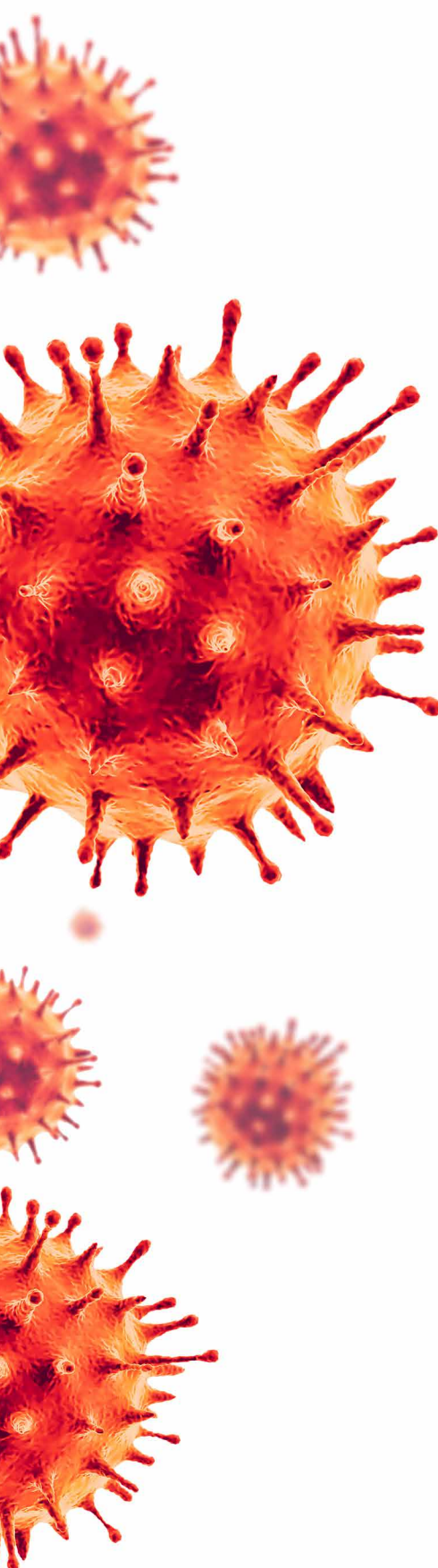




NO IMMUNITY

BC NONPROFITS AND
THE IMPACT OF COVID-19

AN EARLY IMPACT SUMMARY REPORT

May 13, 2020

ABOUT THIS REPORT

Vantage Point, Vancouver Foundation, and the City of Vancouver came together to produce a survey to understand how the COVID-19 pandemic is impacting the operations and program delivery of nonprofit organizations in BC. The survey was drafted by Vantage Point staff based on similar surveys conducted by the [Ontario Nonprofit Network](#) and [SaskNoprofit](#), and was distributed through 4,000 Vantage Point members and newsletter recipients, Victoria area funders, the City of Vancouver, provincial health regions and some municipalities.

Leaders of BC nonprofits and charities were invited to complete the survey between April 8 and April 21, 2020. Vantage Point received 1,119 responses from across the province which equals approximately 4.3% of all nonprofits in BC. This report provides a summary of key survey results, including data that stands out based on geography, subsector, population served, and organization size.

The partners in the creation of this report are Vantage Point, Vancouver Foundation and the Victoria Foundation. Vancouver Foundation provided funding and research knowledge and expertise, Vantage Point provided human resources and networks, and the Victoria Foundation provided funding and research knowledge and expertise. All three partners plus the City of Vancouver provided distribution support.



About Vantage Point

Vantage Point convenes, connects and equips not-for-profit leaders in BC with the training and other supports they need to be successful. Our vision is BC's not-for-profit sector is a thriving community, where organizations mindfully engage talented people and draw on a spirit of abundance to achieve their missions.

Vantage Point is a registered charity. Our charitable number is: 11926 1238 RR0001.

COVID-19 response

- COVID Response Teams: skilled volunteers available to provide free support to address immediate needs in financial management, emergency program support, fundraising, and governance
- A guide to government financial supports
- Facilitation and advisory services
- Specialized learning opportunities like short term planning and governing in times of change
- Weekly Executive Director virtual drop-in sessions
- Umbrella organization convening
- Advocacy to different levels of government and key decision-makers
 - [GoVolunteer.ca](#) for COVID volunteer opportunities
- Free membership

<https://www.thevantagepoint.ca/covid-19-crisis-vantage-point-resources-convening-opportunities>



You are welcome to remix, adapt, build upon this work for non-commercial purposes, as long as you credit Vantage Point, Vancouver Foundation, and Victoria Foundation and indicate if any changes were made.



About Vancouver Foundation

The Vancouver Foundation harnesses the gifts of energy, ideas, time, and money to make meaningful and lasting impacts in communities. Our vision is healthy, vibrant and livable communities across British Columbia.

COVID-19 response

Vancouver Foundation, Vancity, the United Way of the Lower Mainland, and the City of Vancouver launched a Community Response Fund to support our community through the current coronavirus pandemic. [The Community Response Fund](https://www.vancouverfoundation.ca/in-our-hearts) deploys essential relief to charities in BC that provide health and social services and arts, culture, and other community benefits that have been hurt by COVID-19 and its economic consequences.

<https://www.vancouverfoundation.ca/in-our-hearts>



About Victoria Foundation

The Victoria Foundation connects people to causes that matter. By inspiring giving and caring for the assets entrusted to us, we invest in the people, ideas and activities that strengthen our community.

COVID-19 response

The Victoria Foundation launched the [Rapid Relief Fund](https://victoriafoundation.bc.ca), together with the Jawl Foundation and the Times Colonist. Community support has been unprecedented with \$6 million raised and distributed throughout Victoria's capital region to over eighty local organizations providing front-line services to vulnerable populations who have been disproportionately impacted by COVID-19. The Foundation is working closely with our partners to understand evolving community needs and support the recovery and resilience of the civil society sector more broadly.

<https://victoriafoundation.bc.ca>

ACKNOWLEDGEMENTS

We would like to thank all of the respondents of the survey, as well as Vantage Point's partners for sharing the survey and encouraging organizations in their networks to participate, providing valuable data for this initiative. We also acknowledge those nonprofits unable to complete it, given our time and distribution limitations. We hope to continue collecting information about the impacts of the pandemic on our sector in order to highlight our capacity to contribute to recovery, and our needs in supporting our communities. We acknowledge that this survey and report are only a snapshot and we need to uncover the stories on a continuous basis.

Vantage Point would like to acknowledge Vancouver Foundation and Victoria Foundation for their financial support of this report as well as their coordinating and communications support, and the City of Vancouver for their support with the survey development and data collection.

We would like to thank members of the Federation of Voluntary Sector organizations, particularly the Ontario Nonprofit Network (ONN) and SaskNonprofits for sharing their survey designs and reports, which were adapted by Vantage Point for this survey and report.

We would like to thank the Sector Narrative Working Group of Vantage Point for supporting the survey and participating in the data party, as well as other data party participants, who helped interpret the initial results of the survey, and provide questions for the authors to consider as the full data was analyzed.

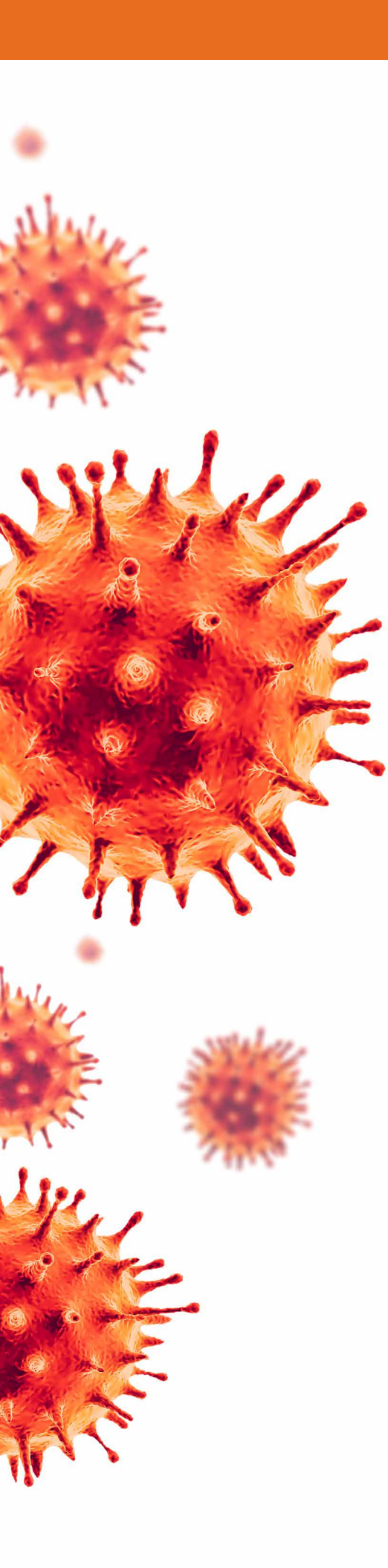
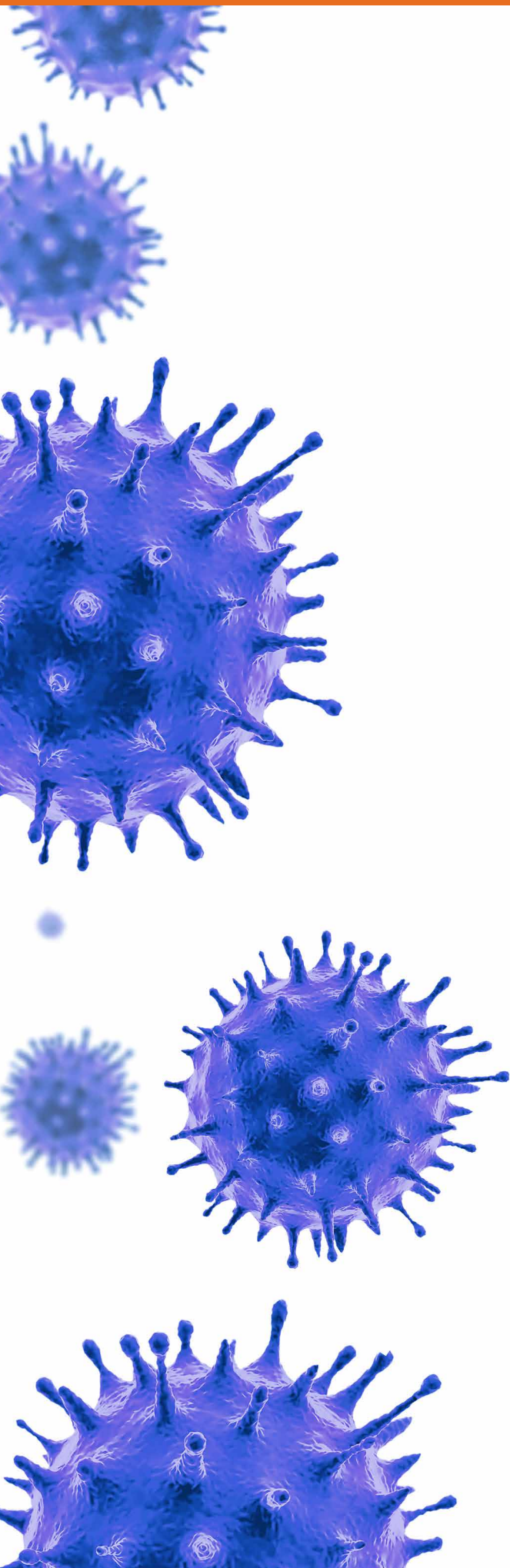


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EXECUTIVE SUMMARY

Vantage Point, Vancouver Foundation, the City of Vancouver, and Victoria Foundation conducted a survey between April 8 and April 21, 2020 to examine how nonprofit organizations across BC are being impacted by the COVID-19 pandemic. BC nonprofits and charities were invited to identify the ways in which COVID-19 is impacting their organizations, and what types of support would help them continue to serve their communities.

Impacts

Respondents indicated that nonprofit organizations in BC are facing a perfect storm of substantial and overwhelming impacts from the COVID-19 pandemic, and no organization is immune. Every respondent is being affected in some way or another no matter the size, subsector, community served, or geographical region, and the impact on unmet community needs is immense. Several equity-seeking groups are experiencing some of these impacts at a higher level than others.

A total of 1,119 respondents completed the survey which represents approximately 4.3% of all nonprofits in the province.

It is important to note that this data represents only the perspectives of the organizations that responded and **cannot be generalized to other nonprofits across the province.** In addition, half of the surveys were completed by individuals in the social services and arts and culture sector which should also be taken into consideration when interpreting the results.

95%

of respondents indicated their stress levels are either somewhat or much higher because of COVID-19.

Mission delivery and community impacts

- 78% of respondents indicated a disruption of services to clients and communities
- 52% are seeing an increased demand

Financial impacts

- 74% of respondents are experiencing reduced revenue from fundraising
- 59% are seeing reduced revenue from earned income

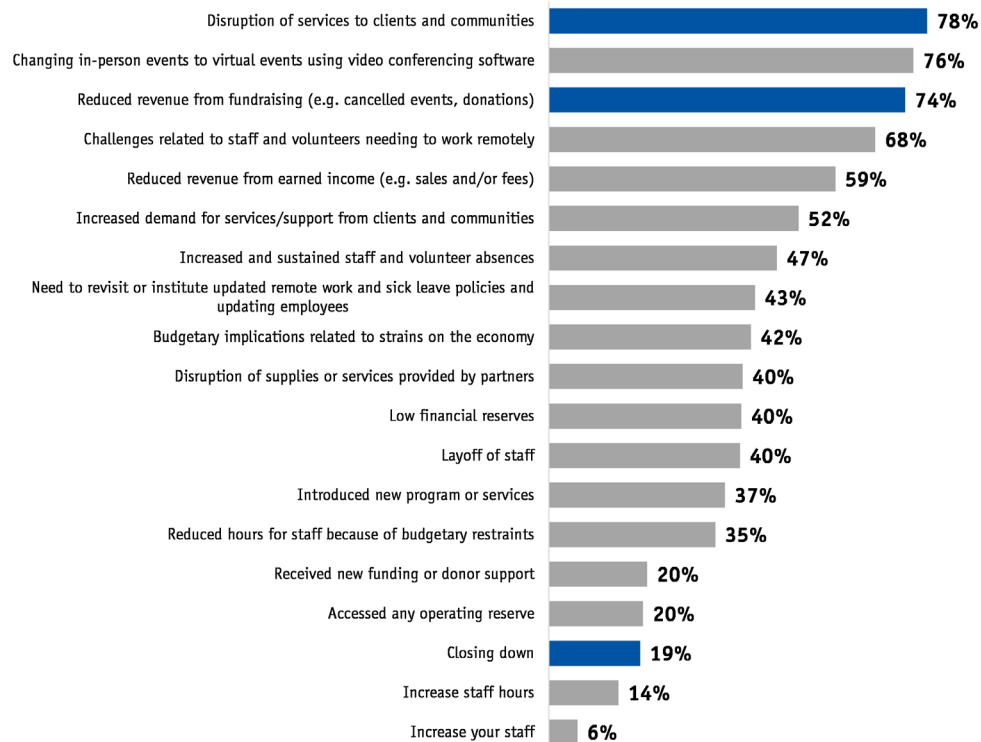
People and capacity impacts

- 68% are experiencing challenges related to staff and volunteers needing to work remotely
- 35% have reduced hours for staff because of budgetary constraints

Organizational stability impacts

- 15-19% have closed down or anticipate closing down
- 23% do not think they can stay open longer than six months
- 40% have laid off or anticipate laying off staff

Many respondents anticipate a disruption of services to clients and communities and reduced revenue from fundraising. Almost one in five have closed down or anticipate closing down.



*The n value for this question is markedly lower because it was added after the survey had already been distributed.

n=353

What we heard from the sector

“COVID-19 made our organization an essential service. That means as ED I needed to strip down my entire agency and rebuild it, after identifying if we even had the capacity to do so. We serve isolated seniors and individuals with physical and mental challenges so we needed to ensure a continuity of care for them while developing new services to support them and new members of the community. This is all while losing 150 volunteers with age and health related vulnerabilities and then developing a new virtual recruitment process for acquiring new volunteers. I worked all day, all night and all weekend for 5 weeks and turned my agency into virtual operations for the safety of my staff. They also didn't sign up for any of this.”

As a result, organizations are adapting as quickly as possible, finding ways to continue to meet the needs of the most vulnerable, moving services online, and pausing to consider how to serve their mission in a physically-distanced world.

While these organizations continue to seek ways to serve their communities, respondents report significant operational challenges under the pandemic:

- Essential service workers don't have access to personal protective equipment (PPE).
- Vulnerable clients are experiencing isolation and food insecurity.
- Many programs, events, performances, workshops, gatherings etc. have had to be cancelled or delayed.
- Shifting to more virtual work has led to unexpected costs for new technology and staff time.
- Funding opportunities have been delayed, cancelled, and/or become more unpredictable.
- Earned income opportunities have dropped off almost completely for many organizations, and fundraising more generally has dropped off.
- Organizations are stressed with rental costs for spaces they aren't working in.
- Volunteer support has dropped off.
- Layoffs are leading to extra hours being worked by remaining staff (often without funding/compensation).
- Emergency salary supports don't benefit organizations who rely on volunteers, contractors and freelancers.

Despite these challenges, respondents are fairly optimistic about their own organization's ability to recover from COVID-19, scoring an average of 7 on a scale of 1 to 10. They are less optimistic about the ability of the nonprofit sector as a whole to recover, scoring an average of 5.5 on the same scale.

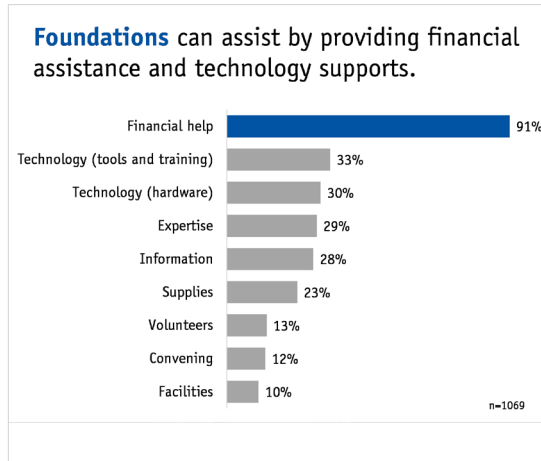
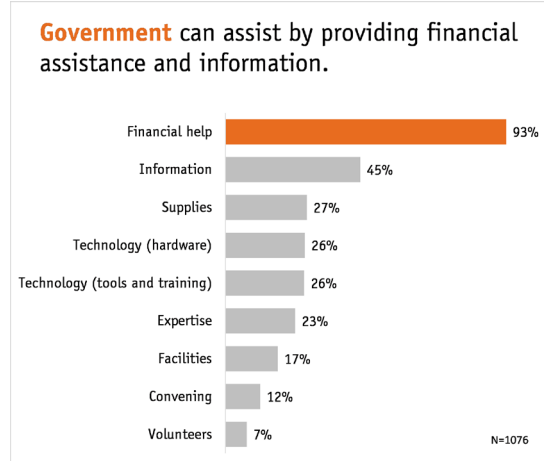
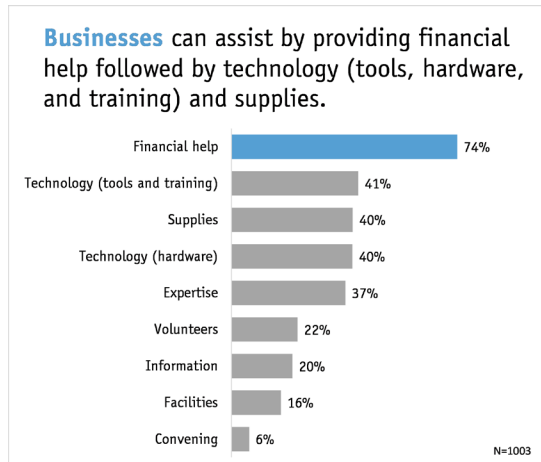
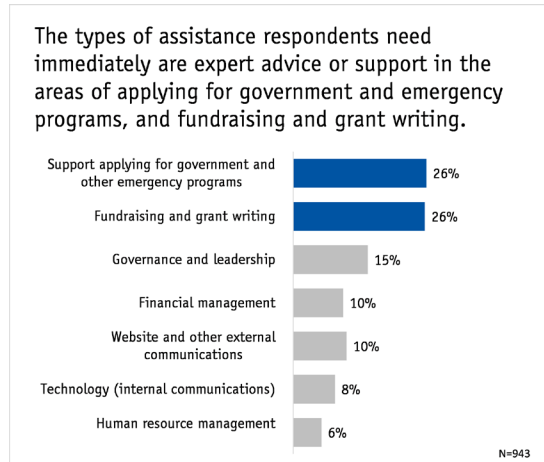
What we heard from the sector

“Every single cultural organization needs to reinvent themselves to become online organizations capable of delivering most services, content, and engagement robustly online - a kind of Culture 3.0 transformation. That requires a massive investment of capital and infrastructure, and creative capital few if any non-profits are able to afford.”

“Stress and anxiety are caused by challenges with technology, concern about whether funding will continue, concern about loss of funding, concern for clients whose connection with us is no longer as close, missing seeing colleagues in the usual ways, concerns about wanting to help others while keeping oneself and one's own family safe - how do you strike that balance?”

Supports Needed

Respondents are feeling optimistic about their ability to rise to the challenge, but they can't do it alone. They clearly indicated that foundations, government, and business can help the most by providing financial assistance. Governments can also assist in providing information, and businesses can be sources of assistance with technology (tools, hardware, and training) and supplies. Additional types of support that all three can provide include expertise, volunteering, assistance convening, and facilities.



What we heard from the sector

“

We are unable to continue operations for the time being because we can not produce shows, a significant portion of what we do. There is no money available to keep staff employed at this time.”

Immediate Supports

In terms of specific support, respondents identified more immediate needs in the areas of help with applying for government and emergency programs, and fundraising and grant writing. Other suggestions provided include:

Mission delivery and community needs

- Pay-as-you-go phones and grocery gift cards for vulnerable clients.
- Help with food storage, distribution and delivery.
- PPE for essential service workers.
- Facilitation and planning support for adapting services, strategy, and budget in the near term in a physical-distancing world.

Financial needs

- Funder stability, flexibility, and patience.
- Funding pool for bridging costs to take organizations from now to the next normal, and to kickstart when restrictions open up.
- Rent² and property tax relief, and advice on negotiating with landlords.
- Connecting organizations with each other for space-sharing opportunities for the short term.

People and capacity needs

- Expanded wage subsidies and emergency funding pools to benefit small and all-volunteer organizations, who are working with contractors, freelancers, and staff needed to replace volunteers.
- Health benefits/insurance for staff and volunteers.
- Training and pro-bono support with technology and legal/fiduciary needs.

Longer-term Supports

Survey respondents also offered solutions that would help them continue to serve their communities in the long term, as we recover from the COVID-19 crisis and build the next version of normal.

- Basic COVID kits with PPE, cleaning supplies for when offices that are currently closed to staff and the public reopen.
- Conversations about reenvisioning what's possible: for organizations and how they deliver on their missions in the "next normal", and for the nonprofit

² The Canadian government announced the Canada Emergency Commercial Rent Assistance while the survey was open.

sector more generally and how we can meet the needs of our communities after we emerge from this early stage of the pandemic.

- Funders move away from project funding. Support operation/core funding to improve organizations' stability.
- More government/nonprofit sector regional coordination and collaboration for emergency/essential services.
- Government includes nonprofits from the beginning in their benefit planning,

rather than focussing on businesses as the sole beneficiary.

- Cooperative solutions: space-sharing, technology purchasing, sharing employees among organizations (e.g. for small nonprofits).
- Universal internet access.
- Universal extended health (including dental and mental health).
- Universal basic income or guaranteed annual income.

A Call to Immediate Action

The voice of nonprofits has been loud and clear in this survey--COVID-19 is a perfect storm that has impacted all nonprofits no matter the size, subsector, or location. The economic recovery of our province depends on the nonprofit sector being able to continue balancing the space between governments and the private sector to address unmet community needs and interests. This crisis will impact the nonprofit sector and our communities significantly over the long term if tactical bridging support isn't immediately provided.

Survey respondents identified a number of calls to action. The table below does not represent an exhaustive list of what respondents are requesting nor of what supports are possible--all actors are invited to go beyond and interpret how else they may be able to support the organizations that are trying to meet the needs of our communities. Nonprofits touch the lives of everyone in some way or another in British Columbia, and there is a role for everyone to play in collectively helping them to survive these turbulent times to protect our vital community resources.

Governments	Provide clear information on government emergency supports and COVID-related precautionary measures. Provide wage subsidies and rent subsidies. Provide rent relief directly when acting as landlord to nonprofit tenants. Source and supply PPE. Increase regional emergency coordination with nonprofits providing essential services. Provide technology (tools, training and hardware). Support innovative collaboration.
Governments (as funders)	Provide financial assistance: ensure stability and timely distribution of existing funds, increase flexibility with the use of existing grants/contribution agreements, increase funding available for COVID-related expenses/bridge funding to the "next normal", including space stabilization, technology, loss of earned income, time to figure out what comes next, loss of volunteers.

Foundations and funders	Provide financial assistance: ensure stability and quick distribution of existing funds, increase flexibility with the use of existing grants/ contribution agreements, increase funding available for COVID-related expenses/bridge funding to the “next normal”, including space stabilization, technology, loss of earned income, time to figure out what comes next, loss of volunteers. Provide technology (tools, training and hardware). Provide information and support for applying for government and emergency programs. Support (through convening, expertise, and/ or funding) innovative collaboration and long term (re)visioning at the organizational and sector levels.
Businesses	Provide financial assistance. Donate technology (equipment, software, cell phones). Donate PPE and cleaning supplies. Donate refrigeration (equipment or access) and provide delivery support. Provide office space/ rent relief. Offer skilled volunteers to help with technology training (moving the cloud, virtual events, online sales, etc.).
Volunteers	For those who stopped volunteering because of COVID-related reasons, consider how or when they might be able to resume your volunteer role safely or virtually. Specific, virtual support needed includes help with applying for government and other emergency programs, help with grant writing and other fundraising, help with online marketing and communication, and help with technology training (moving the cloud, virtual events, online sales, etc.)
Donors	Maintain existing contributions. Increase contributions, especially unrestricted donations.
Nonprofit organizations	Continue to be resourceful and collaborative in finding solutions to meet unmet community needs in difficult times.
Capacity-builders, networks, and umbrella organizations	Continue to ensure the voice of their members and their unique COVID-related challenges are understood and heard by key decision-makers. Through convening and expertise, foster and support innovative collaboration and long term (re)visioning at the organizational and sector levels. Organize cooperative solutions (e.g. bulk technology purchasing, space sharing, health benefits). Training and pro bono support on technology and legal issues. Share streamlined information about COVID supports.
General public	In addition to volunteering and donating, support virtual events and fundraisers, and speak to local decision-makers about the importance of nonprofits in their own lives.

What we heard from the sector

“Due to the cancelling of most of our in-person programs and activities, we’ve had to lay-off several of our part-time staff. In addition, many of our key volunteers are finding it more difficult to assist due to social distancing rules. This has placed more burdens on the staff remaining and has significantly raised the stress levels. Admin staff are finding that reduced revenue because of a drop-off in donations has required them to be more careful with expenditures. The many new government assistance programs, while welcomed, are complex and require the staff to spend extra time researching each program as to its applicability to non-profits.”

The results of this survey present a snapshot of the current situation for the sector. However, the ground is shifting quickly under nonprofits during this unprecedented time. What is clear is these impacts have had, and will continue to have, a substantial effect on unmet needs in the community. We will need everyone to collectively help the sector adjust and thrive in the “next normal” so we can continue to meet the needs of a post-COVID-19 world.

For more information contact thevantagepoint.ca, vancouverfoundation.ca, and victoriafoundation.bc.ca.

MESSAGE FROM THE SURVEY PARTNERS

From Vantage Point

Vantage Point exists to uplift and support nonprofits across the province. We will continue to provide high quality, practical training, facilitation and consulting supports to individual nonprofits. One of our core principles is to meet nonprofits and their leaders where they are at, adapting programs and services to reflect the capacities of the organizations we serve. In addition to our direct services, Vantage Point had begun to build our work in addressing systemic issues facing the sector and the creation of opportunities for the sector to identify and articulate its own strength and value. We see ourselves as representing portions of the sector often left out of conversations - smaller organizations, volunteer-run or with small staff teams, organizations facing all the pressures of larger ones to keep admin costs down and impact up.

When COVID-19 hit, Vantage Point immediately retreated to our core purpose - to convene, connect and equip nonprofit leaders. We adapted our programs for virtual delivery, designed new ones to address COVID related challenges, and utilized a virtual platform to truly expand our reach outside the Lower Mainland. We made membership free so organizations could access GoVolunteer and articulate COVID-related needs to potential volunteers, as well as provide resources to those volunteers on how to be safe in their commitment to community. We also jumped to provide platforms for important conversations - a daily drop in for nonprofit leaders to try and make sense of the pandemic and its impacts (now weekly), a bi-weekly gathering of umbrella organizations to align services and advocacy work, and produce communications to all levels of government to highlight the unique needs of our sector. We also participated in a range of gatherings of volunteer organizations, nonprofit federations, and Imagine Canada gatherings to ensure the BC sector is aligned and leveraging all the national opportunities to advocate for ourselves effectively.

This survey has provided us with important information about what we can do next. We have heard the deep need for information and support about funding sources and opportunities and will leverage our knowledge of funders, revenue development and grant writing to support the sector. It is clear that COVID has uncovered the impact of decades of pressure to limit spending in our organizations to direct programs delivery only. The 'overhead myth' that pushes our organizations to limit investment in contingency funds, technology, employee benefits and stable governance is part of what has created the precariousness of our vital work in this challenging time.

Vantage Point's own experience reflects this challenge. Because we rely almost entirely on earned income, we immediately experienced a 30-40% drop in revenue, but that same reliance on earned income also meant that we have been able to save some money in an operating reserve, allowing us, for now, to bridge the gap. Our fellow organizations that rely on charitable dollars, government contracts, and project grants are not as lucky.

The results show us what a resilient and optimistic sector we are about our own organizations, however, not for the sector as a whole. As we recognize the digital divide that has emerged, the challenge organizations have had to transition to cloud-based home offices, rely on outdated software and hardware, and bridge the gap between the technology available and the lack of capacity of our sector to access it has become all the more evident. There is work for all of us to do in advocating for universal internet access and the development of technological solutions that serve our missions and allow us to be nimble and impactful. Clearly we look to the private sector for that kind of support and Vantage Point can contribute to advancing those opportunities for private/nonprofit partnerships.

We also hear the desire for information, to know and understand what is possible. That is the very theme of our BOSS conference, now moved to November and - at this stage - likely a combination of virtual and in-person. The theme of the conference is, “What is possible for BC if our sector is united and supported? What do we, as nonprofit leaders, need to know about systems change, advocacy and decolonization to be a dynamic, inclusive sector that contributes to positive change?”

We also hear the unique challenges of our arts and culture, and sports and recreational subsectors. Arts and culture are central to our recovery, especially those organizations designed to uplift the voices of marginalized communities! Sports and recreation organizations are central in keeping all of us healthy and active, with opportunities to gather with our own communities and chosen families to play. Festivals, tournaments, events and arts groups are designed to showcase and celebrate the lives of all British Columbians and without them we can easily slide into assumptions about our homogeneity. Vantage Point will continue to work with umbrella organizations like the BC Alliance for Arts and Culture to align our advocacy work to ensure the full scope of our sector is understood and visible to decision-makers in the province.

Finally, Vantage Point will reflect on and seek solutions to the challenges equity-seeking communities and organizations have in participating fully in surveys like this. We will strive to make the needs of our most vulnerable organizations central to the dialogue and conversation. While surveys like this one can tell a story, we must always be awake to the stories that fall through the cracks, listening to the call for meaningful inclusion of organizations supporting people with disabilities, Indigenous voices, LGBTQ2+ British Columbians, refugees and newcomers to Canada, and those marginalized by income inequality.

Thank you to everyone who was able to participate, and a call of compassion and commitment to those who were not able to. We look forward to continuing our support of the sector in all of its diversity.

Joint Funders Statement from Vancouver Foundation and Victoria Foundation

Vancouver Foundation and Victoria Foundation are pleased to partner with Vantage Point on No Immunity, An Early Impact Summary Report based on a survey of British Columbia's nonprofits in the wake of the COVID-19 pandemic.

Since the public health impacts of COVID-19 were first felt, the Foundations have worked together with nonprofits to understand urgent community needs. In response, we have contributed from our reserves and have mobilized millions of dollars from thousands of donors to provide rapid relief grants to the frontline agencies battling the effects of this pandemic. Many nonprofits have been called upon to increase their community-based support for our most vulnerable residents, who have been disproportionately impacted by this crisis. These organizations are working tirelessly to meet these challenges head on, to deliver food, secure safe housing, offer virtual counseling, provide childcare for essential workers and much more.

The nonprofit sector, also known as civil society, is vital to British Columbia's social as well as economic well-being. The 2018 Civil Society Impact Report quantified and underscored the sector's economic contributions and highlighted how nonprofit organizations are diverse and woven into the fabric of our daily lives.² We all interact with civil society every day, through arts, culture and environmental programs, schools and places of worship, health and social services and more. Our province's ability to fully recover from the impacts of the pandemic will require significant and focused investments in all areas, especially our civil society.

Just as COVID-19 is affecting all citizens, the No Immunity report provides direct evidence of how this crisis is impacting all nonprofit organizations. The findings reveal the extent of the precarity of the civil society sector overall, and comes at a critical time as the sector, together with funders, governments at all levels, and donors and volunteers, begin to chart a course for renewal and consider what contribution each of us will make to ensure nonprofits and charities are positioned to thrive in the next normal and beyond.

Vancouver Foundation and Victoria Foundation will use the information in this report to shape our short term planning as well as long term thinking. As nonprofits ourselves, we are committed to working alongside civil society to develop strategies to support the recovery as well as the resilience of the sector more broadly. We recognize an opportunity to leverage our collective strengths and confront challenges together, to emerge stronger and more resilient in the post-COVID 19 world.

² See Victoria Foundation and University of Victoria's Civil Society Impact Report (2018): https://victoriafoundation.bc.ca/wp-content/uploads/2018/11/21204-Charity-Impact-Report-FINAL_Low-res2.pdf

ABOUT THE BC NONPROFIT SECTOR

British Columbia's nonprofit sector is vast in size, scope, and impact. It makes a significant and meaningful impact on the economy and lives of people across British Columbia. BC has more than 25,000 nonprofit societies.³

The nonprofit sector is diverse and includes areas such as agricultural, artistic, benevolent, charitable, educational, environmental, patriotic, philanthropic, political, professional, recreational, religious, scientific, social and sport.

The nonprofit sector contributes \$6.4 billion to BC's GDP⁴ and employs 86,000⁵ people across the province.⁶ 74% of the people employed in the nonprofit sector are women.⁷ Average salaries are 13.8% less than the provincial average.⁸

Sixty-two percent of British Columbians volunteer their time and talents to strengthen their communities.⁹ This is the equivalent of 146,711 full-time jobs¹⁰ and an economic value of \$6 billion.¹¹

Nonprofits vary widely in size from small community-based and volunteer-run organizations to large-scale agencies. One third of nonprofits operate on less than \$30,000 in revenue, and 11% have over \$1 million in revenue.¹²

Eighty-three percent of BC charities participate in earned revenue activities and generate more than one-third of their own revenue through the sale of goods and services, membership fees, and investment income.¹³

3 BC Registry Services, Dec. 31, 2019.

4 Statistics Canada. (2019). Table 36-10-0614-01: *Gross domestic product (GDP) and income of nonprofit institutions by activity* (x 1,000,000). Retrieved from <https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3610061401&pickMembers%5B0%5D=1.11&pickMembers%5B1%5D=3.1&pickMembers%5B2%5D=4.2>

Government of BC. (2019). *B.C. GDP by industry dollars 2007-2016 current*. Retrieved from <https://www2.gov.bc.ca/gov/content/data/statistics/economy/bc-economic-accounts-gdp>

Statistics Canada. Table 36-10-0452-01 *Culture and sport indicators by domain and sub-domain, by province and territory, product perspective* (x 1,000). Retrieved from <https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3610045201&pickMembers%5B0%5D=1.11&pickMembers%5B1%5D=2.1>

5 Excludes hospitals, colleges, and universities.

6 Statistics Canada. (2017). Table 36-10-0617-01 *Employment in nonprofit institutions by sub-sector* (x 1,000). Retrieved from <https://www150.statcan.gc.ca/t1/tbl1/en/cv.action?pid=3610061701#timeframe>

7 Ference Weicker & Co. (2014). *Characteristics of the labour market in British Columbia's nonprofit sector*. Vancouver, BC: Ference Weicker & Co.

8 Statistics Canada. (2017). Table 36-10-0613-01 *Production, income and outlay accounts of nonprofit institutions* (x 1,000,000). Retrieved from <https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3610061301>

Statistics Canada. (2017). Table 36-10-0617-01 *Employment in nonprofit institutions by sub-sector* (x 1,000). Retrieved from <https://www150.statcan.gc.ca/t1/tbl1/en/cv.action?pid=3610061701#timeframe>

Statistics Canada. (2019). *The Daily - Nonprofit institutions and volunteering: Economic contribution, 2007 to 2017*. Retrieved from <https://www150.statcan.gc.ca/n1/daily-quotidien/190305/dq190305a-eng.htm>

Statistics Canada. (2017). Table 11-10-0239-01 *Income of individuals by age group, sex and income source, Canada, provinces and selected census metropolitan areas*. Retrieved from <https://doi.org/10.25318/1110023901-eng>

9 Vancouver Foundation. (2019). *Vital signs 2019*. Vancouver, BC: Vancouver Foundation. Retrieved from <https://www.vancouverfoundation.ca/our-work/initiatives/vital-signs>

10 Statistics Canada. Table 45-10-0012-01 *Volunteer rate and average annual volunteer hours, by age group*. Retrieved from <https://doi.org/10.25318/4510001201-eng>

11 Statistics Canada. (2013). Table 36-10-0618-01: *Economic value of volunteering activity* (x 1,000,000). Retrieved from <https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3610061801&pickMembers%5B0%5D=1.11>

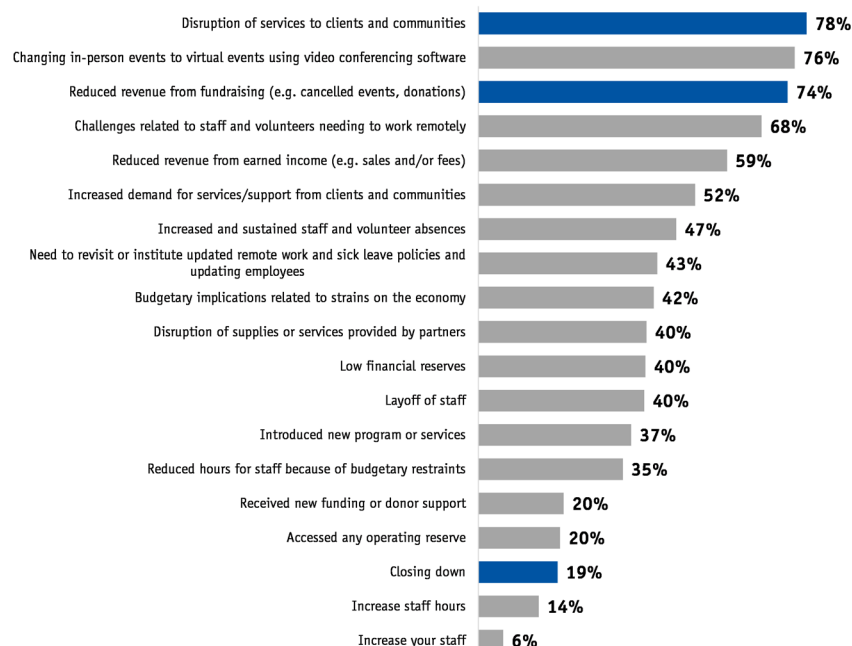
12 Ference Weicker & Co. (2014). *Characteristics of the labour market in British Columbia's nonprofit sector*. Vancouver, BC: Ference Weicker & Co.

13 Statistics Canada. (2019). Table 36-10-0613-01 *Production, income and outlay accounts of nonprofit institutions* (x 1,000,000). Retrieved from <https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3610061301>

IMPACTS OF COVID-19 ON THE BC NONPROFIT SECTOR

Survey respondents are experiencing significant challenges across the board as a result of COVID-19 no matter their size, subsector, or geographical location.

Many respondents anticipate a disruption of services to clients and communities and reduced revenue from fundraising. Almost one in five have closed down or anticipate closing down.



*The n value for this question is markedly lower because it was added after the survey had already been distributed.

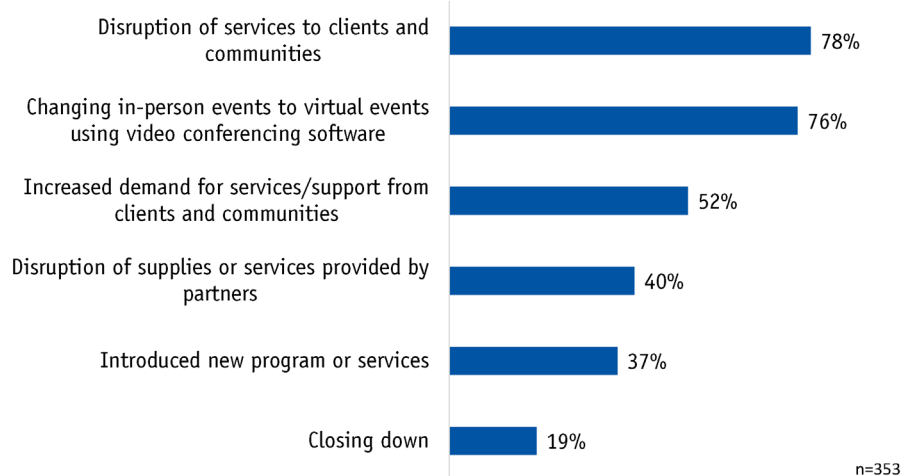
n=353

Mission Delivery and Community Impacts

While these organizations continue to seek ways to continue to support their communities in rapidly changing circumstances, there are significant challenges being encountered:

- Essential service workers don't have access to personal protective equipment (PPE).
- Communicating with vulnerable community members is harder because of lack of home internet/closed libraries and fewer in-person interactions because of physical distancing.
- Vulnerable clients have less access to food, previously provided in-person, and organizations are struggling with the logistics (funding/supply chain/delivery) of food.
- Many services don't work well virtually. Many programs, events, performances, workshops, gatherings etc. have been cancelled or paused.

Respondents are being affected in the areas of **Mission Delivery and Community Impacts.**



Mission delivery challenges are impacting organizations differently.

- Social services (86%) are seeing the most disruptions of services to clients and communities compared to other subsectors, followed by health (83%).
- 78% of respondents indicated a disruption of services to clients and communities. Respondents serving women (100%) and people with disabilities are experiencing the greatest disruption (93%), followed by families (88%) and youth (84%).
- Respondents seeing the greatest increase in demand for services are social service organizations (77%). In terms of primary community served, the greatest increase is in respondents serving people living in poverty (75%) and families (72%).
- 76% of respondents cited impacts from changing in-person events to virtual, with respondents serving women (92%) and people with disabilities (86%) impacted the most.

Needed now

Suggestions provided by respondents include:

- Pay-as-you-go phones and credit (or other connectivity solutions) to connect vulnerable clients with services.
- Funding food for clients if no longer offered at in-person programming (food hampers, or grocery gift cards).
- Food storage, distribution and delivery (funding, donations, or redeployment of for-profit food industry).
- PPE for organizations whose services have been deemed essential.

- Facilitation and planning support for adapting services, strategy, and budget in the near term in a physical-distancing world.
- Funding to bridge “pausing” costs in the near term.

Possibilities for the next normal

Suggestions provided by respondents include:

- Basic COVID kits with PPE, cleaning supplies for when offices that are currently closed to staff and the public reopen.
- Conversations about reenvisioning what’s possible: at the organization and sector level; opportunities for creative discussion and collaboration; how to serve mission differently as physical distancing requirements come and go (especially for arts, culture, and recreation organizations).
- Funders include food as an essential part of programming/service, rather than an add-on to in-person programming.
- More government/nonprofit sector regional coordination and collaboration for emergency/essential services.
- Universal internet access.
- Universal basic income or guaranteed annual income so that members of our community can access housing and food security.

What we heard from the sector

- *We are offering our services remotely so through phone and Internet. This doesn’t apply to all our clients as we work with many homeless and low income clients who may not have access to a phone or Internet.*
- *[We need] to upgrade broadband speeds across BC (especially the north).*
- *Our project is based on in person meetings and regional convergences. Most of our members do not have phone or internet access due to libraries etc closing.*
- *[We could use] donations for delivery of services, gift cards for clients for food, donations of phones/tablets/computers, volunteers for food delivery/shopping.*
- *Our members are required to be out in the community to provide our services and there is concern over exposure.*
- *We’re three weeks in and every piece of PPE and our meals have been through our own privately sourced donors, we have not received anything from government who keep saying they’re supporting us. As of April 8, 2020 we have not received support, neither financial nor physical goods.*
- *Staff are responding to clients at high risk of domestic violence or who have experienced sexual assault which is far more challenging when done from a distance. Risk assessment and safety planning is made more difficult and worry for client’s safety has increased.*
- *We were not prepared to adapt our work to online at all! And online family support doesn’t really work very well. Our services are best and very helpful when we work face to face with families.*

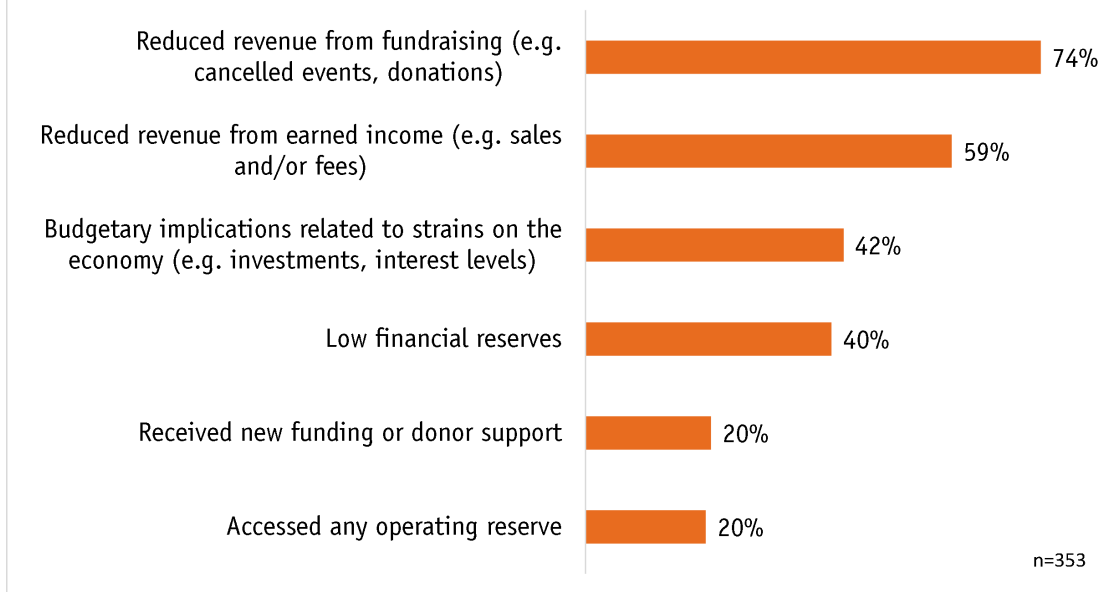
- *For our programming we are open, but have moved almost everything virtual. Our social enterprises, however, are not able to operate.*
- *Exhibitions & events cancelled or postponed, working on other ways to engage to maintain interest and relevancy.*
- *[We would like] increased supports for the families we work with - ie a Universal Annual Income. We could use help in our moves to deliver our services online. This includes support with technology (tools, equipment, training, hardware) curriculum development and promotion.*
- *We run outdoor rec programs for youth, very hard with the current guidelines.*
- *We're operating in a much reduced capacity, holding on hopes that we can still produce our festival [later this summer]. Staff on CERB are volunteering their time where possible.*
- *We are spending a huge amount of time and energy pivoting current commitments and looking for new opportunities to move our mission forward.*
- *We have had to pivot and operate differently. Not all the changes are bad and our Elders phoning network has been such a success we might keep it after all this is over.*
- *[We could benefit from] meeting and brainstorming about how we can invent new structures that would help the dance community survive.*
- *Facilitate opportunities to bring us together to collaborate on planning beyond the current shutdown period—proactive planning for the future that focuses on collaboration.*

Financial Impacts

While many organizations are accessing COVID-related funding opportunities, they are experiencing unique challenges with funding, revenues, and expenses:

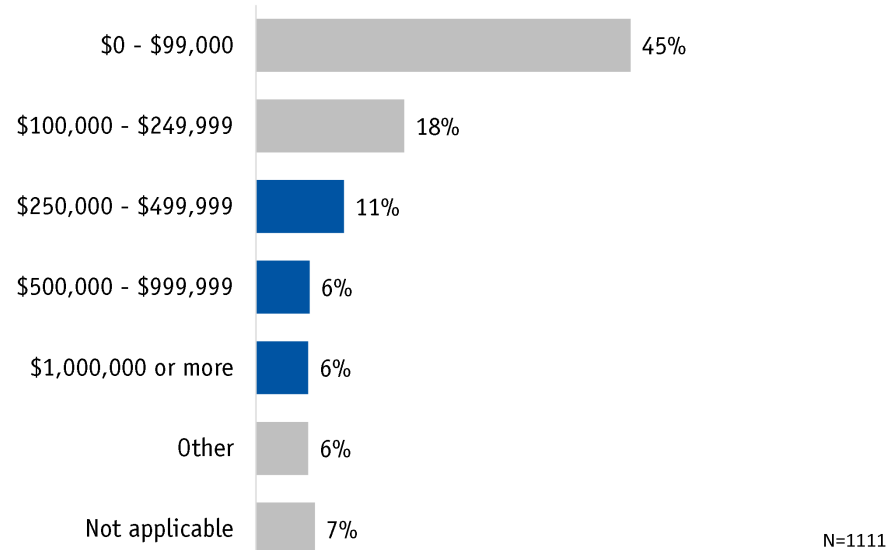
- Shifting to more virtual work has led to unexpected costs for new technology and staff time.
- Funders are acting unpredictably. Regular funding opportunities have been cancelled, money has been shifted to COVID-related needs, and previously planned decisions have been delayed. There is uncertainty about longer-term changes in funder priorities.
- Earned income opportunities have dropped off almost completely for many organizations. Tickets sales and sponsorship revenue are gone, impacting the ability to afford to retain rental space.
- Fundraising has dropped off.
- Emergency financial supports do not benefit small organizations who rely on volunteers, contractors and freelancers.
- Organizations are feeling rent stress. For renters, a sense of security depends heavily on the landlord - some are reducing/waiving rent, but others are open to negotiations. Those with leases are stressed about being locked in. Those dependent on another organization for space have had to respond based on their hosts requirements. Some are in the middle of seeking/negotiating new space, and are unsure how to proceed.

Respondents are being affected in the areas of **Financial Impacts.**

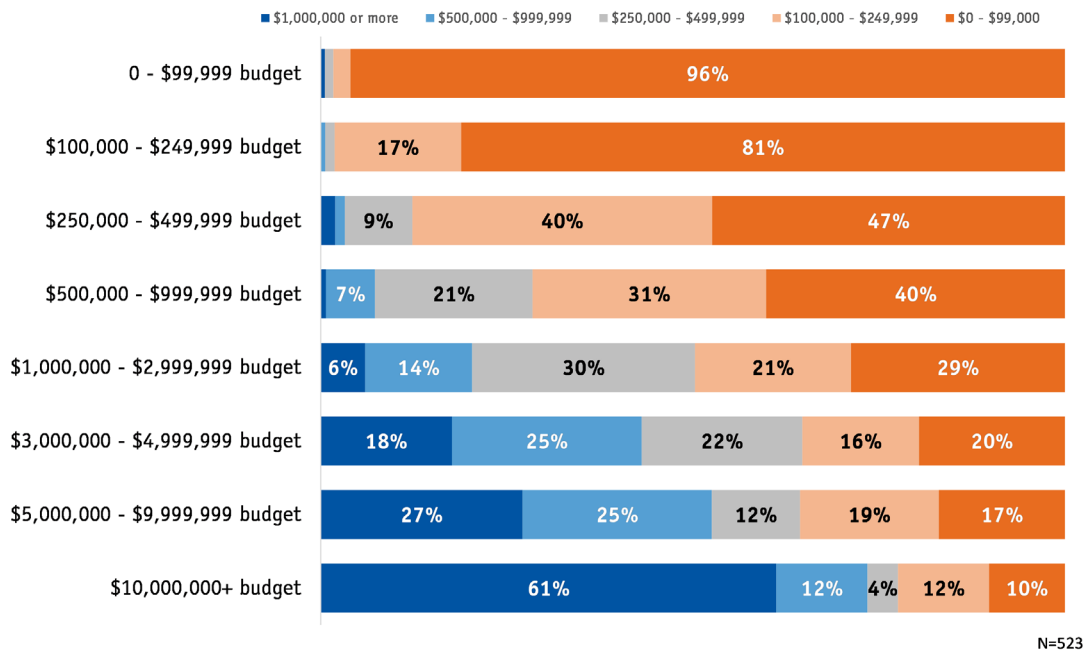


- Almost half of all respondents are concerned about low operating reserves and the laying off of staff. One in five respondents have accessed their operating reserves already, and almost the same proportion have, or anticipate, closing down.
- One in five social service and health organizations had already accessed some of their operating reserve. Organizations serving people living in poverty, indigenous populations, and seniors are the most impacted with low reserves.
- Arts and culture organizations are the most concerned about reduced revenue from fundraising from donors, cancelled events, from earned income (e.g. sales and/or fees).
- Respondents serving people with disabilities (86%), women (83%), and seniors (82%) have been hit the hardest with seeing reduced fundraising revenue.
- Half of respondents in the Vancouver Coastal Health region anticipate losing revenue, compared to one-quarter on Vancouver Island.

Almost one-quarter anticipate losing more than \$250,000 in revenue in 2020.



Respondents of all sized-organizations anticipate losing revenue in 2020.



Needed now

Suggestions provided by respondents include:

- Funder stability. Keep continuity of existing funding streams. Honour existing commitments.
- Funder flexibility and patience. Let existing funding be used beyond its original purpose. Let funds go towards transitions instead of program delivery. Don't claw back funds for services that can't be immediately provided. Forgive reports that come in late/differently.
- Funding pool for bridging costs - space stabilization, technology, loss of earned income, time to figure out what comes next, loss of volunteers, food for clients, PPE.
- Rent relief - through rent subsidy programs or directly from government/nonprofit landlords.¹⁴
- Property tax relief.
- Connecting organizations with each other for space-sharing opportunities for the short term.
- Advice on negotiating with landlords and how to break leases.
- Advice on how to get relief from ongoing costs that organizations aren't currently benefiting from (some insurances, dental benefits, health premiums, photocopier leases).
- Expanded wage subsidies and emergency funding pools to benefit small and all-volunteer organizations, who are working with contractors, freelancers, and staff needed to replace volunteers.
- Banking alternatives to in-person deposits and cheque signing.

Possibilities for the next normal

Suggestions provided by respondents include:

- Funders move away from project funding and support operation/core funding.
- Financial/fund development planning for organizations who may lose COVID-related funding. Some services may be funded better in this moment, and those organizations' finances may be precarious when things settle to a new normal.
- An intentional pool of funding for kickstarting, restarting when physical distancing requirements are reduced (e.g. for re-hiring).
- Support co-location/space-sharing if demand for office space decreases as many workers remain working remotely.
- Bulk/co-operative purchasing of technology and services.
- Government includes nonprofits from the beginning in their benefit planning, rather than focussing on businesses as the sole beneficiary.

¹⁴ The Canadian government announced the Canada Emergency Commercial Rent Assistance while the survey was open and it is unclear how many organizations will be able to benefit.

What we heard from the sector

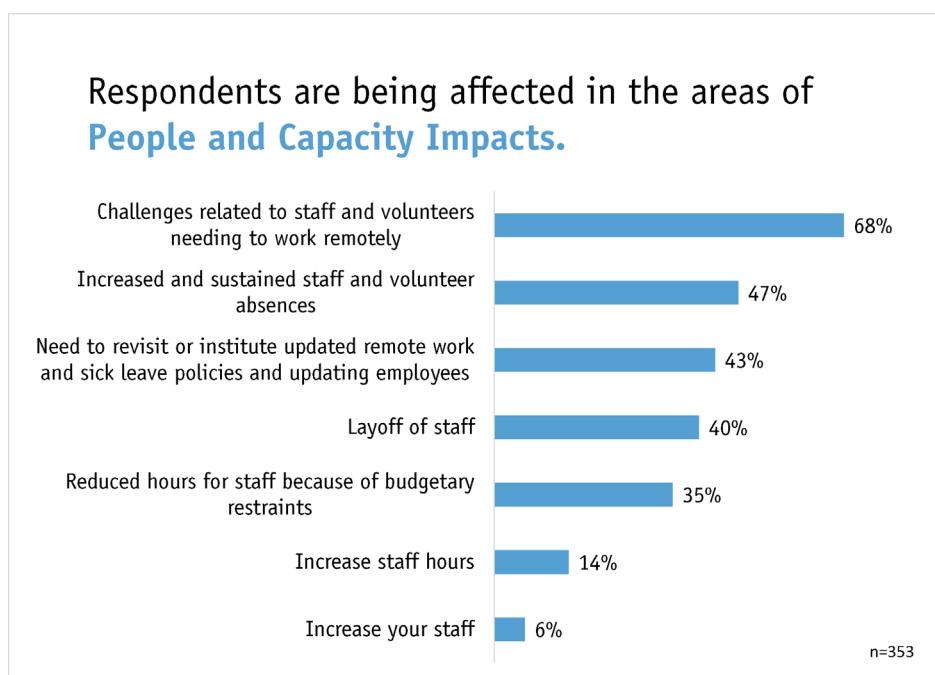
- *Revenues will hopefully not change; costs have increased. We have purchased technology and security equipment for staff and clients to facilitate remote access to services.*
- *We would like governments to be more realistic when it comes to funding, e.g. our training is now online instead at [our location] where the clients were fed. As a result the feds cut the funding for food ("they can eat at home") and so now we are sending out food hampers.*
- *Our funders have withheld or outright cancelled funding because we cannot meet in groups at *this* moment. This means our services have shut down and we cannot pay our rent.*
- *We are lucky enough to have a 5-yr contribution agreement. Our funder has confirmed no clawbacks are being considered at this time.*
- *Funders who have told us that we have two more years of funding are now telling us that our funding "may" be cut.*
- *Various project funders have their project adjudication on hold.*
- *Delaying final reports that are due to funders has helped very much. Simplifying access to program funding that was due to renew was also a great relief.*
- *[We need] longer-term funding initiatives that will support non-profits in reorienting their operations post-crisis; we'll need new operating models, new business plans, new approaches to fund development.*
- *A lack of core/flexible funding is most likely to tip our organisation over the edge. We are capable of altering our organization and projects to adapt to the new reality, but we cannot afford to pay our workers to make the necessary adaptations.*
- *We are hearing from regular donors and supporters that they can't continue to support us right now, because they have diverted all their funding to urgent needs.*
- *All depends on what operating funding will look like in 2021. We cannot survive if we do not have secured operating funds, as we have lost MOST to ALL of our earned revenue.*
- *We will lose revenue from our largest fundraiser which is essential to our operations.*
- *We specifically run a festival and live events as our primary source of income, all of which are cancelled this season and for likely 12-18 months.*
- *We don't have budget for employees, we are contract-based so that means we can't issue many of our contracts we were supposed to because so many presentations have been cancelled.*
- *[We have] ongoing operating costs continue despite interruption/cessation of services. Assistance with ongoing operational costs would be helpful. Ongoing operational costs include: group benefits, rent, utilities, wages, service provider retainers, taxes, maintenance and cleaning services, subscription fees, membership fees, website and domain hosting fees, remote working related costs.*
- *Our landlord has very kindly given us a 50% discount on our rent.*

- *We have asked our landlord for a break on rent but been flatly denied.*
- *We were in the middle of negotiation for a increase in the lease... all of it is now adding more stress due to the lack of revenues we are facing now and in the future.*
- *Our lease is in a building owned by the City of Vancouver. Rent relief would help.*
- *[One solution is] co-sharing office space for not-for-profits/NGO's in one building, [which] has the potential to reduce overall operating costs and provides an environment that is conducive for collective creativity and collaboration.*

People and Capacity Impacts

Respondents are concerned for their staff and volunteers, and are facing increased demands on the capacity of their people:

- Essential services workers don't have access to PPE.
- Volunteers have dropped off or have been let go for safety concerns. The ones who remain are at risk.
- Layoffs. Responses indicate that a 9% drop in current employment levels may occur between April and June 2020. The people who remain are often working extra hours (often without funding/compensation).
- Organizations are spending time and staff costs moving work and services online.
- Staff are stressed due to home life, family care responsibilities, job security, and existing health challenges.

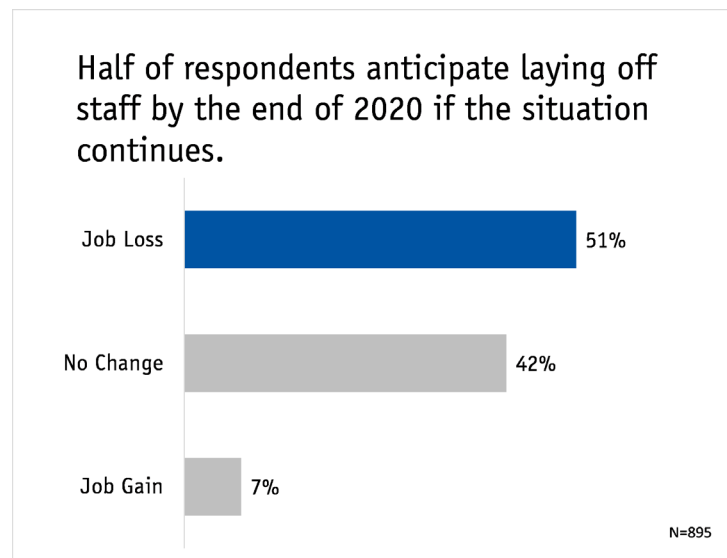


- Respondents serving women (100%) and youth (84%) in particular are the most impacted by challenges related to staff and volunteers needing to work remotely (vs 68% for all organizations). Among subsectors, arts and culture organizations (79%), followed by social services (77%), are struggling the most with this challenge.

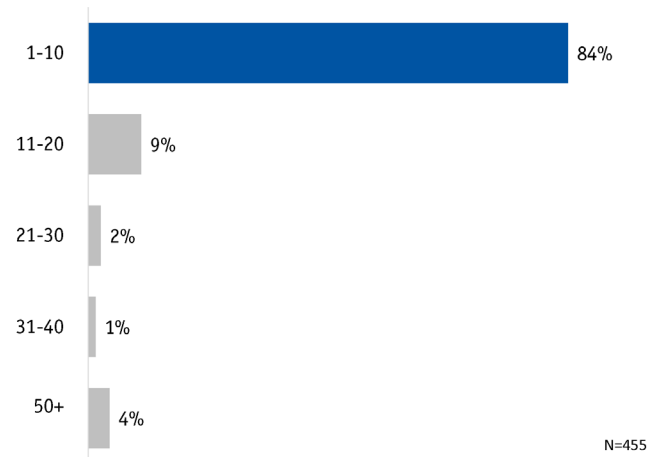
Job losses

Half of respondents anticipate laying off staff by the end of June 2020 if the situation continues as present. For those who do anticipate laying off staff, this represents a 9% drop in their current employment levels, equivalent to 3,783 FTE jobs lost or an average of nine FTE positions per respondent (range 0.25 to 225, median 3). Most of the job losses are expected to be in the range of one to ten positions per organization.

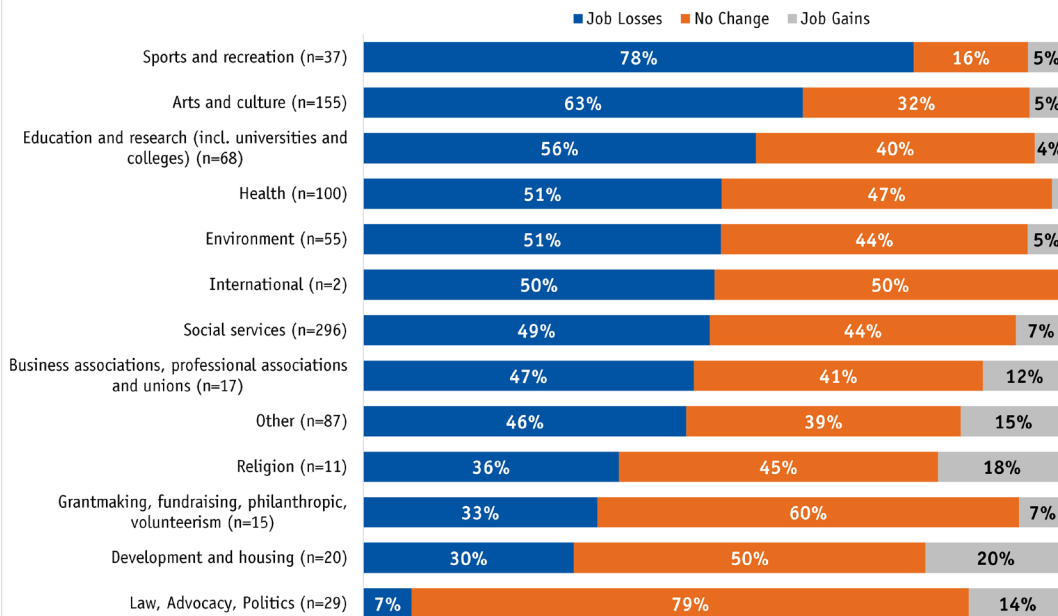
- The organizations expecting job losses are more likely in the sports and recreation and arts and culture subsectors, and respondents serving children and families.
- However, there are substantial losses across all primary groups served.
- Respondents with both small and large organizational budgets will experience job losses, and the most will be seen in the Vancouver Coastal health region.



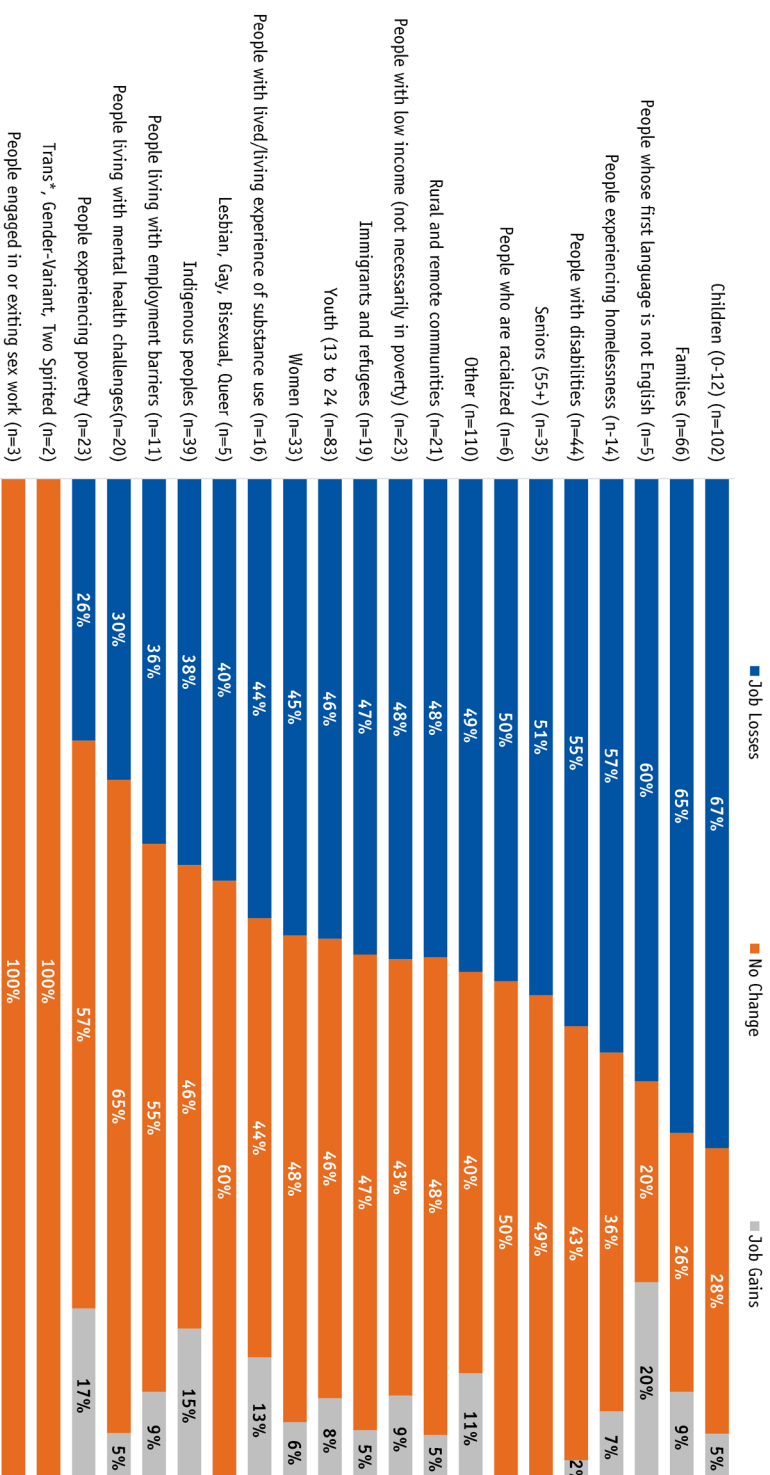
Most anticipated job losses will be between one and ten FTE staff per organization.



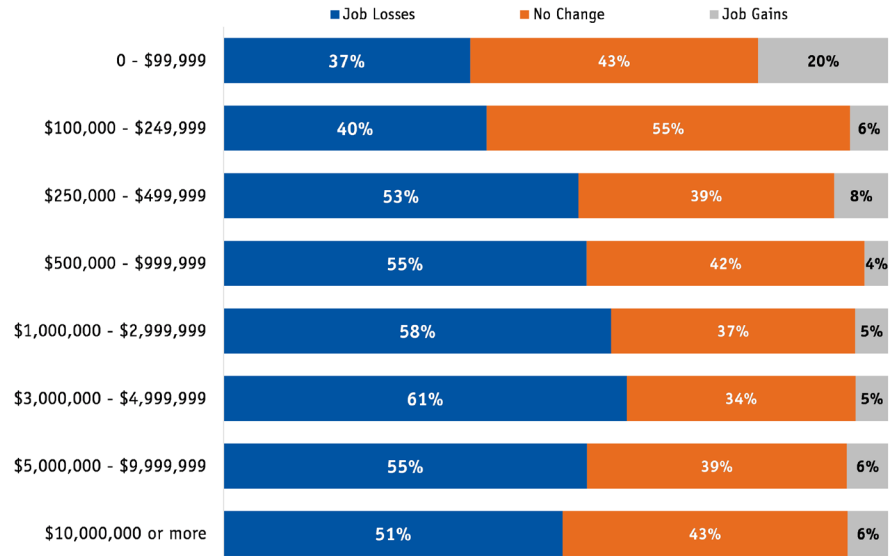
Respondents are facing significant anticipated job losses. The largest are in the sports and recreation, and arts and culture subsectors.



Respondents serving children and families anticipate the largest job losses, but there are substantial impacts across all primary groups.

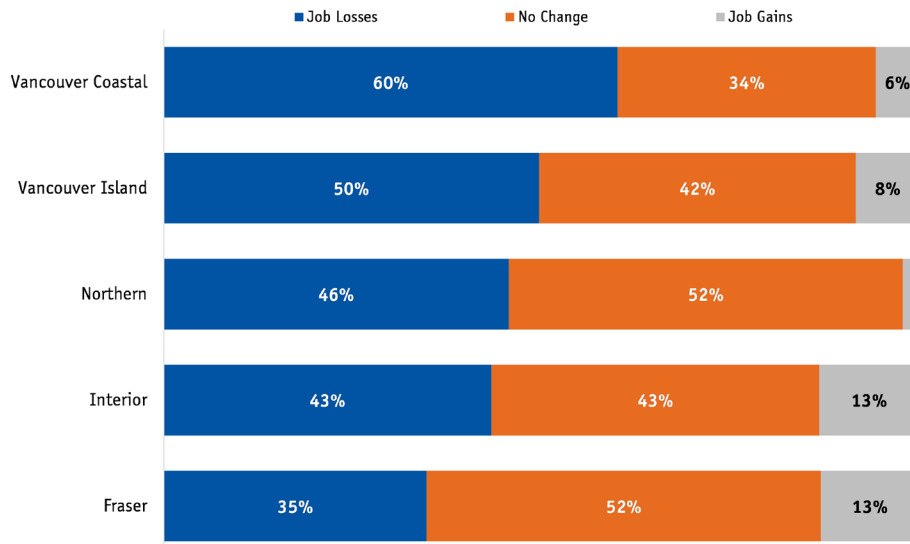


Respondents with both large and small organizational budgets will experience job losses.



N=879

Respondents serving the Vancouver Coastal Health Region will experience the most job losses.



N=655

Needed now

Suggestions provided by respondents include:

- Health benefits/insurance for staff and volunteers.
- Mediation/counselling to support healthy relationships between staff and board, or among staff, when times are tense.
- Wage subsidies, especially to support those with a loss of volunteers or who rely on contractors and freelancers.
- Technology training and referrals to pro-bono support: moving programs and services online, online marketing, virtual AGMs, online events, shifting to the cloud.
- Fiduciary training and referrals to pro-bono support: legal/fiduciary impacts of COVID, volunteers and risk, mergers and acquisitions.
- Accurate, up-to-date, streamlined, simplified information about government supports, funding opportunities, training, and other opportunities.
- Support applying for COVID-related opportunities for small nonprofits.
- Success stories and inspiration.
- Network building so that leaders have 1) trusted sources of local information and support 2) a trusted group of fellow leaders (e.g. via email list, in-person gatherings) to ask and answer questions in real time.

Possibilities for the next normal

Suggestions provided by respondents include:

- Even stronger networks among nonprofit organization leaders in order to request and offer support and ideas in real time.
- Cooperative employment/deployment of contractors and freelancers working for small nonprofits that don't have capacity for payroll.
- Universal extended health (including dental and mental health), offered by the government or through a cooperative model.
- Exploration of what insurance and risk will look like as COVID comes and goes.

What we heard from the sector

- *[We're concerned with] volunteers putting themselves at risk to serve the most vulnerable.*
- *We had to dismiss 800 volunteers, and staff take on all roles.*
- *We have lost 90% of our staff.*
- *It was important our staff be okay. The CEWS [Canada Emergency Wage Subsidy] will help prolong how long we can support them, and also to prevent further layoffs.*
- *Ensure access to wage subsidy is available to all non-profit organizations so we can keep employees.*

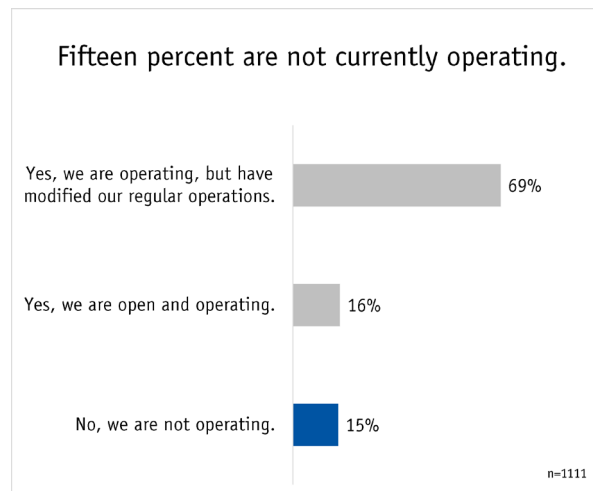
- *[We have] extra work-load and learning curves creating alternative digital content all whilst completing usual spring grant-writing.*
- *Uncertainty around funding, loss of fundraising, team moral and layoff threats are significant. Leadership burnout is a major concern.*
- *[This situation has resulted in] a divided board and some less than kind comments.*
- *Our sector lags behind due to lack of funding/investment in technology, talent, and other supports (digital marketing, data management, etc.). My organization will survive only if we can convert from in-person service delivery to online service delivery. I don't have/can't afford to engage people who have the expertise I need.*
- *We need Human Resources help and expertise. We are having to hire extensively, virtually and train virtually. Expertise and additional help with this work would be great.*
- *Webinars! Staff are hungry for information and training right now.*
- *We are having transparent discussions, and trying to be gentle, simple and take the time we need. Mental health is top priority.*
- *[We need] insurance or health benefits to volunteers or staff that contract the virus while in the line of duty. We will not send our volunteers out because insurance fails to cover them.*
- *Establish "group" services to give access to benefit programs, payroll systems, HR advice, corporate and director insurance plans, retirement savings plans and other resources that are too expensive or impossible to have in-house but are critical to operations.*
- *Streamline communication. We feel inundated with emails [and] for an organization of our size, we only have energy and time to focus on innovation that will allow us to continue to roll out programming as best we can.*
- *Up to date information on how other arts orgs are responding to the situation. That way we don't have to keep reinventing the wheel when one arts org comes up with a good solution.*
- *How can Vantage Point support the exploration / matching of organizations for a potential merger?*
- *Insurance - business continuity coverage; volunteer coverage during a pandemic; levels of checking on buildings that are vacant, etc.*
- *[Would like help] connecting us to network of non-profits.*
- *We are deeply impressed by how many authorities, at so many levels, have stepped up to help, to support, to re-distribute, and to allow flexibility -- and we are very grateful.*

Organizational Stability

In addition to, or perhaps due to impacts on mission, finances, and people, many organizations are facing organizational instability.

Operating status

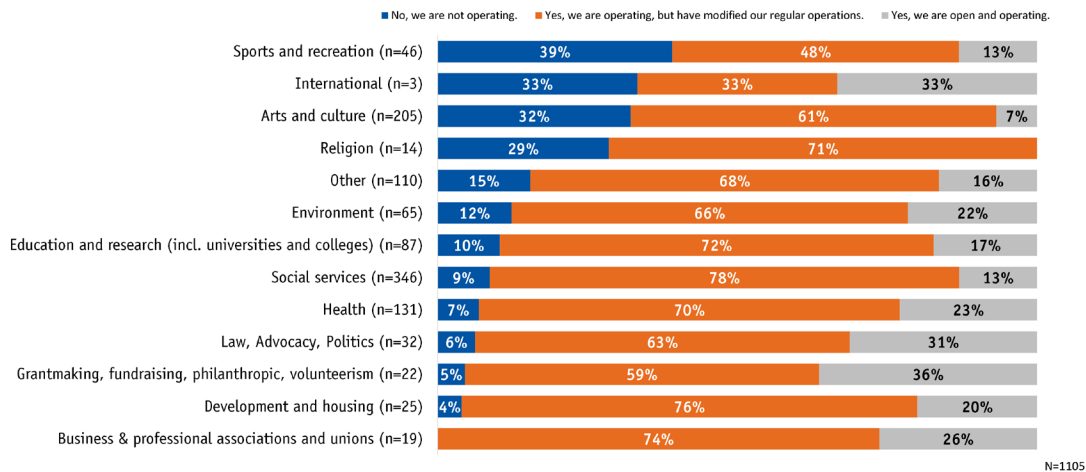
Fifteen percent of respondents are currently not operating. More respondents from sports and recreation (39%), arts and culture (32%), and religious organizations (29%) are not operating currently. A substantial proportion of respondents serving vulnerable populations are also not operating. This impact is not limited to smaller organizations but affects ones of all sized organizational budgets.



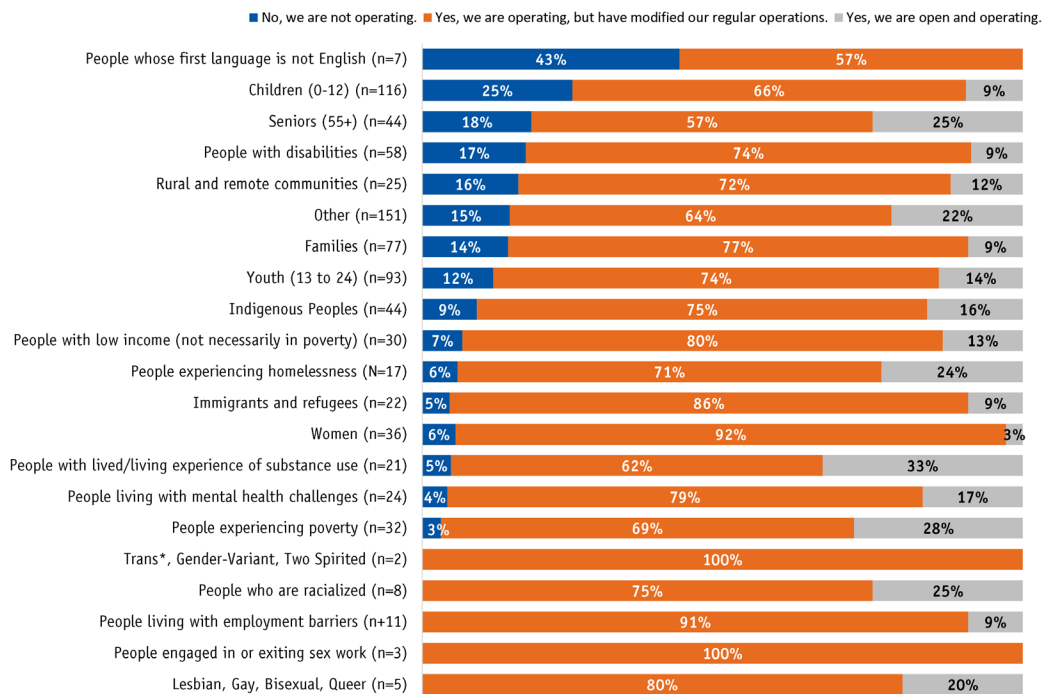
Nonprofit organizations are responding to these challenges in a variety of ways, often based on whether their work has been deemed an essential service, and whether their work can be done with physical distance or virtually.

- Many organizations are closed to the public and have shifted to staff working from home.
- Offerings such as performances, classes, and public events have been cancelled, put on hold, or, when possible, offered virtually.
- Some have minimized their operations and are only operating with a skeleton crew.
- Essential services, often organizations serving vulnerable populations, are continuing to operate and are trying to find ways to keep staff, volunteers, and clients safe and healthy.

More respondents from sports and recreation, arts and culture, and religious organizations have closed their doors either temporarily or permanently.

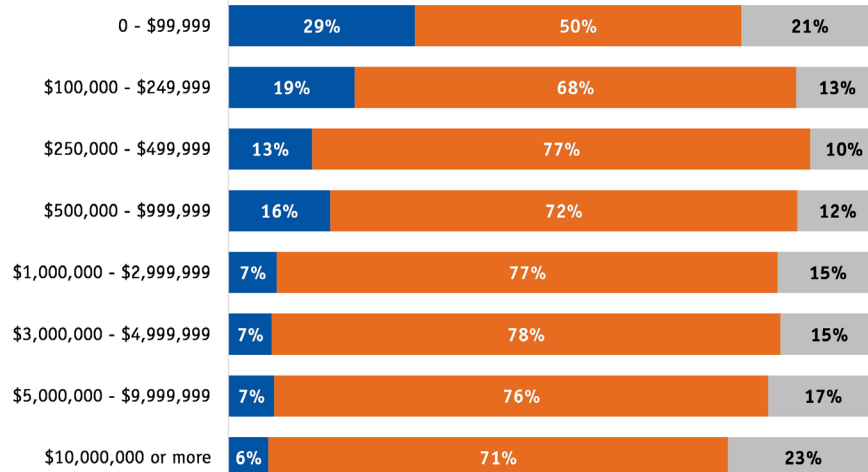


A noticeable proportion of respondents serving vulnerable populations have closed their doors either temporarily or permanently.



Respondent organizations of all sizes have had to close their doors either temporarily or permanently already.

■ No, we are not operating. ■ Yes, we are operating, but have modified our regular operations. ■ Yes, we are open and operating.

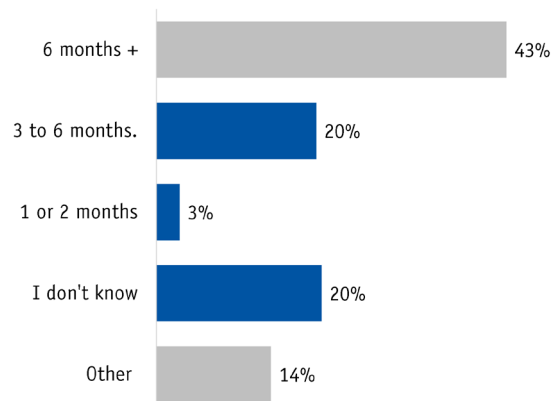


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Sustaining operations

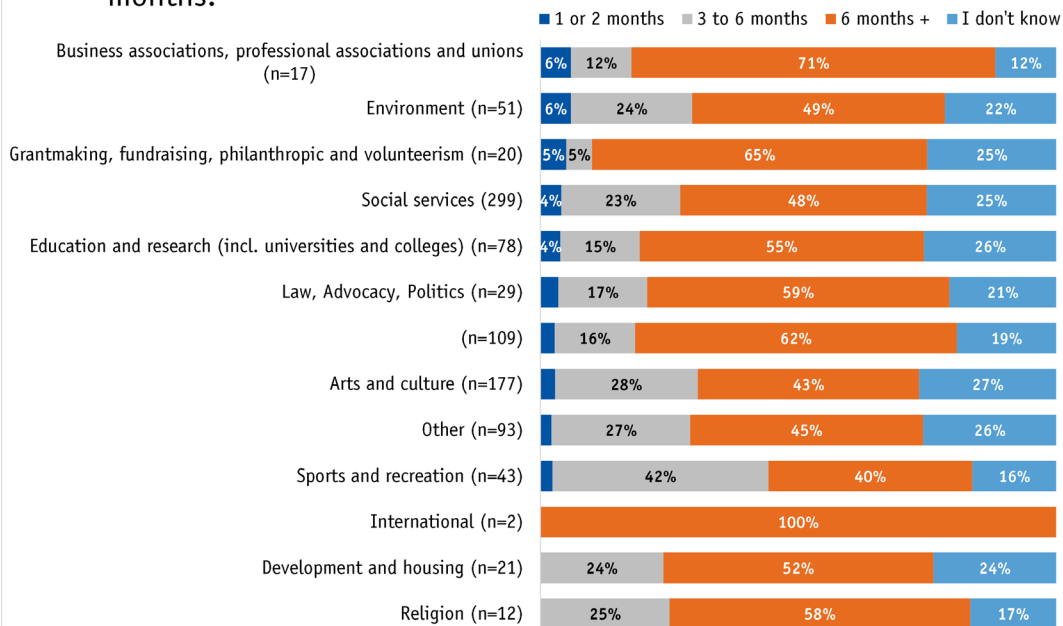
Almost one-quarter of respondents are concerned about sustaining their organization longer than six months, most particularly respondents working in sports and recreation organizations. Another one in five respondents don't know how long they will be able to survive for, despite their organization's size.

Almost one-quarter of respondents are concerned about sustaining their organization longer than six months.

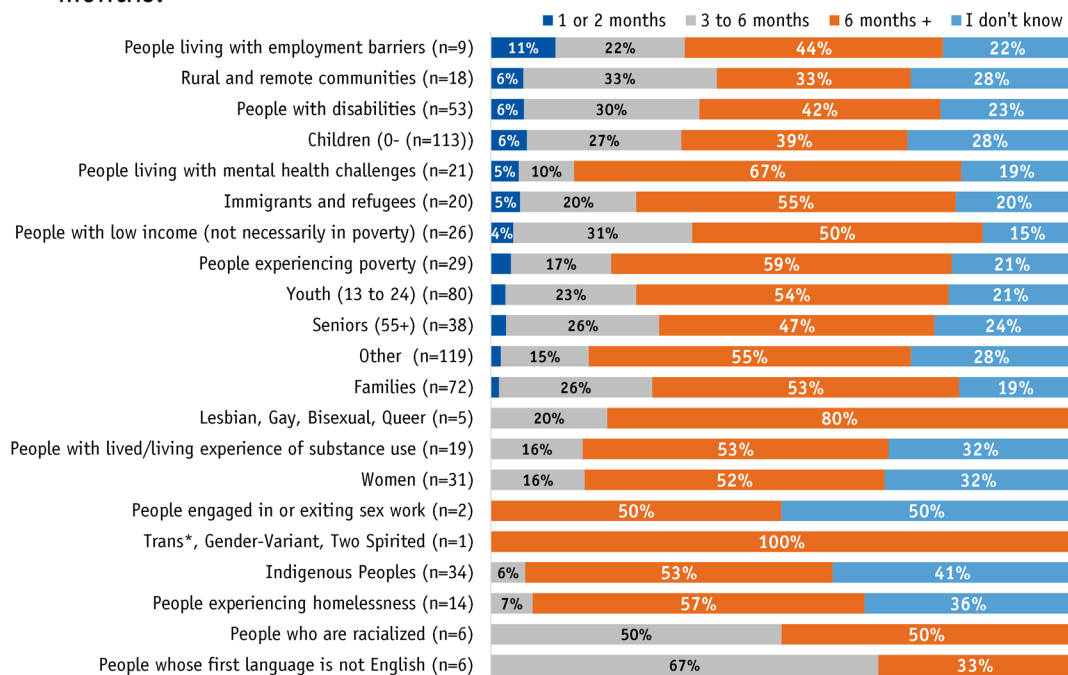


N=1113

A large number of respondents from different subsectors indicated they may not be able sustain their organization beyond six months.

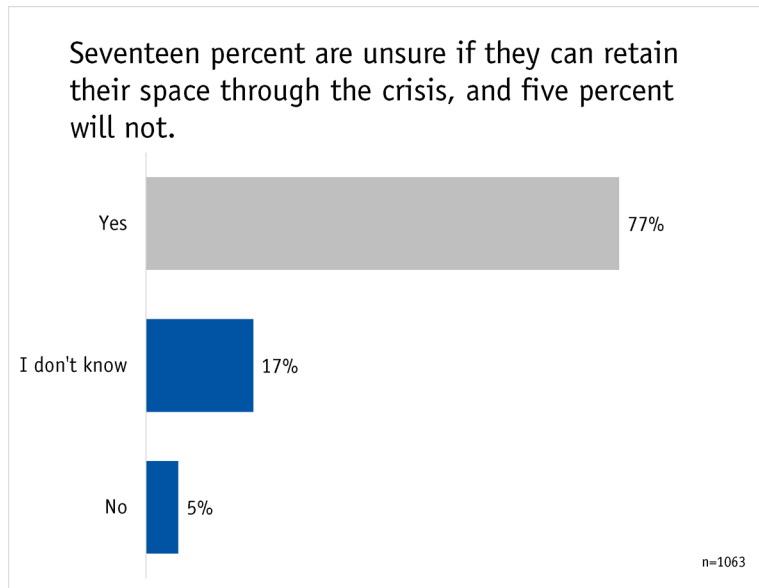


A large number of respondents serving different primary communities are also unsure if they can sustain their organization beyond six months.

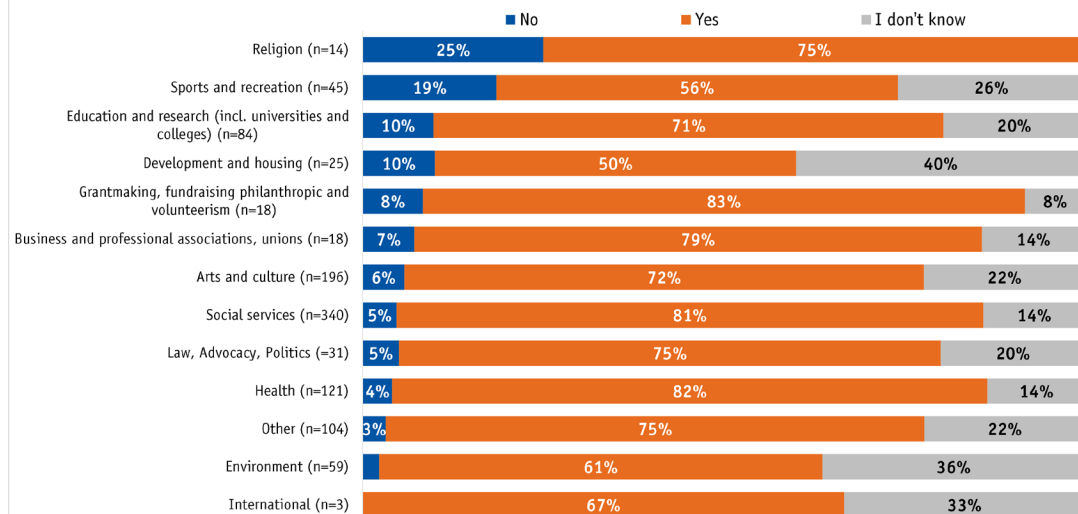


Retaining their facilities

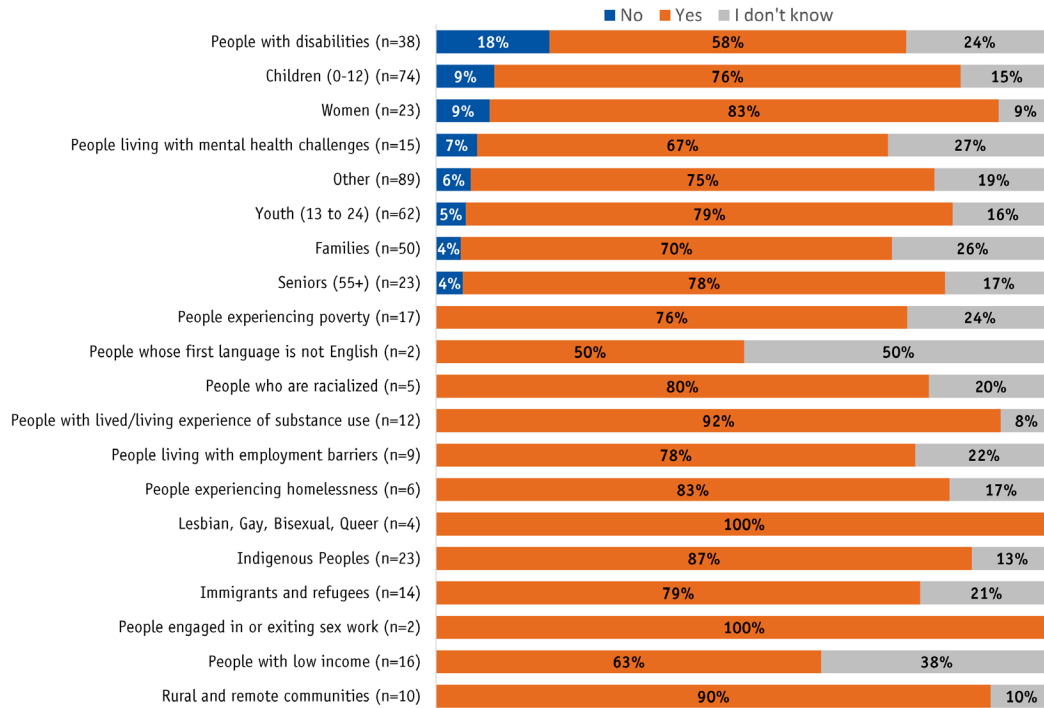
Almost two-thirds of respondents rent or lease the facilities they normally work in. However, 5% have indicated they will not be able to retain their space through the crisis, and another 17% are unsure. Of those who rent or lease, respondents from religious and sports and recreation organizations, plus those who serve people with disabilities, have the lowest expectations of retaining their space.



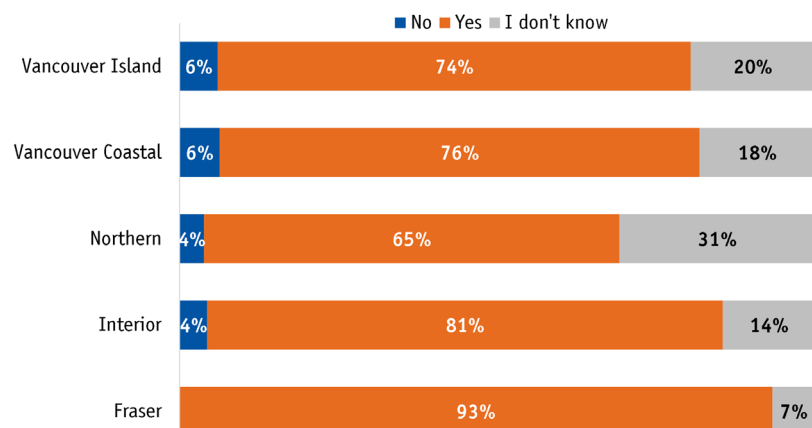
Of those respondents who rent or lease their space, religious and sports and recreation organizations have the least expectations of retaining their space through the crisis. But many more respondents are unsure.



Of those respondents who lease or rent their space, those who serve people with disabilities are the most concerned about retaining their space through the crisis. Many more are unsure.

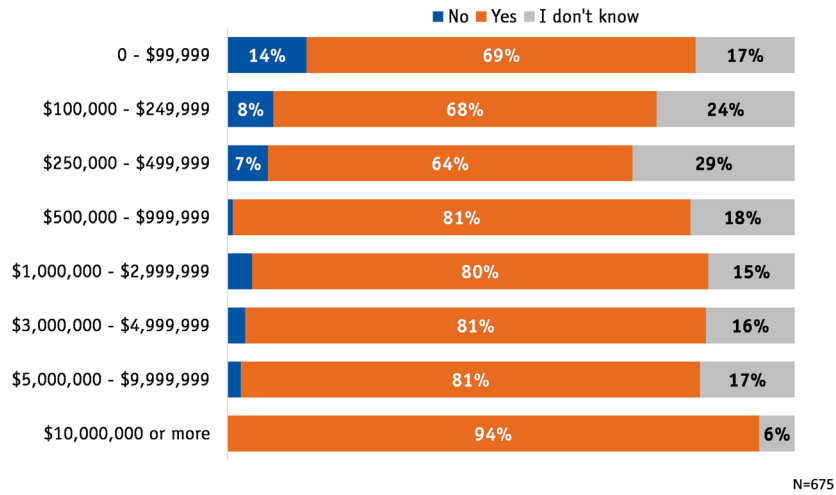


One-third of respondents serving the Northern health region who rent or lease their space were unsure if they can retain it.



N=675

Although more respondents from smaller organizations expect to lose their space during the crisis, respondents of all sizes of organizational budgets who rent or lease are unsure.



IMPACTS BY EQUITY-SEEKING GROUP

Survey sample sizes were lower for respondents serving various equity-seeking groups. The following are brief snapshots only. Several equity groups are seeing greater impacts in terms of their service delivery.

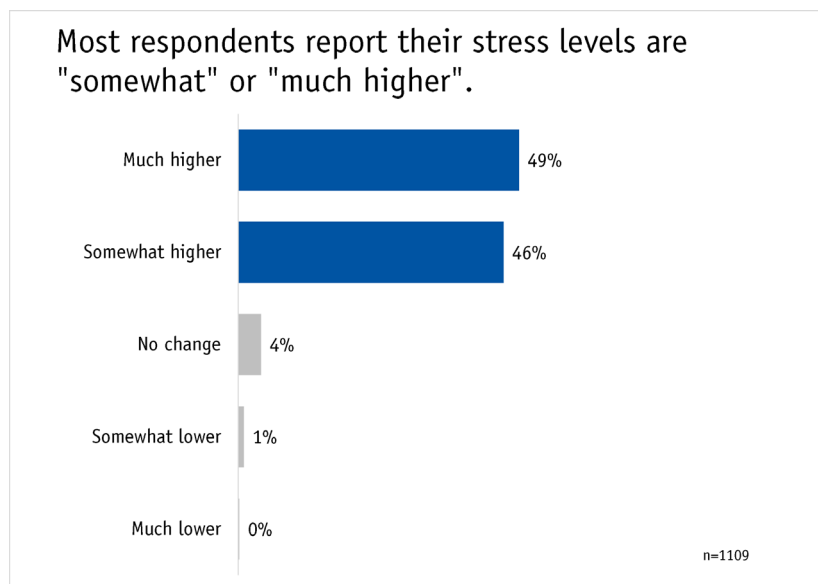
Respondents by primary community served	Service Delivery Impacts	Stress factors				
		Not currently operating	Not able to or unsure about retaining their space	Losing more than \$100,000 in 2020	Unsure if they can survive longer than 6 months	Anticipate job losses
All respondents (n=1119)	<ul style="list-style-type: none"> disruption of services (78%) changing in-person events to virtual (76%) reduced revenue from fundraising (74%) 	16%	22%	37%	45%	52%
People with disabilities (n=59)	<ul style="list-style-type: none"> disruption of services (94%) reduced revenue from fundraising (88%) changing in-person events to virtual (82%) 	19%	25%	46%	45%	53%
Indigenous peoples (n=44)	<ul style="list-style-type: none"> disruption of services (73%) challenges related to staff and volunteers needing to work remotely (73%) changing in-person events to virtual (73%) 	9%	18%	30%	37%	38%

Respondents by primary community served	Service Delivery Impacts	Stress factors				
		Not currently operating	Not able to or unsure about retaining their space	Losing more than \$100,000 in 2020	Unsure if they can survive longer than 6 months	Anticipate job losses
Women (n=36)	<ul style="list-style-type: none"> challenges related to staff and volunteers needing to work remotely (100%) disruption of services (100%) changing in-person events to virtual (92%) 	6%	9%	37%	16%	45%
People experiencing poverty (n=30)	<ul style="list-style-type: none"> increased demand for services (77%) reduced revenue from fundraising (69%) changing in-person events to virtual (62%) 	18%	23%	46%	42%	50%
Immigrants and refugees (n=22)	<ul style="list-style-type: none"> disruption of services (100%) challenges related to staff and volunteers needing to work remotely (100%) changing in-person events to virtual (100%) 	18%	24%	47%	43%	52%

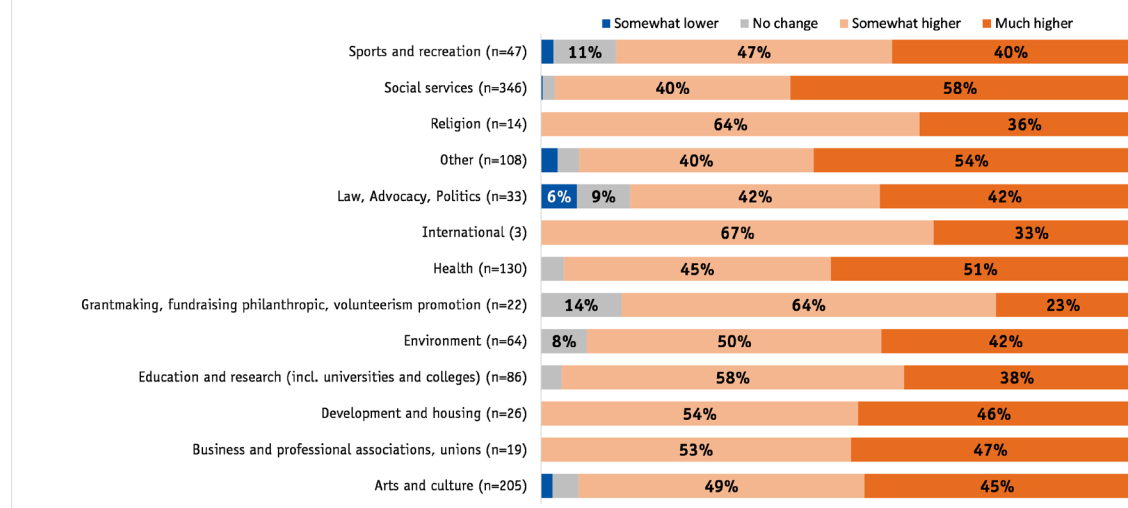
ADDITIONAL CONSIDERATIONS

Stress Levels

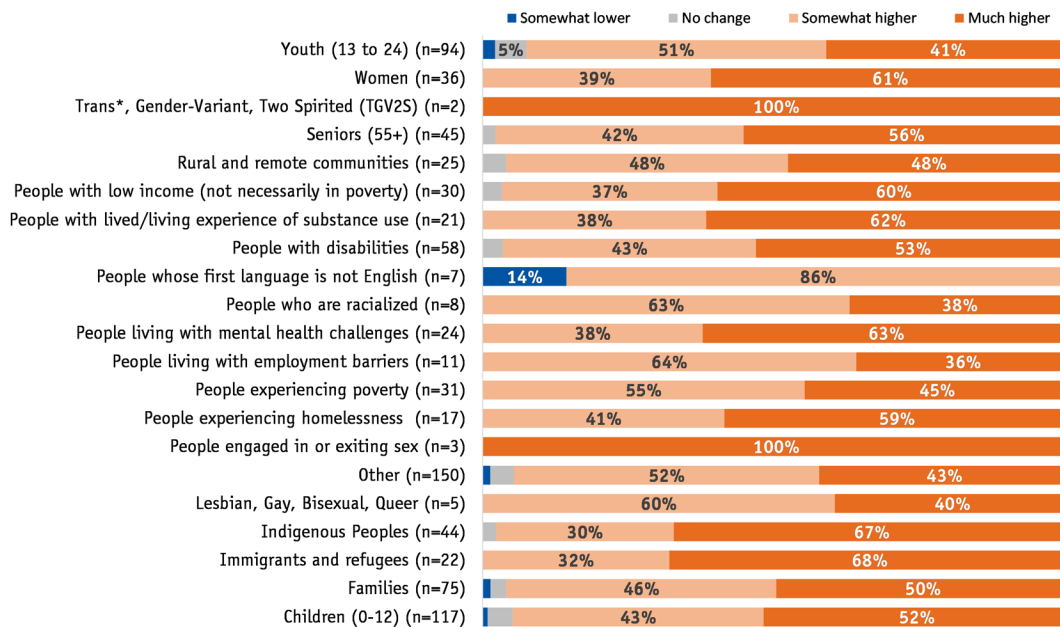
Note that responses regarding stress levels reflect only the views of the individual completing the survey. Survey respondents clearly indicated increased levels of stress as a result of the pandemic. While some organizations described their situations as being stressful before the pandemic (e.g. precarious funding), the current stressors are new.



Respondents across all subsectors have experienced increases in stress.



Respondents serving all types of primary communities have experienced increases in stress.



Overall Optimism

Note that responses regarding optimism reflect only the views of the individual completing the survey. Respondents are fairly optimistic about their organization's ability to recover from COVID-19, scoring an average of 7 on a scale of 1 to 10. They are less optimistic about the ability of the nonprofit sector as a whole to recover, scoring an average of 5.5 on the same scale. This level of optimism varies slightly depending on subsector, primary group served, geography, and organizational budget (Appendix D).

On a scale of 1 to 10, survey respondents are more optimistic about their own organization's ability to recover from COVID-19 than for the non-profit sector as a whole.



Sample sizes for several of the subsectors and primary groups served were very low, however, some of the least optimistic respondents are:

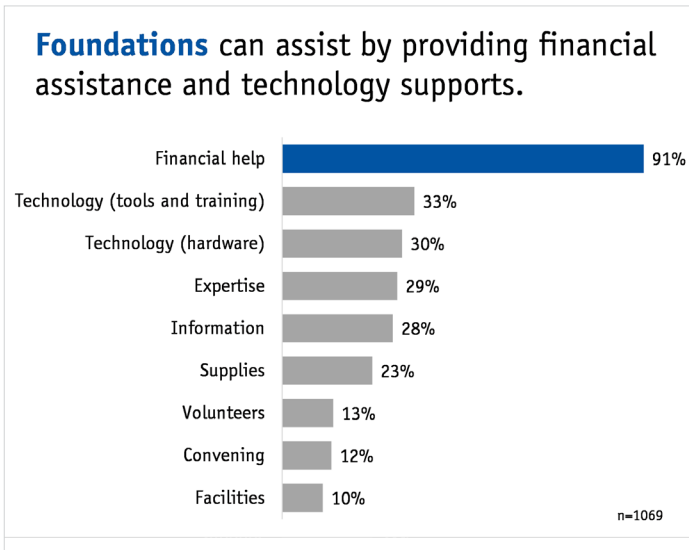
- Arts and culture, environmental, and religious organizations.
- Those serving seniors, people with low income, rural and remote communities, or women.
- With budgets of \$250,000 - \$499,000.
- In the Vancouver Coastal health region.

Some of the most optimistic respondents are:

- Grantmaking, fundraising, philanthropic and volunteerism promotion organizations.
- Those serving people with living/lived substance abuse, homelessness, or living in poverty.
- With budgets of \$5 million or more.
- Outside of the Vancouver Coastal health region.

GENERAL TYPES OF SUPPORTS NEEDED

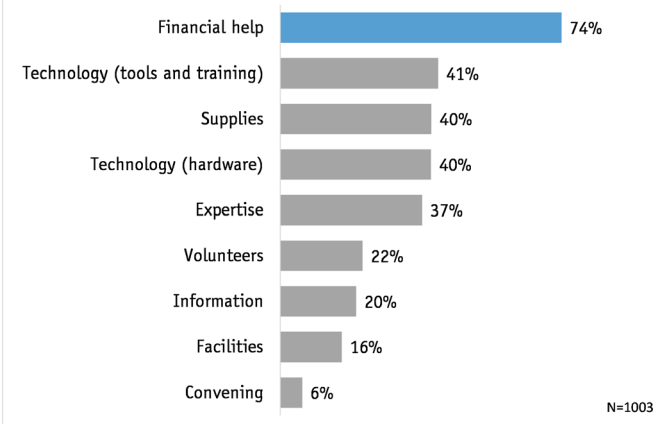
Respondents clearly indicated that foundations, government, and business can help the most by providing financial assistance. Government can also assist in providing information, and businesses can be sources of support with technology (tools, hardware, and training) and supplies.



Government can assist by providing financial assistance and information.



Businesses can assist by providing financial help followed by technology (tools, hardware, and training) and supplies.



The types of general assistance needed immediately indicated on the next page fall mostly into the areas of expert advice or support in applying for government support and emergency programs and fundraising and grant writing, followed by other forms of non-financial support such as volunteering, assistance convening, and facilities.

The types of assistance respondents need immediately are expert advice or support in the areas of applying for government and emergency programs, and fundraising and grant writing.



N=943

A CALL TO IMMEDIATE ACTION

The voice of nonprofits has been loud and clear in this survey - COVID-19 is a perfect storm that has impacted all nonprofits no matter the size, subsector, or location. They are facing increased demand for services and a need to adapt their delivery models while navigating reduced revenues. Several equity groups are seeing greater impacts in terms of their service delivery. Restrictions, responses, and adaptations related to the pandemic are changing daily. These results are only a snapshot in time and things will likely look very different six to twelve months from now. The nonprofit sector would benefit from an increased ability to measure and monitor community needs and how crises like COVID-19 impact organizations' abilities to deliver on those needs.

The economic recovery of our province depends on the nonprofit sector being able to continue balancing the space between government and the private sector. This crisis will impact the nonprofit sector and our communities significantly over the long term if tactical bridging support isn't immediately provided.

Nonprofits touch the lives of everyone in some way or another in British Columbia, and there is a role for everyone to play in collectively helping them to survive these turbulent times and protect our vital community resources.

Governments

Provide clear information on government emergency supports and COVID-related precautionary measures. Provide wage subsidies and rent subsidies. Provide rent relief directly when acting as landlord to nonprofit tenants. Source and supply PPE. Increase regional emergency coordination with nonprofits providing essential services. Provide technology (tools, training and hardware). Support innovative collaboration.

Governments (as funders)	Provide financial assistance: ensure stability and timely distribution of existing funds, increase flexibility with the use of existing grants/contribution agreements, increase funding available for COVID-related expenses/bridge funding to the “next normal”, including space stabilization, technology, loss of earned income, time to figure out what comes next, loss of volunteers.
Foundations and funders	Provide financial assistance: ensure stability and quick distribution of existing funds, increase flexibility with the use of existing grants/contribution agreements, increase funding available for COVID-related expenses/bridge funding to the “next normal”, including space stabilization, technology, loss of earned income, time to figure out what comes next, loss of volunteers. Provide technology (tools, training and hardware). Provide information and support for applying for government and emergency programs. Support (through convening, expertise, and/or funding) innovative collaboration and long term (re)visioning at the organizational and sector levels.
Businesses	Provide financial assistance. Donate technology (equipment, software, cell phones). Donate PPE and cleaning supplies. Donate refrigeration (equipment or access) and provide delivery support. Provide office space/rent relief. Offer skilled volunteers to help with technology training (moving the cloud, virtual events, online sales, etc.).
Volunteers	For those who stopped volunteering because of COVID-related reasons, consider how or when they might be able to resume your volunteer role safely or virtually. Specific, virtual support needed includes help with applying for government and other emergency programs, help with grant writing and other fundraising, help with online marketing and communication, and help with technology training (moving the cloud, virtual events, online sales, etc.)
Donors	Maintain existing contributions. Increase contributions, especially unrestricted donations.
Nonprofit organizations	Continue to be resourceful and collaborative in finding solutions to meet unmet community needs in difficult times.
Capacity- builders, networks, and umbrella organizations	Continue to ensure the voice of their members and their unique COVID-related challenges are understood and heard by key decision-makers. Through convening and expertise, foster and support innovative collaboration and long term (re)visioning at the organizational and sector levels. Organize cooperative solutions (e.g. bulk technology purchasing, space sharing, health benefits). Training and pro bono support on technology and legal issues. Share streamlined information about COVID supports.
General public	In addition to volunteering and donating, support virtual events and fundraisers, and speak to local decision-makers about the importance of nonprofits in their own lives.

The ground is shifting quickly and constantly under nonprofits during this unprecedented time. What is clear is these impacts have had, and will continue to have, a substantial effect on unmet needs in the community.

We urge you to reach out and continue this conversation. We will need everyone to collectively help the sector adjust and thrive in the “next normal” so they can continue to meet the needs of a post-COVID-19 world.

APPENDIX A - SURVEY DESIGN AND ANALYSIS

Design

The survey was drafted by staff of Vantage Point, City of Vancouver, and Vancouver Foundation based on similar surveys conducted by the [Ontario Nonprofit Network](#) and [SaskNoprofit](#).

Distribution

The survey was circulated to approximately 4,000 Vantage Point members and newsletter recipients, as well as via various social media channels, Victoria-area funders, Coastal Health regions, and some municipalities. Respondents were also asked to forward the survey on to other organisations in the province.

Response Rate

A total of 1119 respondents answered the survey, which represents approximately 4.3% of all nonprofits in the province. Therefore it is important to note that the data presented represents only the situation of the organizations that responded and **cannot be generalized to other nonprofits across the province**. In addition, half of the surveys were completed by organizations in the social services and arts and culture sector. Similarly, three-quarters were from organizations in the Vancouver Coast and Vancouver Island health regions, and as such caution should be exercised when formulating conclusions.

Limitations

There are several limitations to this data in addition to the response rate above.

- Sample sizes were low for certain subsectors and primary groups served. While grouping these was possible, it would have lost the uniqueness of each.
- The primary community served and subsector could not be classified for 18% and 10% of respondents respectively (collectively “Other”).
- It is unknown if more than one person per organization filled out the survey.
- There may be a bias in who actually completed the survey. If an organization is very concerned about their survival they may have been more likely to fill it out. Conversely, ones in crisis may have been too preoccupied with the crisis to complete it.
- It is not known who actually filled out the survey in terms of their position within the organization, or their basic demographics from an equity perspective.

- The question regarding overall impacts has a lower number of respondents because it was added as an extra question after the survey had already been distributed.
- The question on whether or not respondents are not operating currently does not explicitly state whether this is directly due to the pandemic or not.
- It is unknown if the postal code provided is for the respondent's organization, or their home.
- The data on job losses only reflects FTE positions and doesn't account for part-time or contract staff, which can be common for smaller nonprofits. It also doesn't account for organizations that have more seasonal programming and do more hiring in the summer.
- Several respondents noted that their answer regarding the number of FTE job losses would change if they received the Canada Emergency Wage Subsidy (CEWS), which didn't open for applications until after the survey closed.
- Canada Emergency Commercial Rent Assistance (CECRA) was announced in the middle of the survey cycle, and so earlier and later respondents may differ. It is not yet open as of this report.
- The only indicator of organization size was organizational budget versus number of staff.
- The survey did not include options to indicate desire for supports from individual philanthropists or supports from First Nations governments.
- Small organizations that rely on all volunteers or work with contractors, freelancers, or independent artists would not be well-captured in the staffing related questions and, given the announcement of government support directed at employers, may have unique needs.
- The survey's language centered on organizations that provide services to people. Some organizations (e.g. arts and culture, environmental, sports and recreation) may not use the word "service" to describe their work and it may have impacted how they responded to some questions.

Data Analysis

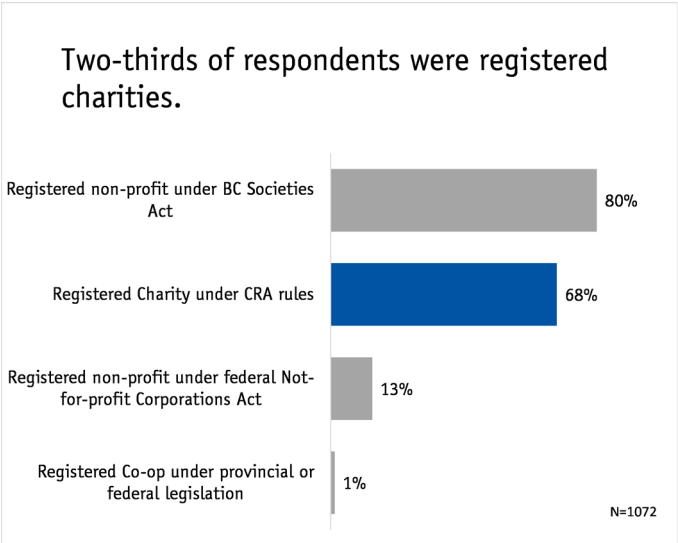
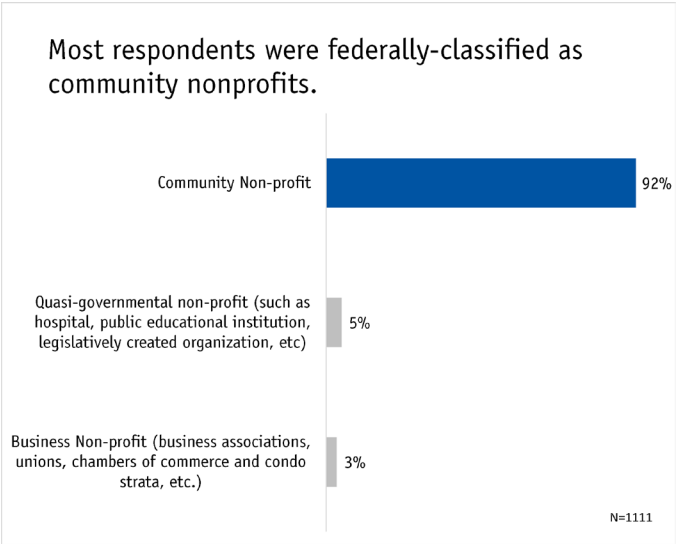
Descriptive analyses were conducted on all quantitative survey questions. Additional thematic analysis was used on the eleven survey questions with open-ended questions.

APPENDIX B - SURVEY QUESTIONS

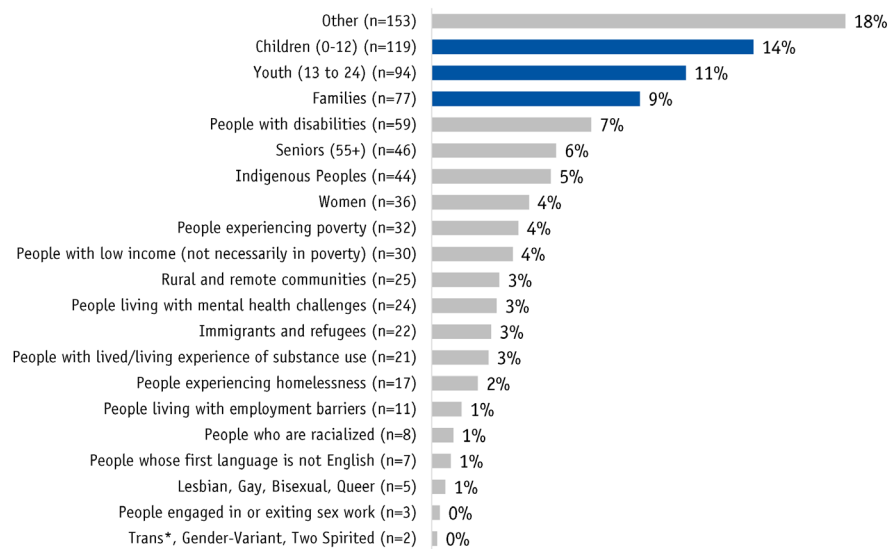
1. How optimistic are you for your organization's ability to recover from COVID-19?
2. How optimistic are you for the nonprofit sector across B.C. to recover from COVID-19?
3. How have stress and anxiety levels changed in your organization because of COVID-19?
4. What impacts has your organization experienced or anticipates experiencing? (Check all that apply.)
5. Is your nonprofit staying open and operating? (check the one that best applies)
6. In terms of facilities your organization normally works in, do you rent, lease, or own:
7. Do you expect to retain this space through this crisis?
8. If the current environment continues, how long do you think you will be able to sustain your organization?
9. Given what you know today, please estimate the total financial impact that the COVID-19 pandemic will have on your organization. (estimate annual revenue lost up to December 2020)
10. Foundations, Government and the Business community all provide supports to nonprofits in BC. What resources or supports would you find helpful from each? (check all that apply)
11. Where are you getting non-financial support from now including things like advice, information, volunteers, etc? (check all that apply)
12. How could Vantage Point or other nonprofit serving organization best support you during the COVID-19 pandemic or beyond?
13. What expert advice/support would most benefit you over the next few months? Please rank the topic area you feel you most need as of today. (Note: you can grab each one and arrange, or select numbers on the left)
14. Is your organization a registered nonprofit or charity? (check any that apply)
15. What type of nonprofit organization best describes you? (categories align with federal data collection)
16. What nonprofit subsector does your organization belong to? (pick one that best aligns with your core purpose)
17. What are the first three digits of your postal code?
18. Are you a province-wide organization?
19. If no, please identify 1-5 municipal areas you serve
20. If you are a service provider, do you target specific populations?
21. If yes, what are the communities your organization primarily serves? (choose only one that reflects your core purpose. Question 19 allows you to expand beyond the one)

22. If you provide services, what are the other communities your organization serves beyond the core group identified above? (please select all that apply)
23. My organization's annual operating budget pre-COVID-19 (e.g. 2019-2020 or 2019 if you operate on a calendar year):
24. How many FTE (Full time equivalent) staff did your organization employ on March 1st, 2020?
25. How many FTE (full-time equivalent) staff do you estimate you will have as of June 30th, 2020 if things continue as they are?

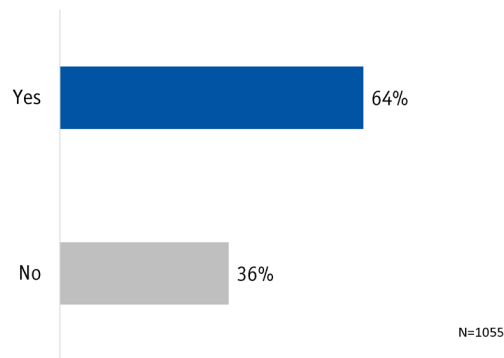
APPENDIX C - SURVEY RESPONDENTS



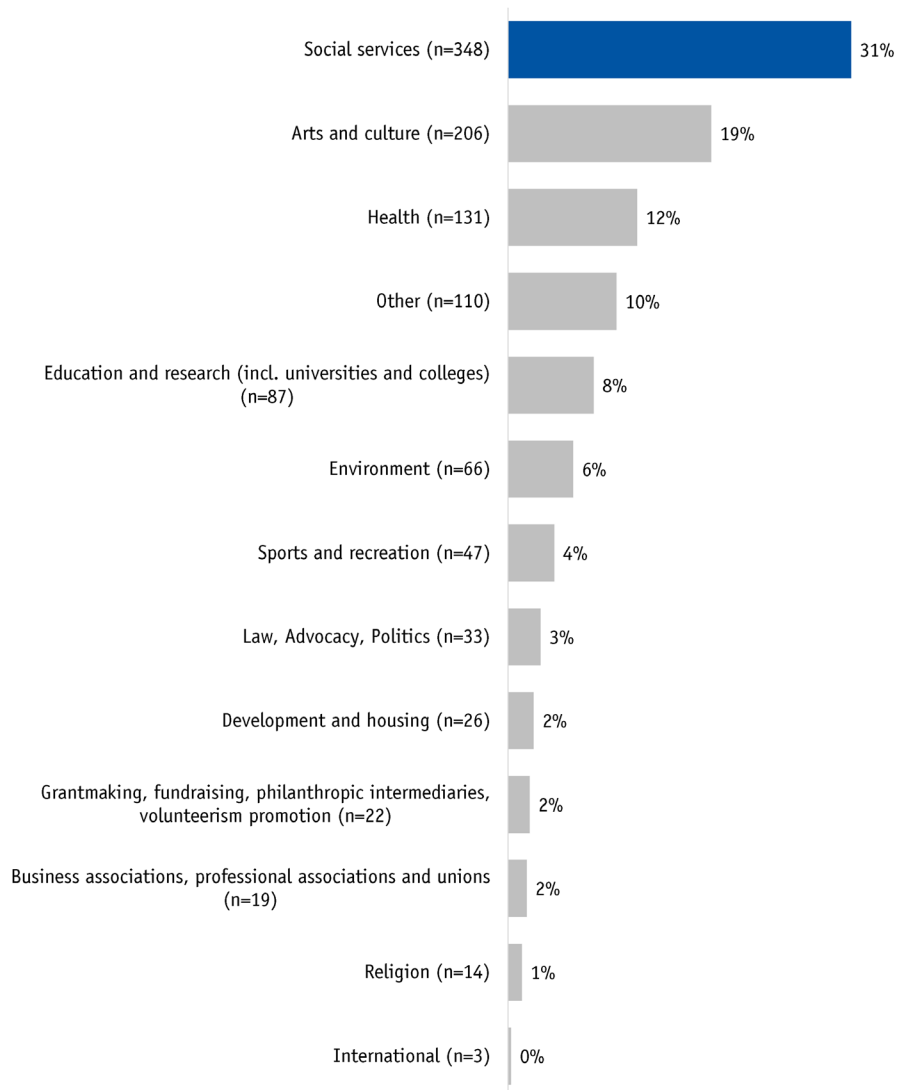
One-third of respondents primarily serve children, youth, and families.



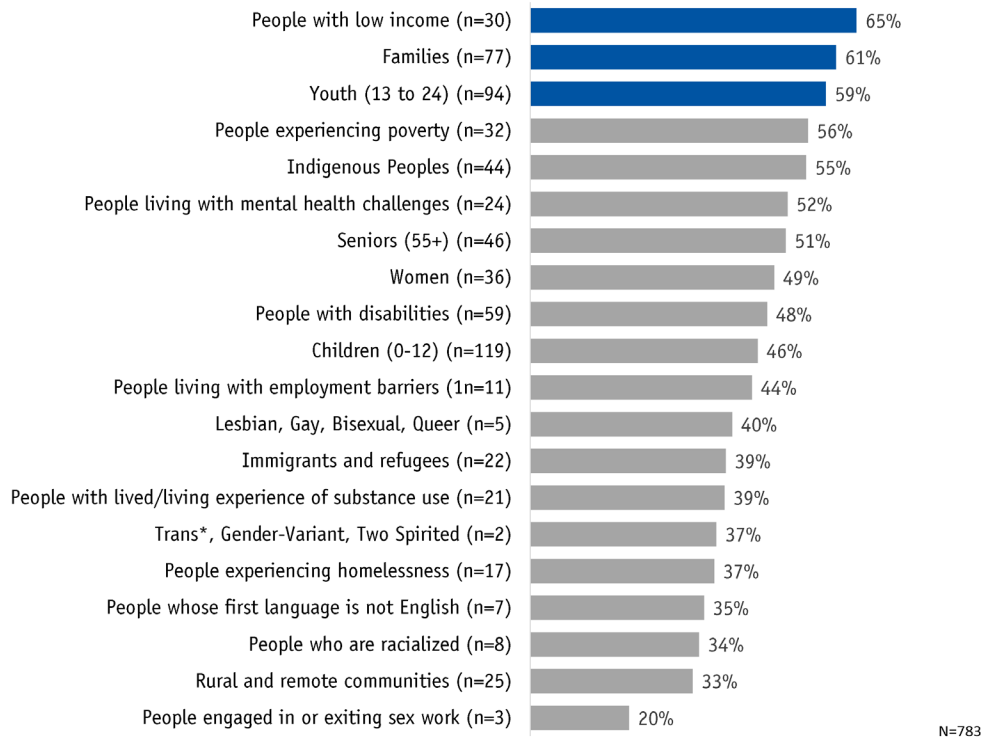
Two-thirds of respondents serve specific populations.



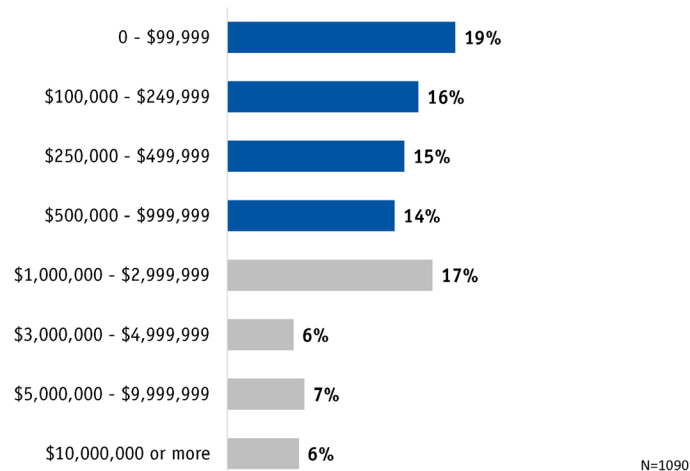
Almost one-third of respondents identified their core purpose as social services.



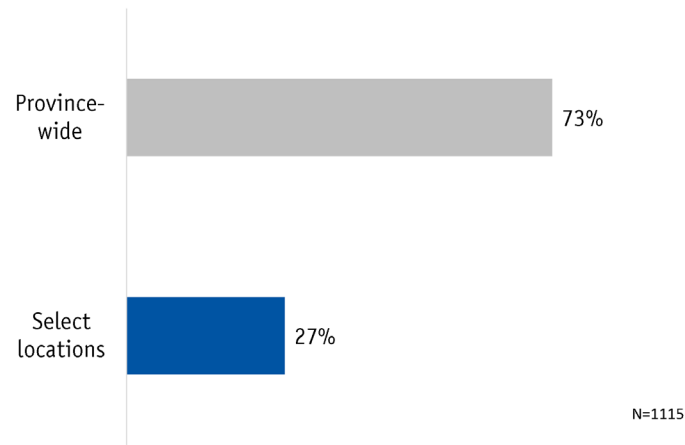
Secondary communities served by respondents include people with low income, families, and youth.



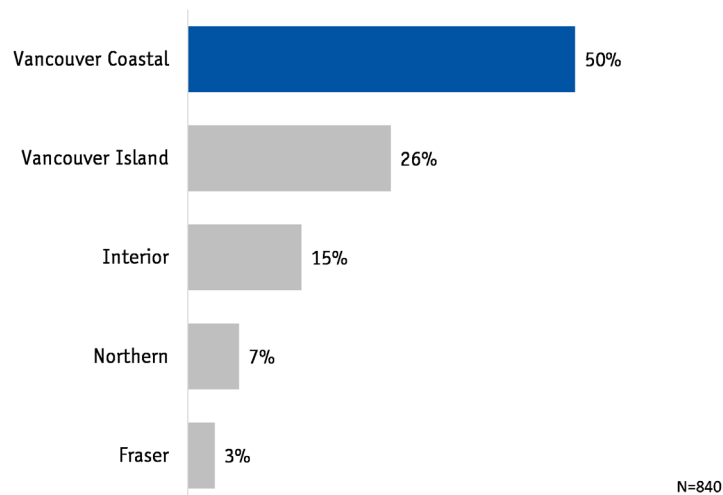
Two-thirds of respondents had annual operating budgets of less than \$1 million.



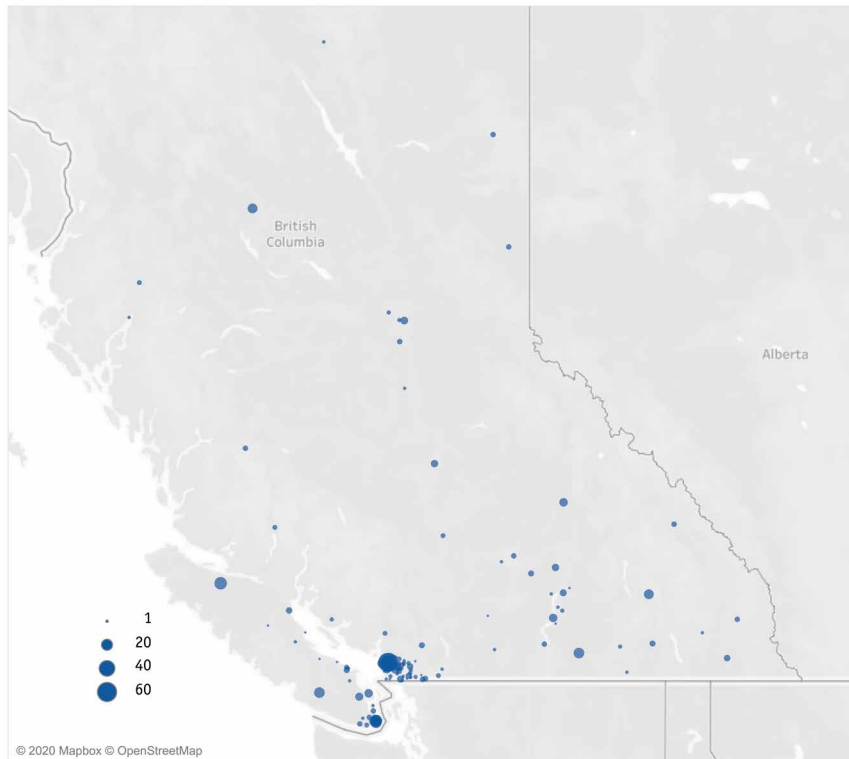
One-quarter of respondents provide services province-wide.



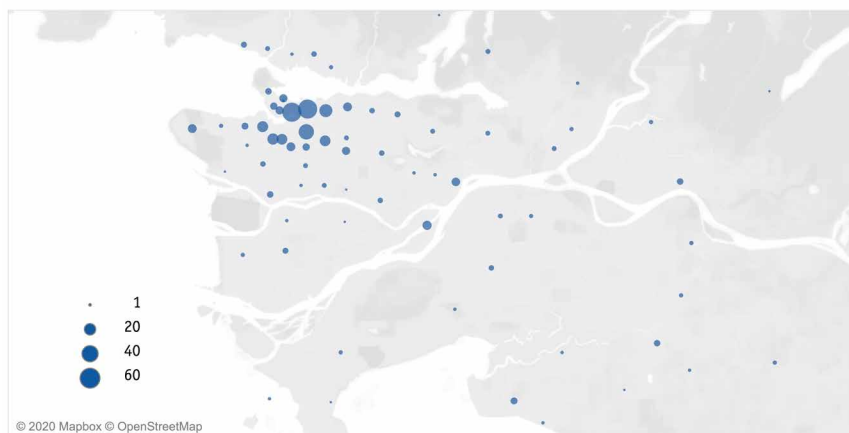
Half of respondents were located in the Vancouver Coastal health region.



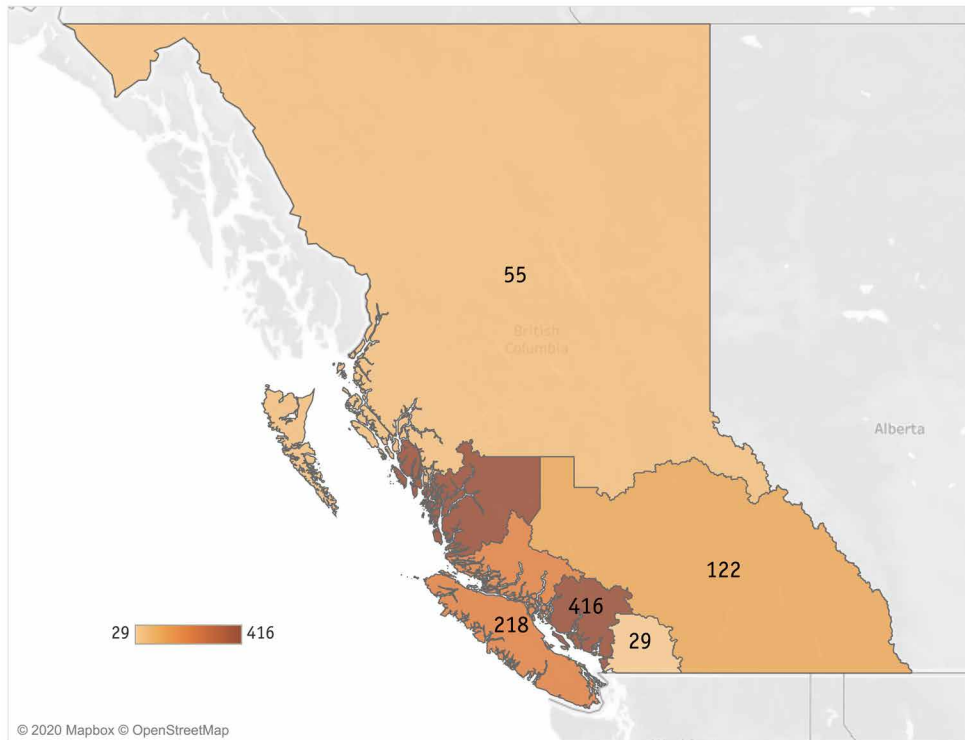
Respondents were located around BC, with the majority located in Metro Vancouver and Vancouver Island.



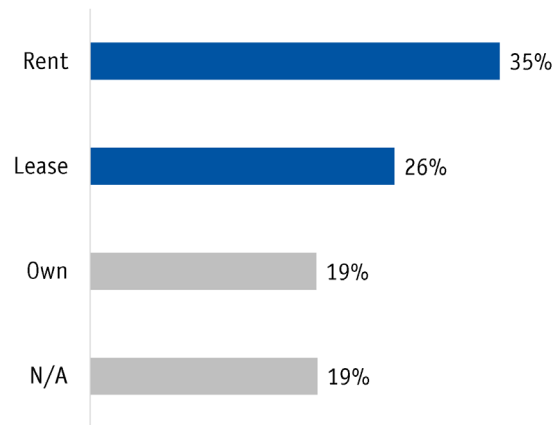
Respondents were located around BC, with the majority located in Metro Vancouver and Vancouver Island.



Respondents provided services around BC, with almost half in the Vancouver Coastal Health Region.

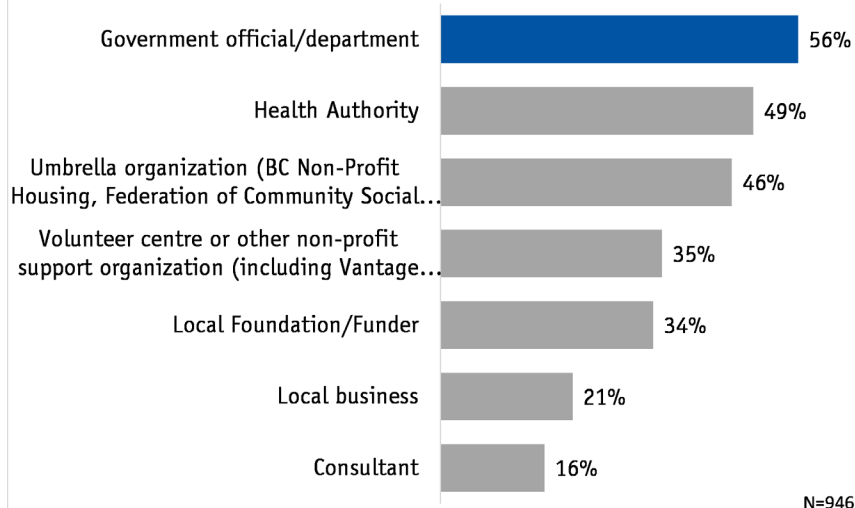


Almost two-thirds rent or lease their facilities.



n=1109

Half of respondents are currently receiving non-financial support (e.g. advice, information, volunteers) from government

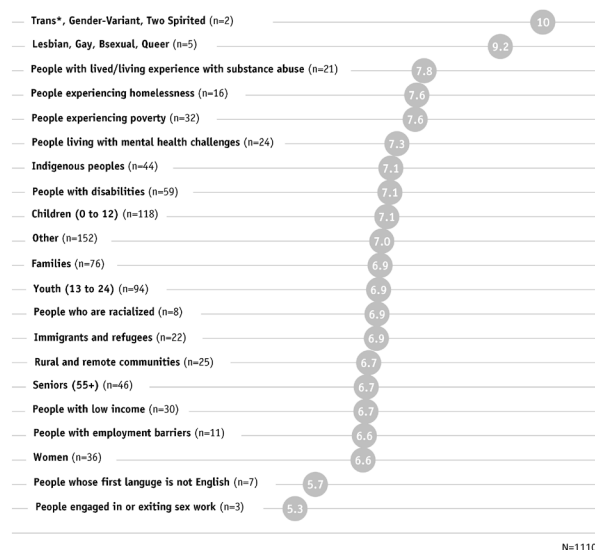


APPENDIX D - ADDITIONAL CHARTS

Respondents' optimism, on a scale of one to ten, regarding their organization's ability to recover from the pandemic varies by subsector.



Respondents' optimism, on a scale of one to ten, regarding their organization's ability to recover from the pandemic varies by primary community served.



Respondents serving the Vancouver Coastal health region are less optimistic regarding their organization's ability to recover from the pandemic.



Respondents' optimism, on a scale of one to ten, regarding their organization's ability to recover from the pandemic varies by size of organization.



APPENDIX E - SURVEY INFOGRAPHIC

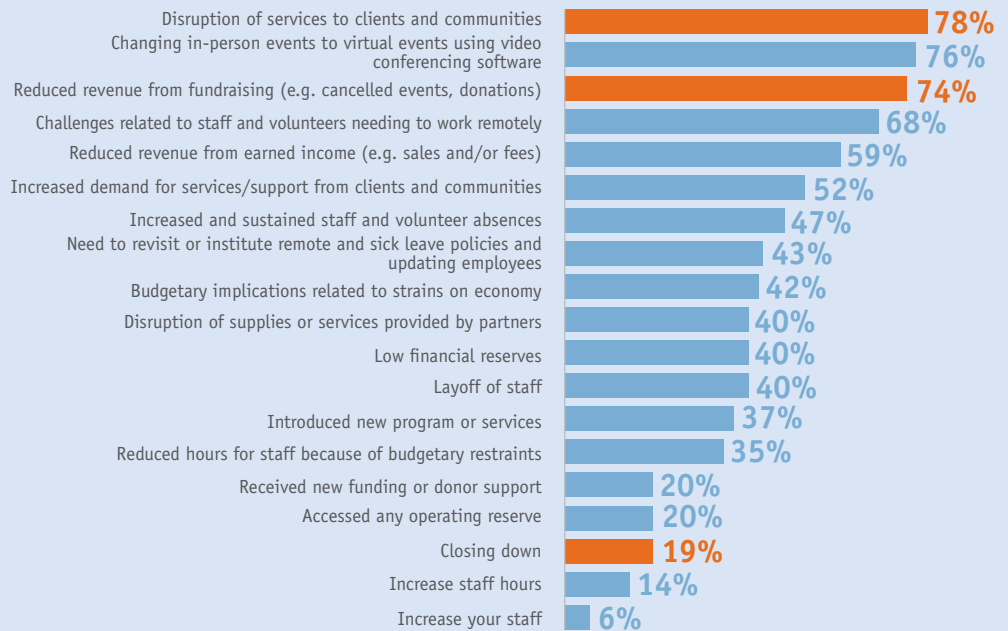
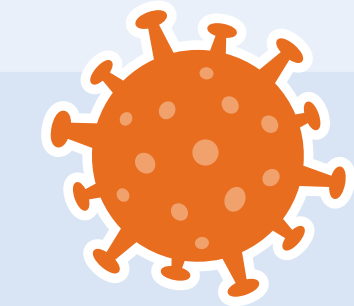
NO IMMUNITY: Impact of COVID-19 on BC Nonprofits

British Columbia's non-profit sector is vast in size, scope, and impact. It contributes \$6.4 billion to BC's GDP and employs 86,000 people across the province. It makes a significant and meaningful impact on the economy and lives of people across British Columbia.

1,119
respondents

completed a survey in April 2020 about the impacts of COVID-19 on their organization.

Many respondents anticipate a disruption of services to clients and communities and reduced revenue from fundraising. Almost one in five have closed or anticipate closing down.



All organizations, no matter the size, subsector, are impacted by COVID-19.

95%

of respondents indicated their **stress levels** are either somewhat or much higher because of COVID-19.

“Every single cultural organization needs to reinvent themselves to become online organizations capable of delivering most services, content, and engagement robustly online - a kind of Culture 3.0 transformation. That requires a massive investment of capital and infrastructure, and creative capital few if any non-profits are able to afford.”

Mission Delivery and Community Impacts



78%

are experiencing a disruption of services to clients and communities



15%

are not operating currently



23%

do not think they can stay open longer than six months under current conditions

Financial Impacts



74%

are experiencing reduced revenue from fundraising



59%

are experiencing reduced revenue from earned income



22%

are concerned about retaining their facilities

People and Capacity Impacts



68%

are experiencing challenges with staff and volunteers working remotely



35%

have reduced staff hours



40%

anticipate laying off staff

Other Impacts



Volunteer support is down

as people self-isolate and organizations reduce risk



Funding opportunities

have been delayed, cancelled, and become more unpredictable



Emergency government benefits are not meeting the needs of nonprofits who rely heavily on volunteers.

UNMET
COMMUNITY NEEDS

What we heard from the sector



COVID-19 made our organization an essential service. That means as Executive Director I needed to strip down my entire agency and rebuild it, after identifying if we even had the capacity to do so. We serve isolated seniors and individuals with physical and mental challenges so we needed to ensure a continuity of care for them while developing new services to support them and new members of the community. This is all while losing 150 volunteers with age and health related vulnerabilities and then developing a new virtual recruitment process for acquiring new volunteers. I worked all day, all night and all weekend for 5 weeks and turned my agency into virtual operations for the safety of my staff. They also didn't sign up for any of this. ”

Organizations are rapidly responding



Serving vulnerable populations and building distribution networks, often without Personal Protective Equipment (PPE)



Cancelling or pausing all activities that involve gatherings of people



Moving to remote work and virtual services

Nonprofits would primarily like financial assistance from **foundations**, financial assistance and information from **government**, and financial assistance and technology (tools, hardware, and training) from **business** to help them survive.



IMMEDIATE NEEDS

identified by survey respondents



PPE for essential service workers.



Training and pro-bono support with technology and legal/fiduciary needs.



Funder patience, flexibility, and stability.



Bridge funding to help transition to the "next normal".



Expanded wage subsidies and emergency funding pools to benefit small and all-volunteer organizations without full-time staff.



Rent and property tax relief. Advice on negotiating with landlords.



Pay-as-you-go phones and grocery gift cards for vulnerable clients.



Help with food storage, distribution and delivery.



Space-sharing opportunities for the short term.



Health benefits/insurance for staff and volunteers, given concerns with getting COVID-19 and the need for better health support more generally



Planning support for adapting in the near term to a physical-distancing world.

LONGER-TERM NEEDS

identified by survey respondents



Conversations about reenvisioning what's possible, at the organization and community impact level.



Less project funding and more operational/core funding.



Cooperative solutions such as space-sharing, technology purchasing, sharing of employees for small nonprofits.



More immediate inclusion of non-profits in government emergency benefit planning.



More regional coordination with government for emergency and essential services.



Basic COVID kits with PPE and cleaning supplies for when facilities reopen.



Universal internet access.



Universal extended health.



Universal basic income.

On a scale of 1 to 10, survey respondents are more optimistic about their **own organization's** ability to recover from COVID-19 than for the **non-profit sector** as a whole.



A CALL TO IMMEDIATE ACTION

Nonprofits touch the lives of everyone in some way or another in British Columbia, and there is a role for everyone to play in collectively helping them to survive these turbulent times and protect our vital community resources.

GOVERNMENTS



Provide clear information on government emergency supports and COVID-related precautionary measures. Provide wage subsidies and rent subsidies. Provide rent relief directly when acting as landlord to nonprofit tenants. Source and supply PPE. Increase regional emergency coordination with nonprofits providing essential services. Provide technology (tools, training and hardware). Support innovative collaboration.

GOVERNMENTS AS FUNDERS



Provide financial assistance: ensure stability and timely distribution of existing funds, increase flexibility with the use of existing grants/contribution agreements, increase funding available for COVID-related expenses/bridge funding to the “next normal”, including space stabilization, technology, loss of earned income, time to figure out what comes next, loss of volunteers.

FOUNDATIONS AND FUNDERS



Provide financial assistance: ensure stability and quick distribution of existing funds, increase flexibility with the use of existing grants/contribution agreements, increase funding available for COVID-related expenses/bridge funding to the “next normal”, including space stabilization, technology, loss of earned income, time to figure out what comes next, loss of volunteers. Provide technology (tools, training and hardware). Provide information and support for applying for government and emergency programs. Support (through convening, expertise, and/or funding) innovative collaboration and long term (re)visioning at the organizational and sector levels.

BUSINESSES



Provide financial assistance. Donate technology (equipment, software, cell phones). Donate PPE and cleaning supplies. Donate refrigeration (equipment or access) and provide delivery support. Provide office space/rent relief. Offer skilled volunteers to help with technology training (moving the cloud, virtual events, online sales, etc.).

VOLUNTEERS



For those who stopped volunteering because of COVID-related reasons, consider how or when they might be able to resume your volunteer role safely or virtually.

Specific, virtual support needed includes help with applying for government and other emergency programs, help with grant writing and other fundraising, help with online marketing and communication, and help with technology training (moving the cloud, virtual events, online sales, etc.)

DONORS

Maintain existing contributions. Increase contributions, especially unrestricted donations.

NONPROFIT ORGANIZATIONS

Continue to be resourceful and collaborative in finding solutions to meet unmet community needs in difficult times.

CAPACITY-BUILDERS, NETWORKS, AND UMBRELLA ORGANIZATIONS

Continue to ensure the voice of their members and their unique COVID-related challenges are understood and heard by key decision-makers. Through convening and expertise, foster and support innovative collaboration and long term (re)visioning at the organizational and sector levels. Organize cooperative solutions (e.g. bulk technology purchasing, space sharing, health benefits). Training and pro bono support on technology and legal issues. Share streamlined information about COVID supports.

GENERAL PUBLIC

In addition to volunteering and donating, support virtual events and fundraisers, and speak to local decision-makers about the importance of nonprofits in their own lives.