Non-Profit & Community Organization Survey

June 15, 2020

Non-profits, charitable groups and community organizations are experiencing destabilization due to the Covid 19 crisis. As we work through this crisis, we looked for feedback from non-profits and community groups in our community to understand their critical needs and challenges to better support the sector.

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Executive Summary

The Town of Canmore conducted a survey to examine how non-profit and community organizations are being impacted by the Covid 19 pandemic. Key themes that emerged from the survey results included:

- social agencies are struggling to provide services in a meaningful way;
- cultural organizations are cancelling shows, festivals and classes;
- recreational facilities were closed and have restrictions in place as they reopen.
- the cancellation of fundraising events, activities, and casinos combined with a loss of funds generated through registration, programming, and event admission lead to an abrupt loss of revenue; and
- more than half have no, to low operating reserve funds and many are ineligible for government funding so there is low financial stability

The survey was open from June 2-15, 2020 to 85 Canmore non-profit and community organizations; Social (13), Cultural (12) and Recreation (60) including community event organizations. There were 48 respondents; 11 Social, 12 Cultural and 25 Recreational.

While 70% of respondents indicated that expenses have decreased or stayed the same, 90% of organizations have experienced a decrease in revenue with 75% indicating a significant decrease.

Like other sectors, the non-profit sector faces an uncertain future. Respondent concerns included themes such as: Will I keep my job?; Will we be safe?; When will programs and events be permitted again?; Should we plan for next year?; and, Will our organization survive this? There were also identified concerns about the loss of connection and human contact, and the loss of skill and development.

A different ability for organizations to adapt was noted. While some administrative staff can work from home, this option is not always available to operational staff, volunteers, and for program delivery. One on one counselling is happening on-line however some respondents feel that online options do not allow support groups to come together in a meaningful way. The creative workforce is, for the most part, out of work unless they can switch to on-line platforms. Many groups need communal spaces for rehearsals, programs, and workshops. Several recreational activities require facilities to be open – pools, arenas and sports fields – in order to conduct organizational activities and work on skill development.

The non-profit sector adds great value to our community. They are resilient, dedicated and hardworking. The results of the survey will help guide supports and services to appropriately meet the needs of the non-profit community.
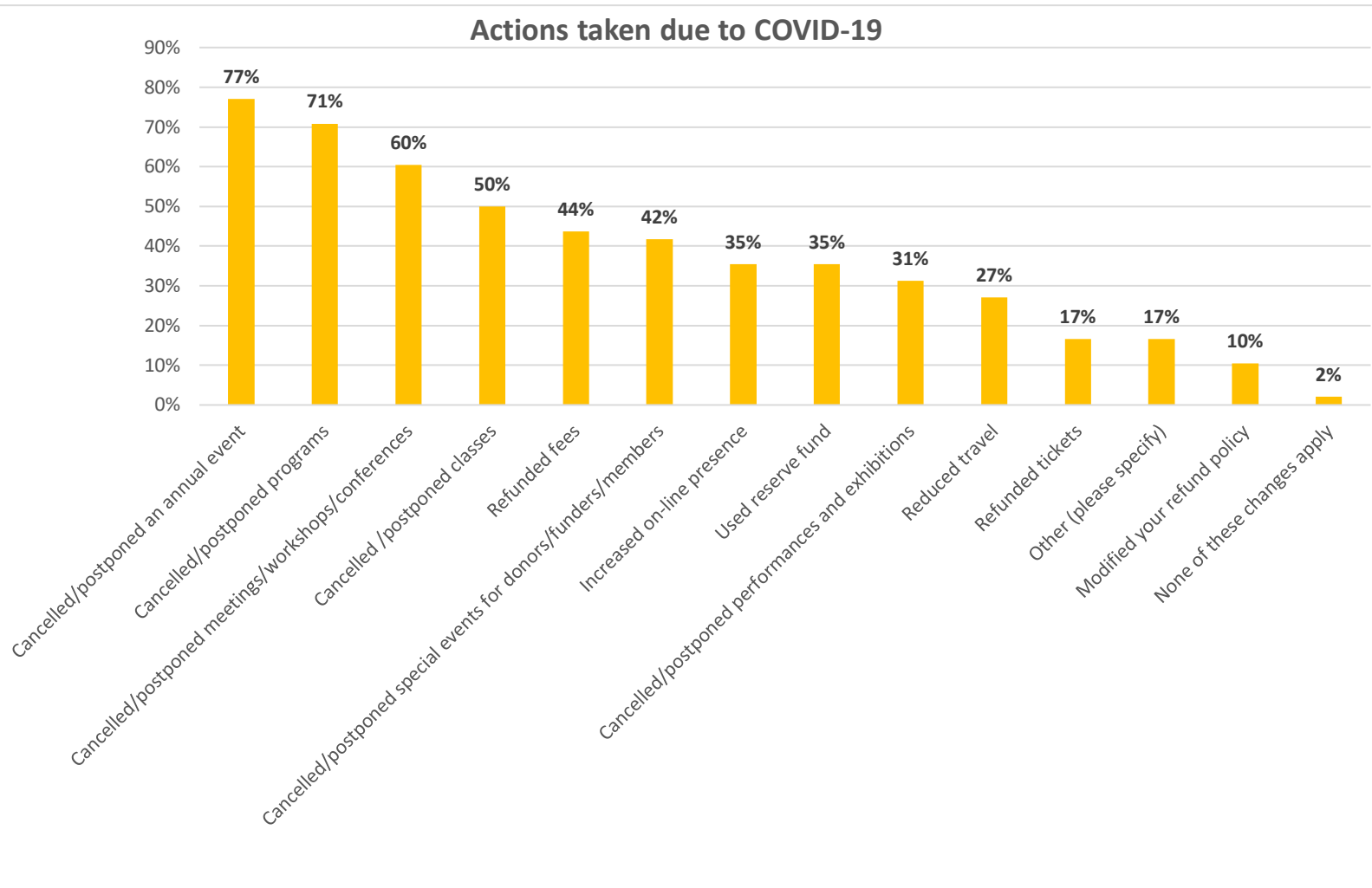
Type of Organization:
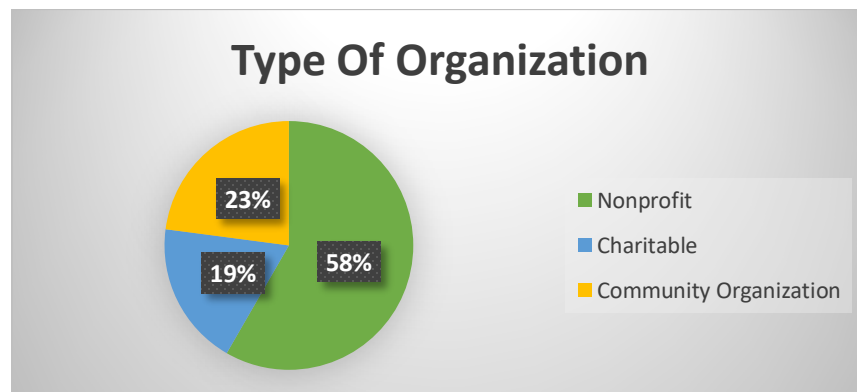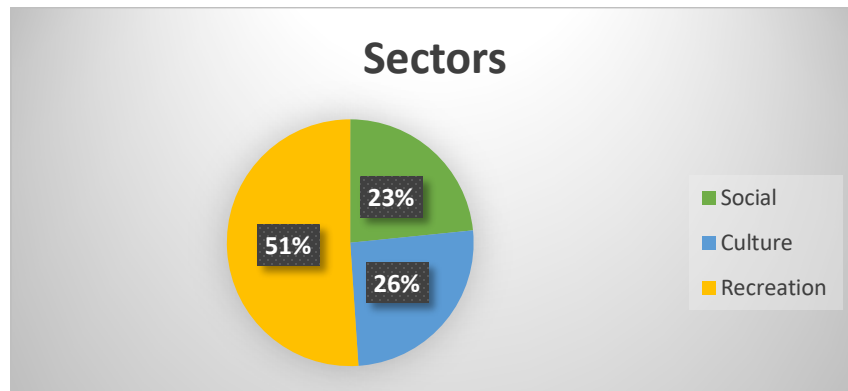
With 51% of responses, the majority of organizations participating in this survey are part of the recreation sector, followed by the social and culture sector with fairly equal parts.

58% of respondents fall into the nonprofit category.

Organizational impact of restrictions:

Actions taken due to COVID-19

Action	Percentage
Cancelled/postponed an annual event	77%
Cancelled/postponed programs	71%
Cancelled/postponed meetings/workshops/conferences	60%
Cancelled /postponed classes	50%
Refunded fees	44%
Cancelled/postponed special events for donors/funders/members	42%
Increased on-line presence	35%
Used reserve fund	35%
Cancelled/postponed performances and exhibitions	31%
Reduced travel	27%
Refunded tickets	17%
Other (please specify)	17%
Modified your refund policy	10%
None of these changes apply	2%

Respondents that chose "other" took a variety of actions as a direct result of COVID-19. These responses include using their reserve funds to pay outstanding fees or dipping into government grants that were originally planned for another purpose. Some organizations had to lay off staff while others had to suspend retail sales or lost entry fees when facilities closed. Others took action by donating funds to other community groups, reducing annual fees, and not providing face to face support for the time being.

Anticipated actions, if gathering restrictions remain in place until September 30th and, in comparison, December 31st 2020:
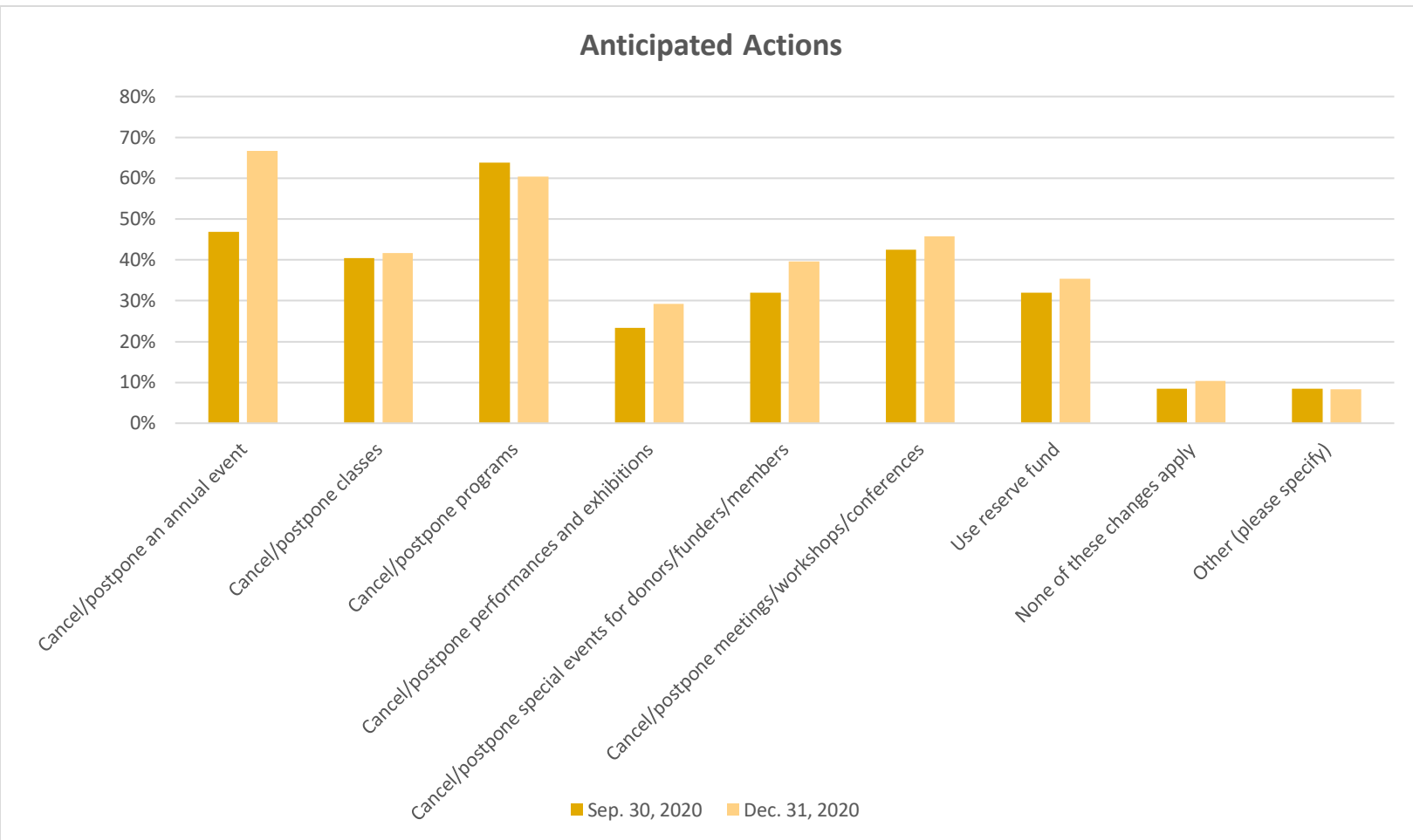
Should gathering restrictions remain in place for the foreseeable future, this comparison shows that, the longer these regulations last, the most dramatic impact will be around the cancelling of annual events.

Some organizations will modify their program, pivot to virtual events instead of in-person gatherings or simply re-think and re-structure their programming, rather than cancelling it.

"Covid has put our organisation in limbo for now yet we are hopeful that we can resume event planning soon."
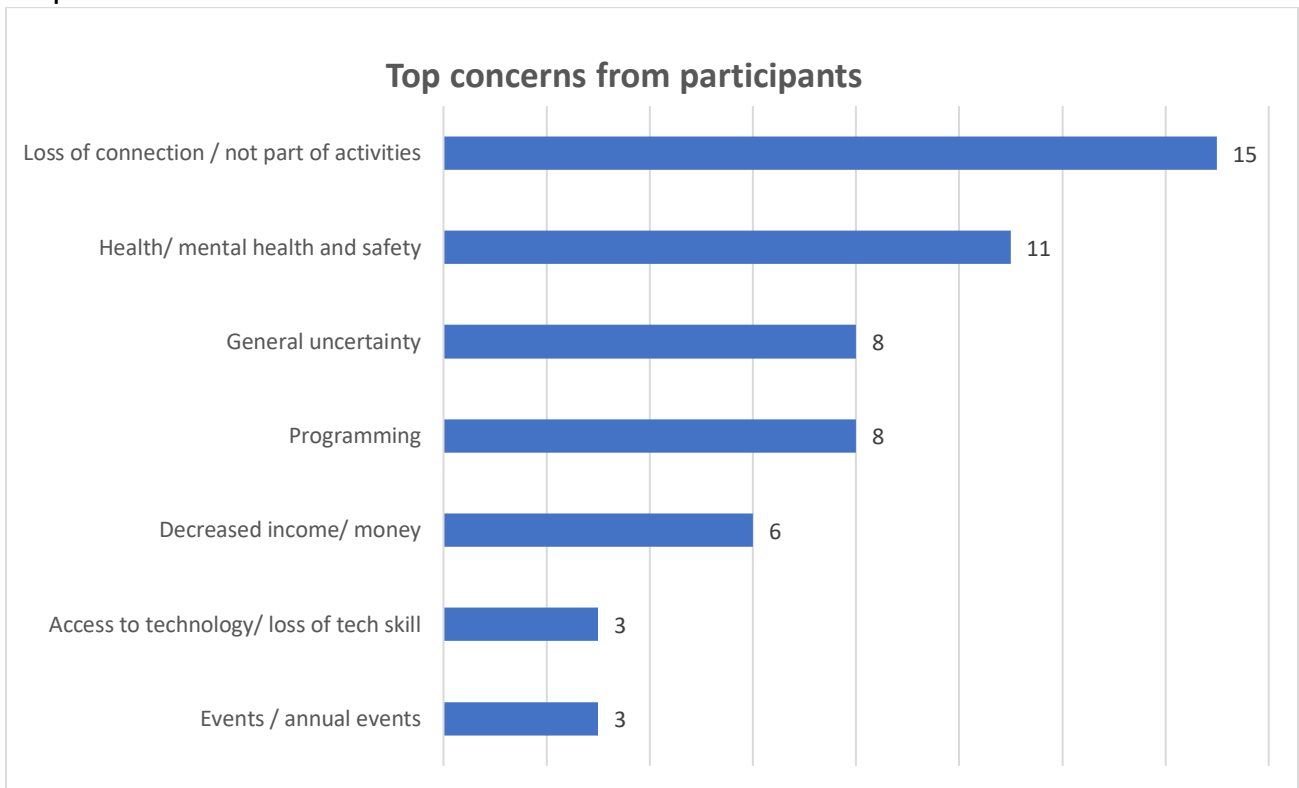
Participant engagement:

Opportunities for social connections with program participants:

This open question shows that the majority of organizations found ways to virtually connect with their program participants. The main resources are Zoom and social media sites such as Facebook. Some organizations were able to re-introduce socially distanced in-person outdoor activities, while others use their own websites, email, and phone contacts, as well as member newsletters as a tool to stay connected.
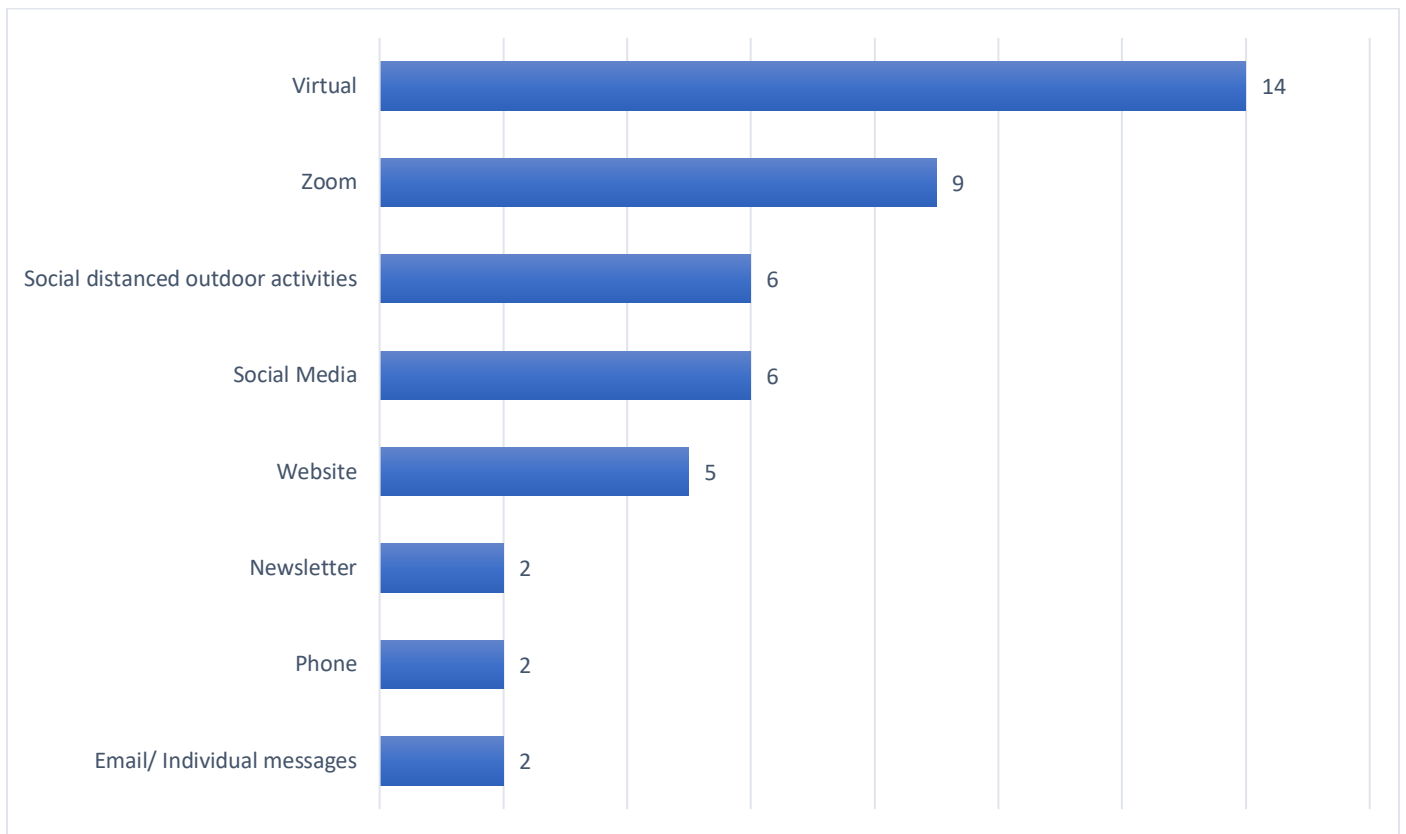
Top three concerns for program participants:

Loss of social connection due to the inability to participate in their usual activity is the biggest concern for non-profits followed by mental and physical health and safety. General uncertainty about the future and programming uncertainty are two more factors that participants are concerned about, with an equal amount of responses for each.

Top concerns from participants

Concern	Value
Loss of connection / not part of activities	15
Health/ mental health and safety	11
General uncertainty	8
Programming	8
Decreased income/ money	6
Access to technology/ loss of tech skill	3
Events / annual events	3

Organizations were asked, if they have event cancellation insurance:
Only 6% answered with yes.

Event Cancellation Insurance

6%

94%

■ Yes ■ No
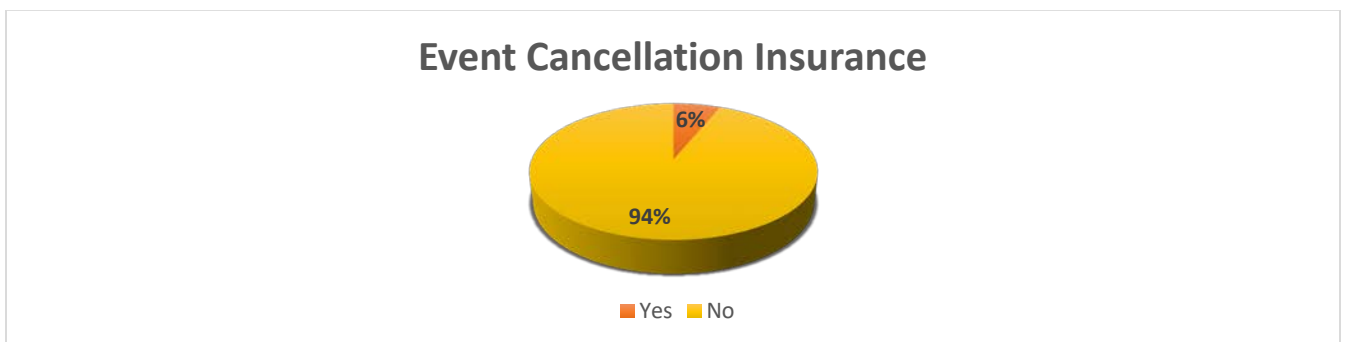
The Non-Profit and Community Organization Survey focused on three main themes: communication resources, human resources, and financial resources. Participants were asked what capacity building resources in each category would be of benefit if they were available.

Communication Resources
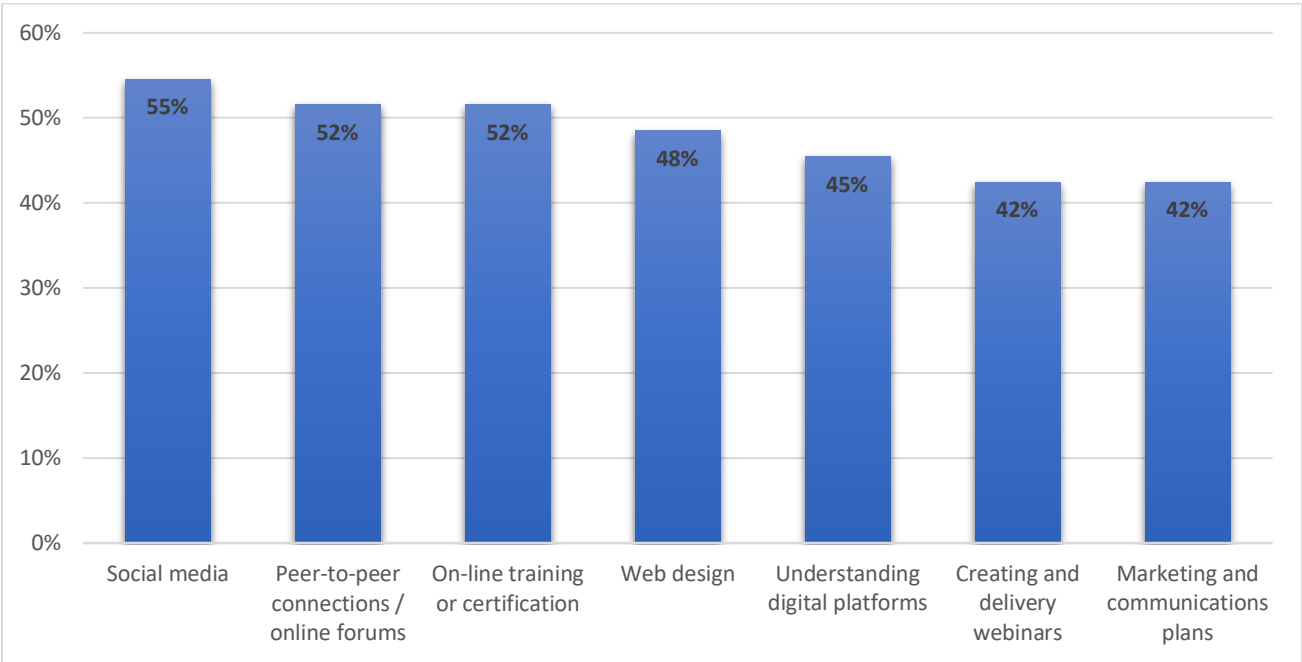
55% of respondents are looking for social media training to improve their on-line presence, exposure and engagement. 52% are looking for peer to peer connections through on-line forums where they where they can talk through challenges, share resources and experiences and gain knowledge. 52% are looking for web design training and 48% would like to better understand digital platforms.

Human Resources

Volunteers
How COVID-19 impacted the volunteer requirements:
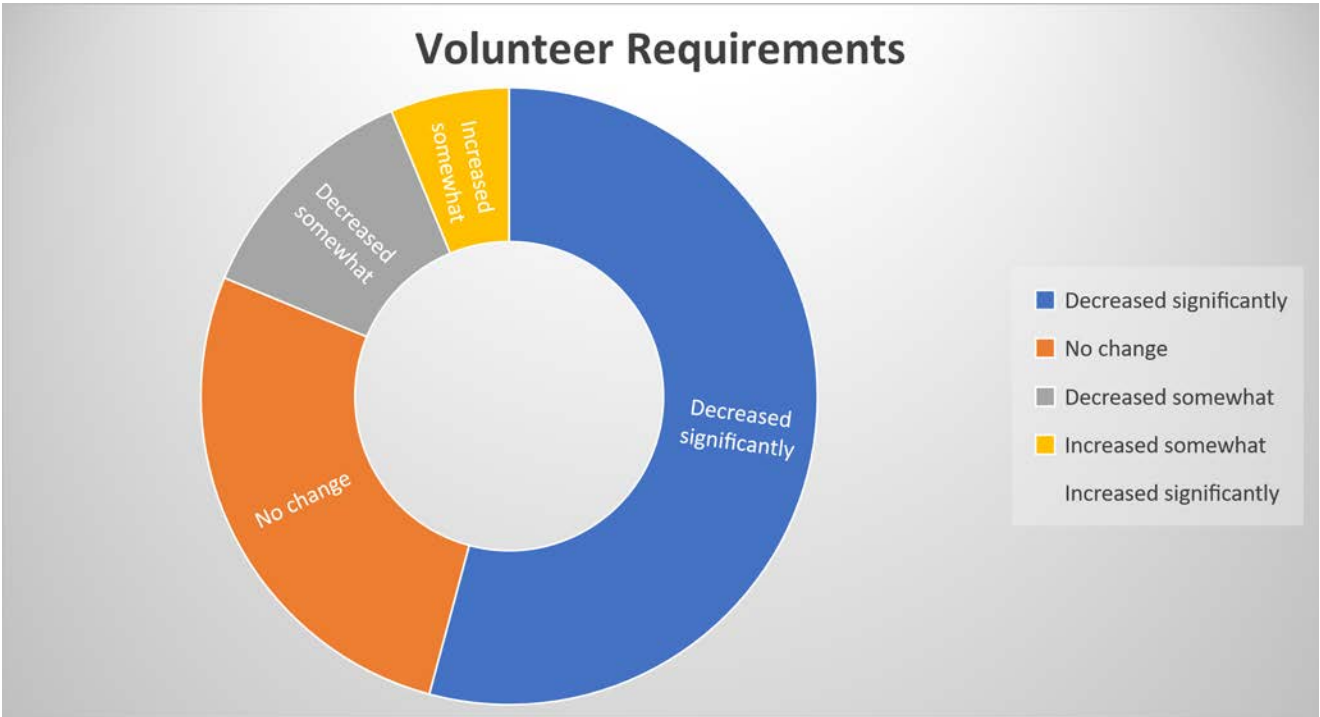
54% of organizations report that they saw a significant decrease in volunteer requirements since the onset of the pandemic, 27% said that they have not seen a change in relation to COVID-19. The response option "increased significantly" was not chosen by anyone.

Were organizations able to recruit the number of volunteers required for service continuity?

The number of organizations having trouble recruiting enough people versus not enough is fairly equal, with more than half (55%) saying that they were able to recruit a sufficient number of volunteers, while 45% stated that they did not recruit enough volunteer to continue their services.
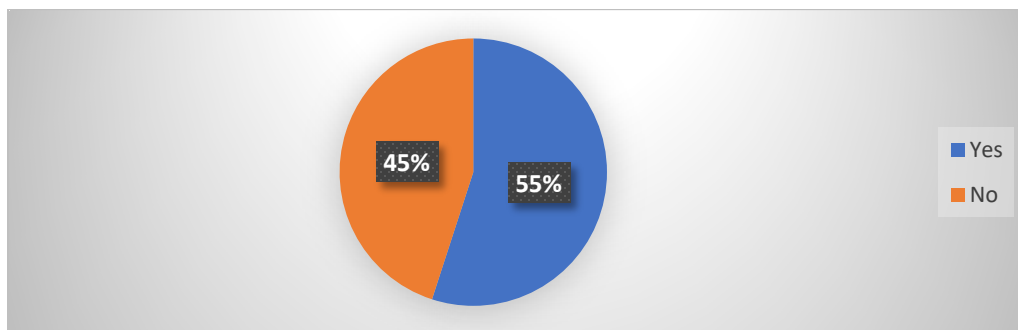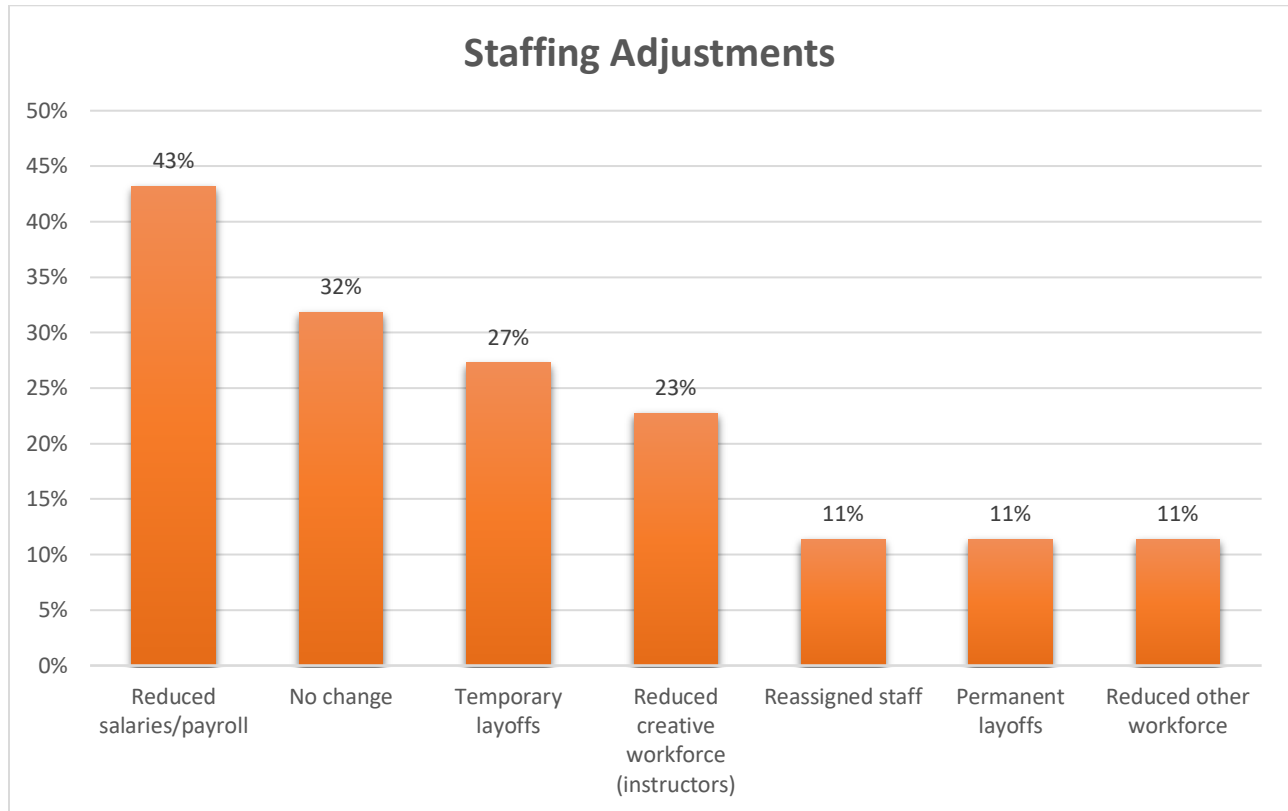

Volunteer Engagement during COVID-19:

Due to the lack of programming during this time, many organizations were unable to keep their volunteers engaged. It was mentioned, that organizations often operate with a board of volunteers, which would stay on to keep the organization afloat, however the volunteers that would usually engage in events etc. are currently not needed. Nevertheless, a number of organizations do keep their volunteers involved in future plans and discussions via phone and email updates, as well as through their website or via Zoom meetings.

Staffing:

Adjustments to staffing model/ availability/ readiness:

Staffing Adjustments

Reduced salaries/payroll	43%
No change	32%
Temporary layoffs	27%
Reduced creative workforce (instructors)	23%
Reassigned staff	11%
Permanent layoffs	11%
Reduced other workforce	11%

Over 40% of organizations were forced to reduce salaries/ payroll during the pandemic, while 32% said that they did not need to make any staffing adjustments. Many organizations had to temporarily lay off staff, as a response to COVID-19.

Organizations were asked how many salaried, hourly, and contracted staff members they had prior to COVID. The numbers in the tables below reflect the average numbers mentioned by the respondents.

Pre-COVID FT salaried staff	8
Hours per week	47

58% of organizations that have salaried employees have an average of eight employees and are able to assign an average of 47 working hours per week.

| Pre-COVID FT hourly staff	3
Hours per week	35

35% of organizations that have hourly employees have an average of three employees and are able to assign an average of 35 working hours per week.

Pre-COVID contract staff	4
Hours per week	35

64% of organizations that have contracted employees have an average of four contractors and are able to assign an average of 35 working hours a week.

The organizations were also asked how many people they would normally employ between March 10th and September 30th. 39% of organizations responded that they don't normally employ anyone during this time. The remainder of organizations employs an average of 12 people during this time.

Primary workplace of staff prior to COVID:
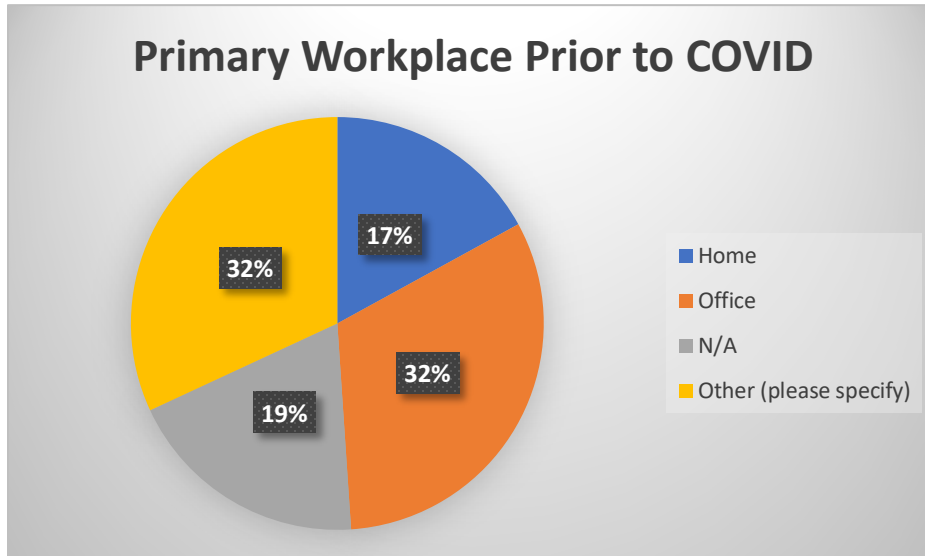
With equal parts (32% each), organizations stated that their staff either worked from the office or they chose "other", which includes responses such as work on bike trails, in the Recreation Centre, Nordic Centre, and many other out of office locations, based on the programming they were running. The remainder said that their staff was either working from home or that this is not applicable to them.

Primary workplace of staff now:
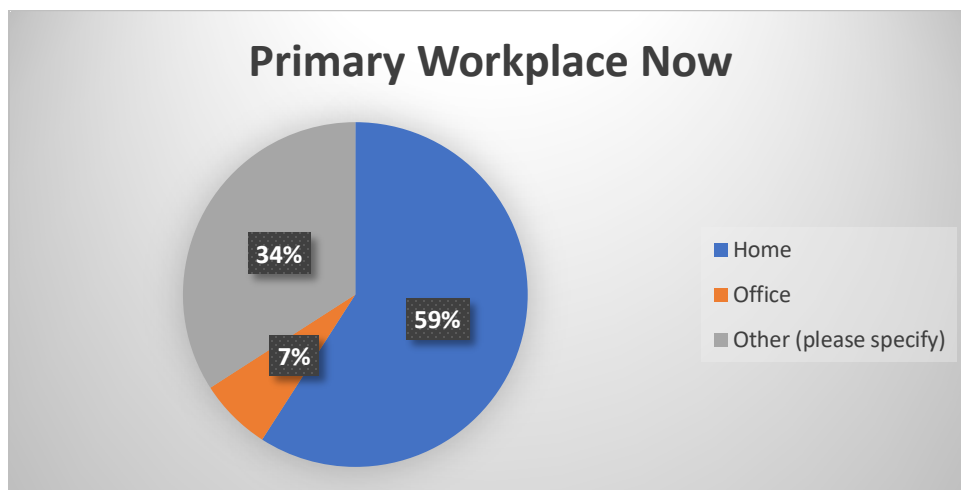
Since April, workplaces have shifted, with 59% of respondents stating that their staff now work from home, with only 7% of organizations saying that staff works from the office. When responding "other" it was said that the organization either hasn't had employees since April or that their employees are spending their work time between the office and home

Technical capacity for remote work:

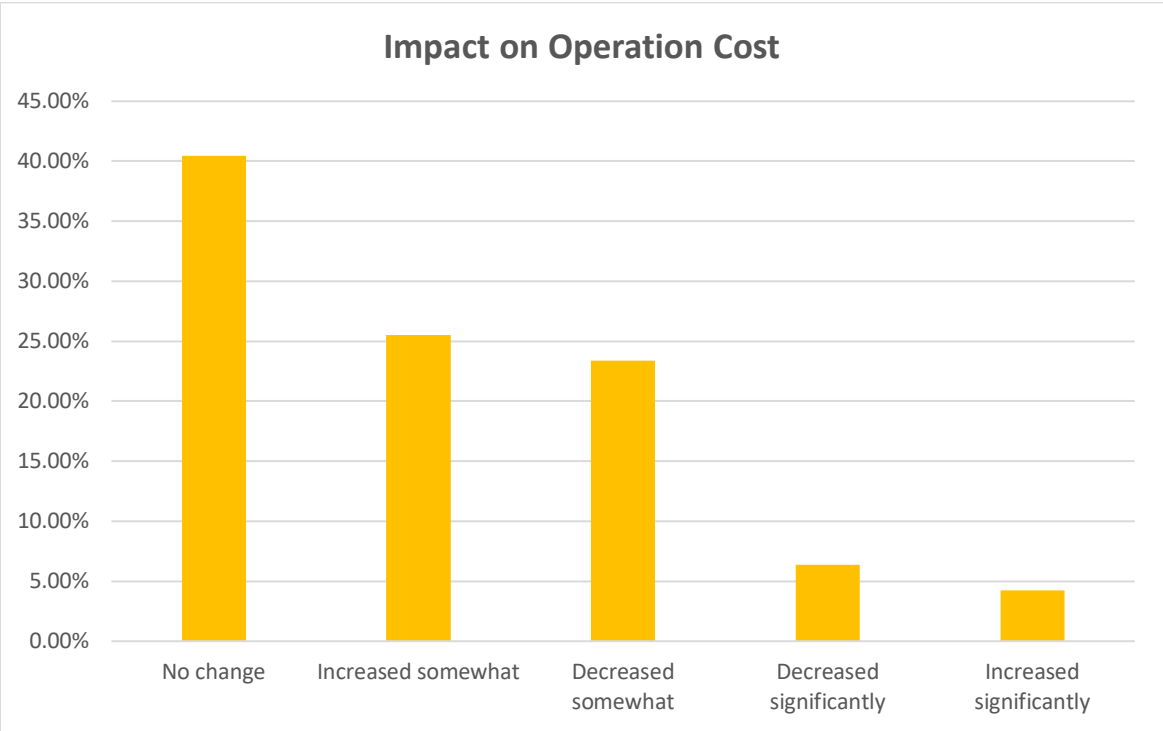## Capacity for remote work

30%

70%

Yes
No
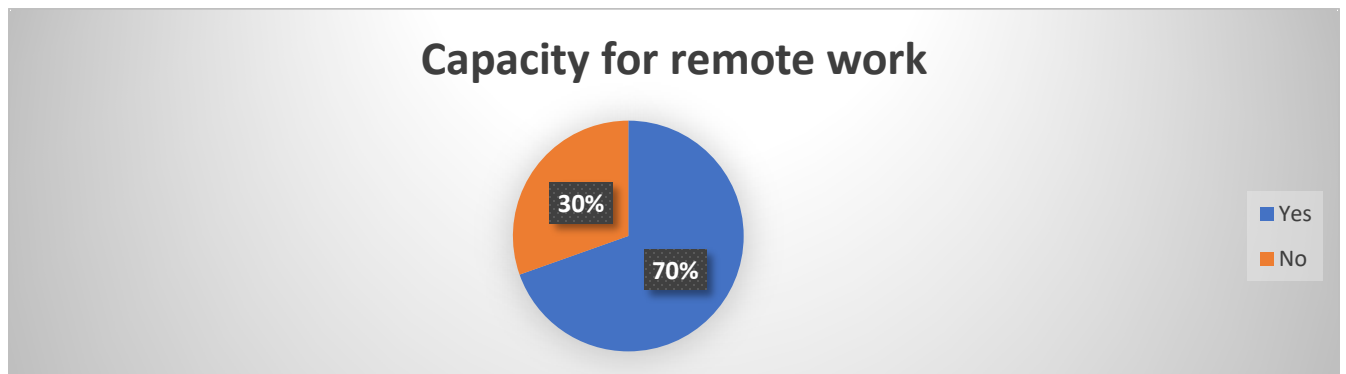
69% of organizations confirmed that they do have the technical capacity to offer their employees remote work places.

Organizations responding with "No" said, that for their operations, it is better to have staff work from the office, as their curator or administrator have tasks that can't be completed from home; that based on their organization and programming, they would need access to sports facilities, or that they simply have no staff and therefore it doesn't apply to them.

Financial Resources

Impact of COVID-19 on operation cost, such as new cleaning protocols, new technologies, cancellation fees, unexpected marketing expenditures, etc.:

Impact on Operation Cost

Category	Percentage
No change	40.00%
Increased somewhat	25.00%
Decreased somewhat	23.00%
Decreased significantly	6.00%
Increased significantly	4.00%

.At the time of the survey (three months into the pandemic), there was no significant impact on operational costs. As things open up and provincial and municipal guidelines change, the answer to this question could be quite different.

On a scale from 1 (not impacted) to 5 (severely impacted), how severe do organizations expect the financial impact of COVID-19 to be?

Expected Financial Impact of COVID-19
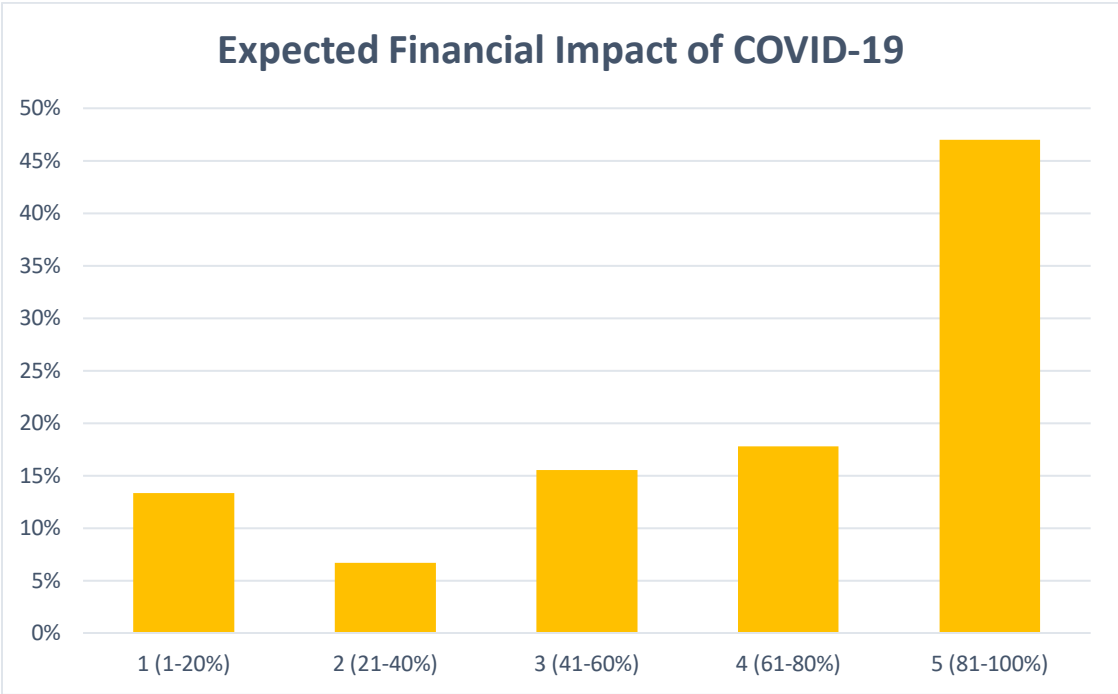
This chart shows the severity of the expected financial impact related to COVID-19. Over 80% of respondents expect to be impacted moderately to dramatically by the pandemic, with 47% alone choosing "5 (81-100%)" as their answer, expecting dramatic financial difficulties.

"Covid has impacted the club for our 2019/20 season, but we are expected the real hit to be with our 2020/21 season. We will not be able to operate at full capacity nor will we be able to host events which will impact our club financially . . . We are bracing for a major financial fall."

Do organizations have an Operating Reserve:
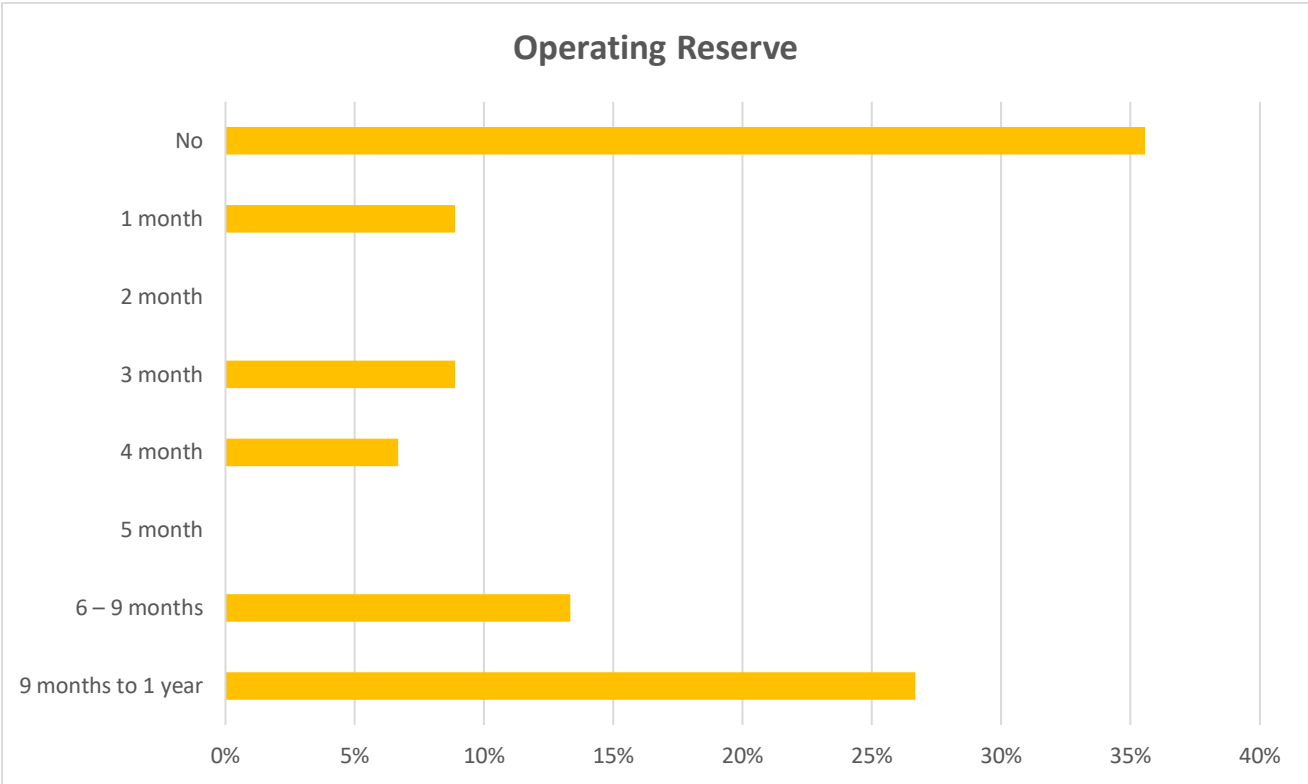
Operating Reserve

More than one third, (36%) of respondents, indicated that they do not have any operating reserves. That said, more than one quarter (27%) said that they do have operating reserves for nine months to one year. The remainder indicated that their reserves will last between one month and nine months.
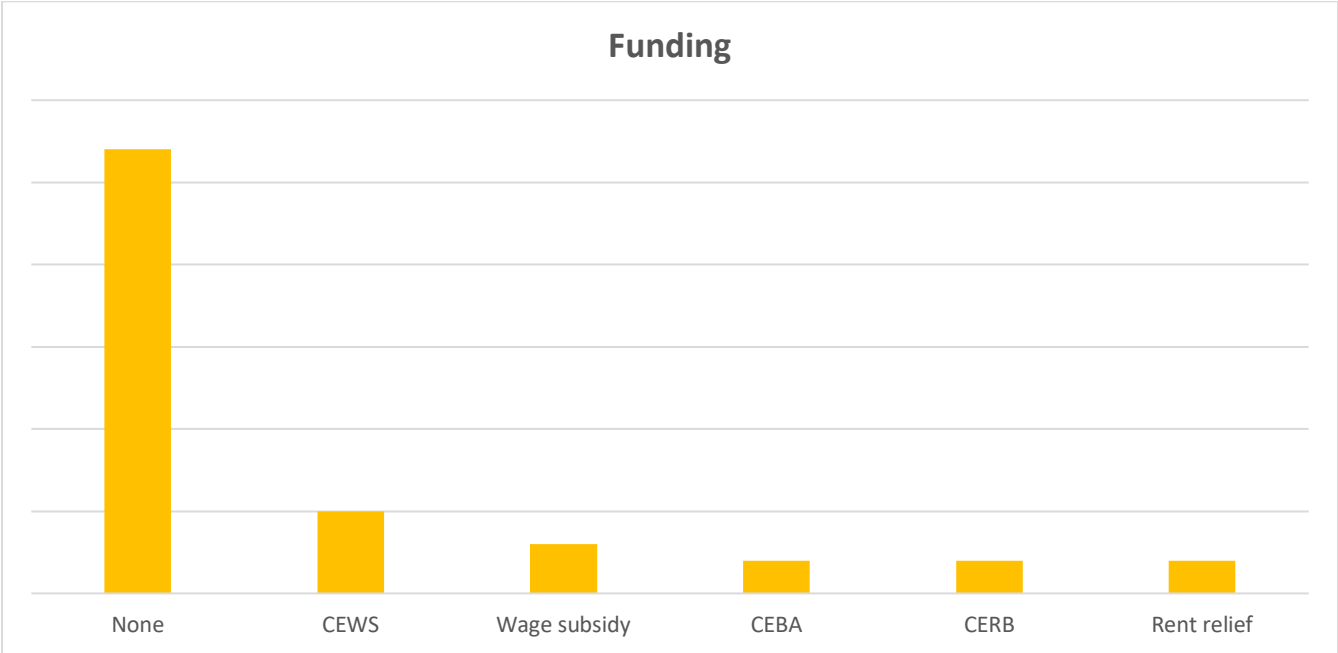
Impacts of COVID-19 on organization's revenue:
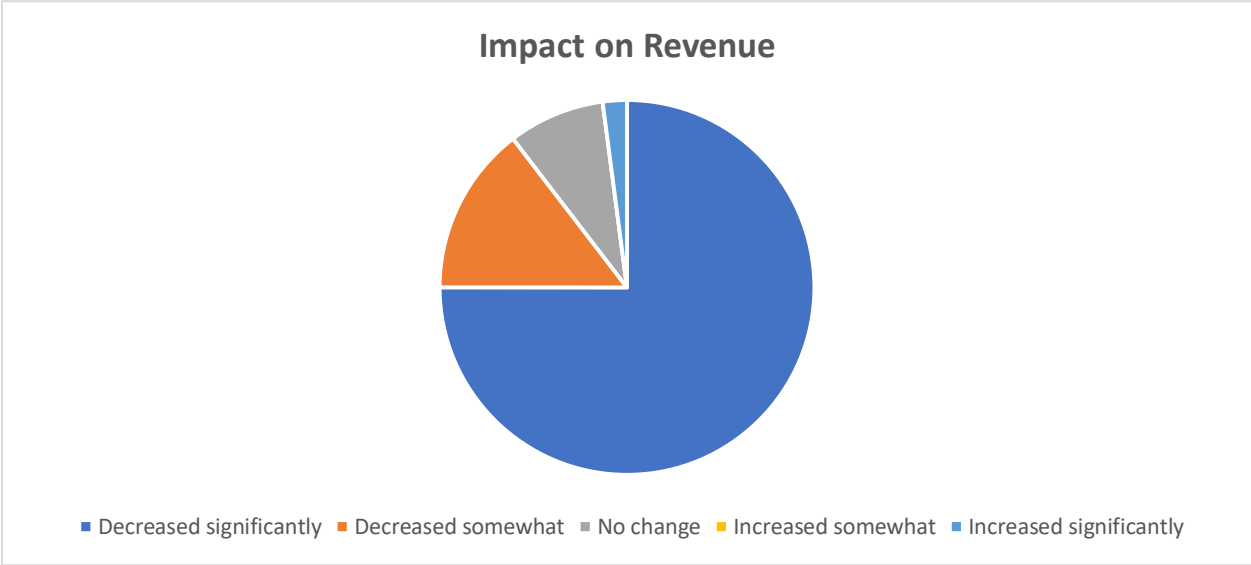
Three quarters (75%) of organizations have seen a significant decrease in their revenue. Another 15% indicated that they have seen their revenue decrease somewhat. This leaves 8% with no changes and 2% with a significant increase.
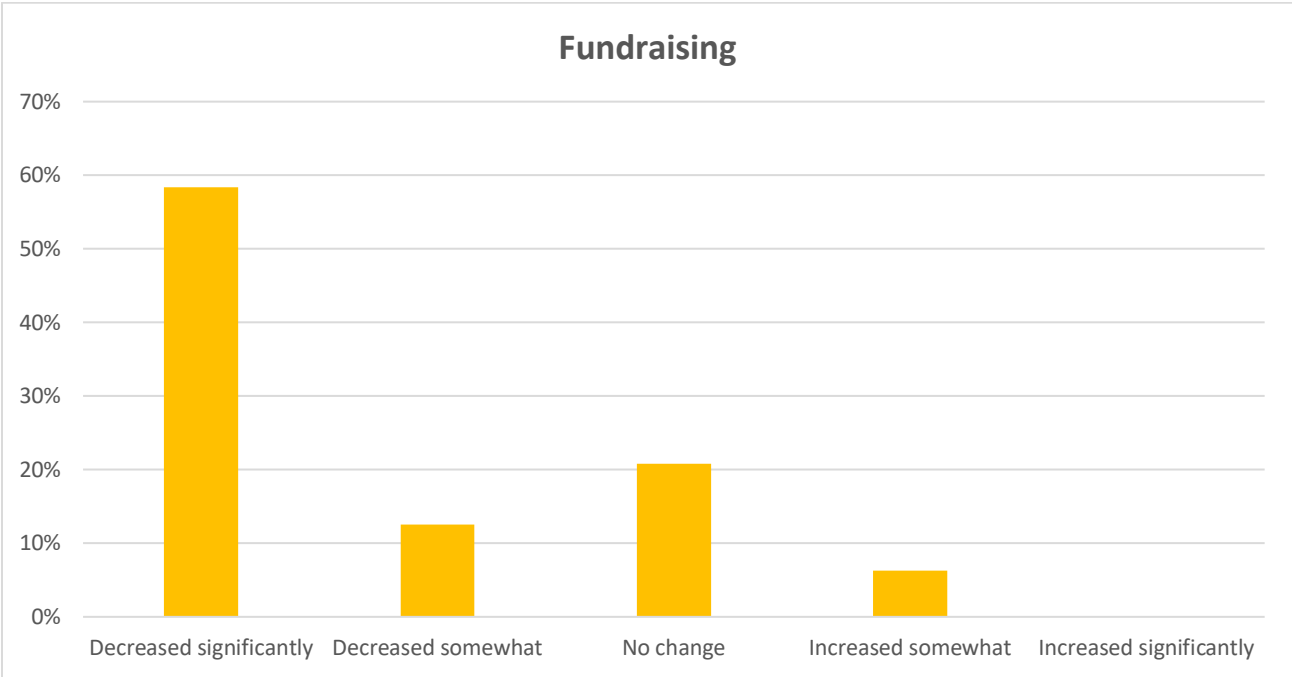
"Organizationally our big concern is next year. Through various programs and grants we are in good shape financially this year. We have also worked really hard to pivot quickly and continue to provide a service to and support the community. The challenge going forward is how to maintain the goodwill will not being able to offer programming and what will the impact be on our different revenue streams as that programming is reduced. Will donors and sponsors still support us if we can't do our normal programming. How do we find alternate ways to monetize the programming"

Funding that organizations applied for or received:

Funding

None	▇
CEWS	▪
Wage subsidy	▪
CEBA	▪
CERB	▪
Rent relief	▪

At the time of the survey, most organizations have not applied for or received any funding during the pandemic. Those who applied for or received funding have taken advantage of a variety of programs, as shown in the chart above.

Impacts of COVOD-19 on Fundraising:

Fundraising

70%	
60%	
50%	
40%	
30%	
20%	
10%	
0%	

Decreased significantly · Decreased somewhat · No change · Increased somewhat · Increased significantly

More than half of the participating organizations (58%) have seen a dramatic decrease in their fundraising, since the onset of COVID-19, while 13% saw a smaller decrease. The remaining respondents have either seen no change (21%) or a slight increase (6%).

When asked what the reasons for either a decrease or increase could be, many organizations stated that most fundraising comes from in person events or meetings and with them now being either cancelled or moved online, it is difficult to raise funds. They are also worried about long term effects, as donors may have to financially recover from the pandemic themselves. Organizations seeing an increase said that this might only be short lived and could change as the year goes on. Their increase came from emergency programs and campaigns and this may decrease. A few organizations noted that they don't do fundraisers.

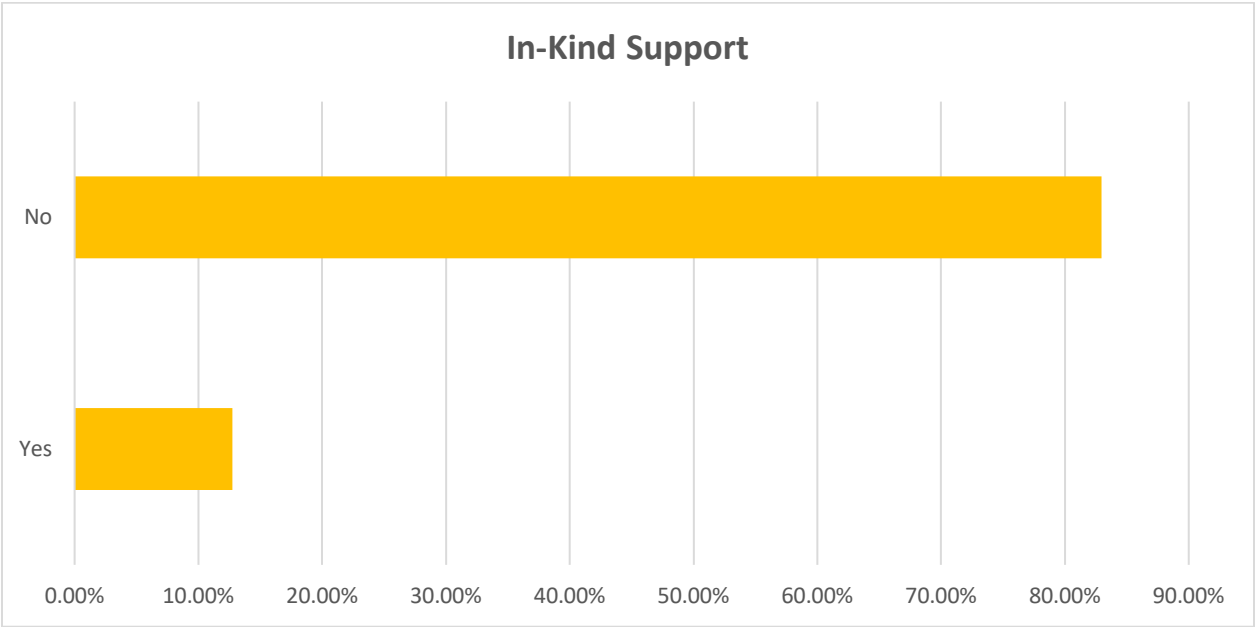**Do or did organizations plan to host a casino fundraiser between March 15th and December 31st 2020?**
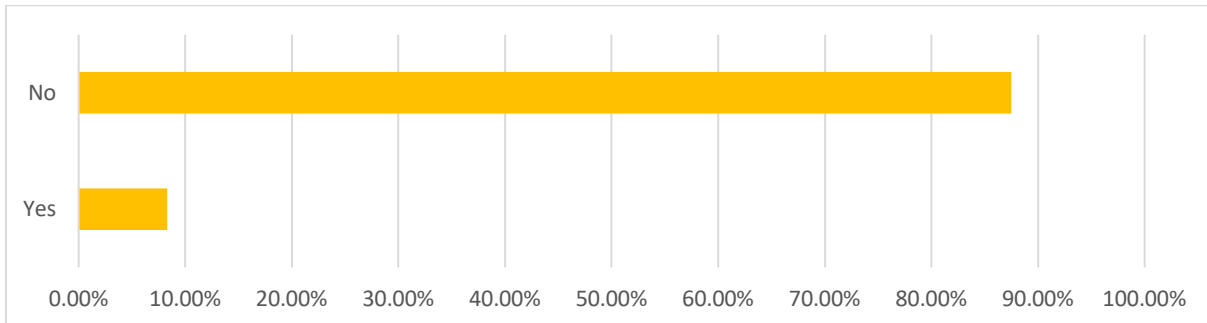
These responses show that the participating organizations did, for the most part, not rely casino fundraisers or didn't have any planned. Only 8% of overall participants indicated that they have or had casino fundraisers planned during this time. One organization of those 8% managed to have theirs just before they filled out the survey, other are thinking of rescheduling or moving it to another year.

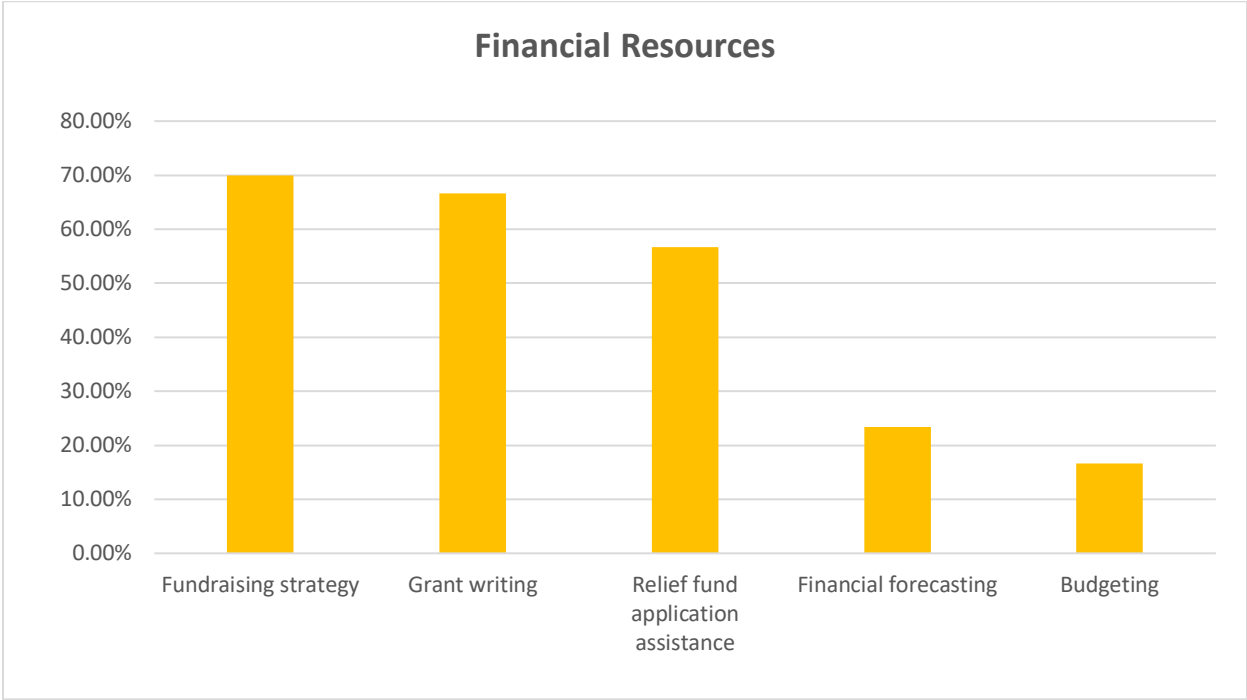**Ways organizations stayed engaged with their donors:**
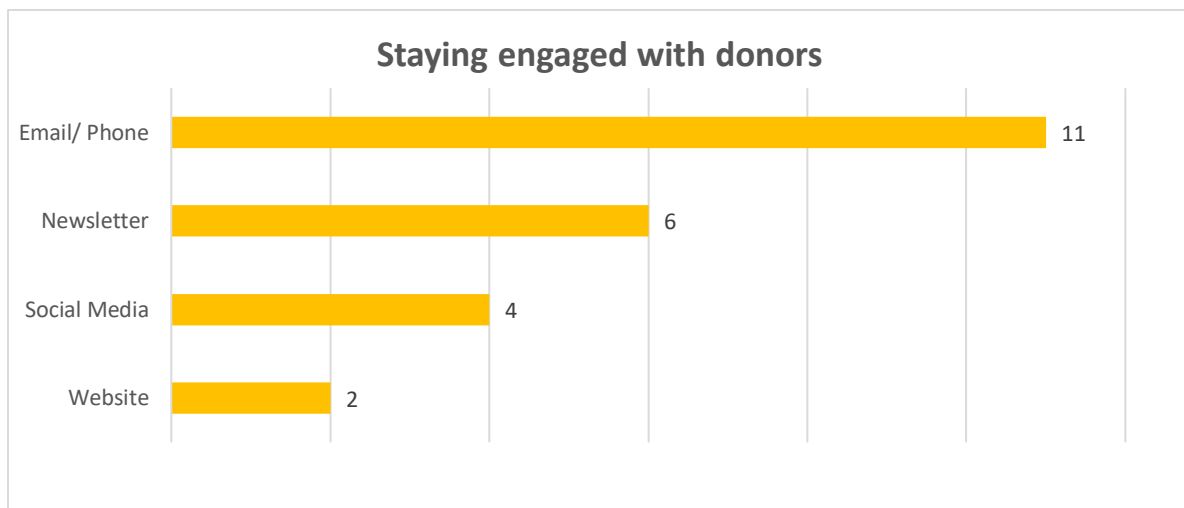
The preferred way for organizations to stay engaged with their donors is email and phone. Newsletters also seem to be a popular way for staying connected, followed by social media and organization websites. 49% of organizations said that they either don't have donors or that this doesn't apply to them.

Have Organizations received in-kind support of any kind?

In-Kind Support

No	(bar extending to ~83%)
Yes	(bar extending to ~13%)

0.00%   10.00%   20.00%   30.00%   40.00%   50.00%   60.00%   70.00%   80.00%   90.00%

The majority of organizations (83%) have not received any in-kind support. The reaming 13% that did received supports such as help with office maintenance, volunteers who provided time and supplies, free labor in general, hotels offered their space for use of technology by the organization's clients, and retail outlets selling cookies on behalf of the organization.

Financial resources that organizations would access, if they were available to them:

Financial Resources

Resource	Percentage
Fundraising strategy	~70.00%
Grant writing	~66.00%
Relief fund application assistance	~56.00%
Financial forecasting	~23.00%
Budgeting	~16.00%

Most respondents have chosen multiple resources that they would use, if they were available, indicating that the interest in financial resources amongst Non-Profit & Community Organizations is significant.