June 23, 2022

The State of the Community Impact Sector

Research, Dashboard, & Network Map

Impact Organizations of Nova Scotia

Overview

- About IONS
- Understanding Our Sector
- 2022 State of the Sector Survey
- Survey Findings
  - Funding
  - Workforce
  - JEDDI
  - Operations, Governance, & Collaboration
- Dashboard Introduction
- Network Map Introduction
- Conclusions
- Questions

Facilitators

Annika Voltan

Executive Director

Abdou Kanteh

Director of Research and Strategic Communications

Reg Manzer

Research & Evaluation Manager

OUR MISSON

To champion and build the capacity of Nova Scotia's impact organizations. We move collectively in unwavering pursuit of healthy, vibrant futures for all communities, people, the land, and living beings.

OUR VISION

A dynamic and influential Community Impact Sector that is valued for its visionary, bold and brave contributions toward a decolonized, just and equitable Nova Scotia.

IONS Strategic Priorities

1

EDUCATE AND INNOVATE

Provide the tools, skills, and knowledge to increase the capacity of existing and newly forming impact organizations province-wide to ensure they build a flexible, diverse workforce that will thrive in today's digital economy.

2

COLLABORATE AND ACTIVATE

Facilitate, support, and activate connections across networks and encourage continued and new collaborations between impact organizations, the government, and private sectors, in order to inspire systems-change and to build an equitable, sustainable, and healthy Nova Scotia.

3

ADVOCATE AND CELEBRATE

Lead, champion, celebrate, give voice to, and advocate for the sector to raise awareness of its critical role in society and to develop its influence in decision-making and contributing to wellbeing for all Nova Scotians.

IONS Theory of Change

People across the sector are working collectively toward improving lives through a lens of equity, wellbeing and belonging for all.

By helping the sector to thrive, we are enhancing the quality of life for all Nova Scotians.

Understanding our Sector

Our Sector is comprised of 7562 diverse Orgs*
working across 11 activity areas

- 2884 Registered Charities
- 4678 Registered Nonprofits
  - Previous reports were ~6000 and did not include Federally Registered Charities

- 5 Largest Sub-sectors are:
  - Culture and Recreation (36%)
  - Religion (16%)
  - Social Services (11%)
  - Development & Housing (8%)
  - Environment (7%)

*Sourced from CRA T3010 Data and NS Registry of Joint Stock Companies

Understanding our Sector

Economic & Employment Impact

- 2020 the GDP contribution was **$1.073 Billion**
- 2.9% of total Provincial GDP
- Largest Contributors:
  - Business & Professional Associations (19%)
  - Social Services (18%)
  - Culture and Recreation (13%)

- 19,000 Jobs
  - Decline from 20,000 in 2019

Top Employers

5000

Social Services makes up 5000 of the jobs in our sector.

4000

Business & Professional Associations makes up 4000 of the jobs in our sector.

2000

Culture & Recreation, Religion each make up 2000 of the jobs in our sector (combined 4000).

Understanding our Sector

Employment demographics

72%

Of people working in the sector are women. The sector is more diverse than any other.

13%

Lower average wage for women than Men in our sector.

20%

Lower hourly wages than national averages.

73%

Of all staff in the sector had some post-Secondary education.

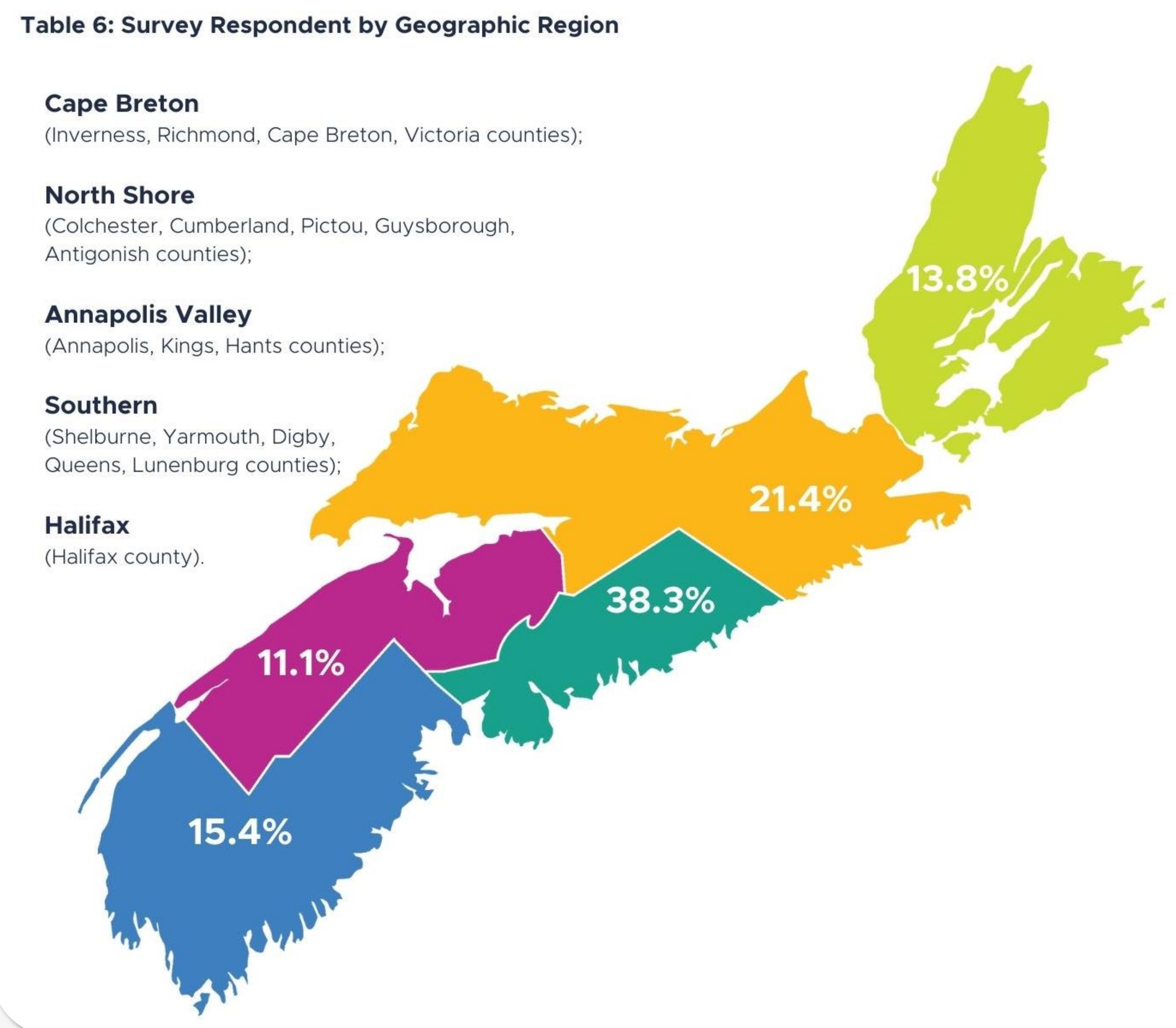
2022 State of the Sector Survey

Impact Organizations of Nova Scotia

State of the Sector Survey

Methodology

- Based of the first sector wide survey in December of 2019
- Distributed January & February 2022
- Expanded to include LMI questions 253 Respondents
- Primarily completed by ED's
- 38% of Responses were from the Halifax Region
- Response spread across the province was consistent with population spread
- Primary Sub-sectors responding
  - Culture & Recreation (31%)
  - Social Services (28%)



State of the Sector Survey Findings

1 Core Funding & Diversity of Funding Sources

2 Retaining & Recruiting Employees, Volunteers, and Board Members

3 Workload & Burnout

4 Wages & Benefits

5 More Committment to JEDDI

State of the Sector Survey Findings

Funding

- Sustainable Funding is the top issue
- Operating budgets are on a downward trend
- Difference between Rural & Urban operating budgets
- 19% of orgs in the North Shore, Annapolis Valley, and Southern Regions had budgets over $500,000
- This number is 45% for Halifax and Cape Breton
- 1/3 of orgs don’t have a contingency fund
- 1/3 of orgs only sustainable for 6 months or less
- 45% of Operating budgets are from the province
- 21% of organizations self-identify as social enterprises and 13% act partially like social enterprises

Table 10: Responses related to financial reserves and contingency funds

Core funding if our biggest wish, or sustainable revenue sources. Like many organizations, we spend more time fundraising to do support our mission than we spend on the actual mission.

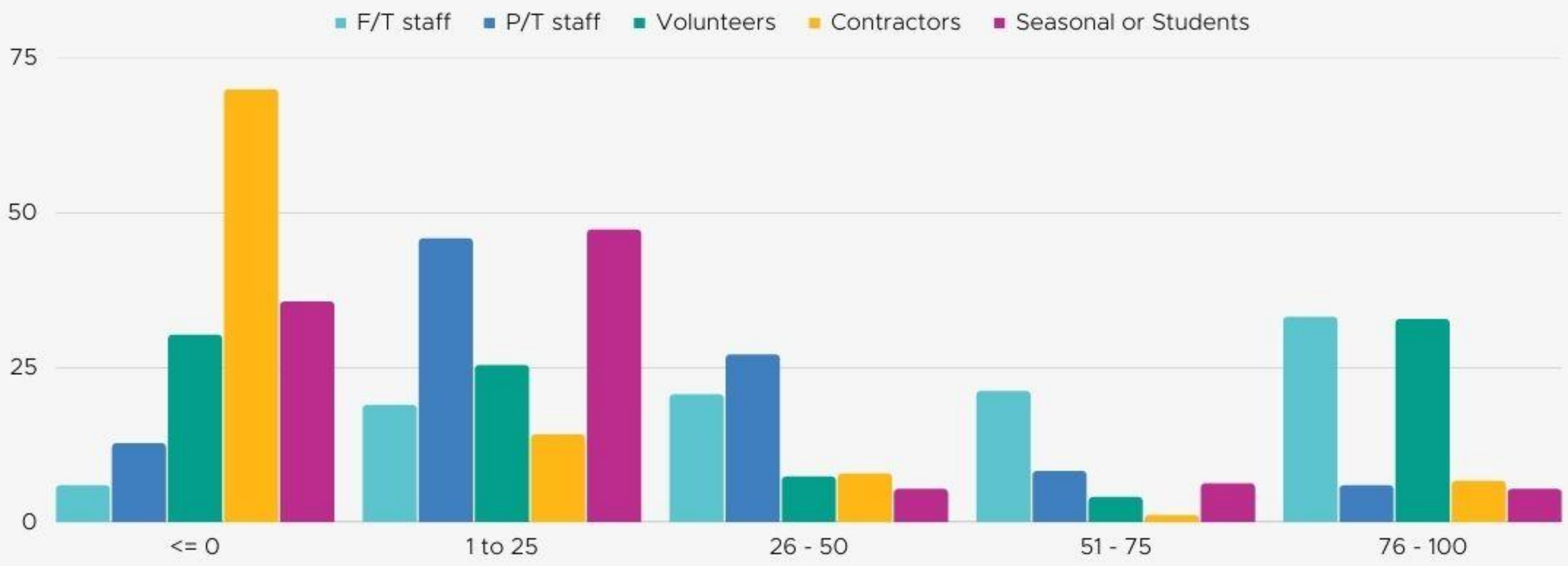
Survey Respondent

State of the Sector Survey Findings

Workforce

- Only 11% of surveyed orgs have more than 30 paid staff
- Majority of orgs have a staff compliment comprised of 70% female identifying staff
- Retention and Recruitment identified as major concerns
- 32% of orgs anticipate up to a quarter of their workforce leaving due to staff retiring in the next 2-3 years

Table 13: Total Staff by Employment Type and Organizational Size



We get those aiming to enter the workforce, but can't stay as we can't keep our salaries competitive.

Survey Respondent

State of the Sector Survey Findings

Top 3 cited Retention Challenges

1 **High competition for staff from inside the sector**
25%

2 **Employees not being a good “fit”**
24%

3 **High competition for staff from outside the sector**
21%

Top Strategies

Increasing work flexibility (hours/location)

Improved wages, benefits, and perks

Improved work culture & work-life balance

State of the Sector Survey Findings

Workforce: Recruitment

- Difficulty finding qualified Labour in the locally
  - This was more pronounced in the Cape Breton Region
- 1/3 of orgs cited overly high expectations of candidates for wages, benefits, and perks
- 27% indicated high competition for staff from other orgs
- Nearly half hadn’t hired any recent graduates in the past 2 years, and only 1% do recruitment at school job fairs
- Most are relying on social media, personal contacts, and online job boards

State of the Sector Survey Findings

Workforce: Salaries & Benefits

- Sector wages are consistently lower in NS compared to other parts of the country
- ED's make approximately $16.59 less an hour
- Directors make $13.89 less an hour
- Orgs are currently offering flexible work arrangements

47%
of organizations have a drug plan in place

24%
of organizations offer a pension

6%
of organizations offer parental leave top-up

17%
of organizations don't offer any benefits

> *Low salary, no benefits, no vacation, why would people want to work in the sector?*
>
> **Survey Respondent**

State of the Sector Survey Findings

JEDDI

58% of organizations have taken steps to address accessibility.

48% of organizations have policies to support JEDDI.

19% of organizations have policies to support environmental sustainability.

73%

of organizations are open to promoting JEDDI in the workplace and would be interested in receiving tools/resources to help create a more inclusive organization

“ *Having decolonization and black history information has been a great reference for our team.*

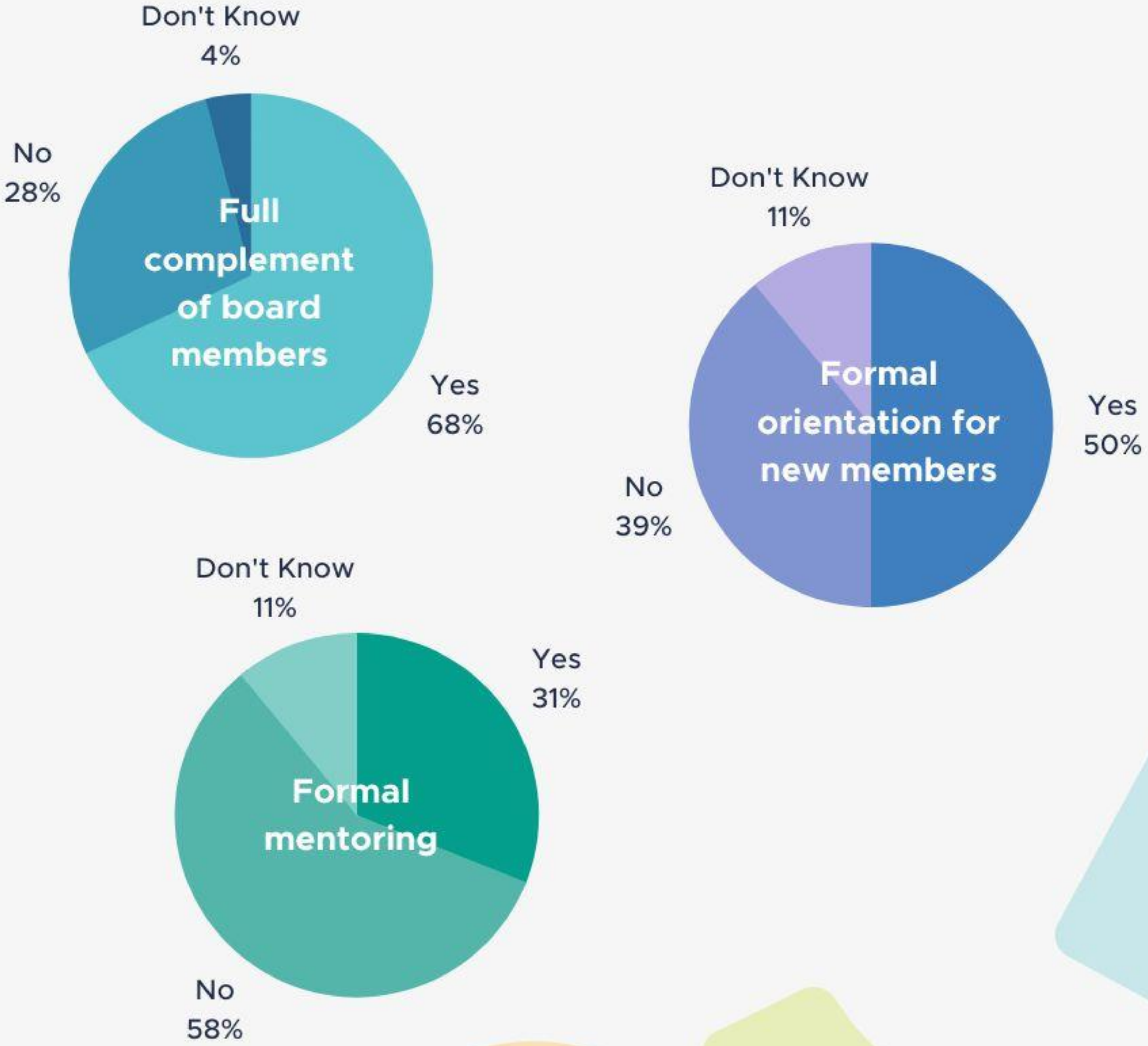
Survey Respondent

State of the Sector Survey Findings

Operations, Governance, & Collaboration

- Majority of organizations have a strategic plan
- Need to go further with business planning, HR, and succession planning
- Skills related to current staff and accessing training were not challenges
- Workloads were considered a major obstacle
- Issues around communicating the value of work to stakeholders
- More mentoring for new board members is needed
- 39% indicated sharing resources
- 33% altered their activities to work on a common goal with other orgs
- 8% have merged operations

Table 22: Board Orientations and Mentoring



Defining our value in a way our stakeholders think is worth the money.

Survey Respondent

New Sector Tools: Dashboard

Impact Organizations of Nova Scotia

Data Dashboard

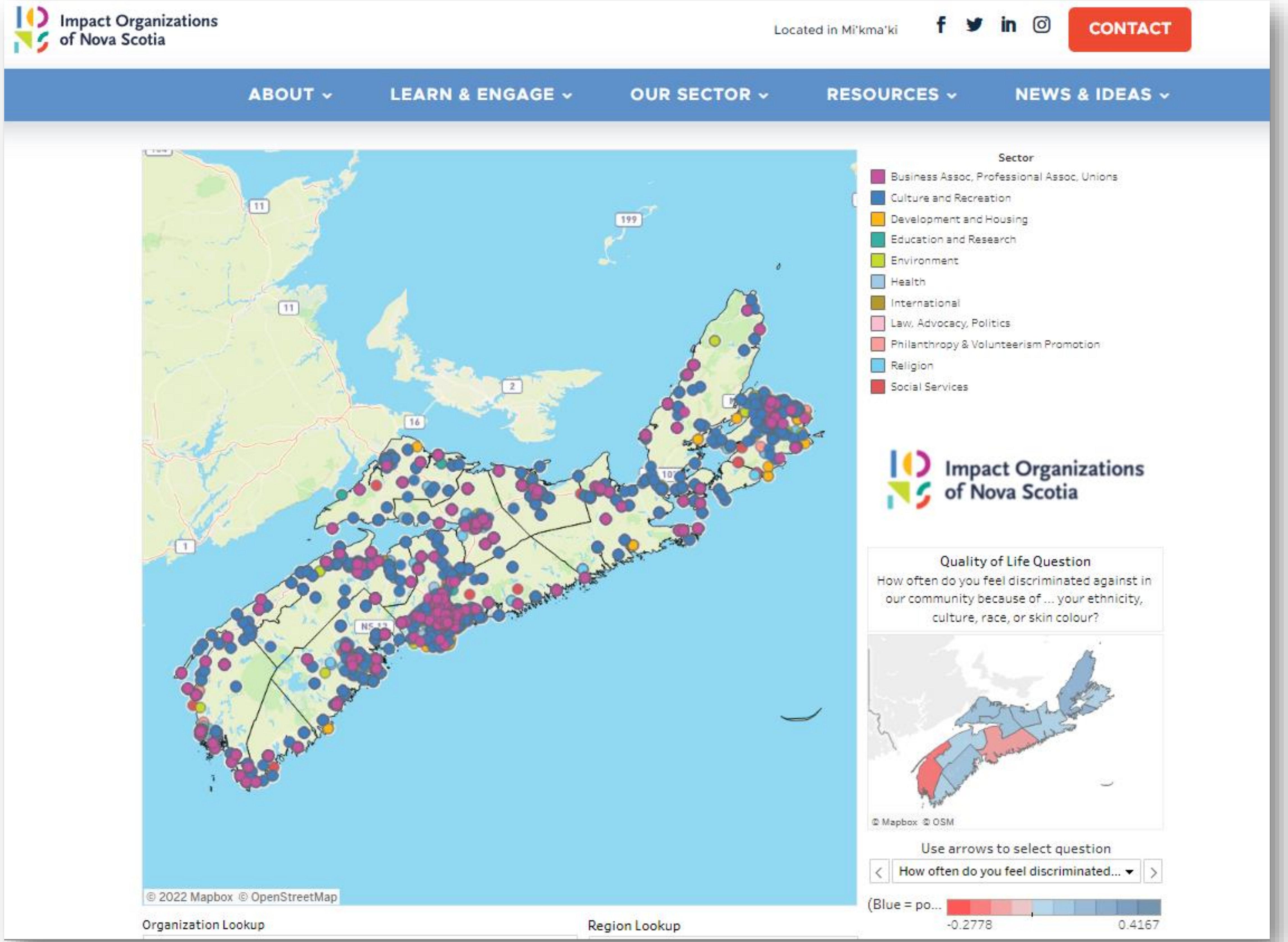
Visit our website to explore the Community Impact Sector Data Dashboard

ions.ca/sector-dashboard

New Sector Tools: Network Map

Impact Organizations of Nova Scotia

Network Map



Visit our website to explore the Community Impact Sector Network Map

ions.ca/sector-map

Conclusions

Impact Organizations
of Nova Scotia

Conclusions

Many challenges are consistent between the two surveys, just amplified by the pandemic.

- Access to sustainable funding is creating challenges that is affecting retention and recruitment
- Workload is high and leading to burnout, meaning more collaboration is needed to alleviate work burdens
- Staff attraction and retention is becoming an increasingly critical issue

Looking Forward

- Look for opportunities to engage in sector transformation
- Experiment and pilot new ways of working
- Continue to offer training and tools for the sector on JEDDI and governance
- Continue to develop our understanding of the sector
- Amplify the impact stories and celebrate our sector

Questions?

Impact Organizations of Nova Scotia

Impact Organizations of Nova Scotia

Thank you!

Connect With Us
@ionscanada

www.ions.ca