ONTARIO NONPROFIT NETWORK

STATE OF THE SECTOR SURVEY 2024

Topline Report
September 2024

ENVIRONICS RESEARCH

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OBJECTIVE

Ontario Nonprofit Network (ONN) is the independent nonprofit network for the 58,000 nonprofits and charities in Ontario. With federal and provincial elections on the horizon in the next two years, it is essential that ONN have accurate and meaningful measurement of the current state of Ontario nonprofits and how this is changing over time, to inform advocacy efforts, guide policy advice and support knowledge sharing within the sector. This survey represents a critical source of information on the sector's current opportunities and challenges.

The purpose of the ONN state of the sector survey is to:

- Identify and share the state of the sector in a given moment of time.
- Understand how the sector is changing over time and why, to directly inform progress and routes to progress for ONN's strategic priorities.
- Generate high quality data about the sector, disaggregated by demographic profiles, that the nonprofits then have access to.
- Use the survey findings to increase ONN and the sector's ability to influence policy, funders, and the public.

The scope of the survey is to:

- Collect data and evaluate the annual state of the sector.
- Ask organizations operational questions that reflect on the past fiscal year (April - March).
- Some questions may not have any connection to their current fiscal year but to their desired states or other opinions.
- Disaggregate data by operating budget, primary language of operation, region, subsector, B3/I4/2SLGBTQI+, rural, type of operation, and paid/volunteer staff.

RESEARCH METHODS

This report is based on an online survey completed by 1,001 nonprofit organizations in Ontario between June 12 and July 17, 2024. The survey was open to all nonprofit organizations in the province.

The questionnaire was designed by ONN, with input and advice from Environics Research. Environics Research programmed the survey, which was then publicized to Ontario nonprofit organizations by ONN through a variety of channels. Participants who completed the survey were invited to enter a draw for one of four gift cards worth $50 each; the random draw was conducted by Environics Research immediately after the survey was closed.

About this report: All questions in the survey were optional. Unless otherwise noted, results for all questions are based on the total sample of 1,001 participants, excluding those who chose not to answer the question. Sometimes results do not add to 100% due to rounding or multiple responses. Labels for values less than 3% are not shown. For “select all that apply” questions, categories with no responses are not shown.

This sample is a convenience sample, meaning that it was drawn from a conveniently available group of individuals. Because it is not a probability sample (respondents were not randomly selected, nor did all individuals in the desired communities have an equal chance of being selected into the sample), the sample cannot be considered representative of all Ontario nonprofit organizations.

However, it should be noted that significant efforts were made to ensure the survey invitation reached a broad cross-section of organizations from across the province representing all regions, operating budget sizes, subsectors, and other organizational characteristics.

ORGANIZATION

Key Insights
Organization

- At the outset of this survey, organizations were asked to give three words that describe how they are feeling right now. The results tell us that organizations are experiencing a wide a mix of positive and negative feelings in 2024. While a sense of being burdened or overwhelmed is most common (45%), many organizations also report feeling optimistic and hopeful (41%). About one in five say they are worried or anxious (20%) but almost as many tell us they are thriving and resilient (15%).

- This mix of emotions sets the stage for 2024's state of the sector survey, which reveals details of the struggles and successes of Ontario's diverse nonprofit sector over the past year.

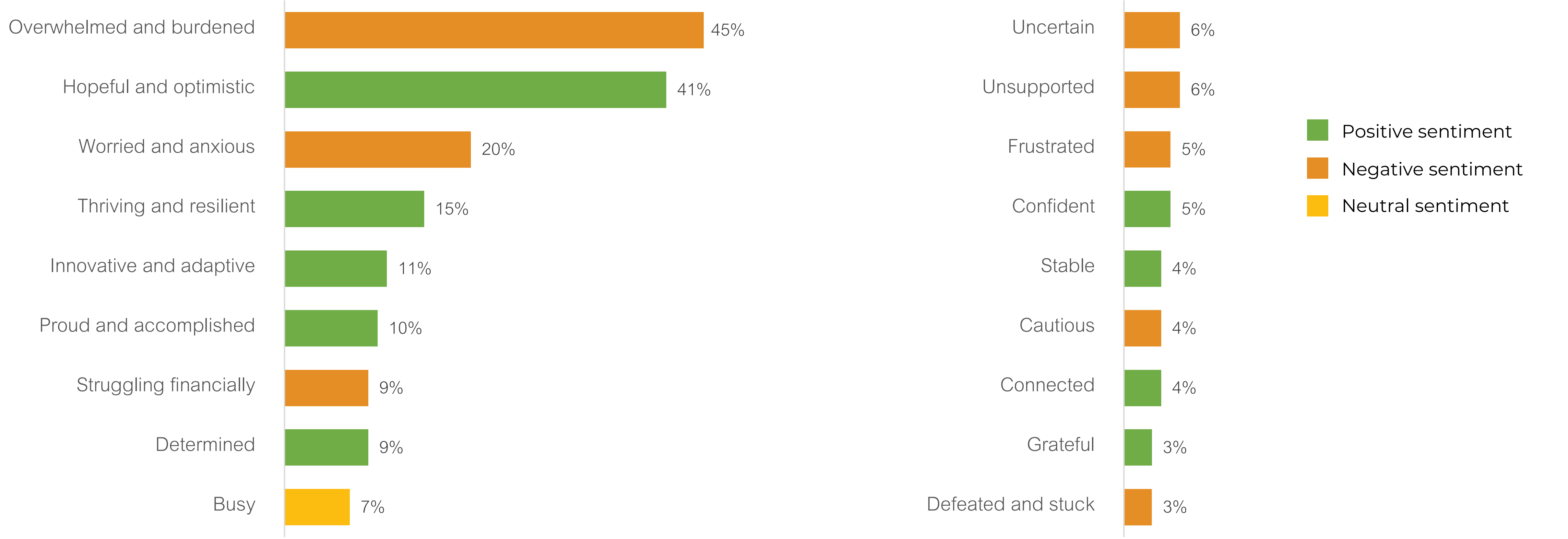
- The 2024 state of the sector survey engaged 1,001 nonprofit organizations across Ontario, representing communities throughout the province, working in a wide array of subsectors. Most of the organizations who responded to the survey are operating with a budget of less than $1M per year (54%).

- The following slides provide a closer look at the characteristics of the organizations who responded to this year's state of the sector survey.

Feeling | **Organization**

Asked to share three words to describe how they feel right now, organizations named a wide mix of positive and negative feelings. Most often, they feel overwhelmed and burdened, followed by hopeful and optimistic.

*Q1 Share three words that describe how your organization is feeling right now.**



**Responses were coded and tallied by theme. Themes below 3% are not shown in graph.*

Characteristics | **Organization**

Organizations from many different communities across Ontario responded to the survey.

Q2 In which Ontario region is your organization's main Ontario office/headquarter located?
Q3 What is the primary language of operation of your organization?
Q4 Is the location of your organization in a rural, remote, northern or small community?

Region in Ontario

57% Central Ontario

25% Western Ontario

12% Eastern Ontario

6% Northern Ontario

Language of operation

91% English

2% French

6% Bilingual
(i.e. French and English)

1% Other

Community type

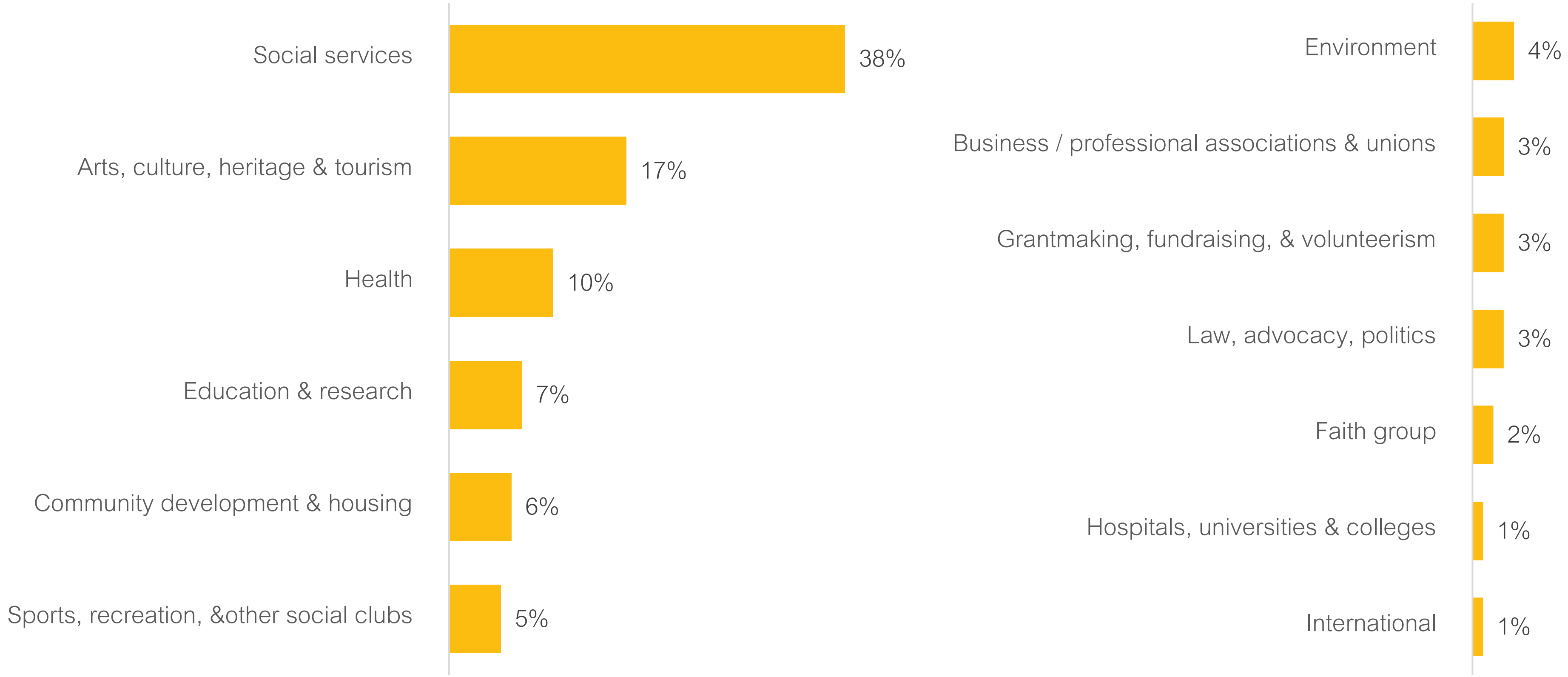
15%

operate in a rural, remote, northern or small community

Region and Subsector | **Organization**

Social services is the most common subsector among organizations responding to the survey.

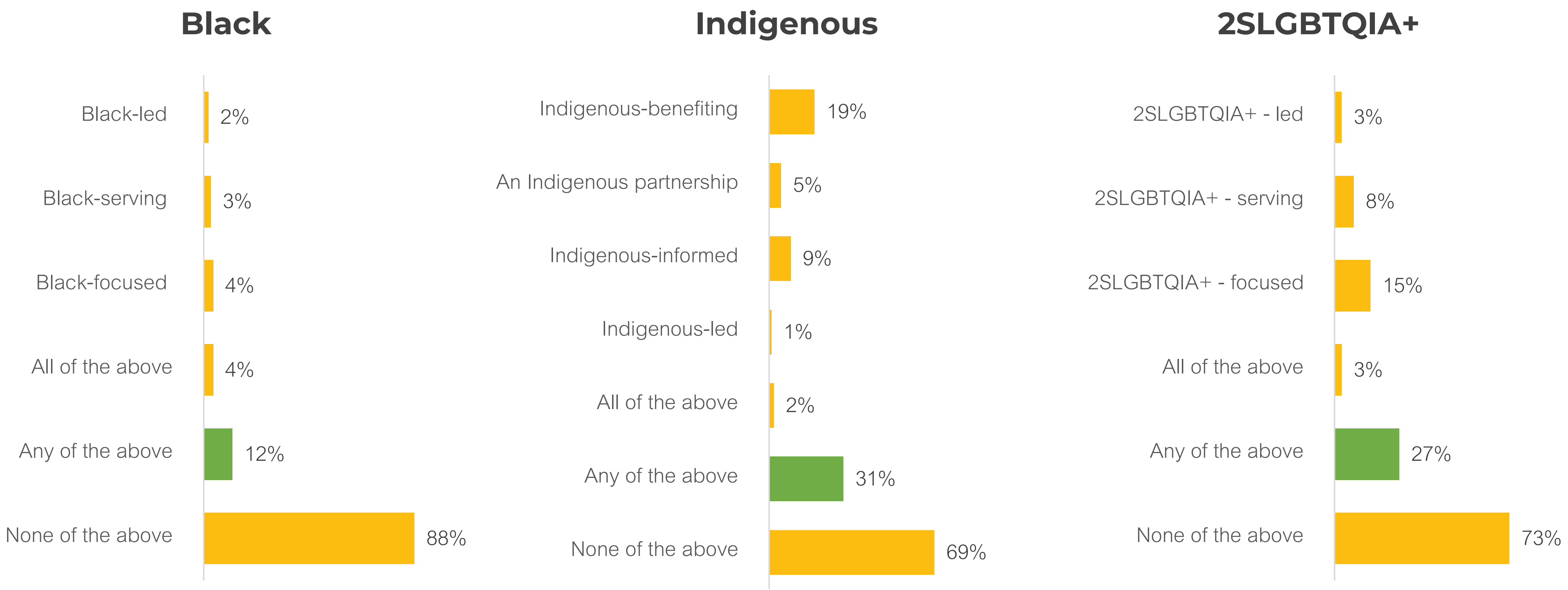
Q5 What nonprofit subsector does your organization primarily belong to?



Equity-Deserving Groups | **Organization**

Many organizations responding to the survey have mandates specific to equity-deserving groups.

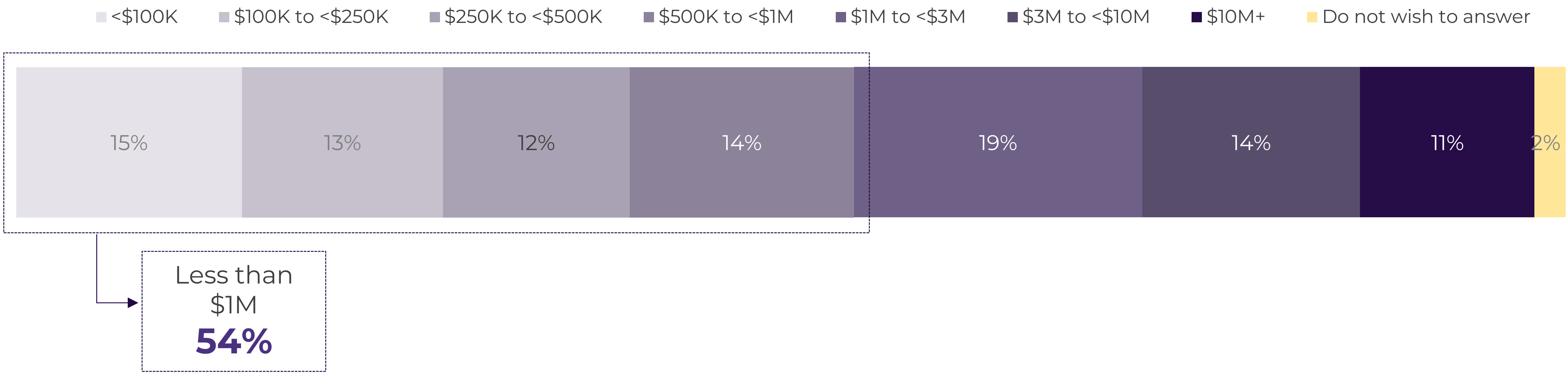
Q6-8 Is your organization any of the following:



Operating Budget | **Organization**

Over half of organizations who responded to the survey have an annual operating budget of less than $1 million.

Q9 *What is your organization's annual operating budget in fiscal 2023-2024?*



Challenges | **Organization**

Organizations were asked about eight specific challenges that could apply to them. Nearly two in three (62%) say they need additional staff but lack resources to hire, and more than half (54%) say they are not well known to potential donors.

T1 Which of the following challenges apply to your organization?

*Base: Organizations with annual budget less than $500K (n=388).

OPERATIONS

Key Insights
Operations

- Most responding organizations do not own any property or buildings of their own (71%), and most often lease the space they need at market rates (31%). Other space solutions, like renting space on an as-needed basis, or receiving the use of space as a gift or at a subsidized rate, are less common.

- Among organizations who do own property, most use this as a primary space for their operations (78%), or for delivering programs and services (73%).

- Space is a concern for many organizations. Nearly one in three say the space they have is not sufficient to meet their needs (32%). Others face barriers to buying property (15%) or are feeling the pinch of rising rents (13%) and real estate development pressures (10%).

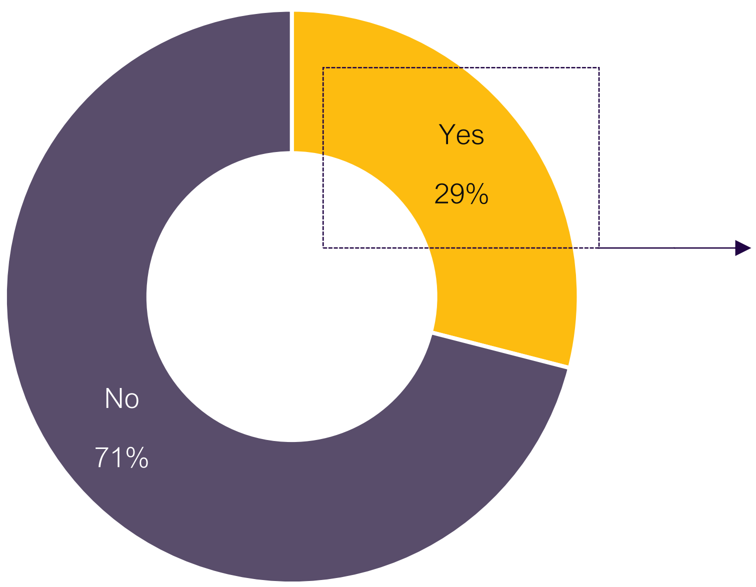
- Beyond juggling the need for operational space, organizations are also widely seeing an increase in demand for services (83%) over the past year. In the face of increasing demand, organizations usually tell us that they are just somewhat meeting this demand (56%).

Own Land or Buildings | **Operations**

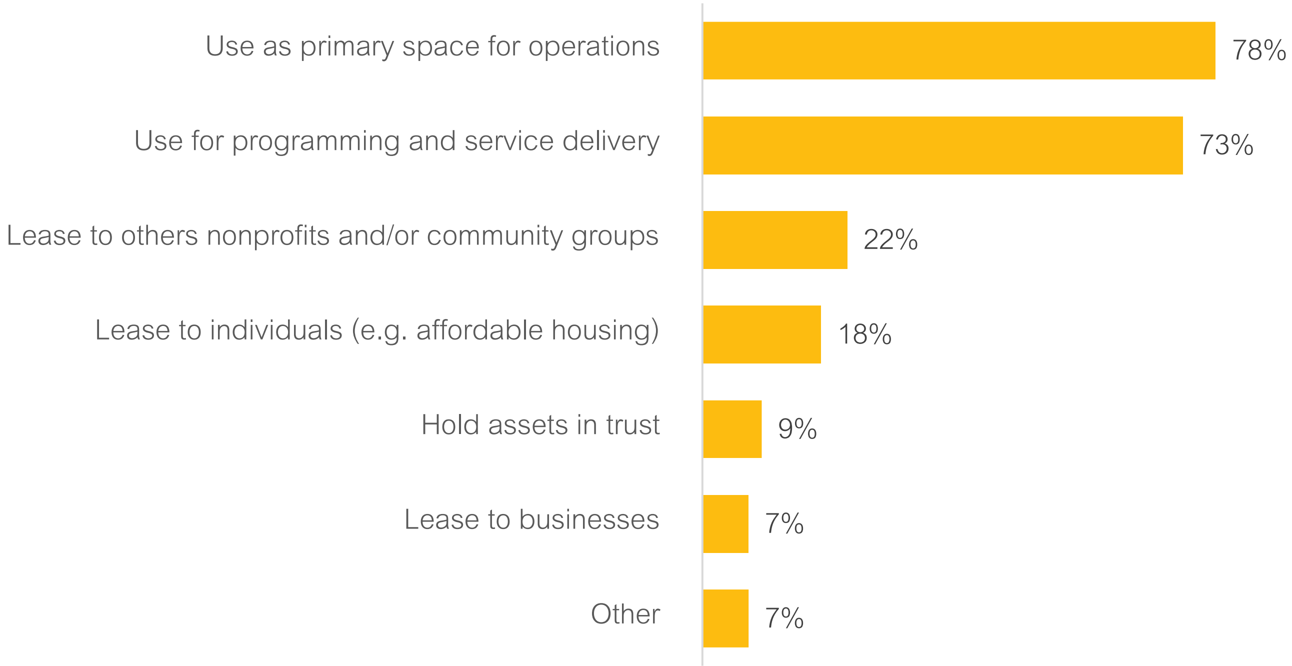
Of the three in ten organizations (29%) who own land or buildings, most use the property as a primary space for operations (78%) or for programming and service delivery (73%). Other uses like leasing are far less common.

Q10 Does your organization own land and/or buildings?
Q11 How does your organization use the land and/or buildings it owns?

Own land or buildings



Land / buildings use



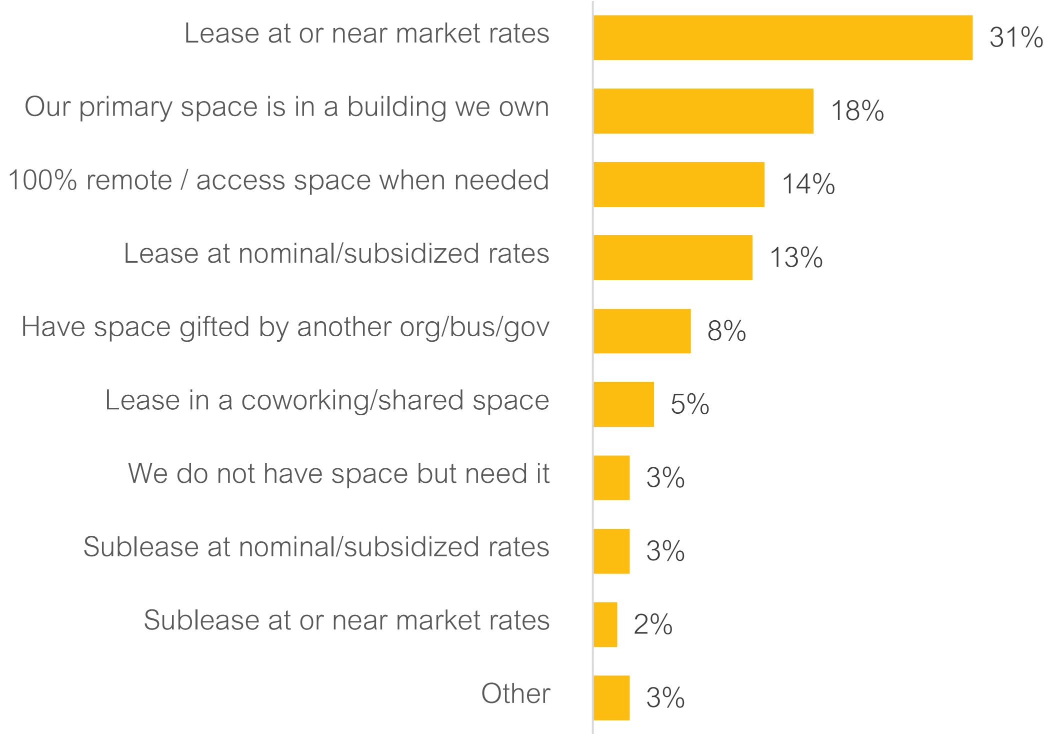
*Base: Organizations who have land or buildings (n = 286).

Primary Space and Related Issues | **Operations**

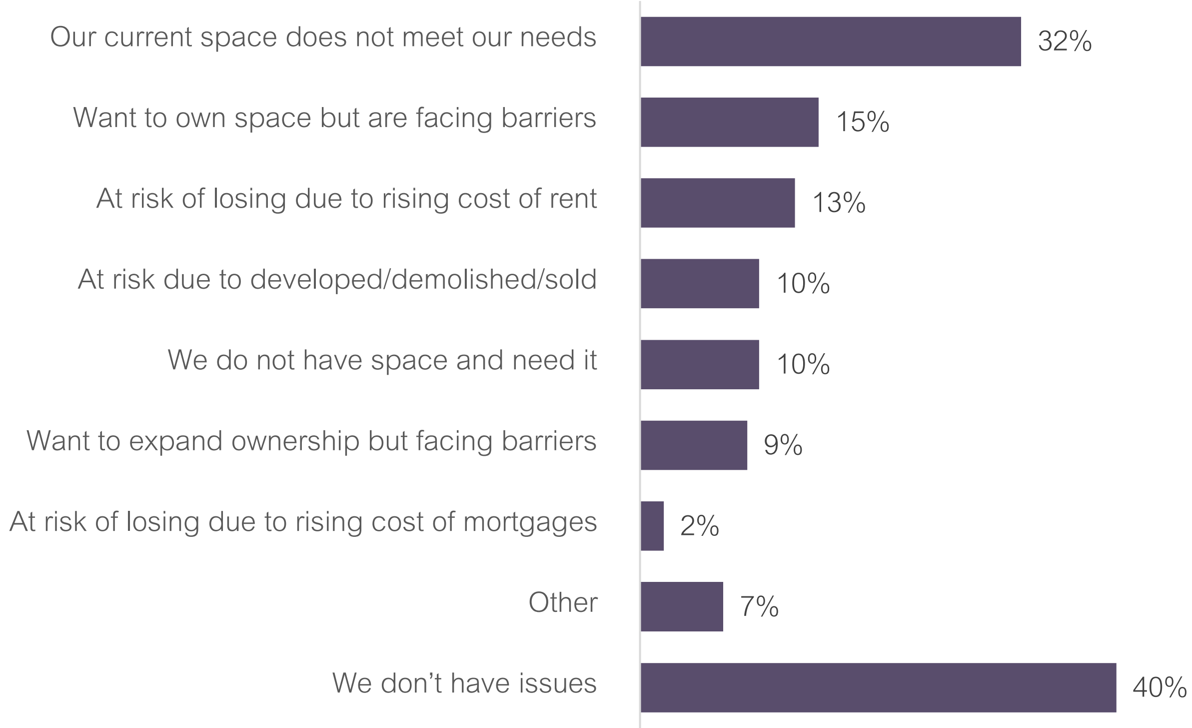
Nearly one in three organizations (31%) lease at market rates, and 18% own their primary space. The most common space issue organizations face is that their current space doesn't meet their needs (32%). Four in ten (40%) have no space issues.

Q12 In terms of the primary space your organization currently operates in, please indicate one of the following…
Q13 Do you have any of the following space related issues?

Status of primary space



Space related issues



Demand Increases | **Operations**

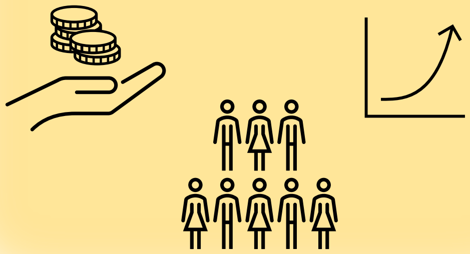
A strong majority of organizations (83%) report an increase in demand for programs and services over the past year. For most, this increase is less than 50%. Increase or not, most organizations say they are somewhat meeting demand (56%).

Q14 Has your organization seen an increase in demand for programs and services between April 1, 2023 - March 31, 2024?
Q15 Please estimate the percentage of increased demand for your programs and services compared to the previous fiscal year.
Q16 How well is your organization meeting the demand for your programs and services?

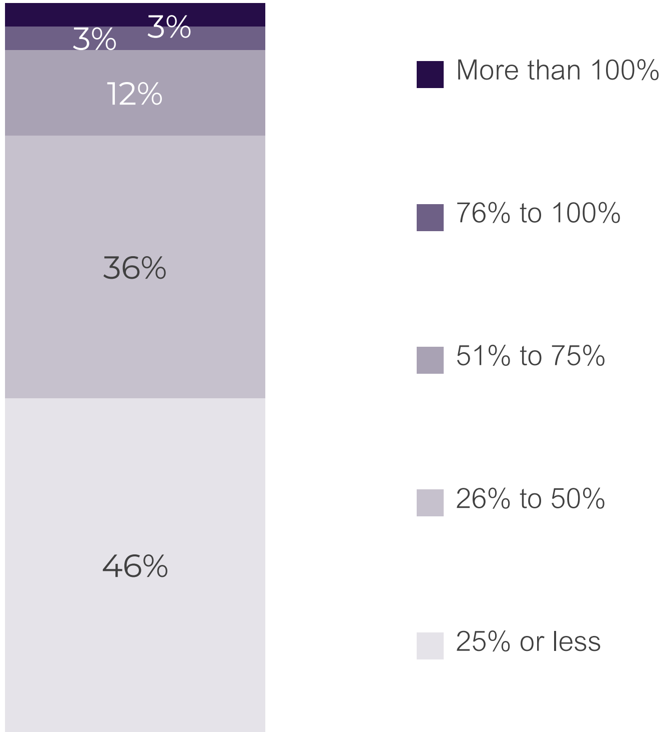
Increase in demand

83%

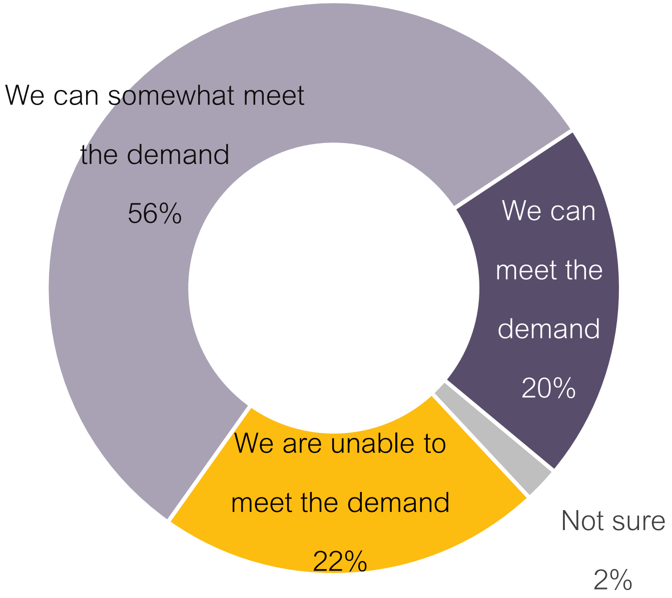
have seen an increase in demand in the past year.



Percentage increase in demand*



Meeting demand



*Base: Organizations who have seen an increase in demand (n = 819).

FINANCES

Key Insights
Finances

- With most organizations working with stationary (28%) or declining revenues (27%), it is notable that nearly one in four organizations (22%) say they only have enough to sustain themselves for six months or less.

- Organizations note stable trends in revenues from specific sources, but decreases are more common than increases for most revenue streams. Of note, one in three (35%) organizations are seeing a decrease in individual donations. Undoubtedly, this is a downstream impact of wider economic uncertainty affecting Ontarians.

- Organizations are also feeling the impact of inflation with major increases in their expenses. Increases are coming from across the board, but most often in salaries and benefits (76%), admin costs (71%), program delivery (70%), and professional fees (64%). Almost one in three (31%) have turned to their reserve funds to ease the burden in the past year.

- The Ontario government is a significant source of funding in the sector with half of organizations (52%) receiving funding from provincial ministries, though many do struggle with the restrictions on admin costs (46%) and carrying money forward (46%) that this entails.

- One in four (25%) organizations expect their finances to worsen over the next year, while a similar proportion (24%) expect improvement.

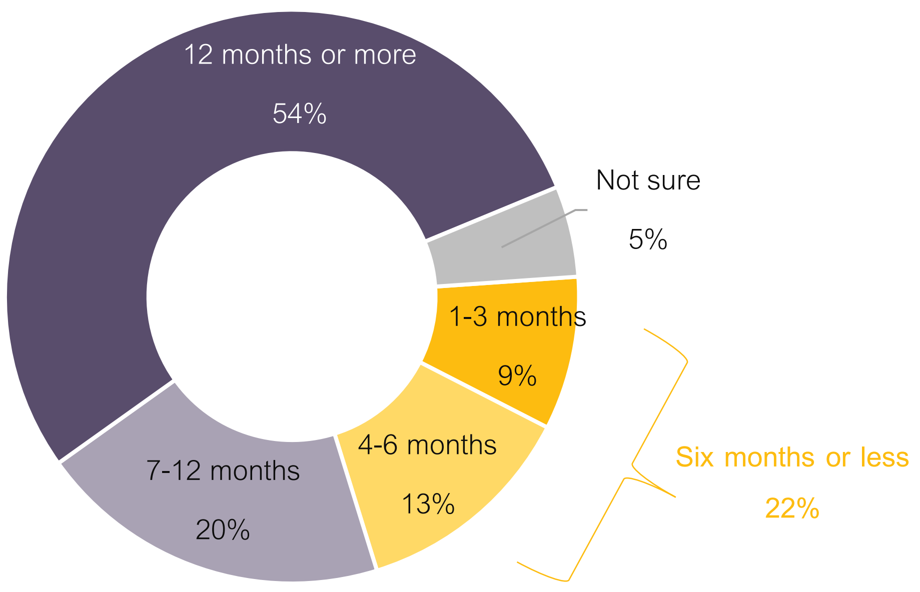
INSIGHTS CREDIT: ENVIRONICS RESEARCH

Financial Forecast | **Finances**

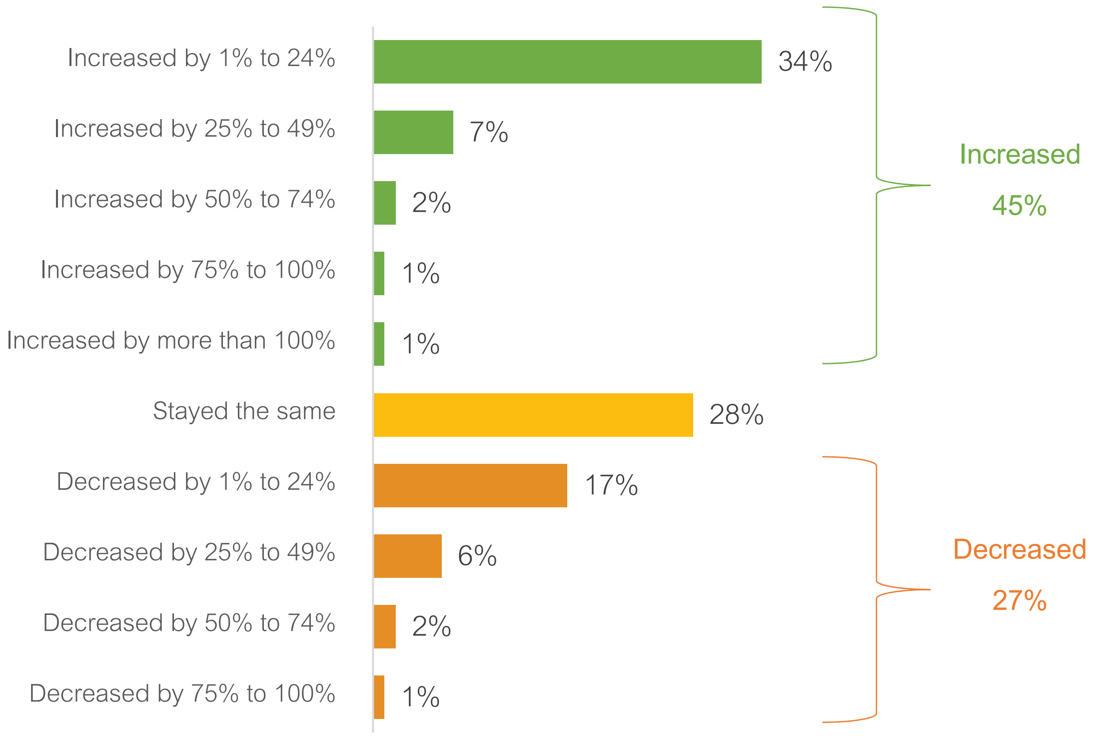
While over half of organizations (54%) say they are sustainable for a year or more, nearly one in four (22%) say they can sustain for six months or less. Most organizations saw revenue stay the same (28%) or decline (27%) in the past year.

Q17 What is your current financial forecast? We are able to sustain our organization for…
Q18 How has your revenue changed between April 1, 2023 - March 31, 2024?

Financial Forecast



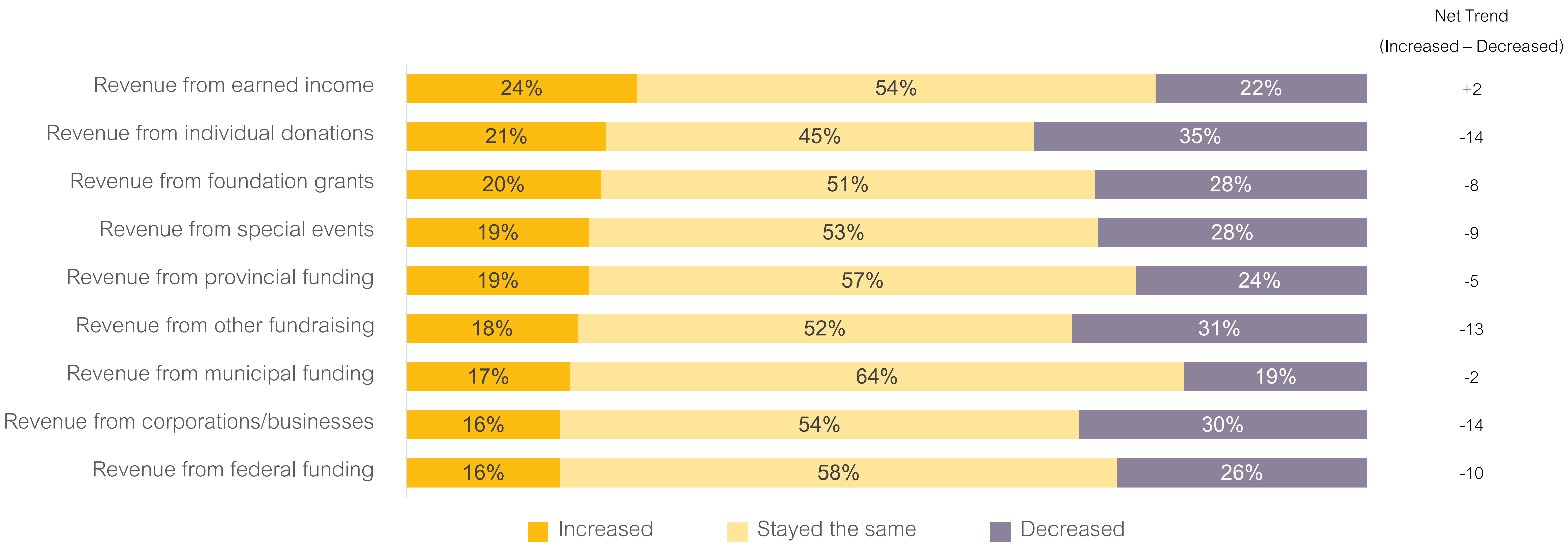
Change in Revenue



Revenue Trends | **Finances**

In most cases, organizations are more likely to see revenues from specific sources decrease than increase. Over one in three (35%) organizations note that individual donations have decreased.

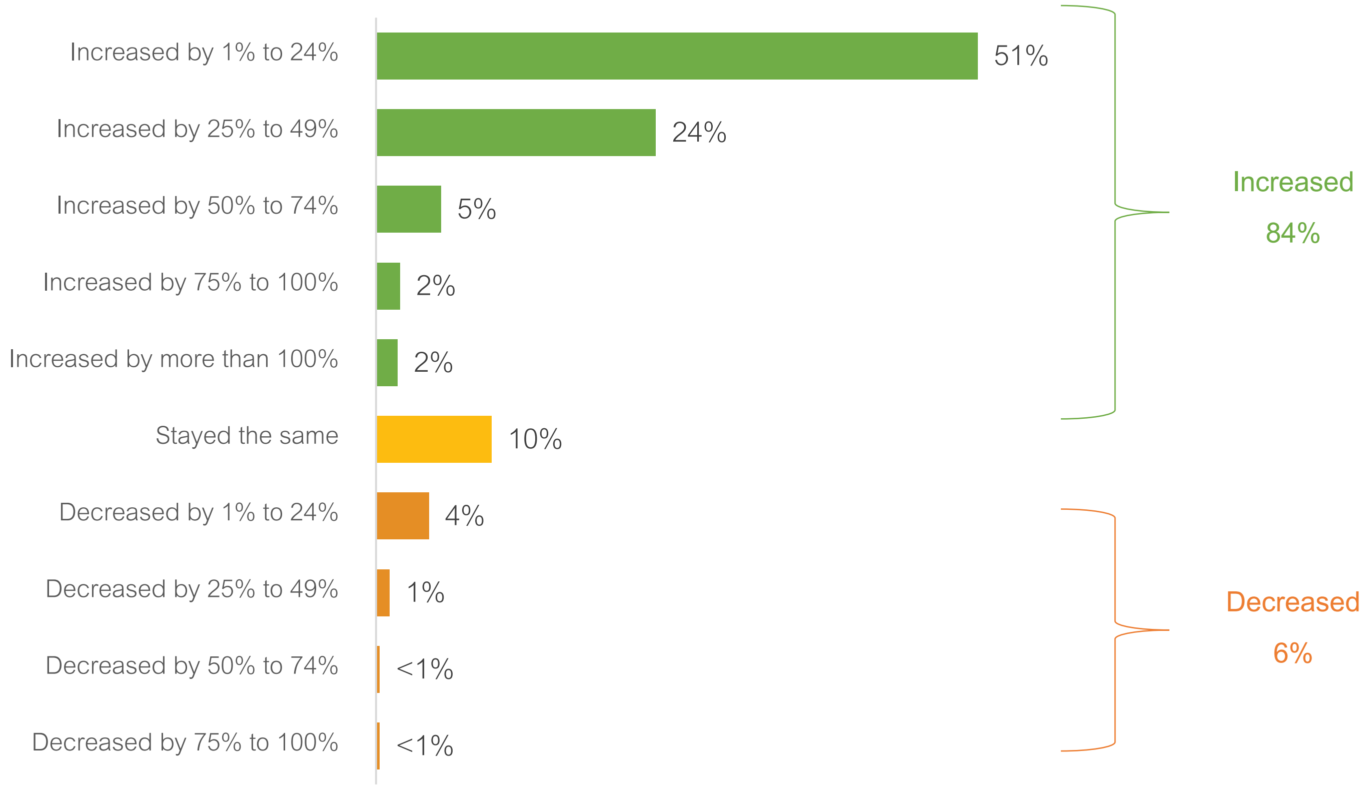
Q19 What trends are you seeing in your actual revenues?



Expenses | **Finances**

The vast majority of organizations (84%) have seen their expenses increase in the past year.

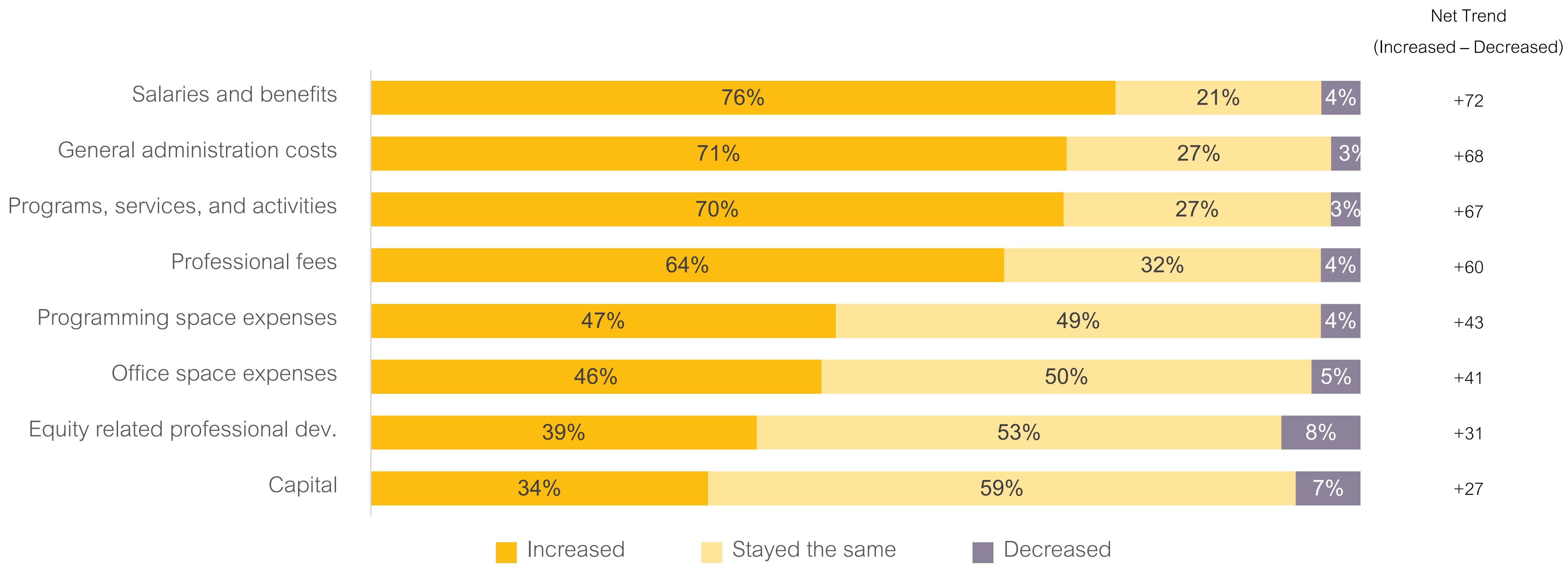
Q20 Have your expenses changed between April 1, 2023 - March 31, 2024?



Expense Trends | **Finances**

Most organizations note increases in expenses related to salaries and benefits (76%), general administration (71%), program delivery (70%), and professional fees (64%). Decreases in any category are rarely noted.

Q21 What trends are you seeing in your actual expenses?

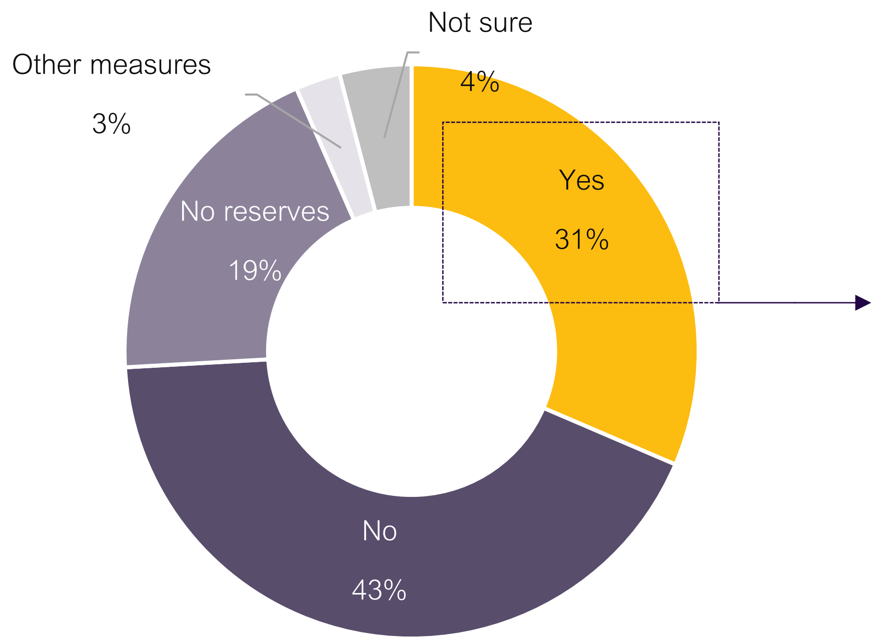


Reserve Funds| **Finances**

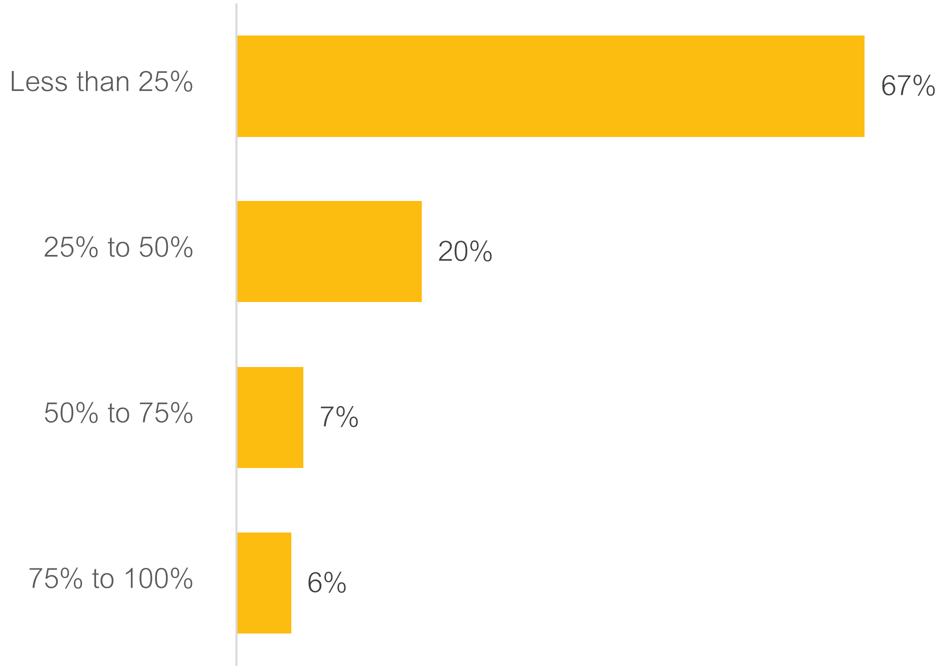
Nearly one in three (31%) organizations have accessed their reserve funds in the past year, usually accessing less than 25% of those funds. A small proportion (13%) have depleted their reserve funds by more than 50%.

Q22 Has your organization had to access its reserve fund between April 1, 2023 - March 31, 2024?
Q23 If yes, can you estimate how much of your reserve fund has your organization had to access between April 1, 2023 - March 31, 2024?

Accessed Reserve Funds



How Much Reserve Fund Accessed*



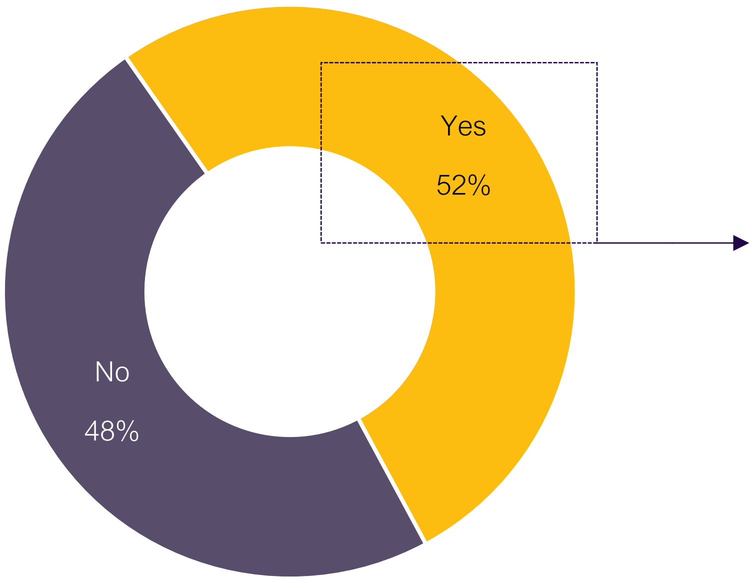
*Base: Organizations who have accessed reserve fund in past year (n = 308).

Ontario Government Funding | **Finances**

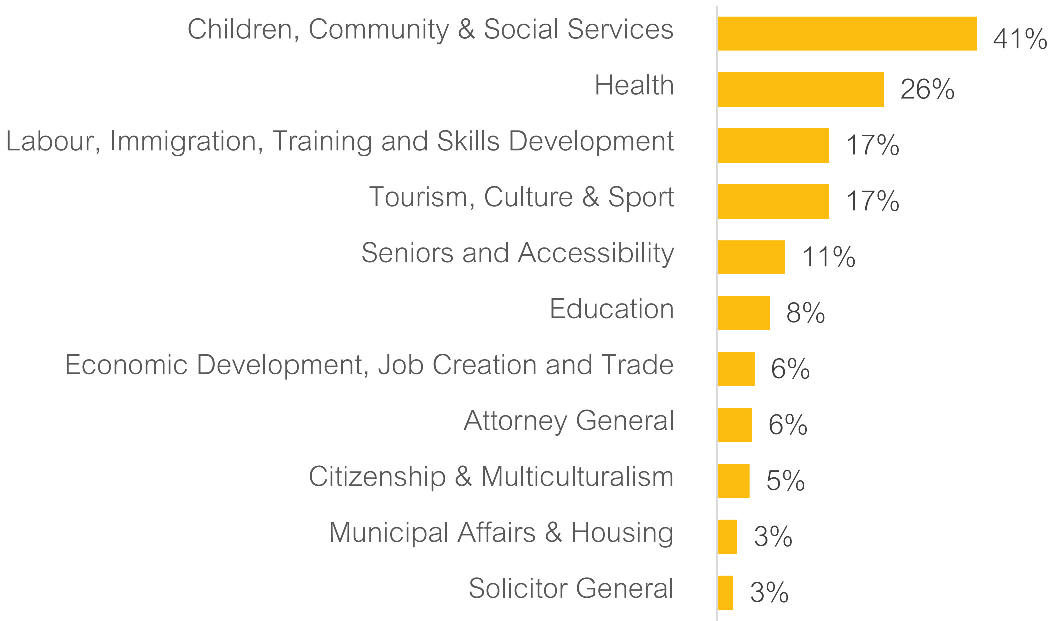
Just over half (51%) of organizations receive funding from the Ontario government, most often from the ministries or Children, Community & Social Services (41%) or Health (26%).

Q24 Do you receive funding from the Ontario provincial government?
Q25 If yes, which ministry?

Receive Funding from Ontario Government



Ontario Ministries Providing Funding*



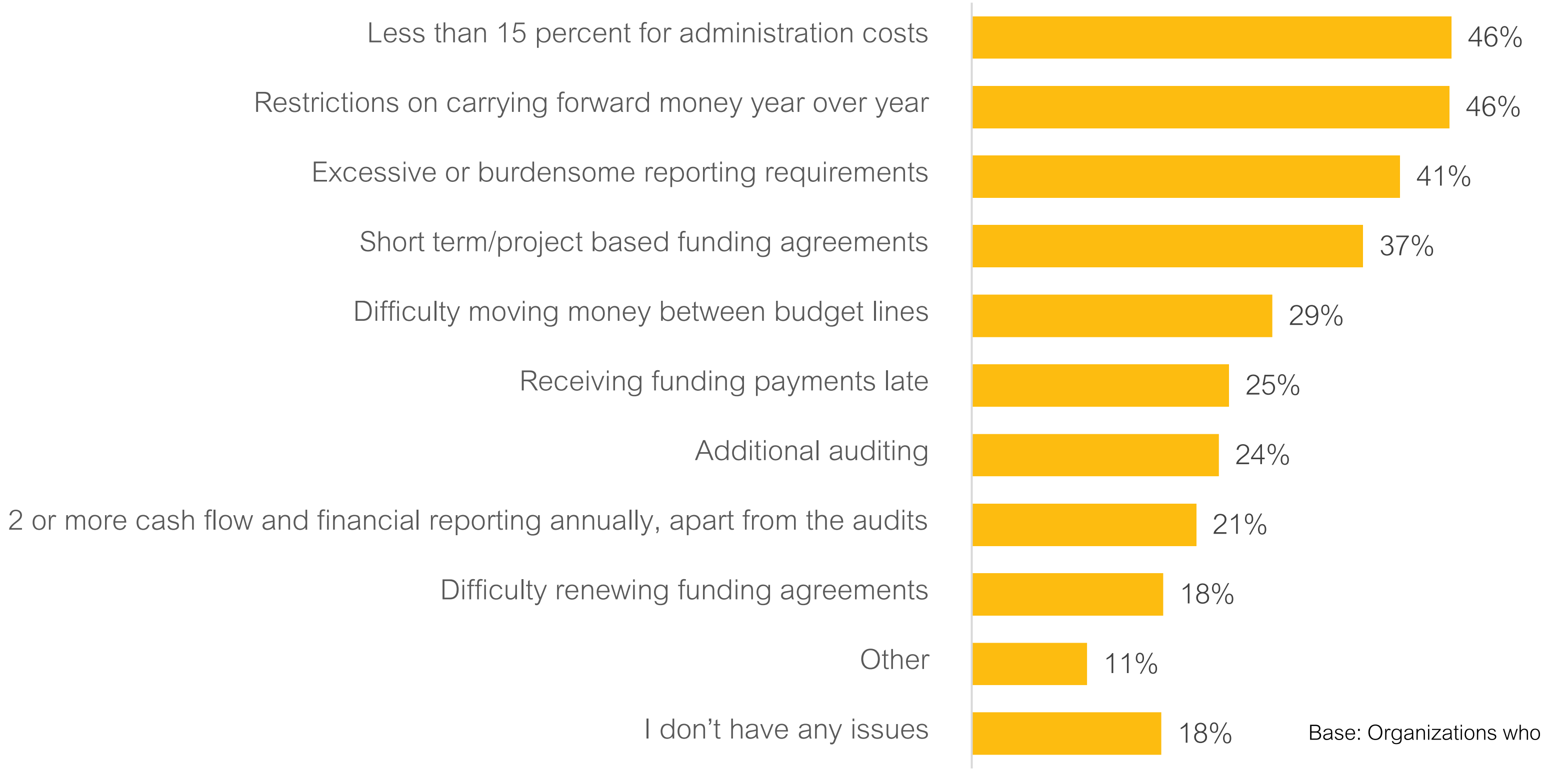
*Base: Organizations who receive funding from Ontario government (n = 509).

Note: Only ministries with 3% or more are shown.

Provincial Funding Issues | **Finances**

Organizations who receive provincial funding most often report issues with the limit on administration costs (46%) and restrictions carrying money forward year over year (46%).

Q26 Does your organization have any of the following issues with their provincial transfer payment agreements?

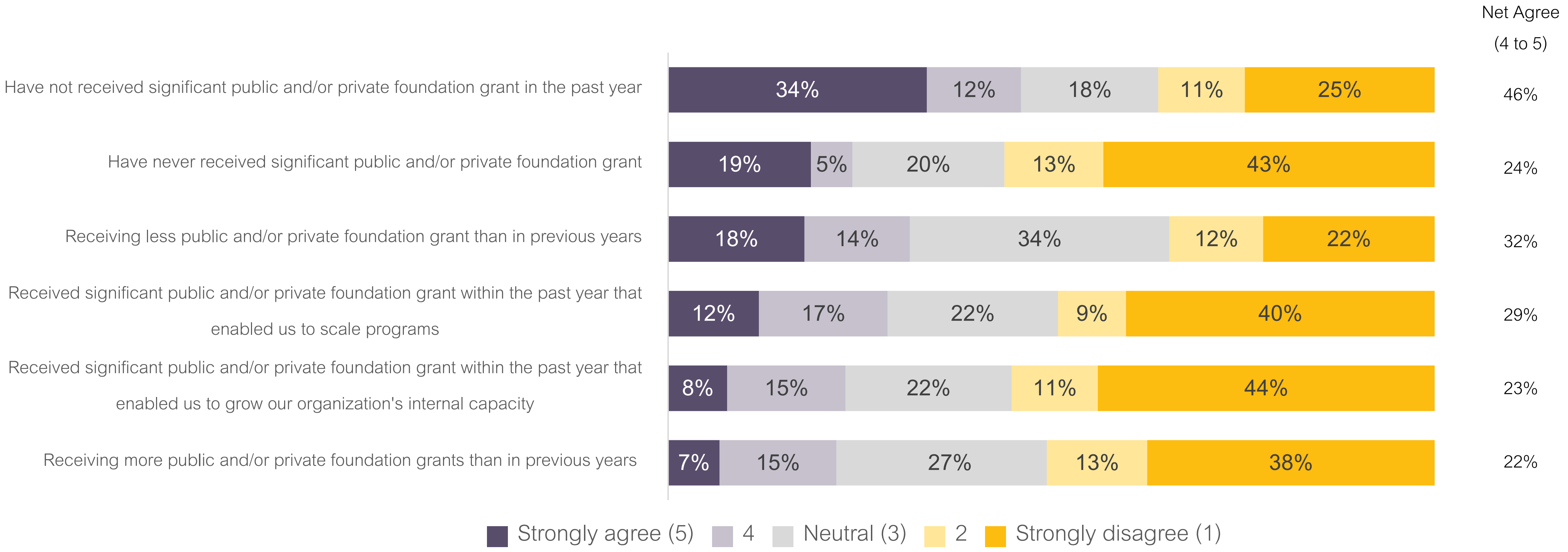


Base: Organizations who receive funding from Ontario government (n = 508).

Foundation Funding | **Finances**

Nearly half of organizations (46%) agree that they have not received a significant grant in the past year.

T2 To what extent do you agree or disagree with the following statements that may describe your funding history from public and/or private foundations?

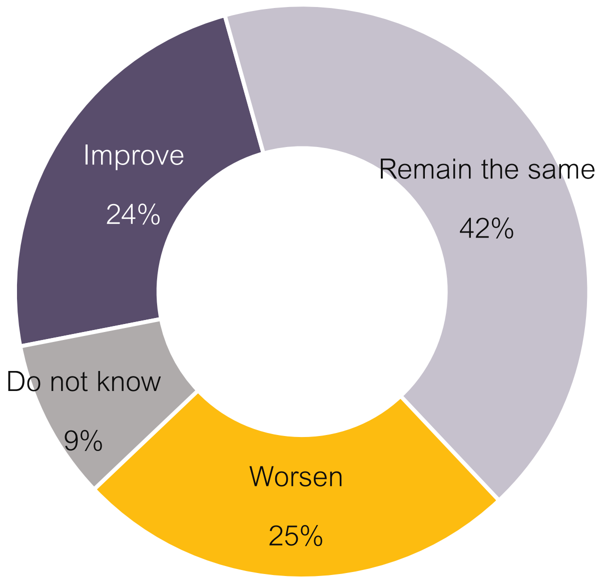


Financial Situation | **Finances**

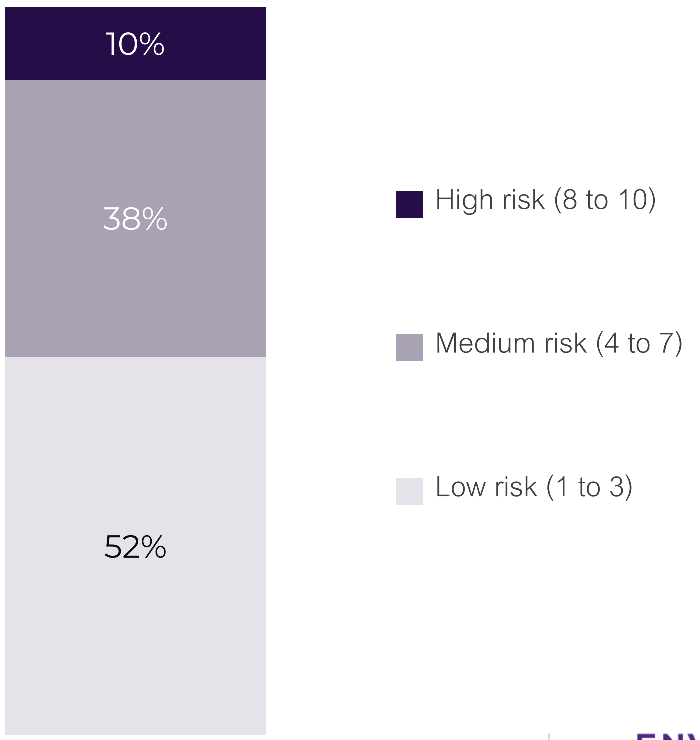
Though many organizations are grappling with challenges, most expect their financial situation to stay the same (42%) or improve (24%) in the short-term. Just one in ten (10%) feel they are at a high risk of not existing in the next three years.

Q27 *In the next 6-12 months, do you expect your organization's financial situation will…*
T3 *How would you describe your organization's risk of not existing in the next 3 years on a scale of 1 (low risk) to 10 (high risk)?*

Financial Forecast



Risk in Next Three Years



STAFF AND VOLUNTEERS

Key Insights
Staff and Volunteers

- Most responding organizations are operating with paid staff (86%), and about half say they have current vacancies (52%). Staffing challenges are common; almost two in three staffed organizations (63%) say they have trouble recruiting and retaining staff. Often, this is due to a wage disparity compared to other sectors (66%), uncompetitive compensation (56%), staff burnout (56%), and a general skills shortage (55%).

- To fill gaps in staffing, many organizations are combining roles (48%), using volunteers (46%), or using external consultants (35%); these are solutions that can result in new challenges for organizations. To improve recruiting, organizations are sweetening the pot with flexible working hours (59%), remote work options (58%), and higher salaries (55%) – all options that come with trade-offs as well. Organizations report difficulty in staffing for a range of skills, but the most common trouble areas are fundraising (42%) and IT / technical skills (34%).

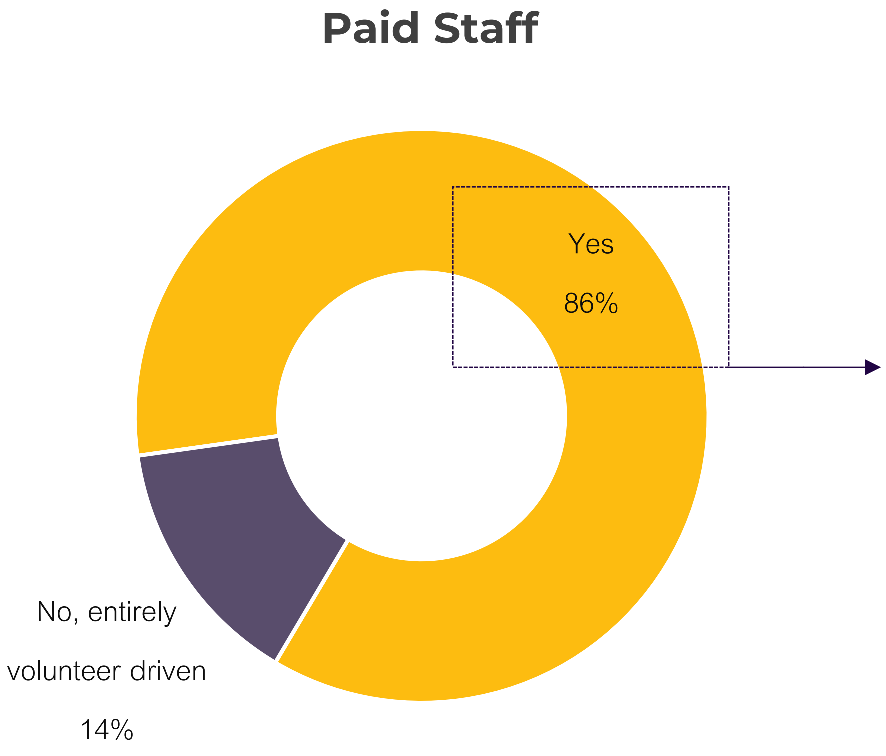
- While volunteering can help fill in staffing gaps for organizations who need it, many organizations also report challenges in recruiting and retaining volunteers (46%). Difficulties attracting new volunteers (75%), and a lack of dedicated resources for managing volunteer recruitment (51%) are the biggest problem areas.

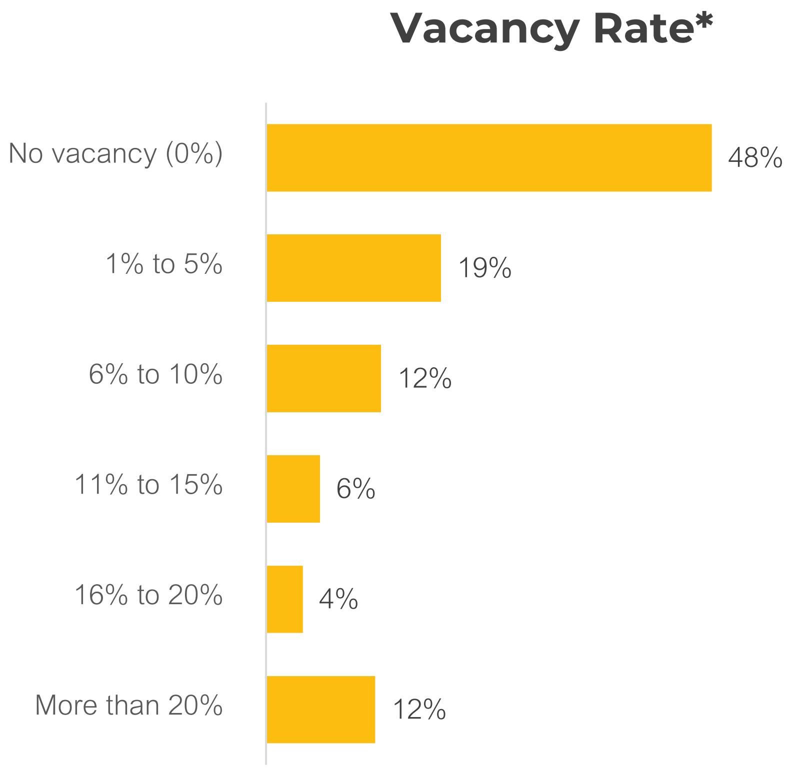
- Over half of organizations (56%) say they have scaled back their programs because of staffing and recruitment issues.

Paid Staff | **Staff and Volunteers**

Among organizations responding to the survey, a strong majority (86%) have paid staff. About half (48%) say they currently have no vacant positions within their organization, leaving 52% with positions to fill.

Q28 Does your organization have paid staff?
Q29 What is your organization's current job vacancy rate?





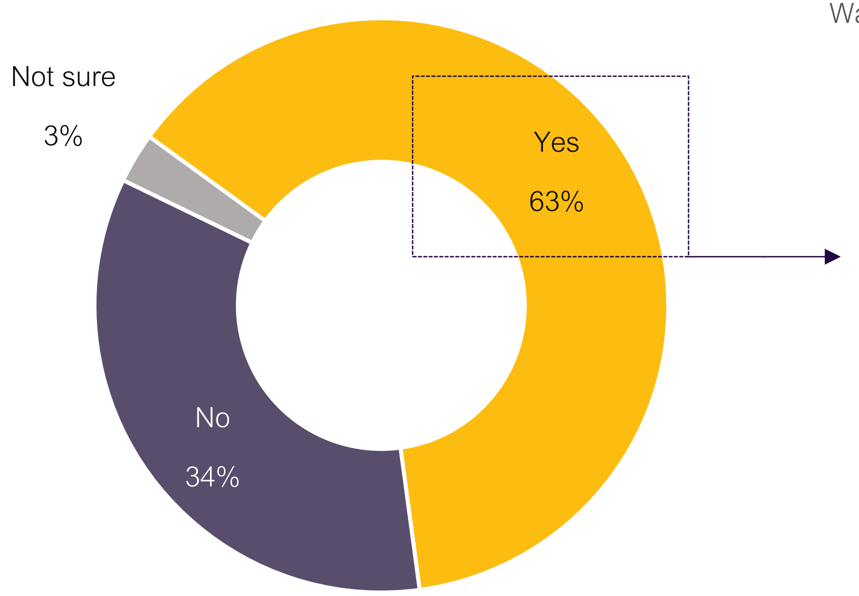
*Base: Organizations who have paid staff (n = 814).

Staff Recruitment | **Staff and Volunteers**

Almost two in three organizations with paid staff (63%) say they have experienced challenges with recruitment or retention of staff in the past year, most often due to a wage disparity compared to similar jobs in other sectors (66%).

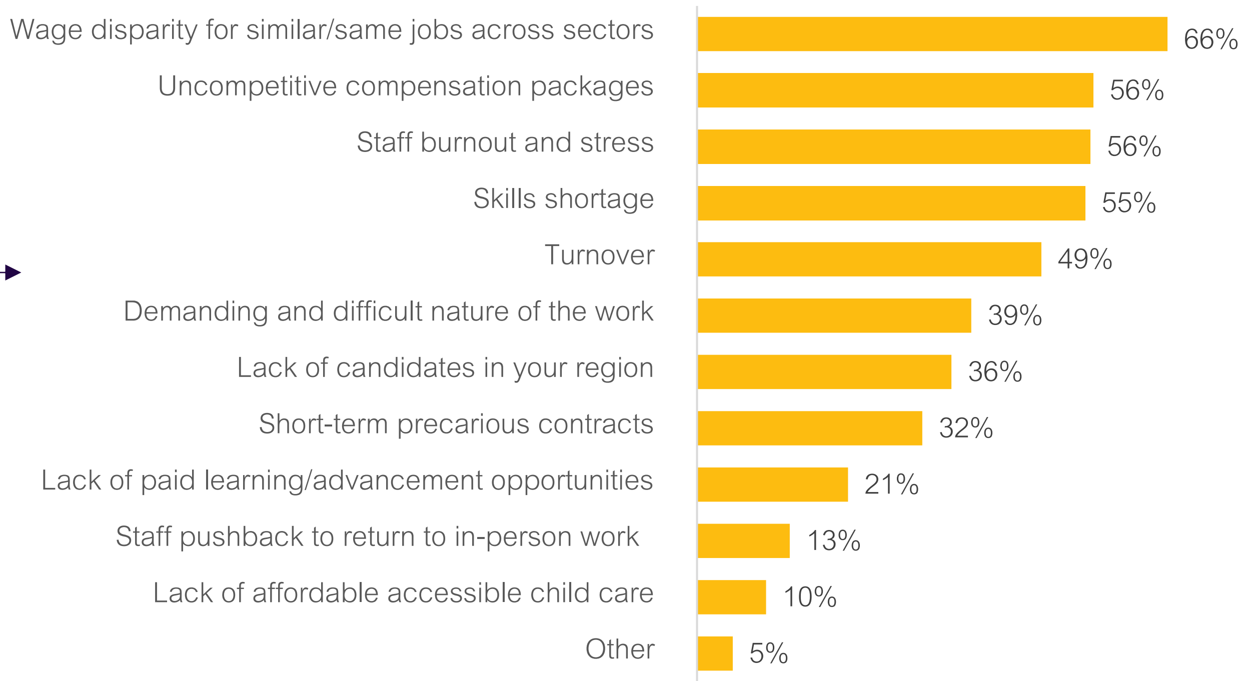
Q30 Did your organization experience challenges with recruitment and/or retention of paid staff between April 1, 2023 - March 31, 2024?
Q31 What factors affected your nonprofit's ability to recruit and/or retain staff?

Recruitment / Retention Challenges



*Base: Organizations who have paid staff (n = 851).

Factors Affecting Recruitment / Retention*

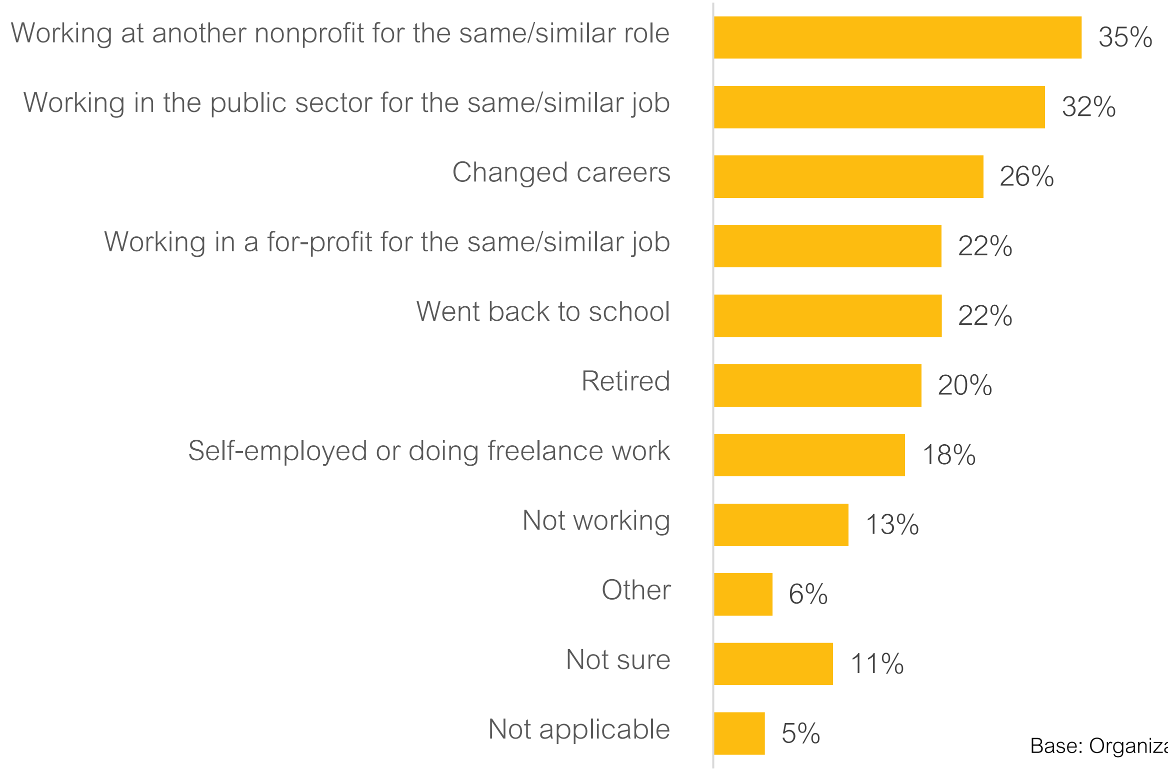


*Base: Organizations who have experienced challenges with staff recruitment / retention (n = 535).

Staff Who Left in Past Year | **Staff and Volunteers**

Staff who left organizations in the past year most often went to similar roles in other nonprofits (35%) or in the public sector (32%), pointing to the competitiveness of recruiting and retention.

Q32 Thinking about team members who left your organization in the past year, what are they doing now?



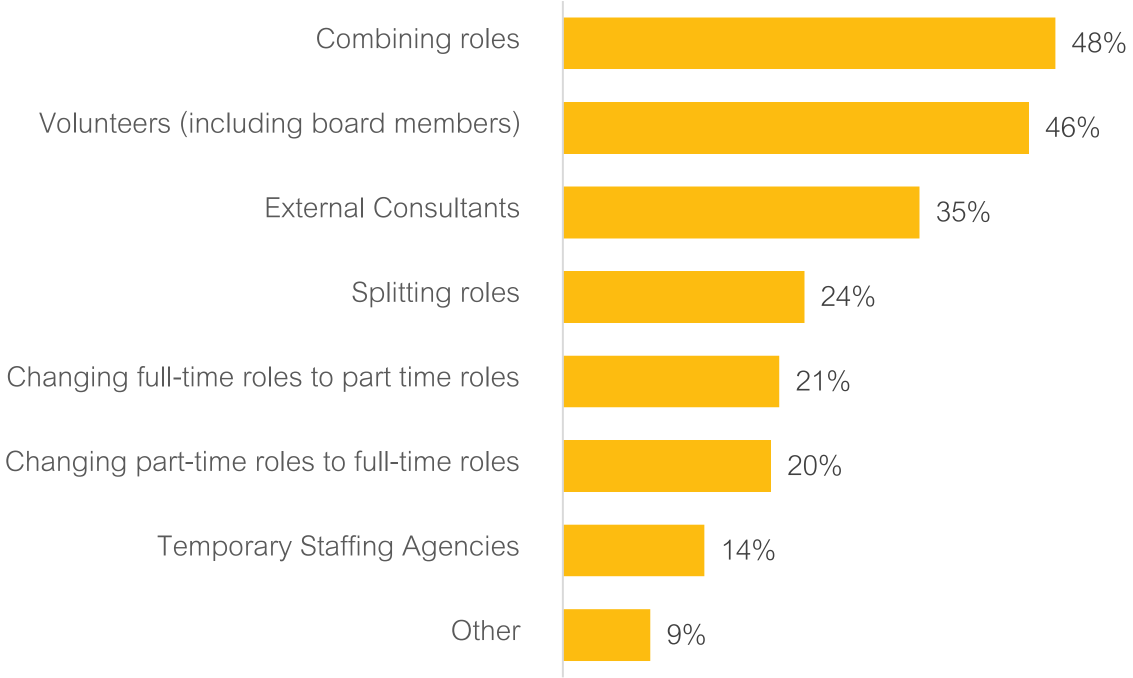
Base: Organizations who have paid staff (n = 814).

Staffing Strategies | **Staff and Volunteers**

Nearly half of organizations are combining roles (48%) and using volunteers (46%) to fill staffing gaps. Organizations are also trying to improve staffing with flexible working hours (59%), remote work options (58%), and higher salaries (55%).

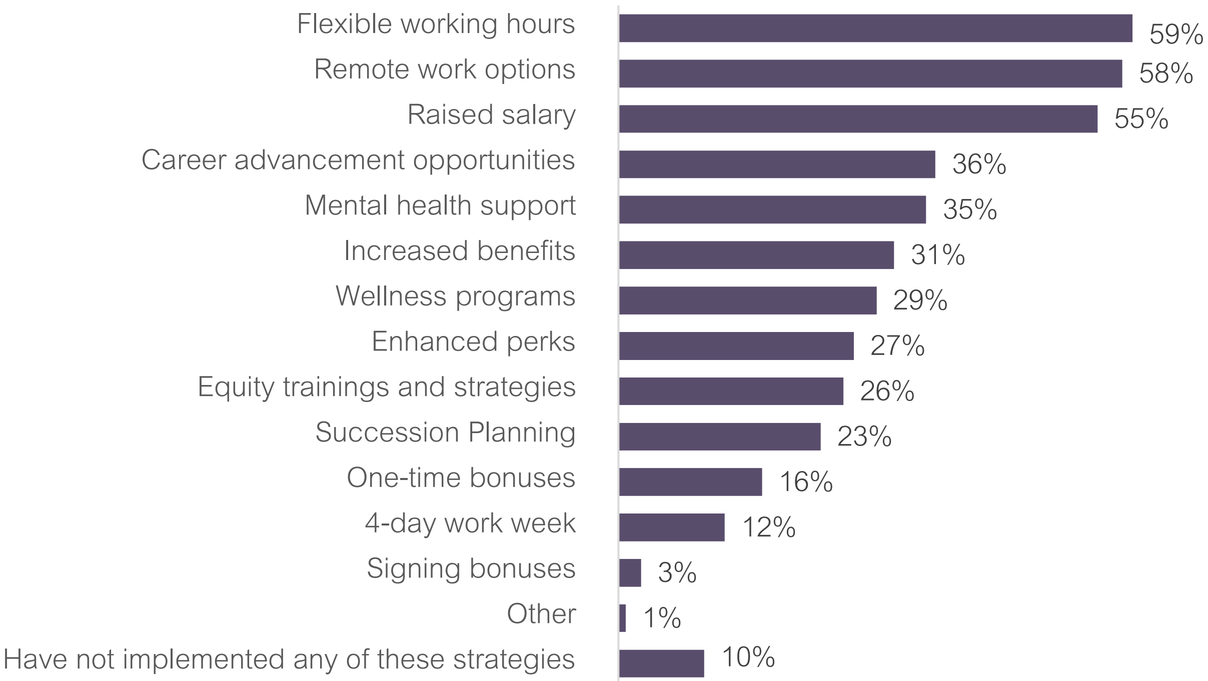
Q33 Is your organization currently using any of the following to fill staffing gaps?
Q34 Has your organization implemented any of the following strategies to recruit and retain staff?

Filling staffing gaps



Base: Organizations who have staff vacancies (n = 736).

Strategies to recruit and retain



Base: Organizations who have paid staff (n = 848).

Skills in Demand | **Staff and Volunteers**

The skills currently most in demand among organizations are fundraising (42%) and IT or tech skills (34%). Other skills mentioned by at least 25% of organizations include grant writing, communications, data, HR, and government relations.

Q35 What specific skills are lacking in your organization's candidates/staff?

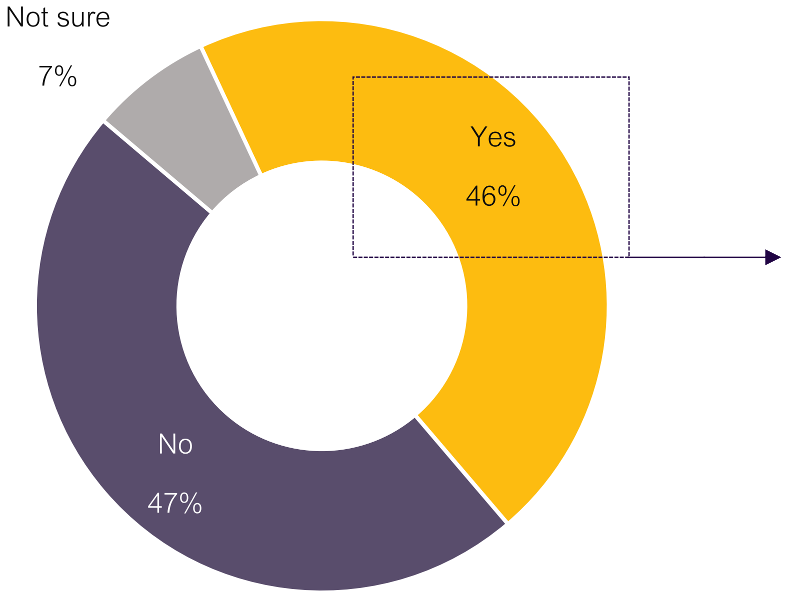
Base: Organizations who have paid staff (n = 848).

Volunteer Recruitment | **Staff and Volunteers**

Nearly half of organizations (46%) say they experience challenges with volunteer recruitment or retention in the past year, mainly due to difficulty recruiting new volunteers (75%).

Q36 Did your organization experience challenges with recruitment and/or retention of volunteers between April 1, 2023 - March 31, 2024?
Q37 What factors affected your nonprofit's ability to recruit and/or retain volunteers?

Recruitment / Retention Challenges



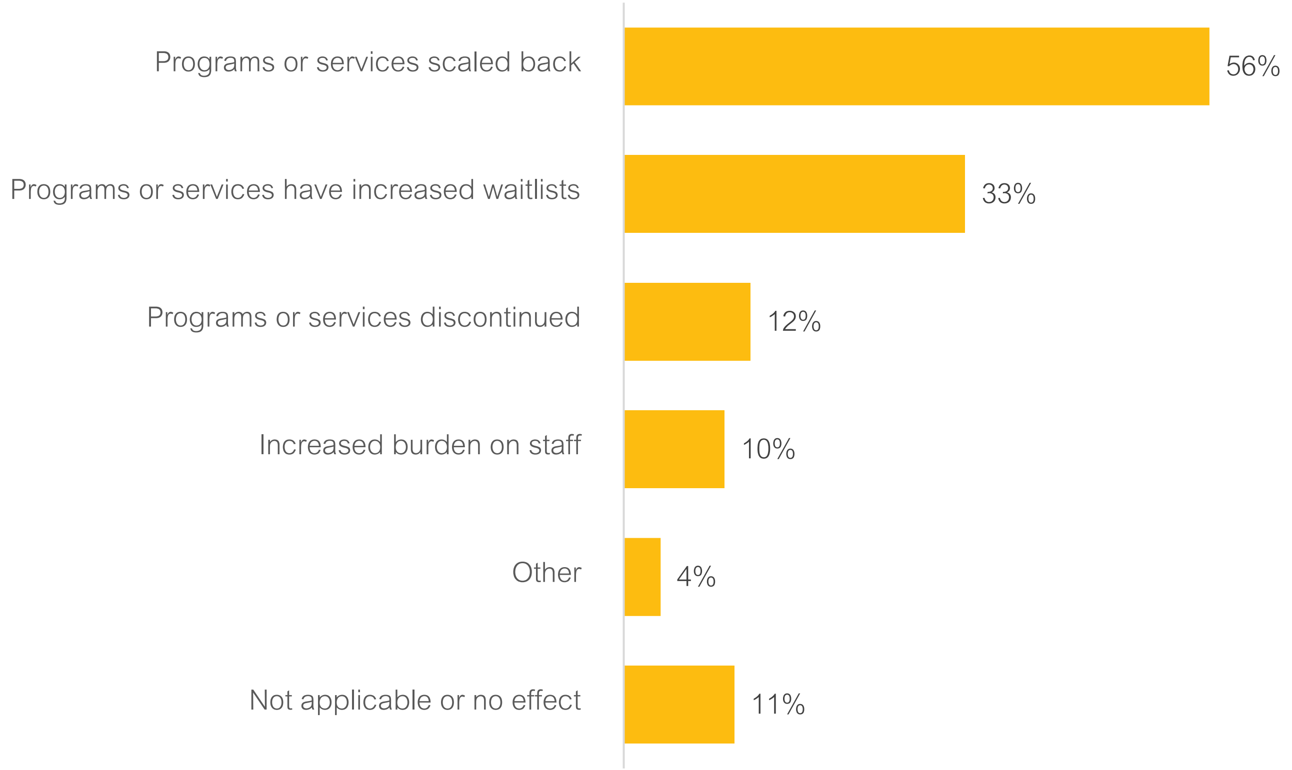
Factors Affecting Recruitment / Retention*

*Base: Organizations who have experienced challenges with volunteer recruitment / retention (n = 448).

Impact of Staff and Volunteer Issues | **Staff and Volunteers**

The main impacts of staff and volunteer issues are that organizations scale back their programs and services (56%) or see increased waitlists (33%).

Q38 How are staffing and/or volunteer challenges affecting your organization's mission or mandate?



SECTOR ENGAGEMENT

Key Insights
Sector Engagement

- Looking outward to the nonprofit sector as a whole, a majority of organizations see the sector as unhealthy, whether that is at the provincial level, the community level, subsector level, or within nonprofits related to equity-deserving communities.

- While some organizations are planning to engage in provincial election readiness activities like get out the vote (25%), general government relations (24%), or capacity-building (23%), most are either unsure (13%) or not planning anything (38%). Responses in the open-ended questions suggest that this may stem in part from concerns that election action would threaten funding they receive from the Ontario government.

- Organizations are grateful for successes and supports in five key areas: Community Engagement and Partnerships, Staff and Volunteer Engagement, Funding and Financial Management, Organizational Development and Governance, and Service Delivery and Client Support.

- Their most pressing concerns tend to align in five areas as well: Funding and Financial Challenges, Staffing and Volunteer Challenges, Leadership and Strategic Planning, Economic and Social Impact, and Operational and Logistical Challenges.

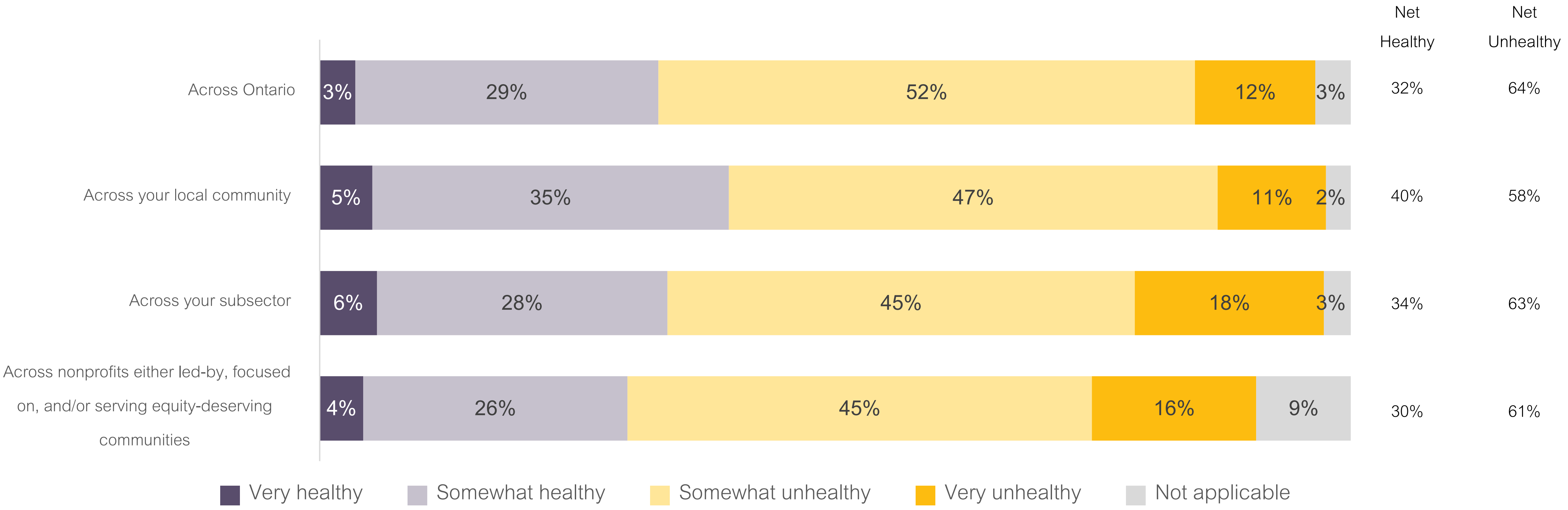
- Organizations tend to relate their value directly to their success at achieving their organizational objectives.

INSIGHTS CREDIT: ENVIRONICS RESEARCH

Health of the Sector | **Sector Engagement**

Organizations tend to see the sector as unhealthy across all lines – provincially, within the community, in their specific subsector, and in nonprofits related to equity-deserving communities.

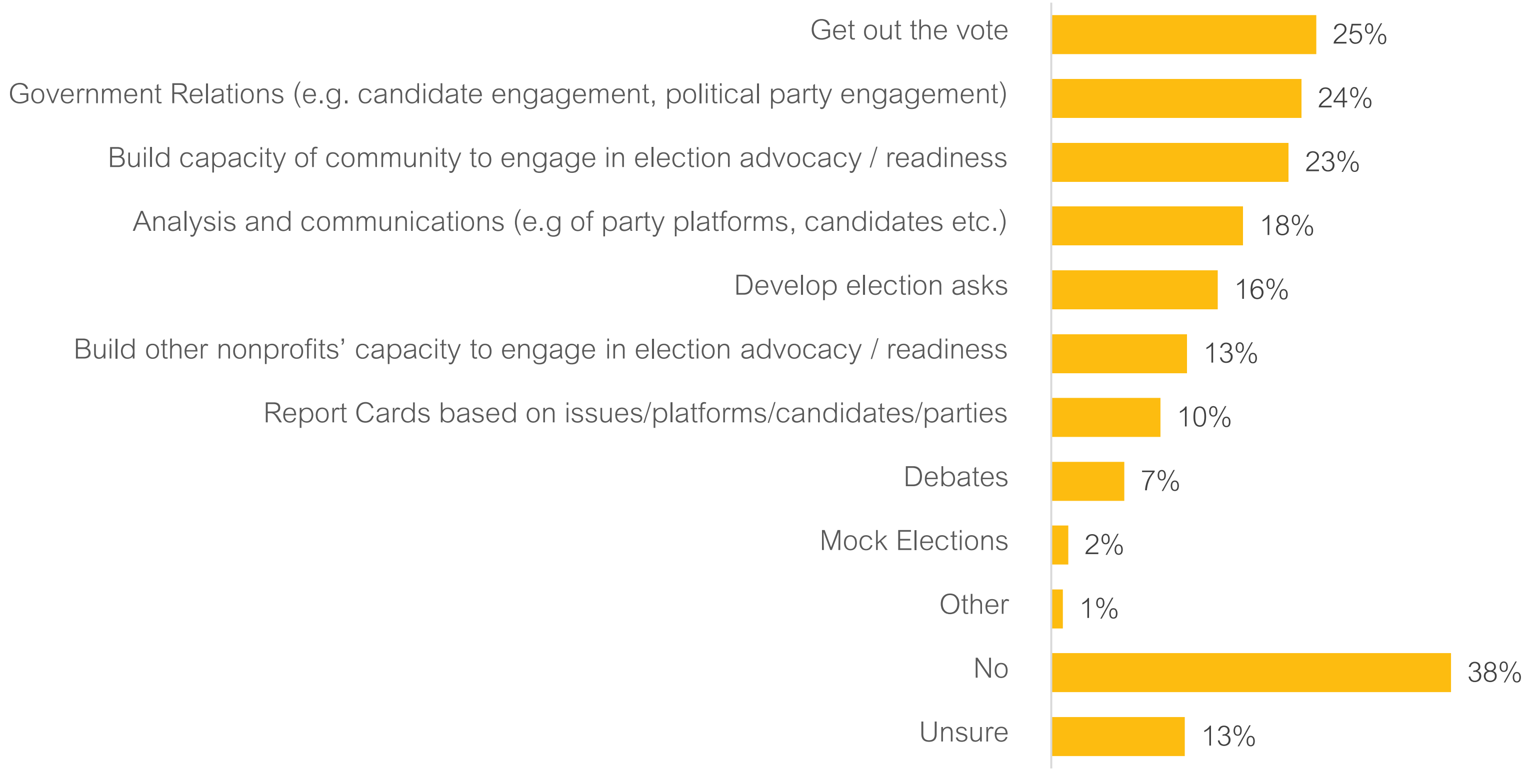
Q39 To your knowledge, gauge the health of nonprofits...



Election Advocacy and Readiness | **Sector Engagement**

About one in four are planning get out the vote initiatives (25%), general government relations (24%), or building capacity within the community (23%). Four in ten (38%) are not planning any election activities.

Q40 Thinking specifically about the upcoming Ontario election (not the federal election or local elections), does your organization plan to engage in any of the following types of election advocacy and/or readiness activities?



Successes, Priorities, Supports | **Sector Engagement**

Five major themes emerged when organizations were asked to share the successes, priorities, and supports they are grateful for. Examples of each theme are shown below.

Q41 *What successes, priorities and supports are you grateful for or are making your organization stronger? In other words, what is helping you thrive?*

Community Engagement and Partnerships	Staff and Volunteer Engagement	Funding and Financial Management	Organizational Development and Governance	Service Delivery and Client Support
A passion amongst those involved to speak for those who cannot speak for themselves.	*The dedication and expertise of our staff, volunteers, and community partners, who work tirelessly, despite poor remuneration, to support the youth we serve.*	*Deep engagement of stakeholders in our fundraising campaign.*	*A very strong board of directors who are able to keep us on task with our strategic plan and who can help us reflect on where our capacities need to be focused.*	*Support from our clients - their gratitude of having access to a range of service in their community.*
Dedicated volunteers, a strong board of directors, local municipalities that welcome our services, wonderful staff, the Federal summer student program.	*The current volunteers who have been a part of the program for a number of years who know what is going on and can help make difficult decisions.*	*Multiple complimentary revenue streams New capital campaign mandate - growth opportunity.*	*Our board will be revisiting our strategic plan early to slowly turn the bow to increasing earned revenues.*	*We have leaders who are open to change and open to taking on challenging clients.*
We stay connected and reached out to each other to problem-solve and utilize each other's knowledge and connections.	*We have invested in training and development which has increased our staff group's resiliency.*	*Philanthropic individuals & corporations that do not tie their donations to program delivery, i.e. they allow us to use the funds to strengthen core operations that ensure the survival of programs.*	*We have a talented and inspired team who take initiative, work hard and embody our core values.*	*We strongly believe that the programing we have meets clients needs - as much as we can, we provide customized programming and services addressing individual needs.*

Concerns and Challenges | **Sector Engagement**

Organizations shared concerns that echo the key findings from the rest of the survey and align with organizational mandates and visions. Their responses tend to align with five main themes, shared below with verbatim examples.

Q42 Looking ahead from now into the next 12 months, what concerns or challenges are top of mind for your organization?

Funding and Financial Challenges	Staffing and Volunteer Challenges	Leadership and Strategic Planning	Economic and Social Impact	Operational and Logistical Challenges
Increased operating pressures that are squeezing our budgets and reducing flexibility to try new programs and services because there are no reserve funds.	*We need to find ways to shore up our organizational structure to accomodate the fact that there will always be staffing vacancies in the next 1-3 years due to the competive labour market.*	*Lack of transparency and communication weakening our position and work in the community.*	*The continually expanding amount of people experiencing food insecurity is alarming.*	*Execution of an expansion of our current space as we have maxed it out.*
A reduction in provincial government funding is requiring a shift in focus for fundraising that we are not staffed for.	*Improving relationships between us and our union; it is better but needs to continue.*	*We have two current part-time staff members, one of whom is the Executive Director, who has to take on many roles within the organization.*	*The need for affordable housing in Toronto is a pressing issue that affects many individuals.*	*The ability to develop new programming with space and staff limitations.*
Concerned about the sustainability of donations in the current economic environment.	*Staffing shortages mean that existing employees need to take on more workload and responsibilities.*	*Strategic planning to ensure our mission is not lost in the process of a merger with a larger non-profit organization.*	*A hardening of anti-immigration sentiments among the Canadian public.*	*We need to change our systems (computer and organizational) to accommodate our quickly growing client base.*

Value to Communities | **Sector Engagement**

Organizations generally discussed impact related to their core mandates. Responses were organized into categories by theme. The most common themes are noted below.

Q43 What value does your organization bring to your communities?

Community Engagement and Social Connections

Education and Skills Development

Social Services and Support

Environmental Initiatives

Arts and Cultural Engagement

Multicultural Integration and Support

Community Advocacy and Policy

Mental Health and Wellbeing Services

KEY RESULTS BY SUB-GROUPS

Key Results | **Operating Budget**

Organizations with larger budgets (especially $1 million and over) understandably show certain indications of greater stability – they are more likely to own land or buildings, receive government funding, and have paid staff.

Question	Total (n=1,001)	$0 to $99,999 (n=145)	$100,000 to $249,999 (n=129)	$250,000 to $499,999 (n=120)	$500,000 to $999,999 (n=144)	$1,000,000 to $2,999,999 (n=185)	$3,000,000 to $9,999,999 (n=140)	$10,000,000 or more (n=112)
Q10. Owns land / buildings (% Yes)	29%	13%	18%	18%	19%	29%	46%	63%
Q14. Experienced increased demand for programs / services (% Yes)	83%	68%	80%	86%	84%	90%	84%	91%
Q17. Able to sustain organization for 12+ months	54%	51%	40%	49%	47%	56%	69%	67%
Q22. Accessed reserve funds (% Yes)	31%	23%	29%	28%	38%	34%	32%	37%
Q22. Does not have reserve funds	19%	44%	38%	23%	14%	6%	6%	9%
Q24. Ontario gov. funding (% Yes)	52%	14%	36%	43%	54%	59%	76%	84%
T3. High risk of not existing in 3 years (% 8 to 10 on 10-point scale)	10%	17%	20%	13%	9%	8%	3%	2%
Q28. Paid staff (% Yes)	86%	28%	81%	98%	99%	97%	100%	100%
Q30. Staff retention / recruiting challenges (% Yes)	63%	28%	54%	53%	50%	61%	81%	89%
Q36. Volunteer retention / recruiting challenges (% Yes)	46%	51%	56%	43%	55%	41%	37%	36%

Green shading indicates results that are significantly higher than other groups.

Orange shading indicates results that are significantly lower than other groups.

Key Results | **Sub-Sector**

Increased demand is most acute for those in community development and housing, advocacy and politics, and social services. Staffing challenges are most prominent for organizations in health or social services.

Question	Total (n=1,001)	Arts / Culture / Heritage / Tourism (n=170)	Business / Professional / Unions (n=33)*	Community dev / Housing (n=61)	Education / Research (n=73)	Environment (n=37)*	Grant / Fundraising / Volunteerism (n=33)*	Health (n=97)	Law / Advocacy / Politics (n=27)*	Social Services (n=383)	Sports / Rec / Social (n-46)
Q10. Owns land / buildings (% Yes)	29%	17%	21%	33%	14%	24%	12%	36%	7%	36%	35%
Q14. Experienced increased demand for programs / services (% Yes)	83%	68%	75%	93%	79%	76%	73%	84%	85%	93%	83%
Q17. Able to sustain organization for 12+ months	54%	49%	70%	47%	58%	46%	64%	52%	56%	53%	61%
Q22. Accessed reserve funds (% Yes)	31%	42%	27%	29%	36%	14%	21%	42%	15%	30%	24%
Q22. Does not have reserve funds	19%	22%	15%	33%	14%	38%	12%	16%	30%	16%	22%
Q24. Ontario gov. funding (% Yes)	52%	48%	39%	32%	56%	22%	18%	67%	22%	68%	28%
T3. High risk of not existing in 3 years (% 8 to 10 on 10-point scale)	10%	12%	15%	10%	16%	16%	9%	4%	8%	9%	11%
Q28. Paid staff (% Yes)	86%	73%	91%	69%	85%	65%	94%	97%	85%	95%	67%
Q30. Staff retention / recruiting challenges (% Yes)	63%	51%	53%	64%	49%	52%	52%	77%	61%	71%	35%
Q36. Volunteer retention / recruiting challenges (% Yes)	46%	54%	36%	51%	33%	46%	36%	42%	30%	46%	67%

Green shading indicates results that are significantly higher than other groups.

Orange shading indicates results that are significantly lower than other groups.

*Small sample size; results should be interpreted with caution. Sub-sectors with samples <20 are not shown.

Thank you.

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