Alberta Nonprofit Data Strategy: Alberta Registered Charity Analysis 2015-2018

Use and Technical Notes

Acknowledgments

SUGGESTED CITATION

SHARING GUIDELINES

It is the hope of all those who contributed to this project that these findings are shared and used to benefit others and inform policy and practice to improve child, family, and community well-being.

PolicyWise asks the intent and quality of the work is retained; therefore, PolicyWise for Children & Families must be acknowledged in the following ways:

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Table of Contents

Using the Registered Charities 2015-2018 Analysis

Three files are provided for the Alberta Nonprofit Data Strategy: Registered Charities Analysis 2015-2018, with the first two files taking the format of PDF slides. These three files are: 1) a file with the full analysis and notes below to explain and help with interpretation (Alberta Registered Charities 2015-18_with_notes), 2) a file with the full analysis in high resolution to support sharing of content (Alberta Registered Charities 2015-18_high_res), and 3) this file on how to use the files and understand key details from the analysis. In addition to these files, other materials are planned to engage with the nonprofit and volunteering sector in Alberta to further increase the impact of the analysis.

When using these three files the following is recommended:

1. The Alberta Registered Charities 2015-18_with_notes file can be used by people new to the analysis, or those looking to increase their understanding of the analysis and the Alberta Nonprofit Data Strategy. It has information on the project background, registered charity data details, full sector analyses, subsector analyses, regional analyses, recent and upcoming interesting reports and data, and analysis takeaways.

   a. The **background** section (slides 3 to 8) describes the history of the Alberta Nonprofit Data Strategy and outlines the questions targeted in the analysis.

   b. The **registered charity data introduction** section (slides 10 to 13) introduces the registered charity data, its benefits and limitations, why it was used, and data details.

   c. The **full sector analysis** section (slides 15 to 22) introduces cross-Alberta numbers on expenditures and revenues of excluded registered charities. It focuses on community registered charity expenditures and revenues, staff compensation, and workforce numbers, while showing how some of the numbers relate to organization size.

   d. The **subsector analysis** section (slides 24 to 32) introduces how subsectors (e.g., social service organizations) make up the sector. This section shows how registered charity subsector breakdowns compare to previous nonprofit breakdown reports. It then shows subsector: expenditures and revenues, and estimated volunteering value, while showing how some of the numbers relate to the percent of organizations in each subsector.

   e. The **regional analysis** section (slides 34 to 37) introduces how sector numbers are seen across regions in Alberta, per unit of people (per capita). It splits expenditures by all subsectors to show which regions spend more across subsectors.

   f. The **other impact data and analysis** section (slides 39 and 40) introduces recent reports about the sector and upcoming interesting datasets that can inform the sector.

   g. The **key takeaways** section (slide 42) introduces overall key points from the analysis.

2. The Alberta Registered Charities 2015-18_high_res file can be used when sharing slides or analyses. Please acknowledge PolicyWise for Children & Families and the project when using these slides externally, and let PolicyWise know when creating derivative works.

3. This file (Alberta Registered Charities 2015-18 Use and Technical Manual) can be used for notes on how to use the three files, and when seeking more in-depth understanding of how the data was derived, how some registered charity organizations were excluded, how regions were derived, and how subsectors were derived.

Registered Charity Data

Analysis was performed using Alberta registered charity data (Canadian Revenue Agency [CRA] T3010) extracted on December 31, 2020 by the CRA.[1] Note that small differences in datasets were observed between datasets with different extraction dates.

Data Cleaning

Before using the data, data cleaning was performed looking for obvious data issues with a likely direction. Our approach was conservative in that adjustments were only made if an issue was highly likely to be an error (and agreed upon by two staff), and had a clear solution. Missing values were filled conservatively (e.g., if organizations did not report staff, it was counted as 0; or if subvalues were supposed to add up to the value which was missing, available subvalues were added up to replace the missing value) and errors in values for key indicators were checked for large discrepancies that clearly stood out against longitudinal trends (e.g., being off by a multiple of 1000 units in compensation in one year [$1,000,000 vs. $1,000] despite similar reported number of staff over time). If a highly likely error was identified, available surrounding data and longitudinal context was investigated to estimate the adjustment for the value.

Some examples of common likely errors were: 1) the organization forgot to report a value in one place, but reported it elsewhere, 2) total numbers did not equal sub-values that were supposed to be added up for a total, 3) clear typos were made in data entry, and 4) compensation amounts were reported as staff numbers. Deemed errors were adjusted by a reviewer, and audited and validated by another reviewer. Decisions on adjustments were made taking into account all available information.

Registered Charity Exclusion

Organizations that did not fit the Alberta Nonprofit Network (ABNN) and previous Statistics Canada nonprofits serving households' (communities) definitions were excluded.[2] These organizations included: hospitals (and publically funded nursing homes), K-12 schools, and universities and colleges, which are sometimes listed under 'government nonprofit' definitions in reports. Searches were performed using registered charity information and common organization names associated with coding (e.g., 'school board' was searched for K-12 schools) to identify organizations to exclude. Finally, a check was performed on whether excluded organizations appeared on the Alberta Non-Profit Listing, to investigate how much overlap was seen with excluded organizations in the listing.[3]

Hospitals

Hospitals, clinics, and publically funded nursing homes were excluded. External fundraising branches that support these organizations were not excluded. Eighteen organizations were identified to be excluded. Excluded organizations on the Alberta Non-Profit Listing accounted for 6.7% of the dollar value of all excluded hospital organizations ($1.1 billion of $16.5 billion dollars in 2018).

Universities/Colleges

Public, private, and religious universities/colleges were excluded. The exclusion process initially referred to the Alberta post-secondary list.[4] Organizations supporting universities/colleges were not excluded (e.g., friends, alumni, and associations). Forty-eight organizations were identified to be excluded. Excluded organizations on the Alberta Non-Profit Listing accounted for 1.2% of the dollar value of all excluded university/college organizations ($75 million of $6.1 billion dollars in 2018).

K-12 Schools

Public, separate, and private K-12 schools and school boards in Alberta were excluded. Preschools affiliated with K-12 schools were excluded, but other preschools and organizations supporting K-12 schools were not (e.g., friends, alumni, associations, etc.). Two-hundred thirty-six organizations were identified to be excluded. Excluded organizations on the Alberta Non-Profit Listing accounted for 6.2% of the dollar value of all excluded K-12 school organizations ($496 million of $8.1 billion dollars in 2018).

Deriving Organization Regions

Based on addresses reported by organizations, data was translated to coordinates using Google location services and split by regions. The bottom four regions are Alberta Health Zones (AHS; of five regions), and the north is split by AHS Subzones (one AHS zone region is split into five). Populations are based on 2016 reported values.[5, 6] Coordinates were mapped to the regions with GIS software. As part of the process, invalid postal codes were investigated, as well as obvious issues where locations across Alberta were attributed to one location. On discovery obvious errors were corrected; however, it is expected that some regional errors are still present, especially where organizations reported multiple locations together.

Deriving Organization Subsectors

Subsectors were derived based on the International Classification of Non-Profit Organizations (ICNPO), which has been used in Alberta and by Statistics Canada in related analyses. The coding scheme was based on methodology used by Imagine Canada. Coding used the primary program code self-reported by organizations as part of registered charity reporting. In absence of program codes, coding used other activity codes supplied in the data files. Classifications attempted to match descriptions offered by ICNPO manuals.[7, 8] As a lack of reporting of program codes was common in individual years (e.g., no subsector related codes were available in 2016 for an organization, but were found in 2017), the most frequent subsector coding (besides unknown codes) over 2015 to 2018 for the ICNPO coding was used for organizations. This helped recover organizations with unknown classifications for some of the years. Principles behind program coding are listed below.

If the organization could not clearly be attributed to a subsector in any year, it was classified as **'unknown'**.

ICNPO Subsectors

Culture and Recreation

Arts and Culture

- *Media and communications.* Production and dissemination of information and communication; includes radio and TV stations; publishing of books, journals, newspapers and newsletters; film production; and libraries.
- *Visual arts, architecture, ceramic art.* Production, dissemination and display of visual arts and architecture; includes sculpture, photographic societies, painting, drawing, design centres and architectural associations.
- *Performing arts.* Performing arts centres, companies and associations; includes theater, dance, ballet, opera, orchestras, chorals and music ensembles.
- *Historical, literary and humanistic societies.* Promotion and appreciation of the humanities, preservation of historical and cultural artifacts and commemoration of historical events; includes historical societies, poetry and literary societies, language associations, reading promotion, war memorials and commemorative funds and associations.
- *Museums.* General and specialized museums covering art, history, sciences, technology and culture.
- *Zoos and aquariums.*

Sports and Recreation

- *Sports.* Provision of amateur sport, training, physical fitness and sport competition services and events; includes fitness and wellness centres.
- *Other recreation and social clubs.* Recreation and social clubs. Provision of recreational facilities and services to individuals and communities; includes playground associations, country clubs, men's and women's clubs, touring clubs and leisure clubs. Service clubs. Membership organizations providing services to members and local communities, for example, Lions, Zonta International, Rotary Club and Kiwanis.

Education and Research

Primary and Secondary Education

Education at elementary, primary and secondary levels; includes pre-school organizations other than day care.

Higher Education

Higher learning, providing academic degrees; includes universities, business management schools, law schools and medical schools.

Other Education

Technical and vocational training specifically geared towards gaining employment; includes trade schools, paralegal training, and secretarial schools.

Research

- *Medical research.* Research in the medical field; includes research on specific diseases, disorders or medical disciplines.
- *Science and technology.* Research in the physical and life sciences and engineering and technology.
- *Social sciences, policy studies.* Research and analysis in the social sciences and policy area.

Health

Hospitals and Rehabilitation

- *Hospitals.* Primarily inpatient medical care and treatment.
- *Rehabilitation.* Inpatient health care and rehabilitative therapy to individuals suffering from physical impairments due to injury, genetic defect or disease and requiring extensive physiotherapy or similar forms of care.

Nursing Homes

Inpatient convalescent care and residential care, as well as primary health-care services; includes homes for the frail elderly and nursing homes for the severely handicapped.

Mental Health and Crisis Intervention

- *Psychiatric hospitals.* Inpatient care and treatment for the mentally ill.
- *Mental health treatment.* Outpatient treatment for mentally ill patients; includes community mental health centres and halfway homes.
- *Crisis intervention.* Outpatient services and counsel in acute mental health situations; includes suicide prevention and support to victims of assault and abuse.

Other Health Services

- *Public health and wellness education.* Public health promotion and health education; includes sanitation screening for potential health hazards, first aid training and services and family planning services.
- *Health treatment, primarily outpatient.* Organizations that provide primarily outpatient health services, e.g., health clinics and vaccination centres.
- *Rehabilitative medical services.* Outpatient therapeutic care; includes nature cure centres, yoga clinics and physical therapy centres.
- *Emergency medical services.* Services to persons in need of immediate care; includes ambulatory services and paramedical emergency care, shock/trauma programmes, lifeline programmes and ambulance services.

Social Services

Social Services

- *Child welfare, child services and day care.* Services to children, adoption services, child development centres, foster care; includes infant-care centres and nurseries.
- *Youth services and youth welfare.* Services to youth; includes delinquency prevention services, teen pregnancy prevention, drop-out prevention, youth centres and clubs and job programmes for youth; includes YMCA, YWCA, Boy Scouts, Girl Scouts and Big Brothers/Big Sisters.
- *Family services.* Services to families; includes family life/parent education, single parent agencies and services and family violence shelters and services.
- *Services for the handicapped.* Services for the handicapped; includes homes, other than nursing homes, transport facilities, recreation and other specialized services.
- *Services for the elderly.* Organizations providing geriatric care; includes in-home services, homemaker services, transport facilities, recreation, meal programmes and other services geared towards senior citizens (does not include residential nursing homes).
- *Self-help and other personal social services.* Programmes and services for self-help and personal development; includes support groups, personal counseling and credit counseling/money management services

Emergency and Relief

- *Disaster/emergency prevention and control.* Organizations that work to prevent, predict, control and alleviate the effects of disasters, to educate or otherwise prepare individuals to cope with the effects of disasters, or to provide relief to disaster victims; includes volunteer fire departments, life boat services etc.
- *Temporary shelters.* Organizations providing temporary shelters to the homeless; includes travelers' aid and temporary housing.
- *Refugee assistance.* Organizations providing food, clothing, shelter and services to refugees and immigrants.

Income Support and Maintenance

- *Income support and maintenance.* Organizations providing cash assistance and other forms of direct services to persons unable to maintain a livelihood.
- *Material assistance.* Organizations providing food, clothing, transport and other forms of assistance; includes food banks and clothing distribution centres.

Environment

Environment

- *Pollution abatement and control.* Organizations that promote clean air, clean water, reducing and preventing noise pollution, radiation control, treatment of hazardous wastes and toxic substances, solid waste management and recycling programmes.

- *Natural resources conservation and protection.* Conservation and preservation of natural resources, including land, water, energy and plant resources for the general use and enjoyment of the public.
- *Environmental beautification and open spaces.* Botanical gardens, arboreta, horticultural programmes and landscape services; organizations promoting anti-litter campaigns; programmes to preserve the parks, green spaces and open spaces in urban or rural areas; and city and highway beautification programmes.

Animal Protection

- *Animal protection and welfare.* Animal protection and welfare services; includes animal shelters and humane societies.
- *Wildlife preservation and protection.* Wildlife preservation and protection; includes sanctuaries and refuges.
- *Veterinary services.* Animal hospitals and services providing care to farm and household animals and pets.

Development and Housing

Economic, Social and Community Development

- *Community and neighbourhood organizations.* Organizations working towards improving the quality of life within communities or neighbourhoods, e.g., squatters' associations, local development organizations and poor people's cooperatives.
- *Economic development.* Programmes and services to improve economic infrastructure and capacity; includes building of infrastructure, such as roads, and financial services, such as credit and savings associations, entrepreneurial programmes, technical and managerial consulting and rural development assistance.
- *Social development.* Organizations working towards improving the institutional infrastructure and capacity to alleviate social problems and to improve general public well-being.

Housing

- *Housing associations*. Development, construction, management, leasing, financing and rehabilitation of housing.
- *Housing assistance.* Organizations providing housing search, legal services and related assistance.

Employment and Training

- *Job training programmes*. Organizations providing and supporting apprenticeship programmes, internships, onthe-job training and other training programmes.
- *Vocational counseling and guidance.* Vocational training and guidance, career counseling, testing and related services.
- *Vocational rehabilitation and sheltered workshops.* Organizations that promote self-sufficiency and income generation through job training and employment.

Law, Advocacy and Politics

Civic and Advocacy Organizations

- *Advocacy organizations.* Organizations that protect the rights and promote the interests of specific groups of people, e.g., the physically handicapped, the elderly, children and women.
- *Civil rights associations.* Organizations that work to protect or preserve individual civil liberties and human rights.
- *Ethnic associations.* Organizations that promote the interests of or provide services to members belonging to a specific ethnic heritage.
- *Civic associations.* Programmes and services to encourage and spread civic mindedness.

Law and Legal Services

- *Legal services.* Legal services, advice and assistance in dispute resolution and court-related matters.
- *Crime prevention and public policy.* Crime prevention to promote safety and precautionary measures among citizens.
- *Rehabilitation of offenders.* Programmes and services to reintegrate offenders; includes halfway houses, probation and parole programmes, and prison alternatives.
- *Victim support.* Services, counsel and advice to victims of crime.
- *Consumer protection associations.* Protection of consumer rights and the improvement of product control and quality.

Political Parties and Organizations

Activities and services to support the placing of particular candidates into political office; includes dissemination of information, public relations and political fund-raising.

Philanthropic Intermediaries and Voluntarism Promotion (Philanthropic & Voluntarism)

Grant-making Foundations

 Private foundations; including corporate foundations, community foundations and independent public-law foundations.

Other Philanthropic Intermediaries and Voluntarism Promotion

- *Volunteerism promotion and support.* Organizations that recruit, train and place volunteers and promote volunteering.
- *Fund-raising organizations*. Federated, collective fund-raising organizations; includes lotteries.

International

Exchange/friendship/cultural Programmes

Programmes and services designed to encourage mutual respect and friendship internationally.

Development Assistance Associations

Programmes and projects that promote social and economic development abroad.

International Disaster and Relief Organizations

Organizations that collect, channel and provide aid to other countries during times of disaster or emergency.

International Human Rights and Peace Organizations

Organizations which promote and monitor human rights and peace internationally.

Religion

Congregations

Churches, synagogues, temples, mosques, shrines, monasteries, seminaries and similar organizations promoting religious beliefs and administering religious services and rituals.

Associations of Congregations

Associations and auxiliaries of religious congregations and organizations supporting and promoting religious beliefs, services and rituals.

Business and Professional Associations, Unions

Business Associations

Organizations that work to promote, regulate and safeguard the interests of special branches of business, e.g., manufacturers' association, farmers' association and bankers' association.

Professional Associations

Organizations promoting, regulating and protecting professional interests, e.g., bar associations and medical associations.

Labour Unions

Organizations that promote, protect and regulate the rights and interests of employees.

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