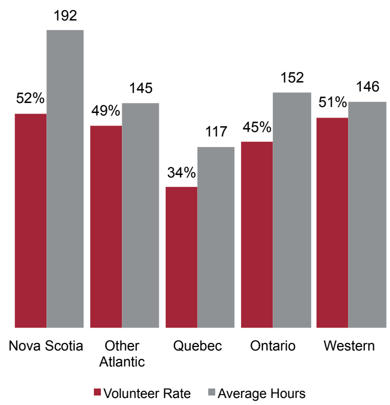
The CSGVP asks donors a number of questions designed to assess the extent to which they plan their donations in advance of donating. It asks donors whether they decide in advance the amount they will donate in a given year. Additionally it asks donors if, for their larger donations, they decide in advance which organizations they will support, if they give in response to being asked, or if they give both ways. Finally, it asks donors whether they always give to the same organizations, if they vary the organizations they support, or if they give to a mix of both.

In 2010, just 16% of donors to Nova Scotia core organizations said that they decide in advance the amounts that they will contribute in a given year. While the percentage of core donors deciding how much they will give is small, they give disproportionately large amounts, accounting for 27% of donation value, or almost twice as much as their numbers might suggest. Twenty-six percent of core donors said that for their larger donations they decide in advance which organizations they will support, 62% said they give in response to being asked and 12% say they donate both ways. Again, those deciding in advance (39% of donation value) and donating both ways (21%) account for disproportionately large percentages of total donation value. Almost a third of core donors (29%) say they always donate to the same organizations, somewhat fewer (27%) vary the organizations they support, and the largest percentage (44%) do both. Again, those that engage in prior planning contribute disproportionately large amounts. Interestingly, this association is somewhat less pronounced among core donors who do both (44% of core donors vs. 48% of donation value) than it is among those who say they exclusively donate to the same organizations over time (29% of core donors vs. 35% of donation value).

Volunteering

In 2010, slightly more than 410,000 Nova Scotians volunteered for at least one core charitable or nonprofit organization. This is equivalent to just over half (52%) of the population aged 15 and over. These volunteers contributed an average of 192 hours each, for a grand total of 78.7 million hours, equal to nearly 41,000 full-time equivalent jobs. Nova Scotians make a greater contribution to volunteering than do residents of some other regions of Canada. For

Figure 4.12: Volunteer rate and average annual volunteer hours, core organizations, by region, 2010.



example, a larger percentage of Nova Scotians volunteer for core organizations than do residents of Quebec (34%) or Ontario (45%; see Figure 4.12). Similarly, the average hours volunteered for core organizations is higher in Nova Scotia than in Quebec (117) and Western Canada (146).[16]

Table 4.3: volunteering for core organizations by key demographic characteristics, Nova Scotia, 2010.

	VOLUNTEER RATE	AVERAGE HOURS
Age group		
15 to 24	60%	…
25 to 34	43%	123*
35 to 44	64%	173*
45 to 54	57%	258*
55 to 64	48%	182*
65 and over	39%	213
Sex		
Male	46%	187*
Female	57%	195
Marital status		
Married or common-law	53%	216
Single, never married	55%	159*
Widow or widower	32%	116*
Separated or divorced	48%	98*
Education level		
Less than high school	36%	…
Graduated from high school	43%	…
Some postsecondary	64%	158*
Postsecondary diploma	51%	176
University degree	70%	203*
Labour force status		
Employed	56%	165
Full-time	55%	168*
Part-time	62%	151*
Unemployed	…	…
Not in the labour force	49%	253*
Household income		
Less than $20,000	29%	…
$20,000 to $39,999	37%	247*
$40,000 to $59,999	55%	177*
$60,000 to $99,999	57%	166*
$100,000 or more	66%	172
Religious attendance		
Weekly attender	68%	293
Not a weekly attender	49%	165

* Use with caution.
… Too unreliable to be published.

DEMOGRAPHICS AND VOLUNTEERING

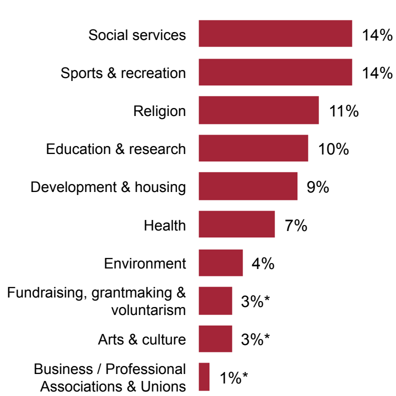
As with giving, not all Nova Scotians are equally likely to volunteer for core organizations, nor do they tend to contribute the same number of hours when they do volunteer. Again, it is important to remember that although personal and economic characteristics have important effects that are visible at the population level, they are not themselves determinative. Groups that stand out as being particularly likely to volunteer include:

- women (57% volunteered; see Table 3),
- those with either some post-secondary education (64%) or a university degree (70%);
- those with higher household incomes, particularly those between $60,000 and $99,999 (57%) or $100,000 or more (66%), and
- those who attend religious services at least once a week (68%).

Conversely, groups that stand out as being less likely to volunteer include those aged 25 to 34 (43%) or 65 and older (39%).

Because of small sample sizes, it is difficult to draw many conclusions about variations in the number of hours different groups tend to contribute. However, a very few groups are sufficiently different that they still stand out. Those with a university degree stand out in that they tend to contribute larger numbers of hours (203 on average). Those who attend religious services at least weekly also stand out as tending to contribute substantially more hours (293) while those attend services less frequently or do not attend services at all stand out as tending to contribute fewer hours (165).

Figure 4.13: Volunteer rate by sub-sector, core organizations, Nova Scotia, 2010.



* Use with caution.

VOLUNTEERING BY SUB-SECTOR

Nova Scotians are most likely to volunteer for core organizations working in the areas of Social services (14% volunteered) and Sports & recreation (14%; see Figure 4.13). Around a tenth of Nova Scotians volunteered for each of Religion (11%), Education & research (10%), and Development & housing (9%). Roughly one in 14 (7%) volunteered for Health organizations. Nova Scotians were least likely to volunteer for Business and professional associations & unions (just 1%* volunteered), or organizations working in the areas of Arts & culture (3%*) or Fundraising, grantmaking & voluntarism Promotion (3%*).

Figure 4.14: Average annual volunteer hours by sub-sector, core organizations, Nova Scotia, 2010.

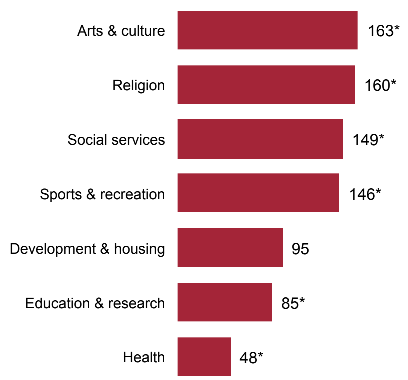


Figure 4.15: Percentage of total volunteer hours by sub-sector, core organizations, Nova Scotia, 2010.

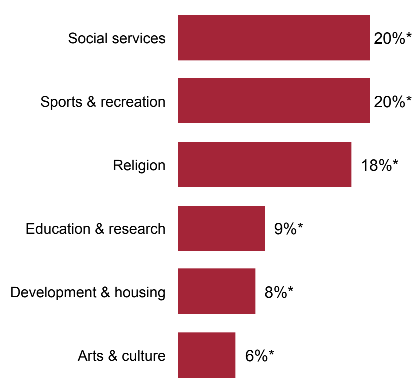
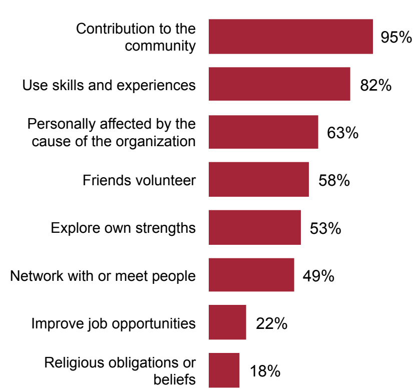


Figure 4.16: Motivations for volunteering, volunteers for core organizations, Nova Scotia, 2010.



* Use with caution.

In terms of the hours contributed to the organizations they volunteer for, Nova Scotians tend to contribute the largest numbers of hours to Arts & culture (163* hours annually, on average), Religion (160*), Social services (149*), and Sports & recreation (146*) organizations (see Figure 4.14). They tend to volunteer somewhat fewer hours for Development & housing (95) and Education & research (85*) organizations. Health organizations tend to receive the lowest number of hours (48* on average).

Collectively, Social services, Sports & recreation, and Religion organizations receive over half of total volunteer hours contributed by Nova Scotia volunteers. One fifth go to Social services (20%*) and Sports & recreation (20%*). Religion organizations receive slightly less (18%*; see Figure 4.15). These organizations receive large percentages of total volunteer hours because they have fairly broad bases of support and their supporters tend to volunteer fairly large numbers of hours. Although the base of support for Education & research organizations is fairly broad, these volunteers tend to contribute relatively few hours compared to the three sub-sectors mentioned above. The net effect is that this sub-sector accounts for a fairly modest percentage of total volunteer hours (9%*). A very similar pattern is seen with the Development & housing sub-sector, which accounts for 8%* of total volunteer hours. The Arts & culture sub-sector, on the other hand, accounts for a modest percentage of total hours (6%*) by virtue of the fact of its narrow base of support, as these supporters do tend to be quite generous with their time when they volunteer.

MOTIVATIONS AND BARRIERS TO VOLUNTEERING

The CSGVP asks volunteers if any of eight key potential motivations were important in their decisions to volunteer for the organization to which they contributed the most hours. Substantially all volunteers for core organizations agreed that they volunteered because they wanted to make a contribution to their community (95%; see Figure 4.16). About four fifths (82%) said they volunteered because they wanted to use their skills and experiences in support of a worthy cause. Personal connections, either with the cause of the organization or with other individuals, are important to many volunteers. Nearly two thirds (63%) said they volunteered because they were personally affected by the cause of the organization). Similarly, 58% said they volunteer because their friends volunteer and

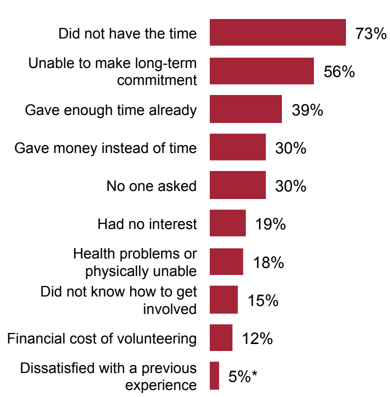
49% volunteer in order to network or to meet new people. Just over a fifth (22%) said that they volunteer in order to improve their job opportunities, either in terms of finding a job or increasing their skills. Volunteering to fulfill religious obligations or beliefs was relatively uncommon, with just under a fifth of volunteers for core organizations (18%) saying this was a reason they volunteered.

Some groups of volunteers for core organizations are more likely than others to report particular motivations for more volunteering. Marital status appears to be particularly important in this regard. For instance, those who are married are more likely to volunteer because they are personally affected by the cause the organization supports (67% reported this). Similarly, those who are separated or divorced are substantially less likely to say they volunteer because their friends volunteer (31%*), and those who are single are more likely to say they volunteer because they want to explore their own strengths (65%). Frequency of attendance at religious services also appears to be an important variable, though it is also correlated with age. Core volunteers who attend religious services on a weekly basis are substantially more likely to volunteer because of religious obligations or beliefs (50% vs. 9% of those who do not attend services on a weekly basis), but also because they want to meet and network with people (62% vs. 48%). Conversely, they are less likely to volunteer as a means to improve their job prospects (11% vs. 26%).

In terms of significant recent trends, the importance of friends volunteering appears to be increasing rapidly. Currently, 58% of volunteers say his motivation is important, compared to 51% in 2007 and 43% in 2004. Conversely, volunteering to fulfill religious obligations or beliefs has become less common, being reported by 18% of volunteers in 2010, compared to 24% in 2007 and 22% in 2004.

Potential barriers to volunteering are measured in two key ways. Volunteers are asked if any of ten potential barriers to volunteering was a reason they did not volunteer as many hours as they might otherwise have done during the previous year. Non-volunteers are asked in any of the same potential barriers were reasons they did not volunteer at all. In terms of barriers to volunteering more, time factors predominate. The most commonly reported barrier keeping volunteers for making greater contributions, is not having enough time (73% of volunteers reported this barrier; see Figure 4.17). Just over half of volunteers (56%) said they were unable to make a long-

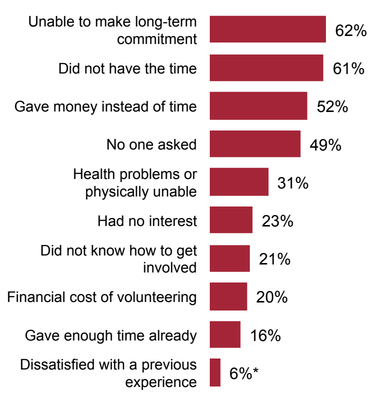
Figure 4.17: Barriers to volunteering more, volunteers for core organizations, Nova Scotia, 2010.



* Use with caution.

term commitment to further volunteering. A significant percentage of volunteers do not volunteer more because they consider themselves to have volunteered enough time already (39%) or because they have no interest in volunteering further (19%). Practical challenges around recruitment are important barriers for some volunteers, with 30% saying they had not been asked to volunteer more time and 15% not knowing how they could become more involved as volunteers. Health and financial barriers also have effects, with 18% saying they have health challenges or disabilities that keep them from volunteering and 12% saying that the financial costs associated with volunteering are a barrier. About a third of volunteers (30%) say that they do not volunteer more because they contribute money instead of volunteering more time. Clearly, volunteering is satisfying for the vast majority of those involved, as can be seen in the fact that just 5%* of volunteers said that dissatisfaction with previous volunteering experiences was a barrier to volunteering.

Figure 4.18: Barriers to volunteering at all, non-volunteers, Nova Scotia, 2010.



Among non-volunteers, time factors continue to predominate. However, there are some important differences compared to volunteers. Non-volunteers are more likely to say that they are unable to make a long-term commitment (62% vs. 56% of volunteers), but somewhat less likely to say that they do not have the time to volunteer (61% vs. 73% of volunteers; see Figure 4.18). Non-volunteers were much less likely to say they had already given enough volunteer time previously (16% vs. 39% of volunteers), but they were somewhat more likely to say that they simply had no interest in volunteering (23% vs. 19% of volunteers). Recruitment linked challenges are more prominent among non-volunteers, with fully half (49%) saying that they had not been asked to volunteer (vs. 30% of volunteers) and just over a fifth (21%) saying they did not know how to become more involved (vs. 15% of volunteers). Health and financial barriers are also more potent among non-volunteers, with significantly higher percentages saying that the financial costs of volunteering (20% vs. 12% of volunteers) and health or disabilities related challenges (31% vs. 18% of volunteers) kept them from volunteering. Contributing money instead of time also appears to be more common among non-volunteers (52% vs. 30%).

A few recent trends can be seen in the data. First, the numbers of both volunteers and non-volunteers reporting dissatisfaction with previous volunteering experiences have declined recently (11% of volunteers reported this in 2007, compared to 5% in 2010; similarly,

* Use with caution.

Figure 4.19: Volunteer activities, core volunteers, Nova Scotia, 2010.

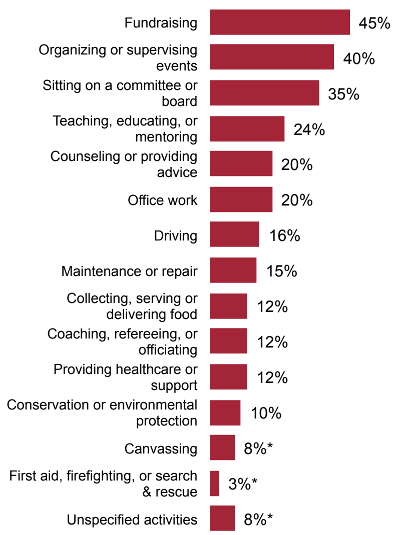
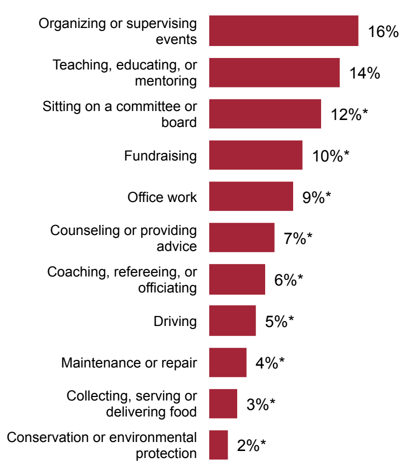


Figure 4.20: Distribution of volunteer hours by activity, core volunteers, Nova Scotia, 2010.



10% of non-volunteers reported this in 2007, compared to 6% in 2010).[17] Inability to make a long-term commitment appears to be increasing as a barrier for volunteers, with 56% reporting it 2010, compared to 49% in 2007 and 48% in 2004. Similarly, volunteers are increasingly more likely to report that they give money rather than more time (30% reported this in 2010, compared to 25% in 2007 and 23% in 2004). Finally, health and disabilities related barriers may be starting to be more potent barriers to volunteering as the population ages, with 31% of non-volunteers reporting this in 2010, compared to 25% in 2004 (and 32% in 2007).

VOLUNTEER ACTIVITIES

The CSGVP asks volunteers whether they engage in any of 15 specific activities for a nonprofit or charitable organization, with an additional catch-all category to cover any activities not specifically mentioned. The most common activities engaged in by volunteers for core organizations were fundraising (45% of core volunteers did this), organizing or supervising events (40%) and sitting on a committee or board (35%; see Figure 4.19). Between roughly a fifth and an eighth of volunteers engaged in most activities. Slightly more said they were involved in teaching, educating or mentoring (24%) and somewhat less said they were involved in canvassing (8%*) or fire-fighting, first aid and search and rescue (3%*).

Activities that volunteers contribute the largest amounts of volunteer time to include: organizing or supervising events (16% of total volunteer hours), teaching educating or mentoring (14%) and sitting on a committee or board (12%*; see Figure .4.20). It is important to keep in mind that just because many volunteers engage in a particular type of volunteer activity, it does not necessarily mean that the activity will receive the same time allocation. For example, although fundraising is the most common type of volunteer activity, it ranks behind a number of other types of activities in terms of the percentage of total hours volunteered (10%*). Activities that account for quite small percentages of total volunteer time are generally fairly specialized, such as with conservation or environmental protection (2%* of total hours) or collecting, serving, or delivering food (3%*).[18]

* Use with caution.

THE ROLE OF MANDATORY COMMUNITY SERVICE

The CSGVP includes instances of mandatory community service or mandated volunteering. In 2010, just over 7%* of volunteers for core organizations said that they were required to volunteer for some reason. Collectively, those who were required to volunteer accounted for a fairly small percentage of total volunteer hours – non-mandatory volunteers accounted for fully 94% of total volunteer hours for core organizations.

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[16] The statistical significance of the difference between average volunteer hours in Nova Scotia and the rest of the Atlantic provinces is 0.0548.

[17] sig. 0.078.

[18] Note that the survey results for hours devoted to other types of volunteer activities were too unreliable to be published.

* Use with caution.

5. ATTITUDES ABOUT CHARITIES

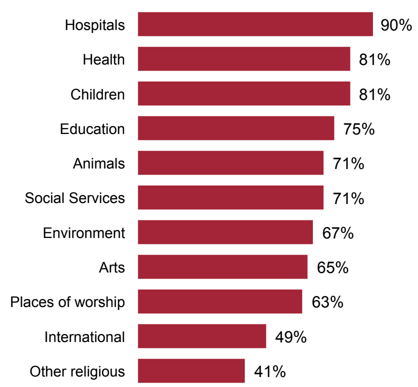
This section of the report presents highlights of what is currently known about the opinions and attitudes Nova Scotians hold regarding charities. Unlike in other chapters, the findings presented here do not focus on core charities, but instead include attitudes and beliefs about charities more broadly (i.e., including non-core charities). The objective of this section is to provide useful insights into public opinions about charities and the effects that these opinions have on charities' operations. The main focus is on providing a brief snapshot of high level findings. A detailed exploration of opinion and the factors that structure it is beyond the scope of this section.

This section is based on data from The Muttart Foundation's *Talking About Charities* survey. The survey has been conducted five times since 2000, most recently in 2013. The survey is administered by telephone and includes Canadians 18 and over. The most recent edition of the survey covered a wide range of topics, including levels of trust in charities and their leaders, opinions about fundraising, the quality of information that charities provide to stakeholders, business and advocacy activities of charities, and perceived need for monitoring and supervision of charities. The most recent edition of the survey included responses from 303 Nova Scotians. While this is a larger than usual sample size for a privately funded survey, it is substantially smaller than with the CSGVP. This smaller sample size means that we will be able to draw fewer statistically valid comparisons.

Trust in Charities and Charity Leaders

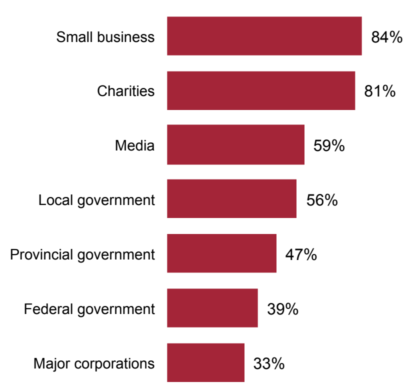
In 2013, just over four fifths (81%) of Nova Scotians said they had some or a lot of trust in charities. Twice as many respondents had "some" (54%) as opposed to "a lot" (27%) of trust. Overall levels of trust in Nova Scotia were statistically indistinguishable from trust in the rest of Canada (81% vs. 79% in the rest of Canada).

Figure 5.1: Level of trust by specific type of charity, Nova Scotia, 2013.



Not all specific types of charities are equally trusted by Nova Scotians. Hospitals receive the highest levels of trust (90% had some or a lot of trust in them), followed by Health organizations (81%) and organizations that serve children or focus on children's issues (81%; see Figure 5.1). Other types of charities received lower levels of trust than charities overall. Most differences were modest, but some were quite considerable. For instance, religious organizations other than places of worship were trusted by just 41% of respondents. Similarly, International Development and Relief organizations were trusted by slightly less than half (49%) of respondents. The only statistically significant difference between Nova Scotia and the rest of Canada in terms of levels of trust for specific types of charities is that Nova Scotians have somewhat higher levels of trust in Hospitals (90% vs. 86% for the rest of Canada).

Figure 5.2: Levels of trust in societal institutions, Nova Scotia, 2013.



In interpreting these results, it is important to understand how levels of trust in charities compare to levels of trust in other societal institutions. Put simply, charities do very well compared to almost all other institutions covered by the survey. While just over four fifths of respondents said they had some or a lot of trust in charities (81%), less than three fifths said the same of local government (56%) - and the percentages are even lower for provincial (47%) and federal (39%) governments (see Figure 5.2). Three fifths said they trusted the media (59%) and one third (33%) said they trusted major corporations. The only major societal institution included in the survey with similar levels of trust to charities was small business (84%).

In addition to asking about trust in charities as institutions, the survey also asks about levels of trust in charity leaders. Here too, levels of trust are fairly high. In 2013, just over three quarters (76%) of respondents said they had some (59%) or a lot (17%) of trust in charity leaders. Again, leaders of charities compare favourably to leaders of many other types of institutions. The only individuals more trusted by Nova Scotians were nurses (trusted by 97% of

Figure 5.3: Levels of trust in types of leaders, Nova Scotia, 2013.

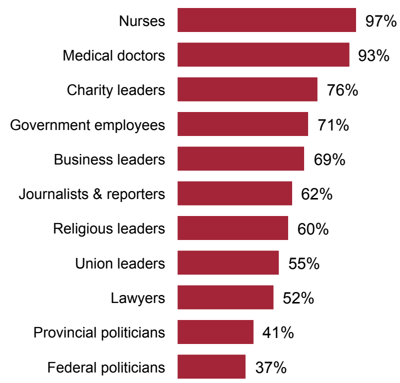
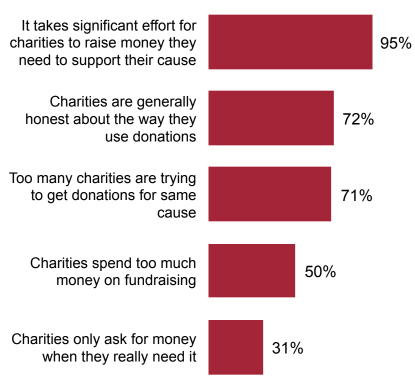


Figure 5.4: Opinions about fundraising, Nova Scotia, 2013.



respondents) and doctors (93%; see Figure 5.3). Government employees (71%) and business leaders (69%) were broadly comparable to charity leaders, but some other personalities trailed significantly. The lowest levels of trust recorded by the survey were with federal (37%) and provincial (41%) politicians.

Opinions about Fundraising

The *Talking About Charities* survey probes respondents for their opinions about a number of aspects of fundraising. Having a clear understanding of individual attitudes around fundraising is important because it bears directly on charities' ability to generate a key source of revenue they depend on to carry out their missions. While some attitudes about fundraising held by Nova Scotians are favourable, this is certainly not universal. The overwhelming majority of respondents agree that it takes significant effort for charities to raise the money they need (95% strongly or somewhat agreed with this idea) and nearly three quarters (72%) agreed that charities are generally honest about the way they use donations (see Figure 5.4). However, 71% said there are too many charities trying to raise money for the same cause, and half were of the opinion that charities spend too much on fundraising. The greatest skepticism was reserved for the idea that charities only ask for money when they really need it. Less than one third of respondents (31%) thought this was the case.

Other opinions around fundraising are generally consistent with the results described above. Fully nine tenths of Nova Scotians said they believe that charities should be required to disclose how donors' contributions will be spent with every request for donations. Sixty-seven percent strongly agreed with this idea and 23% somewhat agreed. When asked about their expectations regarding how charities should spend the money donors contribute, nearly three quarters of Nova Scotians (73%) agreed most closely with a statement to the effect that it is appropriate that some money go towards covering the operating costs of the charity, as long as the costs are reasonable (the other quarter of respondents agreed most closely with a statement to the effect that all of the money donors contribute should go to the charity's cause). Opinion was mixed on whether there should be a legal limit on the amounts that charities spend on fundraising. A slight majority (51%) said charities should decide for themselves how much it is reasonable to spend on fundraising. Forty-four percent disagreed and said there should be a legal limit set on the amount that charities spend on fundraising. The remaining respondents either had no opinion or were unsure.

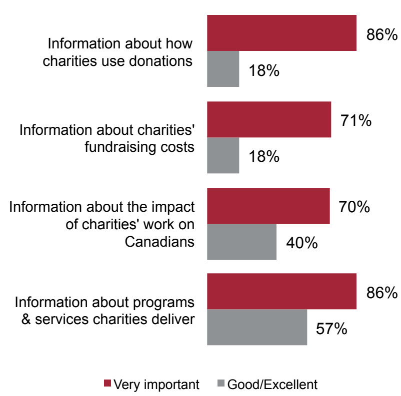
Information Provided by Charities

Nova Scotians are nearly unanimous in their agreement as to the importance of information provided by charities. The survey asks how important it is that charities provide four major types of information commonly communicated to donors and prospective donors. These include:

- programs and services delivered by charities,
- how charities use donations,
- fundraising costs, and
- the impact of charities' work on Canadians.

Well over nine-tenths of respondents said that every one of these types of information was either very important or somewhat important. However, while all agreed that these forms of information were important, many Nova Scotians thought charities were not as effective in providing it as they might like. For instance, 86% of Nova Scotians said information about how charities use donations is very important (see Figure 5.5). However, just 18% said that charities were doing a good or excellent job at providing this information – a gap of sixty-eight percentage points. Similarly, over two thirds (71%) said that information about charities' fundraising costs was very important, but just 18% said charities were doing a good or excellent job in providing this information – a gap of fifty-three percentage points. Other gaps were smaller, but still significant. The gap was thirty percentage points (70% very important vs. 40% good or excellent) with information about the impact of charities' work on Canadians and twenty-nine (86% very important vs. 57% good or excellent) with information about the programs and services charities deliver.

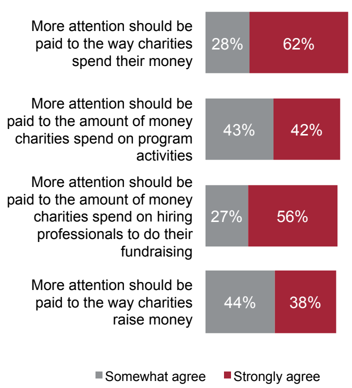
Figure 5.5: Opinions on the importance of various forms of information and charities' effectiveness in delivering it, Nova Scotia, 2013.



Nationally, the trends for information provision are not promising. For some information types, the gaps between the importance of information and charities' performance in providing it have increased over the past decade. The gap for information on how charities use donations has increased from fifty-four percentage points in 2004 to sixty-one in 2013. The gap for information about charities' fundraising costs has increased even more, from forty percentage points to fifty-two over the same period. Gaps have remained much more consistent for other information types. Interestingly, although there are significant (and sometimes increasing) performance gaps with respect to information provision, this does not necessarily translate into demand for more information. Asked in the context of their decision making around charitable donations, fully half of Nova Scotians said they were comfortable with the amount of information they have about the work charities do. Slightly fewer (47%) said they would like more information, even if it might require more money to be spent in communications. The remaining respondents were unsure.

Opinions on the Need for Oversight of Charities

Figure 5.6: Opinions on the need for greater oversight of charities' activities, Nova Scotia, 2013.



Substantial majorities of Nova Scotians agree that there is need for more oversight of various aspects of charities' activities. Nine tenths thought there should be more attention devoted to the ways that charities spend their money (62% strongly agreed with this and 28% somewhat agreed; see Figure 5.6). Eighty-six percent thought that more attention should be paid to the amounts that charities spend on program activities (42% strongly agree and 43% somewhat agree). There were broadly similar levels of agreement that there should be more attention devoted to the amounts charities spend on professional fundraisers and to the ways that charities raise money, though the percentage of respondents strongly agreeing that there needed to be more oversight of professional fundraisers (56%) stands out as particularly high. Even nationally, there are few statistically significant trends with respect to these questions. The only exception appears to be decreased concern with how charities raise money. In 2004, 88% of Canadians strongly or somewhat agreed that more attention should be paid to this issue - by 2013, that percentage had dropped to 80%.

Asked who they believe should be responsible for watching over the activities of charities, nearly two-thirds of Nova Scotians (63%) said they believed that some sort of independent organization or agency that is not part of government, nor part of the charity should be responsible. One fifth (20%) said some sort of government agency or department should be responsible. Sixteen percent said the charity's board of directors should be responsible. Nationally, support for the notion that a government department or agency should be responsible appears to be growing. In 2000, just 9% of Canadians held this view, compared to 23% in 2013.

APPENDIX A - CLASSIFICATION OF ORGANIZATIONAL PRIMARY ACTIVITY AREA AND CAUSE

This report uses a classification scheme based on the International Classification of Nonprofit Organizations (ICNPO), developed by the Johns Hopkins Comparative Nonprofit Sector Project (Salamon & Anheier, 1996).

Arts & culture. Organizations working in the area of media and communications, visual, graphic and performing arts, and architecture. Also includes historical, literary and humanistic societies, museums, zoos, and aquariums.

Sports & recreation. Sports clubs, recreation and social clubs, and service clubs.

Education & research. Elementary, primary, and secondary education. Vocational and technical schools and adult/continuing education. Also includes research in medicine, science and technology, social sciences and policy studies. Excludes universities and colleges.

Health. Inpatient nursing homes, and psychiatric hospitals. Also includes outpatient treatment and rehabilitation, public health and wellness, crisis intervention, and emergency medical services. Excludes hospitals and inpatient rehabilitation facilities.

Social services. Child welfare and child services, including day-care. Youth services and youth welfare. Family services, services for the handicapped and the elderly. Self-help and other personal Social services. Disaster and emergency prevention and control, shelters, and refugee assistance. Income support and maintenance, material assistance including food banks.

Environment. Pollution abatement and control, natural resources conservation and protection, and environmental beautification and open spaces. Animal protection and welfare, wildlife preservation and protection, and veterinary services.

Development & housing. Economic, social and community development. Housing associations and housing assistance. Employment and training, including vocational rehabilitation and sheltered workshops.

Law, advocacy & politics. Civic and advocacy organizations. Legal services, crime prevention and public safety, rehabilitation of offenders, support of victims and consumer protection. Political parties and organizations.

Fundraising, grantmaking & voluntarism. Grantmaking and fundraising organizations (e.g., federated fundraising organizations), organizations providing support and services for the charitable sector, voluntarism promotion and support.

International. Exchange, friendship and cultural programs. Development assistance, international disaster and relief organizations. International human rights and peace organizations.

Religion. Religious congregations and associations of congregations. Seminaries, monasteries, etc.

Business and professional associations & unions. Business associations, professional associations, and labour unions.

Not elsewhere classified. Organizations to do not fall into one of the above categories.

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Statistics Canada. (n.d.-b). Table 282 - 0087 - Labour force survey estimates (LFS), by sex and age group, seasonally adjusted and unadjusted, annual. Retrieved September 28, 2014, from CANSIM (database)

Statistics Canada. (n.d.-c). Table 301-0006 Principal statistics for manufacturing industries, by North American Industry Classification System (NAICS), annual. Retrieved September 26, 2014, from CANSIM (database)

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Statistics Canada. (n.d.-g). Table 384-0038 Gross domestic product, expenditure-based, provincial and territorial, annual (dollars x 1,000,000). Retrieved September 26, 2014, from CANSIM (database)

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