

ALBERTA NONPROFIT DATA STRATEGY:

CANADIAN SURVEY ON BUSINESS CONDITIONS, FIRST QUARTER 2022



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for Children & Families

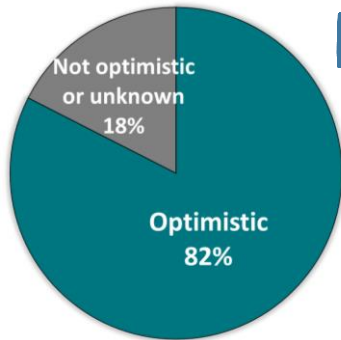


Content

1. **Executive Summary**
2. Canadian Survey on Business Conditions
Q1-2022

Organizational Outlook Summary

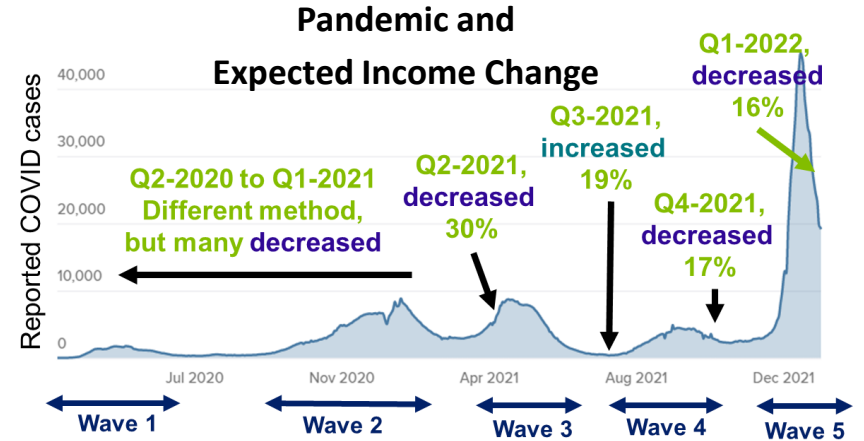
Community Nonprofits, First Quarter 2022



Continued optimism about the next 12 months!

Top obstacles next 3 months?

- 36% recruiting skilled employees
- 32% retaining skilled employees
- 32% rising cost of inputs



Similar to Q4-2021, nonprofits were more likely to report **decreases** than increases in revenue in **Q1-2022**

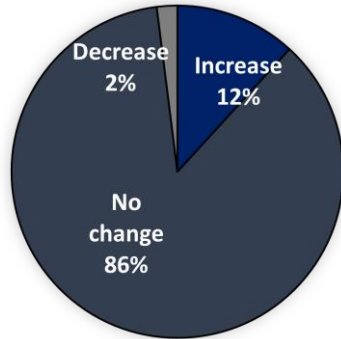
38% plan to expand, restructure or acquire other organizations

35% report expected increases in demand

25% report expected decreases in cash reserves

Employee Outlook Summary

Community Nonprofits, First Quarter 2022



Employee numbers are fairly stable

for next 3 months



Sector aiming for employee retention

47% increasing wages to existing employees

25% encourage on-the job training

16% increase benefits to existing employees



+7% expected average increase to wages for those increasing

Work Arrangements Summary

Community Nonprofits, First Quarter 2022

Work arrangements:

- 64% some remote
- 36% exclusively onsite



*Sector aiming for
employee retention*

26% to offer option
to work remotely

29% to offer flexible
scheduling

Executive Summary - Source

Statistics Canada, Canadian Survey on Business Conditions, First Quarter 2022



Statistics
Canada

Statistique
Canada

www.statcan.gc.ca Canada

Based on 1,453 community nonprofits sampled across Canada January 4 to February 7, 2022. These numbers may not reflect the full community nonprofit sector in Canada. Please interpret the findings with caution when discussing the community nonprofit sector.

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2a. Canadian Survey on Business Conditions

Q1-2022: Introduction

Canadian Survey on Business Conditions

1. A Cross-Canada Statistics Canada cross-sectional survey
2. A voluntary, stratified random sample of businesses by geography, industry sector, and size
3. The First Quarter (Q1) 2022 survey was collected between ***January 4 to February 7, 2022***
4. As a main comparison point, the Fourth Quarter (Q4) 2021 survey was collected between ***October 1 to November 5, 2021***

More details at:

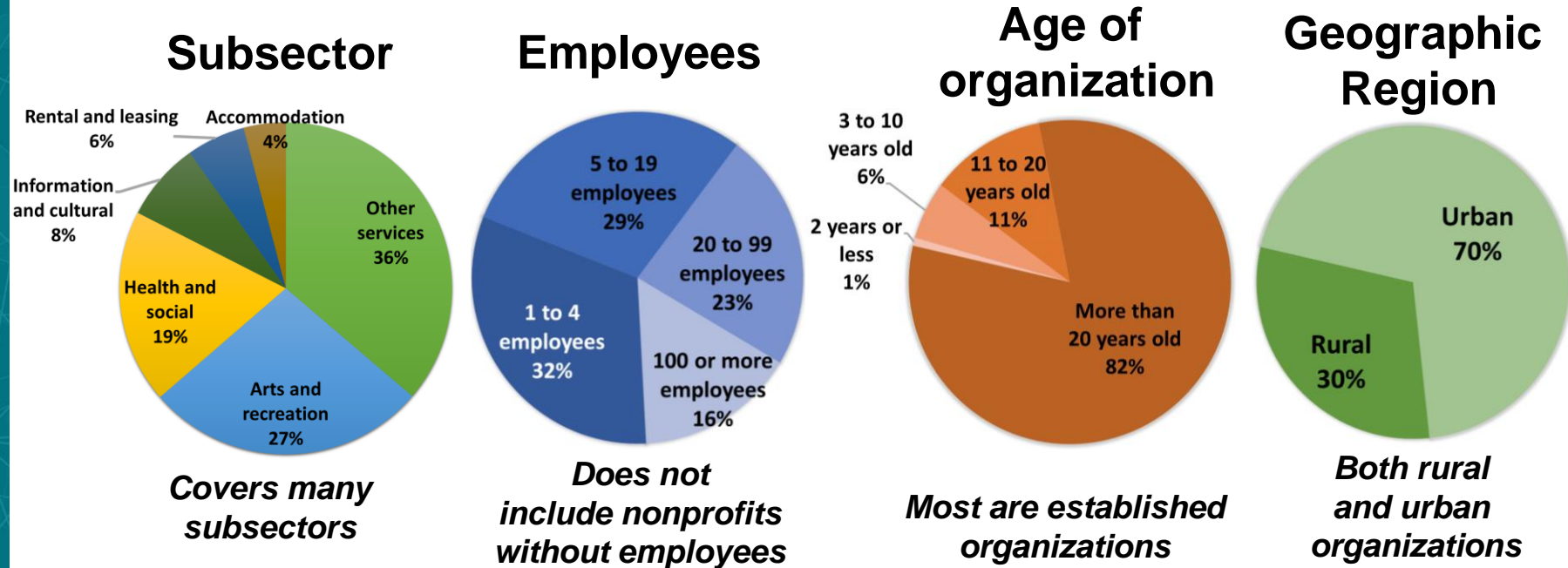
<https://www23.statcan.gc.ca/imdb/p2SV.pl?Function=getSurvey&Id=1330334>

Nonprofits in the Current Analysis

The current analysis focuses on survey responses from *community nonprofits*:

1. Also called 'Nonprofit institutions serving households'
2. Sometimes we compare to private sector businesses
3. The reported data is cross-Canada, but similar to Alberta patterns
4. 1,453 community nonprofits responded across Canada, with 116 from Alberta in the Q1 survey

Nonprofits in the Current Analysis: Breakdown



How to Interpret these Results?¹

(Limitations of this Data)

What to do:

1. Interpret the findings with caution as they may miss aspects of the community nonprofit sector. For example, it was estimated that 58% of community nonprofits in Alberta had no employees in 2003², whereas all organizations had an employee in this analysis;
2. Use the data to provide initial evidence for where the community nonprofit sector may be heading and create opportunities for future discussion on change; and
3. Consider how well the findings apply to your organization's context.

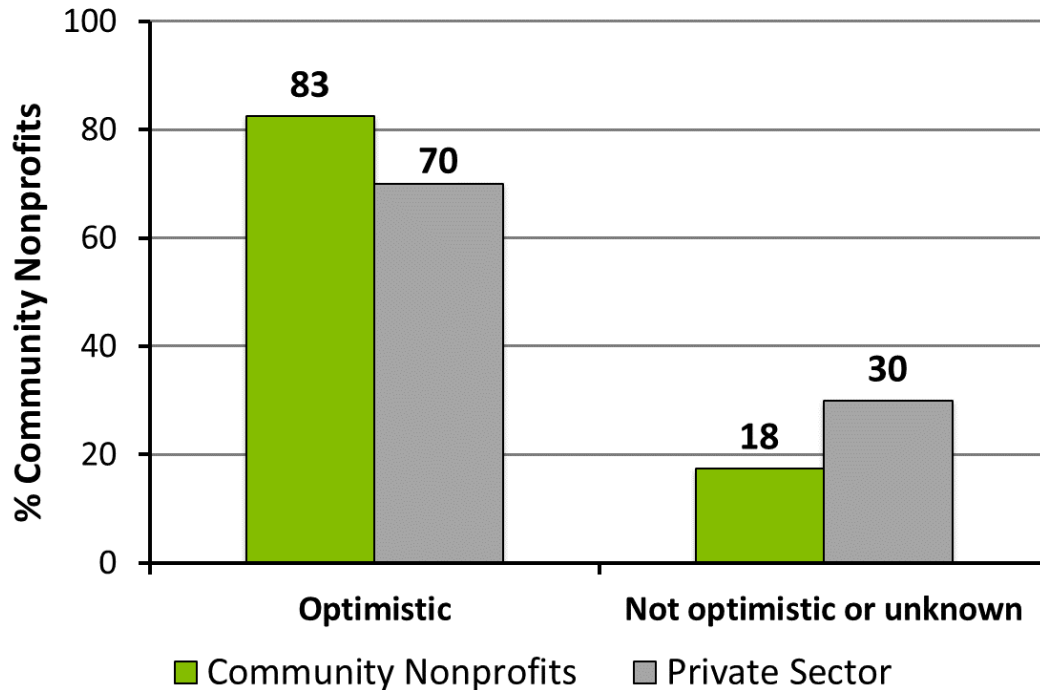
What NOT to do:

1. Do NOT interpret the findings to represent the full community nonprofit sector nationally or in Alberta; and
2. Do NOT use the findings without discussing the context about how the data was collected and how this may affect their application to the broader community nonprofit sector.

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2b. Organization Outlook: Outlook for the Next 12 Months

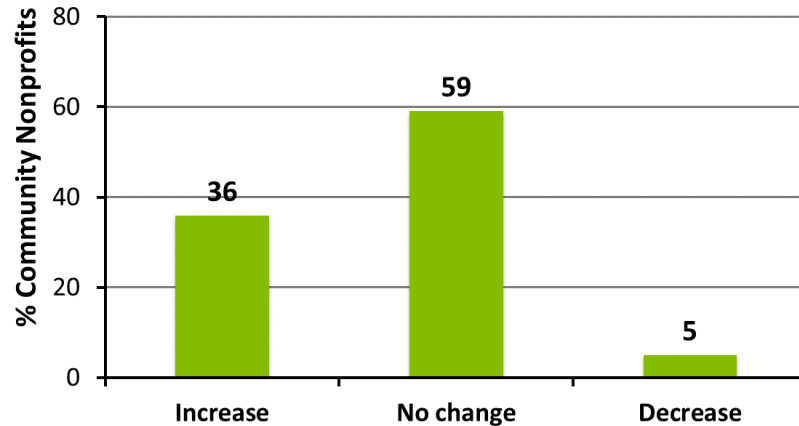


Optimism remains similar to the previous quarter

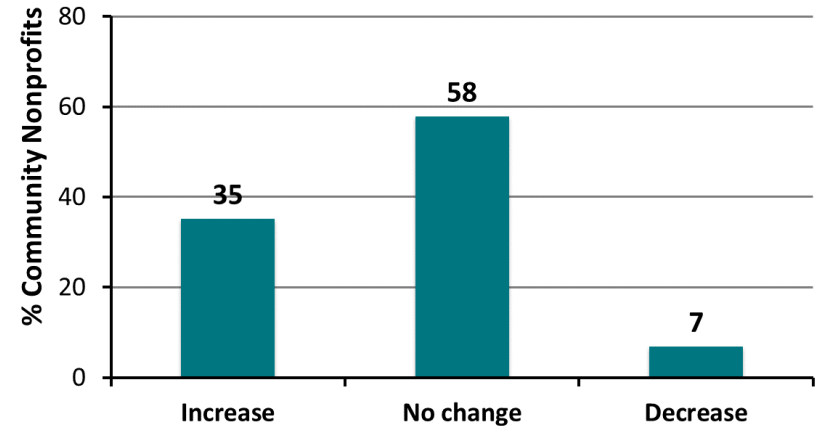
Community nonprofits continue to be more optimistic than the private sector

Expenses and Demands, Next 3 Months

Operating Expenses



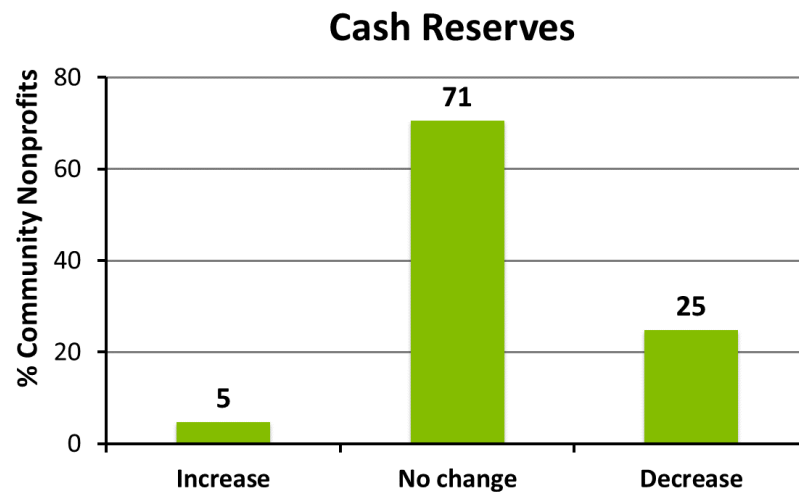
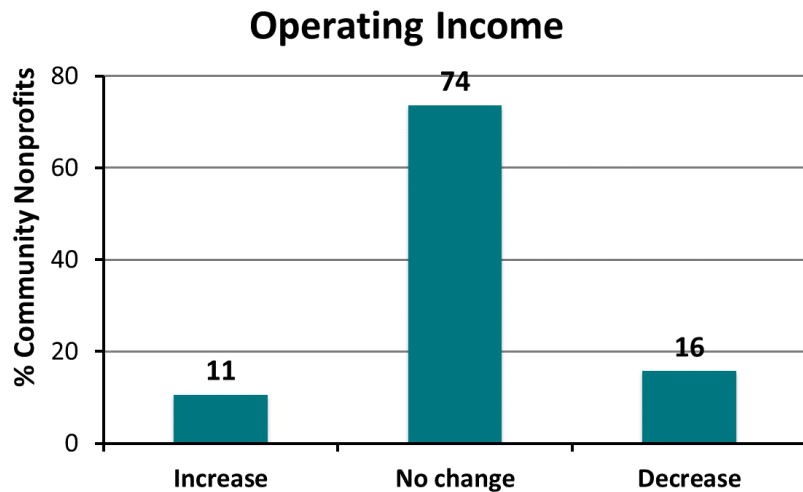
Demand for goods and services



Community nonprofits are more likely to report increases in demand and operating expenses than decreases. There is a slight increase expected in demand compared to Q4 2021.

*Excludes those stating questions were not applicable.

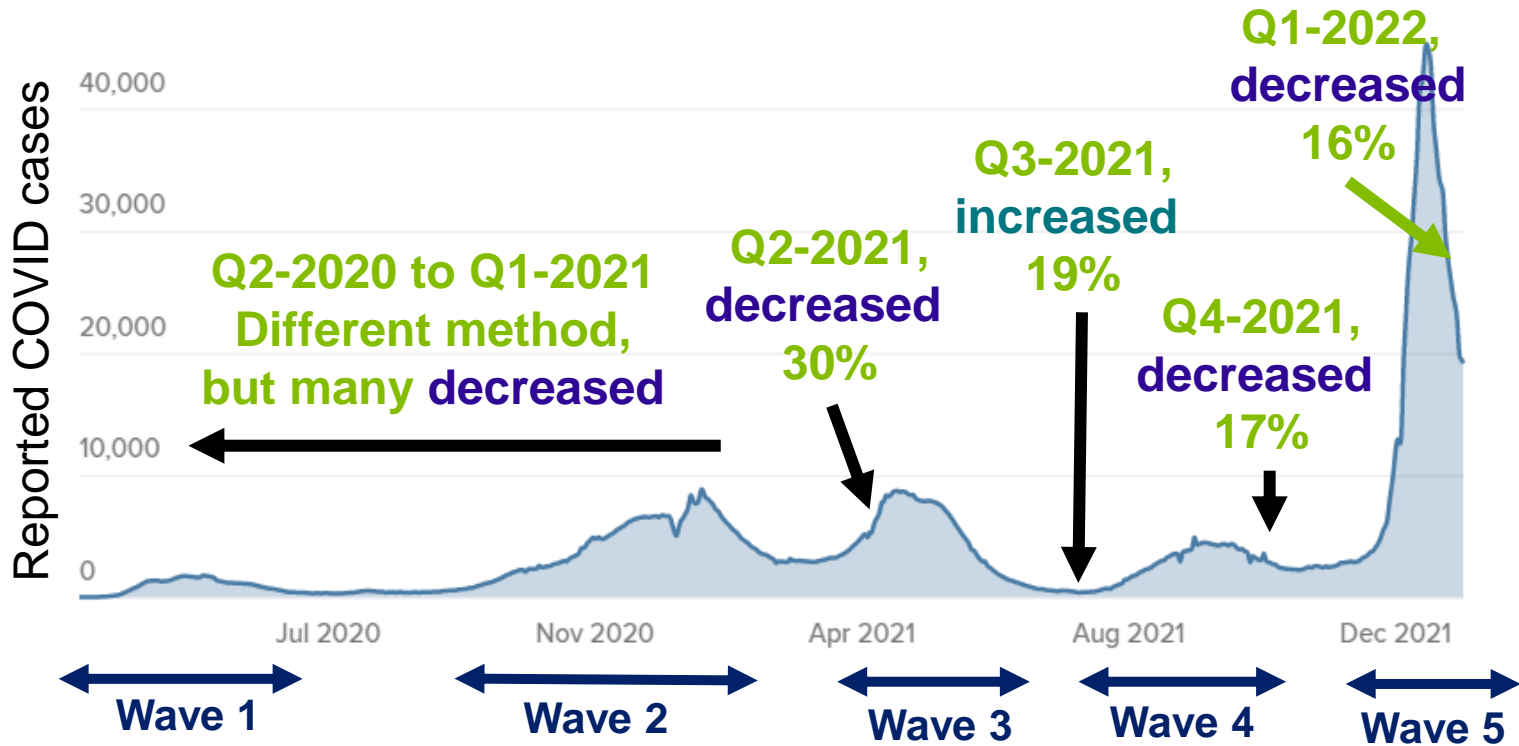
Income and Cash Reserves, Next 3 Months



Community nonprofits are primarily reporting no change in income and cash reserves for Q1 2022. They are more likely to report decreases than increases in both.

*Excludes those stating questions were not applicable.

Pandemic and Expected Income Change



Sources: Statistics Canada and ESRI Canada

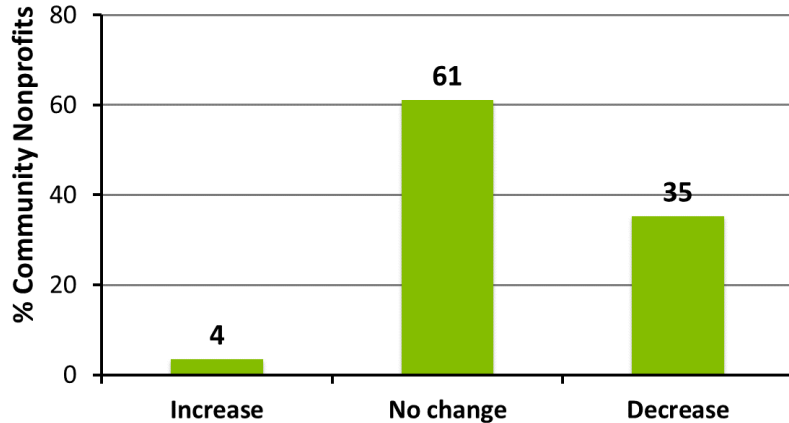
Cash Reserves Q4-2021 and Q1-2022, Next 3 months

Fourth Quarter 2021

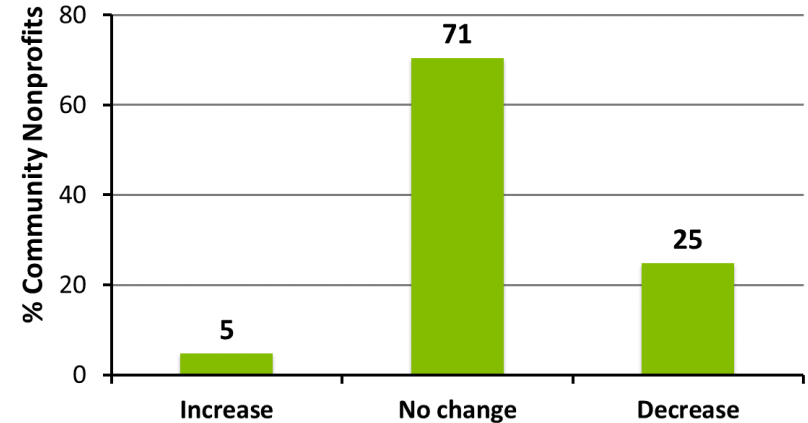


First Quarter 2022

Cash Reserves



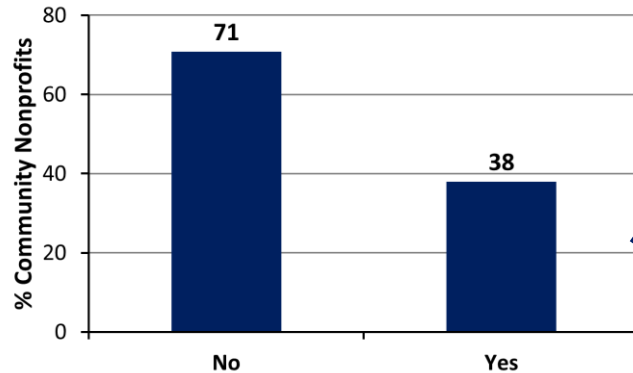
Cash Reserves



There are fewer concerns about decreased cash reserves in this quarter compared to, Q4 2021

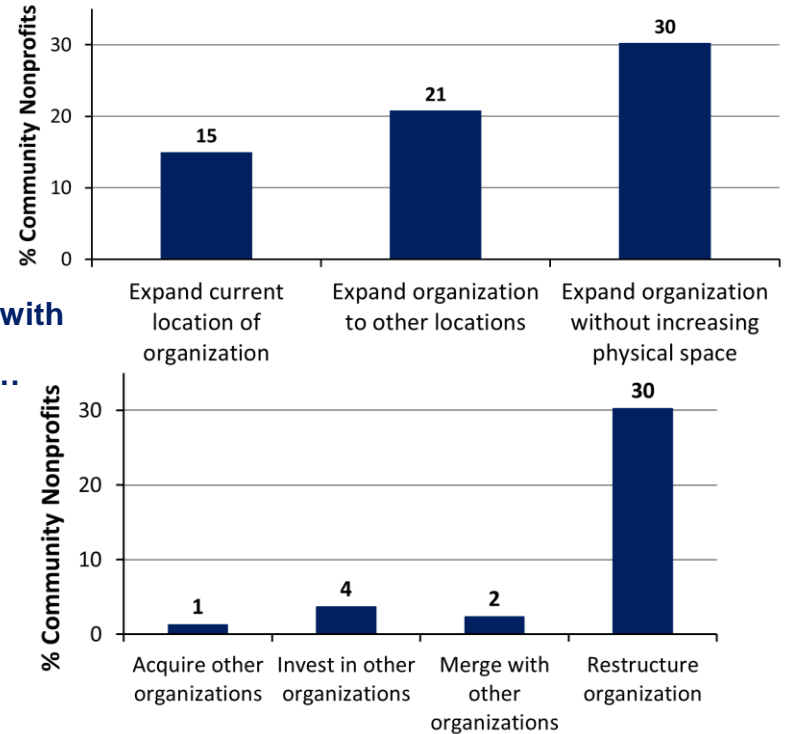
*Excludes those stating questions were not applicable.

Plans to Expand, Restructure or Acquire Other Organizations, Next 12 Months

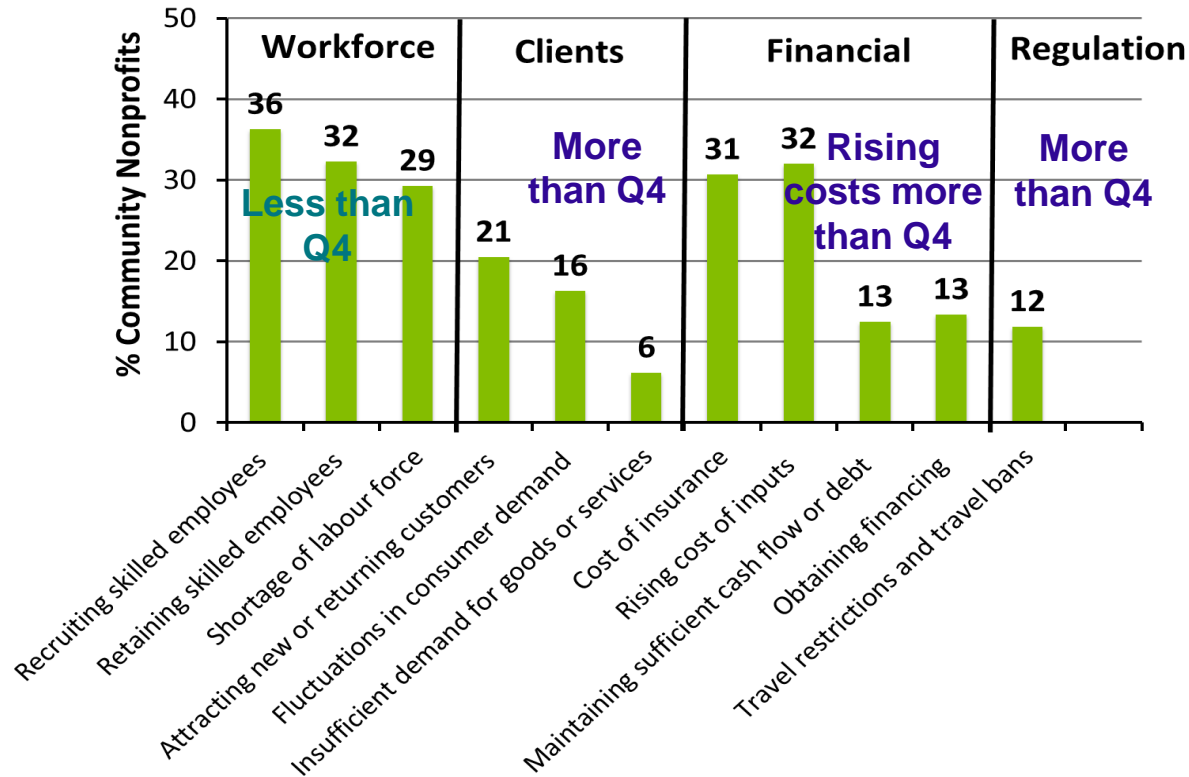


A majority are not planning to engage in these activities

Of those with plans...



Obstacles Q1-2022, Next 3 months

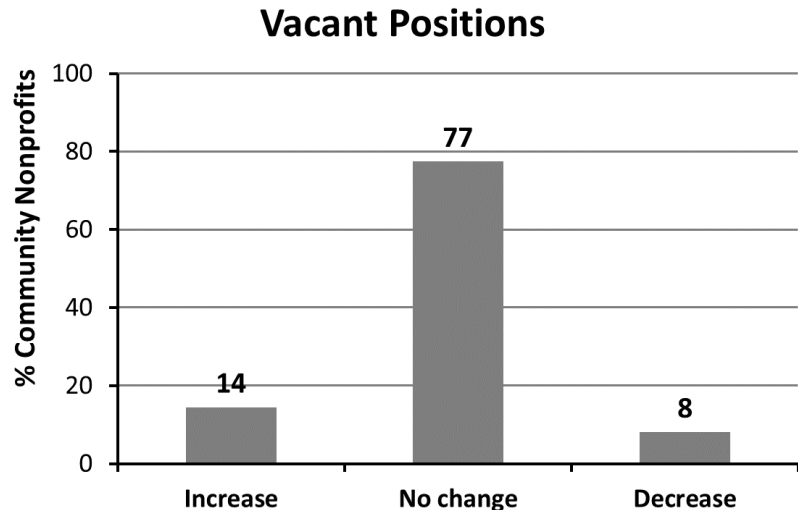
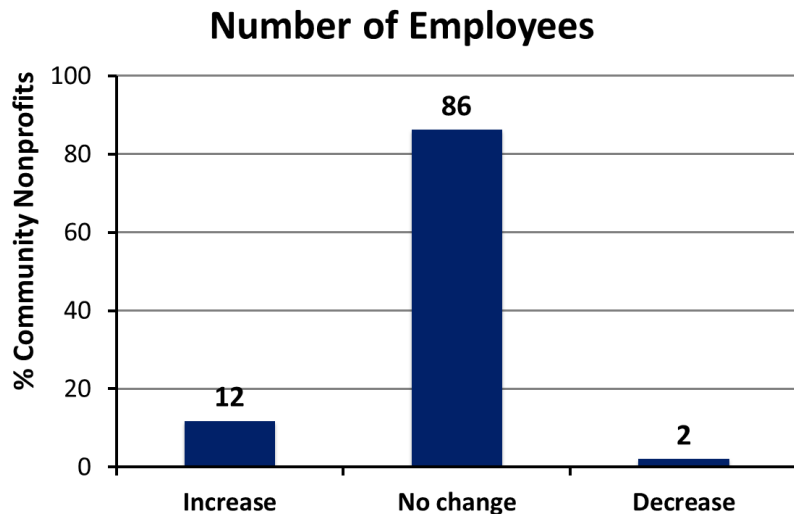


Workforce obstacles are slightly decreasing, and others have slight increases compared to Q4-2021.

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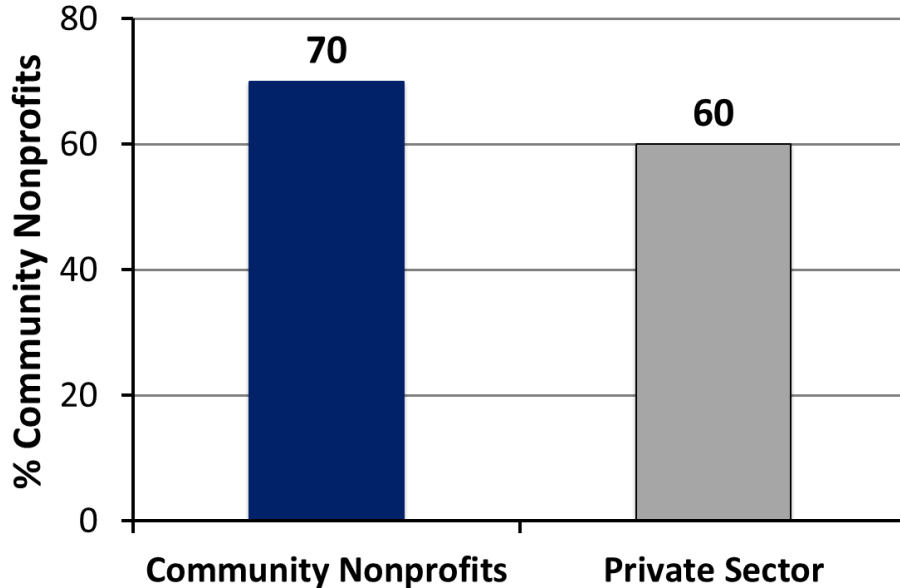
2c. Employee Outlook: Number of Employees and Vacant Positions, Next 3 Months



Most organizations expect the number of employees and vacant positions to stay the same in Q1-2022 compared to Q4-2021

*Excludes those stating this question was not applicable.

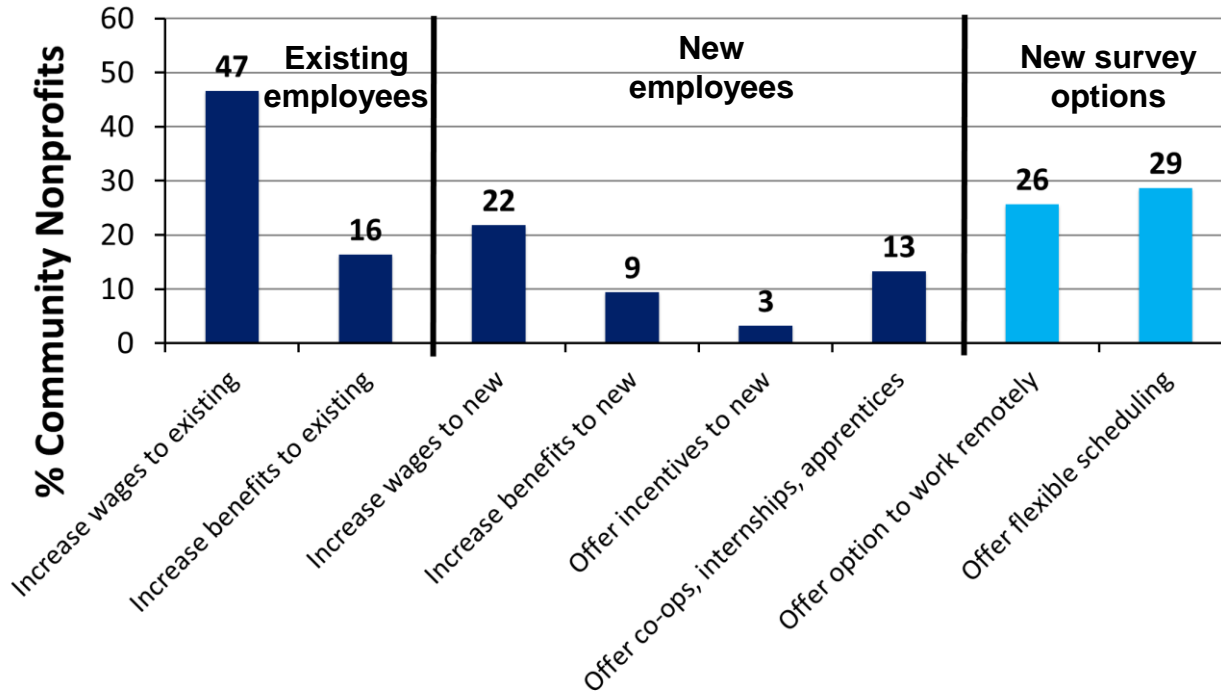
2c. Have Strategy for Employee Retention, Next 3 Months



Majority of nonprofits have a strategy for employee retention

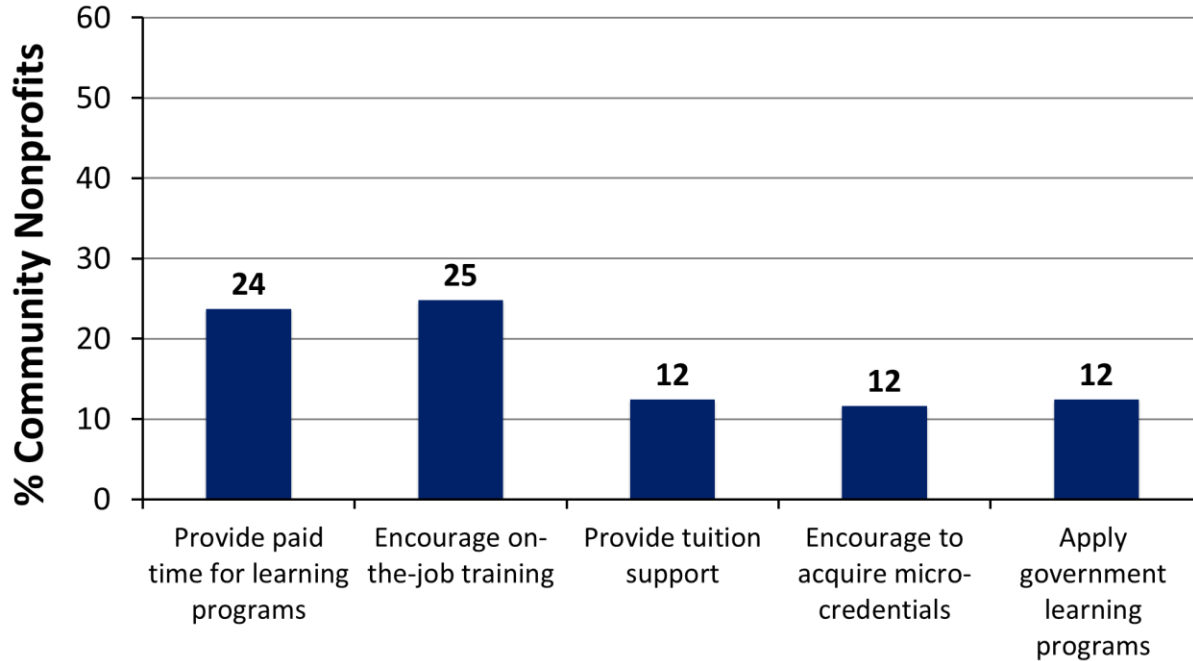
As with the previous quarter, there is more focus on retention in the nonprofit sector

Plans for Retention and Recruitment of Employees, Next 12 Months



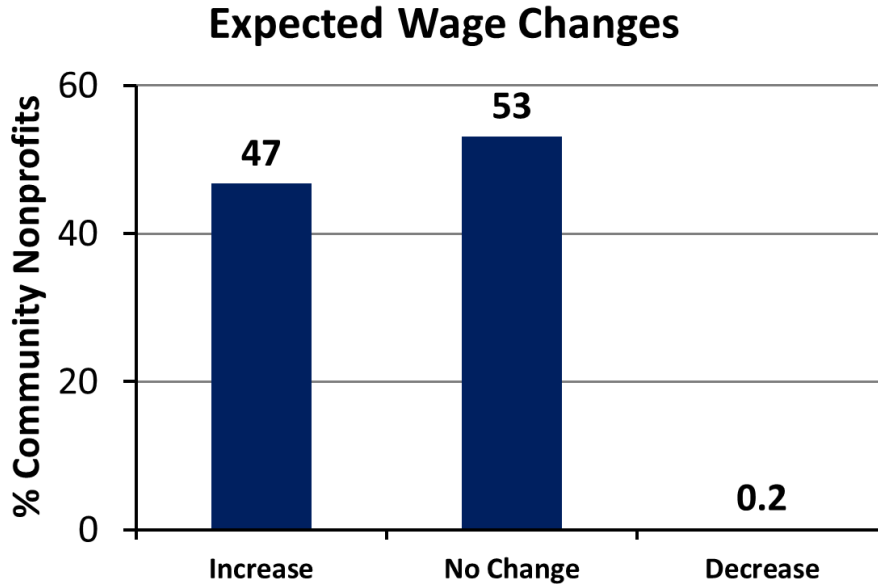
Focus on increase of wages and offering benefits, including remote work and flexible scheduling

Training Plans for Employee Retention, Next 12 Months



Paid and on-the-job training were still the highest priority in Q1-2022

Average Change in Wage Expected, Next 12 Months



A majority of nonprofits expect average wages to stay approximately the same

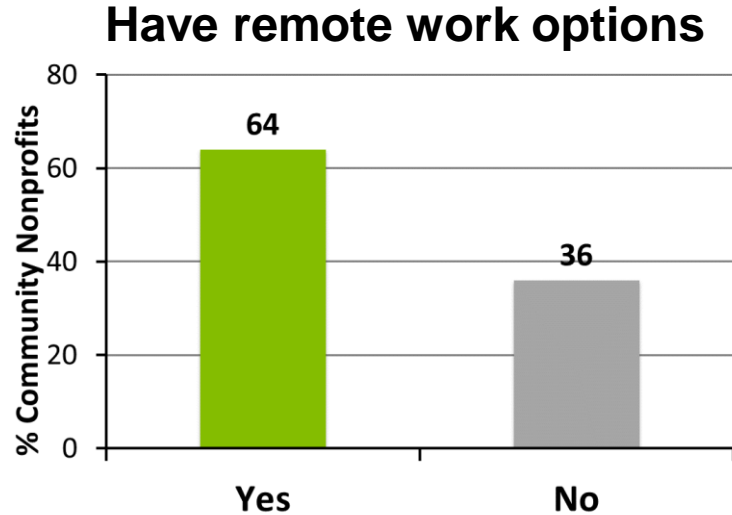
Average Increase = +7%

Average Decrease = -20.5%

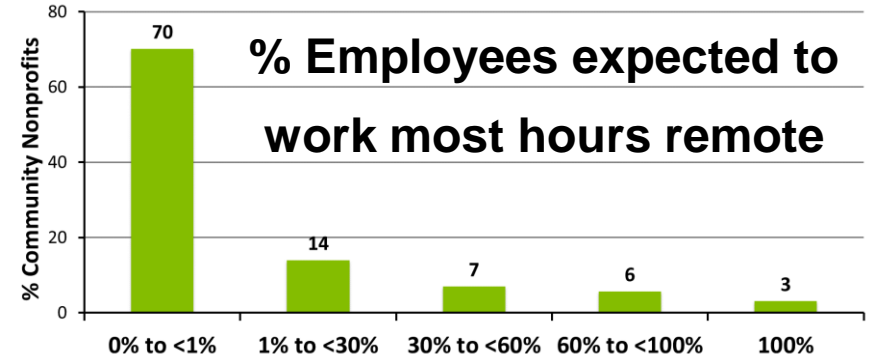
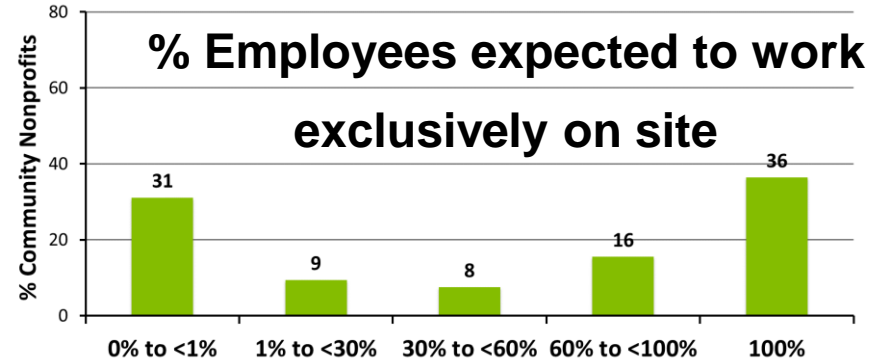
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2d. Work Arrangements: Percent Remote Work Q1-2022, Next 3 months



More than half expect
to work remotely



Acknowledgements

PRIMARY CONTRIBUTORS

Kiran Gurm, Matthew Russell, and Nicole Glenn

PROJECT SPONSORS

PolicyWise for Children & Families, Edmonton Community Foundation, and the Government of Alberta Ministry of Culture, Multiculturalism & Tourism.



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ACKNOWLEDGEMENTS

It is with thanks we acknowledge the individuals who have contributed their wisdom, experience, and perspectives to this project. This project was built on collaborative learning, and we would like to thank the partners that worked with us across the Alberta nonprofit sector, Alberta Government, and Statistics Canada. In particular, we would like to thank the Alberta Nonprofit Network (ABNN), the ABNN Steering Committee, and the co-chairs for the Alberta Nonprofit Data Strategy, Mike Grogan and Robyn Blackadar.

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