

**The Role of Voluntary Organizations in Rural Canada:  
Impacts of Changing Availability of Operational and Program Funding**

Canadian Rural Restructuring Foundation

New Rural Economy Project

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## Executive Summary

This research project on **The Role of Voluntary Organizations in Rural Canada: Impacts of Changing Availability of Operational and Program Funding**, was carried out by the Canadian Rural Restructuring Foundation (CRRF) as part of their on-going New Rural Economy Project. The voluntary sector is important in rural and small town Canada as it provides community-based services which meet local needs in the absence of private sector or public sector delivery of services. A critical ongoing issue for volunteer organizations is financing to cover operations, ongoing programs, and special projects or events. In some cases, there are government grants available to meet these costs. However, many organizations also rely on a mix of other revenue sources ranging from donations, to fundraising, to membership fees, and much more.

The research was carried out by five university-based research teams associated with CRRF. The Voluntary Sector pilot project study is comprised of four components:

- ! A literature review on the relationship between the voluntary sector and government (separate report).
- ! A summary analysis report on the changing role of voluntary organizations as they relate to changing availability of funding (this report).
- ! Site specific case study reports, intended for use in the communities (and appended to this report).
- ! An education strategy for voluntary organizations to improve their knowledge and awareness of funding options and program delivery strategies (separate report).

The strength of the CRRF approach is that it brings a multi-disciplinary team of researchers together to apply a range of research techniques to communities they know well. Familiarity in the study communities assists greatly with the conduct and interpretation of the research.

This report summarizes information collected from interviews with 71 volunteer organizations in nine of the 32 field sites within the NRE project. The focus is on issues related to government funding of operations, programs, and special projects, perceptions about the funding, and the impact of changing availability of funding from a variety of sources on voluntary organizations.

## Methodology

Case study communities were selected on the based of the availability of a local research team, ensuring geographic and linguistic coverage across the country, and a willingness on the part of the local community to participate. The communities included:

- ! Tumbler Ridge and Mackenzie, BC ! Ferintosh, AB ! Blenheim and Tweed, ON
- ! St. Francoise and St. Damase, QC ! Blissfield and Neguac, NB.

For each case study community all volunteer organizations were identified and categorized into one of six groups:

- ! social service
- ! health service (including emergency services)

- |                              |                                 |
|------------------------------|---------------------------------|
| ! local economic development | ! arts, culture, and recreation |
| ! service clubs              | ! youth and seniors.            |

The target was to conduct interviews with 12 to 20 organizations in each community, providing coverage in each category where possible. A literature review was conducted parallel to the development of an interview guide. Face-to-face interviews were conducted from January to April, 1999. Key informant interviews using structured, semi-structured, and open-ended questions were completed. Data from the interviews was stored in Lotus files (for coded questions) and text files (for open ended questions). These files are stored on the NRE database (<http://nre.concordia.ca>).

### **Types of Organizations and Their Characteristics**

As argued above, voluntary organizations are important. These organizations are, for the most part, the very fabric of the community, the “glue” which holds together many disparate parts. Furthermore, the overriding importance and pervasiveness of voluntary presence in community activities is a strong indicator of the importance of social infrastructure in the community - those elements which collectively articulate a community’s abilities and desires to provide for itself.

The community groups interviewed demonstrated a relatively strong degree of organizational development. About 4 of every 7 had a formal mission statement, something more common among social service groups and service clubs. As well, about 5 of every 7 organizations had a board of directors. The membership of these boards is mixed, with about half having elected directors while others have a combination of elected and appointed directors. The average size of a board for our sample is 9 directors.

In terms of group membership, arts/culture/recreation and economic development organizations tend to have more members on average. Active “core” members are also greater in number in arts/culture/ recreation organizations, and fewer in service clubs and health organizations.

In comparing the age and gender composition of organization memberships, social service and arts/culture/recreation organizations generally have a greater percentage of female members, while health and economic development tend to have a greater percentage of males. For most organizations, the majority of members are likely to be in the 30-64 age category. The membership of youth or seniors organizations differ from this pattern largely as a result of the nature of their interests. Service clubs are the only groups to have more members aged 65 years or older.

Voluntary organizations in rural and small town communities are facing a problem with respect to membership recruitment and retention. Issues such as volunteer “burnout” or retirement play a large role in membership loss. While some organizations are successful in maintaining membership levels, others are losing members and are having trouble recruiting new ones. The impacts of membership loss are significant as some organizations were no longer able to continue to deliver

some of their programs. When volunteer capacity is lost, the group's remaining energies must often be focussed upon service delivery and little time is left to develop recruitment strategies.

In terms of day-to-day operations, about 25% of organizations had full time paid staff and a further 35% had part time paid staff. Almost half relied on volunteers to handle office and administrative work. Those organizations with paid staff averaged 60 hours of paid work per week on office maintenance paperwork. An average of about 20 hours per week is contributed by volunteers to office-type work. In the context of limited funding for community groups, the time devoted to office and paper work consumes a significant amount of resources.

Despite limitations, most groups feel they make important contributions to both the economy and social well-being of their communities. Most organizations interviewed provided some type of direct service to individuals in the community - providing youth programs, delivering meals to seniors, fire protection. Others provided both direct and indirect services to the community at large - chambers of commerce, business associations, historical societies, cultural groups. The "reward" for services rendered is often quite immediate. Unfortunately, nearly all organizations reported that if they ceased to exist, there would likely be no other organization to step in and fill the void.

Approximately half of the organizations identified funding support as a critical issue. Lack of local support, particularly in the form of "moral" and in-kind support, is an issue for approximately one-third of the organizations. Psychological burnout, leadership and management issues, and isolation and lack of networking were also identified as issues for organizations.

### **Relationship With Government**

Quantifying the quality of the relationships which voluntary organizations have with different levels of government is very difficult. Local context and the capacities of the various organizations themselves intercede as much as do variations in government funding structures and regulations. The working relationships extend from "very positive" to "very frustrating", and range from very formal contacts to informal networking relationships.

Most interviewed organizations have a relationship with municipal government, from whom they receive information, assistance with projects or programming, and assistance with applying for provincial or federal support. Municipal governments also are in a position to offer more 'in-kind' support like meeting or office space, advertising and publicity, moral support, and the like. The close working context of small towns can mean, however, that not all relationships with local governments are positive.

About two-thirds of voluntary organizations have a relationship with the provincial government. These are more likely to be arts/culture/recreation, economic development, and social service organizations. Examples of positive relationships include where government funding programs are relatively stable and known by the community group. Where there are constantly changing

government programs or funding requirements, or where there are few avenues for groups to obtain needed information about funding applications, the relationship is much more problematic.

A smaller share of voluntary organizations have a relationship with the federal government, and these are more likely to be economic development and arts/culture/recreation organizations. The most common examples of stress in relationships with the federal government focus upon communications, such as in cases where long running programs suddenly fail to get their funding renewed and the organization does not receive a good explanation for why there has been a change from past approvals.

### **Importance of Government Funding**

More than half of the organizations surveyed used government funding. The provincial government is the most important level for providing funding assistance. Social service, health service, and service clubs have made little or no use of federal grants or programs; arts/culture/recreation and economic development organizations are more likely to do so. It is important to note that in some cases the voluntary organization, through their access to funding, acts as an important conduit within the community for people to access services and employment.

Most organizations are engaged in many different types of funding activities and strategies. It was common for organizations to identify three or more revenue streams. The most common strategies involve fundraising (especially among health service, arts/culture/recreation, and service clubs), membership fees (especially among economic development and arts/culture/recreation organizations), revenue from services (especially among arts/culture/recreation, health service, and youth/senior organizations), and private donations (especially among arts/culture/recreation, health service, service club, and social service organizations). The use of personal funds of members is highest in service clubs and in social service organizations. The use of corporate donations is highest among arts/culture/recreation and economic development organizations.

Two-thirds of organizations using government funds use them for operations expenses while the rest use them to fund both operations and projects. When organizations are unable to access government funds, they sometimes face difficult choices about their future or about the manner in which they provide their services. In some cases it means cutting back on some programs and services in order to offer a limited service in a number of important areas.

In many cases, volunteer organizations must make an annual application to government for operation and program funding support. Only about 20 percent of organizations have a long term arrangement for operational funding - this typically involves youth/seniors groups, economic development groups, and social service groups. Long term arrangements for program delivery are much less common. Annual applications can be very draining on the time and resources of volunteer organizations and some groups simply do not participate in these types of 'lotteries'. In our case study communities, health service and service clubs are less likely to make annual applications or to have long term arrangements.

There are important implications for not having long term funding arrangements for operations or programs. When organizations have to make annual applications, their ability to plan for a successful event or program, to do the necessary promotion well in advance to ensure appropriate participation, and, in some cases, to hire the right people to carry out the project or program, are placed in jeopardy. Longer term, multi-year arrangements provide better chances for quality events and programming.

Organizations noted that there are significant challenges to finding the funds to support their work, activities, and operations. These factors include but are not limited to:

- ! people are donating smaller amounts of money
- ! more groups are doing fundraising in the community with limited dollars available for all
- ! cutbacks in the amount of grants and program dollars from government
- ! the move to a “user-pay” system of service delivery and economic measurement of investment outcomes.

Thus it becomes imperative for community organizations to know how to apply for government funding, and how to access other funds to compliment government dollars. This will be a challenge, given that a number of organizations do not feel that current practices of disseminating program and grant information is completely open and obvious to them. Direct mail from government agencies, or information collected by the organization direct from a government list, are the two most common means of obtaining government funding information. Word of mouth and direct contact with government staff or politicians were also relatively important. Very few organizations used the media, the Internet, or a fundraising database to obtain such information. These latter results suggest that information currently delivered through community access centres, electronic mail, and government websites are not reaching the intended audience.

### **Application Procedures for Government Funding**

Comments about the application procedures for government funding varied considerably across the organizations but they can generally be grouped into three broad types: straightforward; lengthy and time consuming; and labour intensive. Of particular concern was the repeated reference by many organizations to the lengthy “turnaround” time for receiving a response about the status of their application.

In most cases making an application for funding to municipal government was considered fairly straightforward, involving a short application form (in some cases even filled in by municipal staff) and perhaps a presentation to council. A few organizations noted that municipal governments had very tight budgets and might request applicants to rework their budget to fit their ability to contribute. At the provincial and federal levels it was noted by most groups that the process was too lengthy and time consuming, involving many hours of work, lengthy discussions and negotiations, and lengthy response periods. Some noted the difficulty of processes which required extensive documentation to support the application, including statements of support from the community, provision of statistics describing the community and its needs, guarantees of job

creation, or other documentation. Many volunteer groups ‘lose’ large amounts of resources and time to application writing.

Organizations made a number of suggestions for enhancing the process, including more explicit statements of the instructions, criteria, process, time-lines, and regulations, and having government staff available to meet face-to-face or via telephone with organizations to explain programs and assist with application procedures.

### **Unsuccessful Applications**

One-third of surveyed organizations have never applied for government funding. Service clubs (which tend to do general fundraising for community projects) and social service organizations are less likely to have applied for government funding. Of those who applied for funding, about 40 percent report they have always been successful. This is especially true for social service organizations and arts/culture/recreation organizations. However, an almost equal percentage of organizations have at some point been unsuccessful in applications for funding assistance. Failure to secure funding after a lengthy and resource consuming application procedure is likely to discourage future applications.

Where organizations have been unsuccessful, about two-thirds felt that they were aware of the reasons why they were unsuccessful. What is more important, however, is that only half felt that they understood the decision-making process and only half felt they understood the decision-making criteria. There is an important “capacity building” opportunity for these organizations which government can facilitate through clearer communication. Once they are informed about the range of funding opportunities, and what a successful application looks like, there might be an increase in interest and success in obtaining funding from external sources.

### **Funding Issues and Challenges**

A number of funding issues and challenges for voluntary sector groups was identified through the survey. The most common concerned restrictions placed on government funding, including:

- ! Restrictions on *when* the money could be spent. Some organizations cited examples of how they had to spend all of the grant before the end of the fiscal year even though they wanted to hold the money until needed to fully implement the program. Other examples cited related to the desire to hire someone during a season other than summer, but that employment support programs targeted the summer months only.
- ! Restrictions on *what* the money could be spent for. One community cited the example of how they needed an after school program but were told that the funds could be used for ‘communications purposes’ only, not for actual programs.

- ! Amount awarded based on *last year's expenditures* rather than projections for the upcoming year. Many identified that their budget for ongoing programs was reduced simply because they did not spend all of their allocation in one year.
- ! The need to obtain *approval* by funding agency of certain operating procedures for programs or projects limited the organizations' ability to act in a timely and pro-active manner.
- ! The need to find *matching funds* before final approval created an almost catch-22 situation for groups in rural and small town communities under economic stress.
- ! Money only given as *reimbursements* require the organization to pay the up front costs and many groups do not have sufficient funds.

The question of mandates is a critical issue as well. If we understand that grass-roots community-based organizations reflect the needs of the local place, a problem is encountered when standardized national or provincial programs disqualify some organizations because parts of their mission or objectives were not eligible for government assistance. Nearly half of organizations who received funding noted that the nature of the funding forced them to change their mission and goals somewhat.

## **Conclusions and Recommendations**

Voluntary organizations are essential to the fabric of the community, the "glue" which holds together many disparate parts. The overriding importance and pervasiveness of voluntary presence in community activities is a strong indicator of the importance of social infrastructure in the community. This report finishes with a set of recommendations aimed at strengthening the position of volunteer sector organizations in rural and small town Canada to serve and react to the needs of their clients.

### ***Assistance to organizational development***

- To help volunteer sector organizations develop or refine mission/mandate statements, assistance should be available through educational media.
- Volunteer sector organizations can benefit from an education program designed to improve membership recruitment; including brochures or handbooks, or facilitation of increased "sharing of membership success stories".
- Incentives or assistance to maintain community office space should be enhanced. Innovative examples may include tax breaks or the creation of volunteer organization "incubator facilities" to function like small business incubators by providing space and services on a collective basis to reduce costs to tenants.

- Where possible, employment support to voluntary organizations should be provided. Examples such as a volunteer organization “incubator facility” could benefit many groups.

### ***Communication:***

- A solution to using the Internet as a more effective tool for exchanging information about funding programs and opportunities must be found. The government must dedicate resources to facilitate staffing local community access centres to enhance this communications media.
- Internet information sites and opportunities, such as Industry Canada’s VolNet, must be made known through traditional information sources such as direct mail or newspaper ads.

### ***Funding Procedures:***

- Government should consider modifications to the funding application process and procedure, including but not limited to:
  - longer term grants and program arrangements
  - new forms of accountability (e.g. shorter interim reports; a more flexible approach to providing evidence for success; granting agencies bear costs for accountability assessments)
  - more consistency across departments so that the processes and forms are the same; allow for "partnership" proposals to be more easily prepared.
- Longer term funding arrangement which provide a modicum of certainty should be encouraged.
- Government funding agencies need to improve their communication back to the organizations about the decision-making process, approval criteria, and reasons for individual funding application success or failure.
- Restrictions on funding which pose program delivery problems need to be examined and either more carefully justified or eliminated.

### ***Adjustments during funding program changes***

- Where there are to be changes in funding allocation from a pattern of past approvals, some form of interim adjustment funding must be developed. This is critically important for organizations providing services to individuals.

- It is critical that changes in eligibility and outcome evaluation in funding competitions which may change the mix of recipient organizations, or result in fewer dollars, be examined closely so that interim or adjustment funding or mechanisms be prepared.

- Senior government agencies can assist with development of local partnerships or private sector sponsorship through provision of seed grants or long term financial partnering which would provide a base of funding upon which voluntary sector groups could develop local support.

## 1.0 Introduction

This report summarizes information collected from interviews with 71 volunteer organizations in 9 rural communities on the issue of the changing role of voluntary organizations in the context of the changing availability of operational and program funding support. The focus is on issues related specifically to government funding of operations, programs, and special projects, perceptions about the funding, and other funding sources, and the impact of changing availability of funding from a variety of sources on voluntary organizations.

The literature review by Joan Marshall (separately referenced) provides a lengthy summary of the important and changing role of the voluntary sector in Canada. In short, this sector provides community-based services which meet local needs in the absence of private sector or public sector delivery of services. Their strength is local representation and involvement in decision-making and implementation. Their challenges reflect the very nature of volunteerism, in that people have a limited amount of time to devote to community projects, and that the work may be seen by some to be less ‘professional’ than it could be and, therefore, might not be worthy of support. This is an important issue as there has been an increasing dependency on volunteer-based activities to fill the gaps in meeting real human needs where no other mechanism for service delivery exists. For rural and small town Canada, voluntary sector groups and organizations play a key role.

A critical ongoing issue for volunteer organizations is arranging financing to cover operations, ongoing programs (which may or may not be revenue generating), and special projects or events. In some cases, there are government programs and grants available to meet these costs. However, many organizations also rely on a mix of other revenue sources ranging from donations to fundraising to membership fees and others. The relative success in attracting “investments” to their operations and projects depends quite widely on a range of variables including the presence or absence of paid staff, the focus or mission, the skill in completing applications, the “wealth” of the community to financially support the organization, and much more.

This report, and the overall project itself, is limited by a number of factors. In using the case study approach to developing a national snapshot, only a small number of voluntary associations were interviewed in each of the nine communities. In most cases, there were fewer than ten interviews per community because of the limited number of organizations in existence. The typology for selecting which groups to interview, explained in the next section, excluded some types of voluntary organizations from the interview process. Finally, limited funds for conducting field research and completing the written case study and group reports precluded a more extensive analysis of the information collected.

This research was carried out by five research teams associated with the Canadian Rural Restructuring Foundation (CRRF). Each of these university-based research teams has been working as part of a larger set of CRRF teams on a cross-Canada study of the New Rural Economy (NRE). The Voluntary Sector pilot project study is comprised of four components:

- ! A literature on the relationship between the voluntary sector and government.
- ! A summary analysis report on the changing role of voluntary organizations as they relate to changing availability of funding (this report).
- ! Site specific case study reports, intended for use in the communities (appended to this report).
- ! An education strategy for voluntary organizations to improve their knowledge and awareness of funding options and program delivery strategies.

The strength of the CRRF / NRE team approach is that it brings a multi-disciplinary team of researchers together to apply a range of research techniques to communities they know well. Familiarity in the study communities assists greatly with the conduct and interpretation of the research.

The balance of this report provides information on the methodology employed, the types of organizations interviewed, relationships with government, the relative importance and use of government funding, and the funding application process. Two appendices are attached which include the interview guide and a short summary of the volunteer organizations in each case study community.

## 2.0 Methodology

This research project was carried out within the context of the New Rural Economy (NRE) research project and its framework for conducting fieldwork in rural communities. Nine of the 32 field site communities within the NRE project where ongoing research is taking place were selected for this topic, based on the availability of a local research team, ensuring geographic and linguistic coverage across the country, and a willingness on the part of the local community to participate. The communities included:

- ! Tumbler Ridge and Mackenzie, BC
- ! Ferintosh, AB
- ! Blenheim and Tweed, ON
- ! St. Francoise and St. Damase, QC
- ! Blissfield and Neguac, NB.

For each case study community all volunteer organizations were identified and categorized into six groups:

- ! social service
- ! health service (including emergency services)
- ! local economic development
- ! arts, culture, and recreation
- ! youth and seniors
- ! service clubs.

The target was to conduct interviews with 12 to 20 of the organizations in each community, providing coverage in each category where possible.

A literature review was conducted parallel to the development of an interview guide. In both cases, a project committee consisting of the various field research team leaders and others in the NRE research project contributed to multiple rounds of revisions to ensure that both products reflected the desired focus.

Field work in the sites in the form of face-to-face interviews was conducted in the months of January to April, 1999. Key informant interviews using structured, semi-structured, and open-ended questions were completed with 71 organizations. Data from the interviews was stored in Lotus files (for the questions which were codable) and text files (for those which required an explanation or written response). These files are stored on the NRE database (<http://nre.concordia.ca>).

### 3.0 Background on Voluntary Organizations

This section provides a brief overview of the organizations which participated in the interviews, including information on their type, structure, mandate, staffing, and other issues.

#### 3.1 Types of Organizations and Their Characteristics

Voluntary organizations were divided into six categories for the purpose of focusing on those which are delivering services and contributing to the overall well-being of the community. Service clubs comprised one-third of the groups interviewed. There were relatively few health service organizations available for interviewing.

Table 1A shows that about 4 of every 7 organizations have a mission statement. A mission statement is more common among social service groups and service clubs, and less common among health service organizations and those involved with youth or seniors.

Table 1A Use of Mission Statement by Type of Organization

Organization Type	Sample	Have a Mission Statement
social service	12	9
health service	5	1
local econ. dev.	9	5
arts/culture/rec.	14	8
youth/seniors	11	5
service club	20	14
Total	71	42

Table 1B shows that approximately 5 of every 7 organizations has a board of directors. This is more common among social service, economic development, and arts/culture/recreation organizations. Slightly more than half are elected boards, and some have boards with a mix of elected and appointed directors. The average size of a board is 9 directors, with social service and economic development boards being larger on average.

The better organized and formalized that community organizations are, the more likely that they will be able to sustain themselves over the long term. During periods of inactivity or low membership numbers, well formally constituted groups will still have a “community presence”.

Table 1B

## Board Structure by Type of Organization

Organization Type	Sample	Have Board of Directors	Board is Elected <sup>1</sup>	Board is Appointed	Average Board Size
social service	12	10	6	5	10.8
health service	5	3	3	1	9.0
local econ. dev.	9	7	5	2	10.4
arts/culture/rec.	14	13	5	8	9.0
youth/seniors	11	7	5	2	7.1
service club	20	14	8	7	8.6
Total	71	54	32	25	8.8

<sup>1</sup> The number of elected and appointed boards does not add up to the same number in the “Board is Elected” column due to the fact that 3 boards identified that they have a mix of elected and appointed directors.

Tables 2A summarizes the “size” of volunteer organizations, identifying both the average number of members, and the average number of active or core members within each group. Membership is greatest in arts/culture/recreation and economic development organizations, and less in health or social service organizations. Active “core” members are greater in number in arts/culture/recreation organizations, and fewer in service clubs and health organizations.

Table 2A

## Size of Membership by Type of Organization

Organization Type	Sample	Average # of Members	Average # of Core/Active Members
social service	12	50	41
health service	5	41	29
local econ. dev.	9	119	31
arts/culture/rec.	14	164	92
youth/seniors	11	84	32
service club	20	79	21
Total	71	93	42

Table 2B shows the age and gender composition of organization membership. Social service and arts/culture/recreation organizations generally have a greater percentage of female than male

members, while health and economic development tend to have a greater percentage of males than females.

Most organizations are likely to have most of their membership in the 30-64 age category. Membership in youth/seniors organizations is split evenly across the age groups. This is due to the nature of grouping these two groups together, with seniors groups being almost exclusively comprised of older people, and youth, of younger people. There may be group leaders or others in the 30-64 age category. Service clubs are likely to have more members 65 years of age or more than other organizations.

Table 2B Gender and Age<sup>1</sup> Structure of Membership by Type of Organization

Organization Type	Sample	% Females	% Males	% Under 30	% 30-64	% 65+
social service	12	80	20	4	86	10
health service	5	34	66	16	82	2
local econ. dev.	9	32	68	10	86	4
arts/culture/rec.	14	71	29	14	73	13
youth/seniors	11	59	41	31	36	33
service club	20	50	50	4	67	29
Total	71	-	-	-	-	-

<sup>1</sup> We are unable to calculate an aggregate average due to the manner in which the question was asked; the percentages reflect the average in each category within each type of organization only.

Table 3A shows that organizations are generally losing slightly more members (an average of nine per organization) than they are recruiting (an average of seven) in the last year; however, it should be noted that social service organizations lost a significant number of members (40) on average than others, and were in fact the only type of organization to lose more members than they gained. In some cases the organization was unable to continue to deliver some of their programs and so active members left. In one other case the organization recently disbanded. Service clubs in particular gained many more members (8) on average than they lost (2). Thus the general conclusion to be drawn from this evidence is that organizations are successful in maintaining their membership numbers, and in some cases, are expanding.

Table 3A Change in Membership Size in Last Year by Type of Organization

Organization Type	Sample	# New Members Recruited Last Year	# Members Lost Last Year
social service	12	6	40
health service	5	4	2
local econ. dev.	9	3	3
arts/culture/rec.	14	9	5
youth/seniors	11	8	6
service club	20	8	2
Total	71	7	9

Organizations contacted tend to use very few recruitment strategies and there is no clear difference among different types of organizations; in general, there is a lack of sophistication among volunteer organizations when it comes to recruiting new members. Most cited that they use word of mouth and informal personal contact among family and friends. Some make appeals at annual meetings, place posters in stores, place notices in community newspapers, or conduct a direct mail campaign. However, these latter strategies were infrequently mentioned. A few organizations rely on people simply approaching them and asking to become involved. Ten organizations noted that people approach the organization simply because they recognize the good work they do in the community and they want to participate.

Table 3B shows that most organizations (83%) lost at least one member last year. For 19 of these organizations, the reasons were “burnout” related; the members lost interest or felt they no longer had the time to commit. Some lost members due to retirement, but only three identified that they lost members because they no longer agreed with the goals or mission of the organization. Other reasons for loss of members primarily related to them moving away or for other unidentified reasons.

Table 3B

## Reasons for Loss of Members by Type of Organization

Organization Type	Sample	# of Organizations Which Lost Members Last Year	Retirements	No Longer Agree With Objectives	People who had "Burnout"
social service	12	8	2	1	1
health service	5	5	2	0	1
local econ. dev.	9	4	1	0	1
arts/culture/rec.	14	14	1	0	3
youth/seniors	11	11	0	0	6
service club	20	16	4	2	7
Total	71	59	10	3	19

Table 4A shows that 4 of every 7 organizations maintain an office space of some sort. For most it is their own office, but in a few cases groups noted that they shared space with another organization or they had a space in a municipal office. About 25% of the organizations have full time paid staff (more likely to be social service or economic development organizations) and about 35% have part time paid staff (more likely to be arts/culture recreation, economic development, or social service organizations). Almost half rely on volunteers to handle some of the office and administrative work, and this is especially the case among economic development, arts/culture/recreation, and social service organizations.

Table 4A

## Paid and Volunteer Staff by Type of Organization

Organization Type	Sample	Have Office Space	Have Full Time Staff	Have Part Time Staff	Use Volunteers
social service	12	7	6	5	6
health service	5	3	1	2	1
local econ. dev.	9	8	4	5	7
arts/culture/rec.	14	8	4	7	8
youth/seniors	11	7	2	4	4
service club	20	7	1	2	7
Total	71	40	18	25	33

Table 4B identifies the amount of time and energy devoted to managing the office space of voluntary organizations. Of those with paid staff, they have on average 60 hours of paid work per

week (indicating that more than one paid staff person would be employed). About 20 hours per week or 78 hours per month is contributed to office-type work by volunteers.

Table 4B Paid and Volunteer Staff by Type of Organization

Organization Type	Sample	Have Office Space	Average # Hours Paid Per Week	Average # Volunteer Hours Per Month
social service	12	7	104	41
health service	5	3	59	114
local econ. dev.	9	8	33	27
arts/culture/rec.	14	8	48	25
youth/seniors	11	7	51	36
service club	20	7	43	148
Total	71	40	60	78

### 3.2 Community Contribution of Voluntary Organizations

Table 5 shows that most groups feel they make important contributions to both the economy and social well-being of their communities. Social service and economic development organizations in particular identified a higher degree of contribution to the economy of the community. All groups with the exception of health service organizations rated their contribution to the social well-being of the community, on average, as 4.4 or higher on a scale of 1 to 5.

Table 5 Community Contribution by Type of Organization

Organization Type	Sample	Contribute to Economy <sup>1</sup>	Contribute to Social Well Being <sup>1</sup>
social service	12	3.9	5.0
health service	5	3.1	4.4
local econ. dev.	9	3.6	4.1
arts/culture/rec.	14	3.0	4.5
youth/seniors	11	3.5	4.5
service club	20	3.3	4.6
Total	71	3.4	4.5

<sup>1</sup> On a scale of 1 to 5, where 1 is “no contribution” and 5 is a “major contribution”.

Most of the organizations interviewed provided some type of direct service to individuals in the community - providing youth programs, delivering meals to seniors, fire protection - and others provided both direct and indirect “services” to the community at large - chambers of commerce, business associations, historical societies, and cultural groups. Consistently identified by organizations in both of these broad categories is the fact that if they ceased to exist, there would likely be no other organization to step in and fill the void, especially cases where direct services are provided to individuals. Here are some comments from the organizations themselves:

... The organization would be greatly missed by the community if it ceased to exist because of the range of activities, the involvement in the community, and particularly the involvement with youth ...

... A major impact: there would be negative effects on the well being of seniors, and there would probably be fewer in the community. Thus the whole community would be negatively affected ...

... There would be no park maintenance, village clean up, no local donations for senior centres and the Cancer Foundation, no flower show and no trade show ...

... There are no other organizations within the community that could as effectively fill the gap. This is because there are no other organizations capable of raising money for the sole purpose of donating it to an organization within the community in need.

... There would be fewer events for teens, opportunities for learning and for community involvement...

... The impact would be a loss of the "Safety net below the safety net" ...

Youths presently have very little to do in town to occupy their time. As a result there is a high incidence of drug and alcohol abuse as well as teens getting into trouble with other criminal acts. By occupying the youth's time with creative and entertaining supervised events, the youths are more likely to stay out of trouble. If the organization ceased to exist, problems such as drug and alcohol abuse may become more significant as youths would have nothing at all to do in town.

Even those providing broader community services noted that there would be a loss in the community if their organization ceased to exist.

... little direct impact, but community would be the poorer for it. The group has little "clout" in the community, but has had some input into architectural preservation, input into recent streetscaping (heritage lighting) ...

... The community would lose an avenue for people to contribute their time and fundraising energies. There would also be a loss in terms of the educational value, particularly with respect to cultural exchanges and cultural/ethnic awareness and sensitivity ...

... The impact would be great: several events in the community would be lost, and there would be much less promotion of the downtown core. Nobody would fill the gap ...

... It would be a disaster because we have good participation from our youth and from people in general ...

What these comments point to is the vital role of voluntary organizations in providing for a civil society. These organizations are, for the most part, the very fabric of the community, the “glue” which holds together many disparate parts. Furthermore, the overriding importance and pervasiveness of voluntary presence in community activities is a strong indicator of the importance of social infrastructure in the community - those elements which collectively articulate a community’s abilities and desires to provide for itself. The difficulty for many of these organizations within the social infrastructure framework is to justify their existence and demonstrate their impact. This is very difficult to measure in terms of jobs, capital reinvestment, and other monetary related output indicators.

### **3.3 Range of Issues Facing Organizations**

The two largest issues facing most volunteer organizations are a lack of members or little participation from those that they do have, and little or no funding (Table 6). Almost two-thirds identify that member-related problems (especially health service and youth/seniors organizations, and service clubs). Earlier evidence presented a positive picture about maintaining or increasing membership levels. This is likely a reflection of decreased active participation among many members, and the increasing reliance on a few to do the bulk of the work.

Approximately half of the organizations identify little or no funding support as a critical issue (especially for service clubs and health service, social service, and arts/culture/recreation organizations). Lack of local support, particularly in the form of “moral” and in-kind support, is an issue for approximately one-third of the organizations, (especially for youth/seniors and arts/culture/recreation organizations). Psychological burnout at the organization level is more likely among health service, economic development, and arts/culture/recreation organizations. Leadership and management issues are of concern among more of the health service and youth/senior organizations. Isolation and lack of networking was identified as an issue for more of the economic development and social service organizations.

Table 6 Range of Issues and Challenges by Type of Organization

Organization Type	Sample	Member Related	Funding	Local Support	Leaders	Psych. Burnout	Isolation
social service	12	5	6	2	1	2	4
health service	5	5	3	0	3	4	0
local econ. dev.	9	2	3	1	1	3	4
arts/culture/rec.	14	8	7	5	4	5	3
youth/seniors	11	11	4	7	6	0	3
service club	20	14	12	5	7	4	1
Total	71	45	35	25	22	18	15

#### 4.0 Relationship With Government

Quantifying the quality of the relationships voluntary organizations have with different levels of government is very difficult. Contextual comments offered by these groups describing the nature and quality of the relationships range from very positive to very frustrating, and range from very formal and mostly financial relationships to informal networking relationships.

Table 7 shows the extent to which organizations have relationships with government. A total of 46 organizations have a relationship with municipal government, from whom they receive information, assistance with projects or programming, and assistance with applying for provincial or federal support be that funding or other support. Social service and service clubs are less likely to have a relationship with municipal government.

Table 7 Relationship with Government by Type of Organization

Organization Type	Sample	With Federal	With Provincial	With Municipal
social service	12	3	9	6
health service	5	0	2	4
local econ. dev.	9	5	7	8
arts/culture/rec.	14	7	13	11
youth/seniors	11	2	7	7
service club	20	3	4	10

Total	71	20	42	46
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A total of 42 organizations have a relationship with the provincial government. These are more likely to be arts/culture/recreation, economic development, and social service organizations. A total of 20 organizations have a relationship with the federal government. These are more likely to be economic development and arts/culture/recreation organizations.

Examples from our interviews with community groups on the manner in which the positive relationship with a municipal government manifests itself include:

... a building insurance agreement with the municipal government ... moral support and a positive relationship ... supplies the recreation board information on grants and other funding ... municipal coordinator meets with the group monthly ... joint projects have included sharing the cost of developing a new parking lot in the community ... they cover our postage, insurance, and telephone costs

The local government takes care of the wages of the library employees and also pays for all the operating costs and maintenance concerns the library has. This link is very positive as with all of the space costs taken care of the library can focus its attention and energy providing the best service possible ...

The local government provides the us with funding to cover all of our operational costs ... This relationship is also very positive as the Council is very keen about all of the work we do ... keep in close contact and work together often to promote events within the community. We work very well together.

The Municipal government provides free rent and maintenance to the organization to run their office. Having the operations costs taken care of by the local government allows the organization to spend the grants received from the Provincial government completely on program costs. This is a very supportive and positive relationship.

But not all relationships with municipal governments are positive:

The link with local government is that it provides the Centre with its funding and provides free operations costs for their office space. The relationship between the Youth Centre and the Municipality is somewhat frustrating as although the Municipality understands the importance of having a youth centre in town, they are never convinced that the Youth Centre provides enough activities for Youth to participate in. The Municipality, along with many other organizations in the community, feels that no matter how much money is spent on providing entertainment opportunities for Youth, there will always be trouble makers giving teenagers a bad name. This feeling sets the tone for a tension filled relationship between the Municipal government and the Youth Centre.

Examples of positive relationships with provincial governments include:

... grant was easily applied for and accepted and this was a positive experience ... a positive, open communication relationship ... the Province has helped with fundraising in the past and is currently a partner in an application for a Lottery grant. The relationship is positive ... we were able to secure bursaries for students to attend a conference ...

The Ministry of Tourism provides us with all of the materials and funding necessary to run the Tourist Information Centre. This link is very positive as not only are we provided with funding to run the regular

Tourism Centre office, but the last few years we have been awarded extra funding to hire a professional to come and gather specific information on how our community, through tourism opportunities, can become more economically diverse.

However, these are tempered by some frustrating experiences, including:

... provides funding, but the relationship is frustrating in that it is difficult to get information from them. The local MPP has shown no interest in assisting ... The relationship is frustrating because of funding cuts ... Provincial government, Ministry of Culture: cut annual funding, made Millennium Fund dependent upon population (\$0.50 per person) which makes it useless for small towns. Very frustrating ... Receive funding from the provincial government, but this is frustrating, because it depends on receiving funding from the municipal government ... we have received financial support but no resources or information, and this is very frustrating ...

The main source of funding for this organization comes from the Ministry of ... This relationship is very difficult and frustrating as the Ministry is only willing to fund programs dealing with issues that have already happened - thereby making it very difficult for this organization to be proactive.

At the federal level there are fewer relationships. A number of organizations simply stated that they apply for funding and it is received, but the following examples exemplify the stressful sometimes tenuous relationship that does exist:

... has provided HRDC grants to hire summer students in the past ... we do not receive funding, resources or moral support. We are always trying to get more information out of them. The relationship is frustrating, but the dialogue continues.

Human Resources Development Canada provided funding ... This relationship is frustrating as the funding is so insecure. For years we received the same amount of funding from HRDC to fund 2 summer students to work at the Tourism Information Centre. All of a sudden, without warning, the criteria for being eligible for funding changed from being based upon community isolation to population within the community and, therefore, we were no longer eligible. Plans had already gone ahead based upon the organization receiving the funding from HRDC.

In some instances the relationship has been positive but has also changed over time:

The Summer Career Placement grant allows us to provide summer employment for students and we are also able to provide children's program to run in the summer time. The relationship with the Federal government has most of the time been positive. However, last year, without warning our funding was denied and at that time it was too late to not run the summer programs ... Because the funding was denied without warning the organization has some resentment towards the Federal funding agents.

## 5.0 Importance of Government Funding

A total of 38 (54%) of the organizations are using government funding. Table 8 shows the relative use of government grants and programs. The provincial government is the most important level for providing government funding.

Social service, health service, and service clubs have made little or no use of federal grants or programs; arts/culture/recreation and economic development organizations are more likely to do so. Social service and arts/culture/recreation organizations, and to a certain extent those involved with youth or seniors, are more likely to be using provincial grants and programs. Arts/culture/recreation organizations and to a certain extent social service and health service organizations are more likely to be using municipal grants and programs.

Table 8 Use of Government Grants and Program by Type of Organization

Organization Type	Sample	Federal Grant	Prov. Grant	Municipal Grant	Federal Program	Prov. Program	Municipal Program
social service	12	0	6	2	0	4	3
health service	5	0	1	0	0	3	3
local econ. dev.	9	3	3	2	2	2	0
arts/culture/rec.	14	3	11	6	5	5	5
youth/seniors	11	3	6	1	1	2	2
service club	20	1	2	2	0	0	1
Total	71	10	29	13	8	16	14

It is important to note that in some cases the voluntary organization acts as an important conduit within the community for people to access services and employment without the organization actually delivering them. The example below identifies how youth in the community have received employment as a result of a community volunteer organization facilitating the money and the job opportunity:

Canadian Mortgage Housing Corporation (CMHC) provides funding to us to help students find jobs in the summer months. Although we receive this funding, the funding is not intended for the organization's use, rather for students to seek employment opportunities. Therefore, the relationship is positive for youths within the organization but indirect to the organization itself.

Table 9 shows that most types of organizations engage in many different types of activities and strategies for funding operations and activities. It was most common for organizations to identify 3 or more revenue streams. Fifty organizations identified 3 or more revenue streams. The most

common strategies involve fundraising (especially among health service, arts/culture/recreation, and service clubs), membership fees (especially among economic development and arts/culture/recreation organizations), revenue from services (especially among arts/culture/recreation, health service, and youth/senior organizations), and private donations (especially among arts/culture/recreation, health service, service club, and social service organizations). The use of personal funds of members is highest in service clubs and in social service organizations. The use of corporate donations is highest among arts/culture/recreation and economic development organizations.

Table 9 Use of Non-Government Funds by Type of Organization

Organization Type	Sample	Fund Raising	Member Fees	Revenue from Services	Personal Funds	Private	Corp	Other
social service	12	7	6	4	7	5	4	0
health service	5	4	2	3	1	3	2	0
local econ. dev.	9	6	6	3	3	3	5	0
arts/culture/rec.	14	12	9	10	4	11	7	4
youth/seniors	11	7	6	6	5	2	2	4
service club	20	15	11	9	9	10	7	3
Total	71	51	40	35	29	34	27	11

When organizations are unable to access government funds, they sometimes face difficult choices about their future or about the manner in which they provide their services. In some cases it means cutting back on some programs and services in order to offer a limited service in a number of important areas:

... [without funding we resort to the] “Rob Peter to pay Paul” concept. When one program has money and another program has been denied funding, the program with funding runs at a lesser capacity in order for both programs to run at some capacity.

The following example of how organizations “patch” together different sources of funds shows their creativity and energy, although it is a time-consuming and stressful manner to provide services to the community:

The Federal government money paid for all of their programs which ran in the summertime. The Provincial grants funded the majority of the rest of the activities and events the organization hosts throughout the year. The Municipal grants allows the wages of their part time staff member to be paid and for all of the operation costs of their gallery. The local mill donated a computer for us to use ... The bank donated a photocopier ...

Sometimes organizations make a conscious decision to not seek government funds, preferring instead to rely on their members and the community as a whole to support their various initiatives:

The organization used to apply for government grants from all three levels of government. The process used to be very time consuming and frustrating. It would end up causing a lot of stress between members within the organization - particularly if the organization's request for funding was denied. The organization decided after awhile to stop applying for government grants and simply earn money through fundraising in the community. Presently, this is the method the organization utilizes for raising funds. We are much happier with this method and no longer see a need for government grants.

Table 10 shows that 29 of the 38 organizations using government funds use them to fund the operations of their organization. Six of these use the funds for operations only, while 23 use funds for both operations and programs or projects. This is especially important for arts/culture/recreation, social service, and youth/seniors organizations. For 32 of the 38 organizations, the money is used for programs or projects. Nine of these use the funds for programs or projects only. This is especially important for arts/culture/recreation, social service, and economic development organizations.

Table 10 Use of Government Funds by Type of Organization

Organization Type	Sample	Operations Only	Programs or Projects Only	Mix of Both
social service	12	1	1	6
health service	5	0	0	2
local econ. dev.	9	0	2	3
arts/culture/rec.	14	2	3	8
youth/seniors	11	2	1	4
service club	20	1	2	0
Total	71	6	9	23

Table 11 shows that in many cases volunteer organizations must make an annual application to government for operation and program funding support. Only 14 organizations have a long term arrangement for operational funding (typically youth/seniors, economic development, and social service organizations). Only 8 have long term arrangements for program delivery (typically youth seniors, arts/culture/recreation, and social service organizations). The two types of organizations “in the game” of annual applications for operations and program support are those involved in arts/culture/recreation and social services. Health service and service clubs are less likely to be making annual applications or to have long term arrangements.

Table 11 Type of Government Funding Arrangement by Type of Organization

Organization Type	Sample	Annual Operation Application	Long Term Operation Agreement	Annual Program Application	Long Term Program Agreement
social service	12	6	4	6	2
health service	5	1	0	1	0
local econ. dev.	9	3	3	4	1
arts/culture/rec.	14	10	3	10	2
youth/seniors	11	3	4	3	3
service club	20	2	0	1	0
Total	71	25	14	25	8

There are important implications for not having long term arrangements for operations or for programs or projects. When organizations have to apply each year for funding of projects and programs, it places in jeopardy their ability to plan for a successful event or program, to do the necessary promotion well in advance to ensure appropriate participation, and, in some cases, to hire the right people to carry out the project or program. Longer term, multi year arrangements provide better chances for quality events and programming.

Organizations noted that there are significant challenges to finding the funds to support their work, activities, and operations. The combination of many factors has made it increasingly “competitive” to secure money from all types of sources. These factors include but are not limited to:

- ! people are donating smaller amounts of money
- ! more groups are doing fundraising in the community with limited dollars available for all
- ! cutbacks in the amount of grants and program dollars from government
- ! the move to a “user-pay” system of service delivery and economic measurement of investment outcomes.

Thus, it becomes imperative for community organizations to know how to apply for government assistance where their mandates match government assistance programs, and how to source other funds to compliment government dollars. This will be somewhat of challenge, given that a number of organization do not feel that the current practice of disseminating information about various program and grants is completely open and obvious to them, as evidenced by these comments:

Trying to access information about different government grants is much more difficult now that the government agent is no longer within the community. The staff had a lot of practice completing grant application forms before the government agent left and now do not have major questions about the process. However, often members of different organizations seek advice and guidance on the process from our staff members, and sometimes they do not know the answers to their questions. This is difficult as there is no one else to ask questions to.

There was no one around to help out with application or to answer questions about eligibility when the organization was applying for Provincial and Federal grants. This was very frustrating for volunteers who already have to spend so much time running the actual event in order to accomplish the goals set out in the organization's mission statement. Most of the members also have full time jobs which makes it more difficult to spend a lot of time on funding applications without any avenue for assistance. People are involved with the organization for the social aspect and to help other organizations meet its goals, not to spend hours on an application only to be denied over and over without explanation.

No, small communities generally are out of the loop and not eligible for many opportunities.

We often cannot get our questions answered by anyone.

There is no process of communication between the organization applying for funding and the funding agent. The organization applies for funding and is either approved or denied. If criteria change then sometimes the organization is made aware of the changes, but most often they are not made aware until after they are denied.

The information may be shared, but it seems that larger organizations are the ones who are always successful in receiving funding.

We often don't get information from government, or when we do, it is incomplete and not helpful.

It does not seem to be as well publicized in rural areas as in urban.

No it is not completely open; the government could do more by directly mailing letters of information to the interested organizations.

It is open, but only if you are used to dealing with government bureaucracy.

It is not a completely open process. You need to know who to talk to.

We are not in the loop the way that we should be. It seems that dissemination problems are getting worse.

There are no lines of communication between organizations who are applying for funding and the funding agents. The applications are completed and sent in, and months later a letter comes in the mail telling the organization whether or not their request for funding has been accepted or denied. This is a frustrating process as there is no opportunity for organizations to learn about why their request has been denied. It could be simply because their organization was not eligible, because they filled out their application wrong, or because the government does not have any money left to give. The organization never knows.

Table 12 shows that direct mail from a government department or agency, or information collected by the organization from a government publication listed funding sources, are the two most common means of obtaining information about government funding opportunities. In the case of the first, this is especially important for youth/seniors and arts/culture/recreation

organizations. In the case of the second, this is especially important for arts/culture/recreation, economic development, and social service organizations. Word of mouth, direct contact with government staff, and through politicians were also relatively important. Very few organizations used the media (11), the Internet (5), or a fundraising database (9) to obtain such information. These latter figures suggest that information currently delivered through community access centres, electronic mail, and government websites are not reaching the intended audience.

Table 12 Current Information Source for Government Funds by Type of Organization

<b>Organization Type</b>	<b>Sample</b>	<b>Direct Mail</b>	<b>Gov't Publication</b>	<b>Word of Mouth</b>	<b>Gov't Staff</b>	<b>Politicians</b>
social service	12	3	4	2	4	4
health service	5	2	0	0	2	1
local econ. dev.	9	3	4	2	3	2
arts/culture/rec.	14	6	8	5	5	4
youth/seniors	11	6	3	3	1	2
service club	20	4	4	5	1	1
Total	71	24	23	17	16	14

Table 13 identifies that more organizations would prefer to receive direct mail from government departments and agencies about funding opportunities (especially arts/culture/recreation, health service, social service, and youth/seniors organizations). Many others would like to have government staff tell them about funding opportunities (especially health service and economic development organizations), or learn about them in a publication identifying such opportunities (especially health service, economic development, and arts/culture/recreation organizations). Fewer than 5 organizations identified the Internet, the media, or word of mouth as their preferred means of obtaining information.

Table 13 Preferred Information Source for Government Funds by Type of Organization

<b>Organization Type</b>	<b>Sample</b>	<b>Direct Mail</b>	<b>Gov't Staff</b>	<b>Gov't Publication</b>	<b>Politician</b>	<b>Funding Database</b>
social service	12	5	4	4	0	0
health service	5	3	3	3	3	1
local econ. dev.	9	3	5	4	2	3
arts/culture/rec.	14	8	6	5	2	1
youth/seniors	11	5	4	3	2	1
service club	20	8	3	6	2	3
<b>Total</b>	<b>71</b>	<b>33</b>	<b>25</b>	<b>24</b>	<b>11</b>	<b>9</b>

Table 14 identifies some of the “process” issues in preparing applications to government for assistance. The rating of the helpfulness of government staff in providing information about funding assistance and other related matters is, on average, 2.9 out of 5, where a 5 is “extremely helpful”. Health service and economic development organizations rate government staff higher, while social service organizations rate government staff lower. Organizations that do take the time to prepare funding applications spend, on average, about 18 days per year doing so. Social service organizations are more likely to spend more time on funding applications, while service clubs and youth/senior organizations are more likely to spend less time. About 20% of all organizations have used a consultant to assist with the preparation of funding applications. This is more common among economic development and arts/culture/recreation organizations.

Table 14 Application Assistance by Type of Organization

<b>Organization Type</b>	<b>Sample</b>	<b>Helpfulness of Gov't Staff</b>	<b>Average Days Prepare Applications</b>	<b>Use Consultant to Prepare Applications</b>
social service	12	2.5	20	2
health service	5	3.5	18	1
local econ. dev.	9	3.4	17	3
arts/culture/rec.	14	2.9	13	4
youth/seniors	11	3.1	18	1
service club	20	3.1	12	3
<b>Total</b>	<b>71</b>	<b>2.9</b>	<b>18</b>	<b>14</b>

<sup>1</sup> On a scale of 1 to 5, where 1 is “not helpful at all” and 5 is “extremely helpful”.

## 6.0 Application Procedures for Government Funding

Comments about the application procedures for government funding varied considerably across the organizations, but they can generally be grouped into three broad types: straightforward; lengthy and time consuming; and labour intensive. Of particular concern was the repeated reference by many organizations to the lengthy “turnaround” time for receiving a response about the status of their application.

In most cases making an application for funding to municipal government was fairly straightforward, involving a short application form (in some cases even filled in by municipal staff) and perhaps a presentation to council. A few organizations noted that municipal governments had very tight budgets and might request applicants to rework their budget to fit their ability to contribute. Others noted that even at this level there is stress involved in making sure all of the information is accurate, that the message about the depth of the organization’s important contribution to the community is delivered, and so on.

At the provincial and federal levels it was noted by most groups that the process was too lengthy and time consuming, involving many hours of work, lengthy discussions and negotiations, and lengthy response periods.

... Time consuming, frustrating, complex. Just got involved in this. After working on a proposal for a year, we found out policy had changed, and we had to rewrite the proposal ...

Mind boggling process. Had to fill out application and proposal of project. Had to include a projected budget for the project. We had to then raise our own share of the money and have this money in the bank before we would be approved and receive funding. Had to wait over six months to hear back about whether or not we had been accepted ... When we were denied funding, the program had already run ...

The library had to send in grant proposals which explained the purpose and goals of the project and that explained why the community would benefit from the service. The process was very involved as the library had to prove their need, gain community support through letters from local businesses stating that they support the need for the proposed project, do a survey in the community to prove the community wanted the services, show how the service would improve the community, and then do three financial status reports if the funding proposal is accepted. The process took a very long time and was rather complicated.

Initially, we must put together a funding proposal. This must outline our project timeline and budget. In addition, it must outline the goals the organization wishes to accomplish by doing the project. We then solicit community support and hand in as many letters from fellow business persons within the community supporting the project. We then must then wait for a letter to come in the mail either accepting or denying the proposal.

For others the process required extensive documentation to support the application, including statement of support from the community, provision of statistics describing the community and its needs, guarantees of job creation, or other documentation.

... The provincial process is frustrating because they required qualifications, guarantees and the creation of jobs ...

The organization has to provide back up information on everything done by the organization and submit copies of it all with their annual application. They must also provide a detailed two year plan and budget for their up coming events. The plan must inform the Provincial government of the organization's exact plan for their project being planned for the next two years. The process was difficult and very time consuming. It is very difficult for a non-profit organization to plan what will be done with the money received two years in advance. In addition, there is a very limited amount of time between when the funding is approved and the program start date. This is stressful as you are not sure if the organization should go ahead and plan the event assuming the funding will be approved, or wait and rush the planning and organizing of the event once the funding is approved. Finally, the provincial grants are the most insecure - although they provide the most funding - because it is a competitive process. Therefore, the organization must make each of their events sound unique each year or the event will not be funded. This is difficult as sometimes it takes more then one year for a project to become self sustaining.

It is important to note, however, that some organizations did find the process relatively direct and simple to accomplish.

The funding application process is easy and decent for both the provincial and local governments. However, more communication between smaller organizations and the Provincial government would be extremely beneficial.

Organizations made a number of suggestions for enhancing the process, including:

More explicit statement of the instructions, criteria, process, timelines, and regulations.

Have government staff more available to meet face-to-face with organizations to explain programs and assist with application procedures.

Better and more accurate information about contact information for sending in funding requests.

Mail the forms and information directly to the organizations.

Broader applicability of grants and programs, and more consistency from year to year.

More education for representatives coming into communities for budget talks. If they could understand better where non-profit organizations are coming from in terms of the importance of the services provided to members of the community, maybe the organizations seeking funding would not have to spend as much time proving their need for funding. There is too much emphasis on money being the bottom line. Somehow people's needs being met must be put back into the equation.

Provide a comprehensive listing of funds that are available.

A one-window approach for sourcing information.

Have government staff in decentralized locations. Offices in the city do not know what is going on in other areas, what is needed and what is being done.

Provide clear, direct responses to questions about the funding application and process.

The Federal and Provincial government should set up a telephone line for organizations who have questions about funding availability and criteria.

## 6.1 Unsuccessful Applications

Table 15 shows that one-third of the organizations have never applied for government funding. Service clubs (which tend to provide member-specific events or which tend to do general fundraising for other community projects and groups) and social service organizations are less likely to have applied for government funding.

It is interesting to note that 26% of all of the organizations and 40% of those who have ever applied for funding have always been successful. This is especially true for social service organizations and arts/culture/recreation organizations.

However, an almost equal percentage of organizations have at some point been unsuccessful in the application for funding assistance, either through a competitive process or through making a specific request for assistance. Economic development organizations are more likely to have had an unsuccessful application in a competitive process, and arts/culture recreation, economic development, and service clubs are more likely to have been refused support for funding assistance outside of a competitive application process.

Table 15 Application Outcomes by Type of Organization

Organization Type	Sample	Never Apply	Apply and Always Successful	Apply and Unsuccessful in Competitive Process	Apply and Refused Support
social service	12	5	6	1	0
health service	5	2	1	0	1
local econ. dev.	9	3	0	4	2
arts/culture/rec.	14	2	6	1	4
youth/seniors	11	1	4	2	0
service club	20	11	2	2	3
Total	71	24	19	10	10

Table 16 summarises the organizations' understanding of the application outcomes when they have been unsuccessful. About two-thirds felt that they were aware of the reasons why they were unsuccessful in their funding application (arts/culture/recreation organizations and service clubs were less likely to be aware of the reasons). What is more important, however, is that only half felt that they understood the decision-making process and only half felt they understood the

decision-making criteria. Again, arts/culture/recreation organizations and service clubs were less likely to understand these.

Table 16 Understand Why Unsuccessful or Refused by Type of Organization

Organization Type	Sample	Unsuccessful or Refused	Aware of Reasons	Understand Decision Process	Understand Decision Criteria
social service	12	1	1	0	1
health service	5	1	0	1	1
local econ. dev.	9	6	6	4	4
arts/culture/rec.	14	5	2	2	1
youth/seniors	11	2	1	0	1
service club	20	5	3	2	2
Total	71	20	13	9	10

Table 17 suggests that about half of the 48 organizations who have ever applied for funding assistance are interested in knowing which organizations were successful in obtaining funding, about half stated that they have seen a successful application, and about half stated they would like to see a successful application.

There are clearly some mixed signals on the part of some of the voluntary organizations. Given that only one-third have seen a successful application, it is surprising that only a similar number want to know who was successful and a similar number would like to see a successful application. In part this is explained by the fact that not all organizations have applied for government funding, and therefore do not express the need to know about successful applications. On the other hand, there is an important “capacity building” opportunity for these organizations. Once they are informed about the range of funding opportunities, who previously successful applicants are, and what a successful application looks like, there might be an increase in interest and success in obtaining funding from external sources (including government, foundations, and corporations).

Table 17

## Need for More Information by Type of Organization

<b>Organization Type</b>	<b>Sample</b>	<b>Want to Know Who Was Successful</b>	<b>Have Seen A Successful Application</b>	<b>Would Like to See a Successful Application</b>
social service	12	2	4	2
health service	5	1	2	1
local econ. dev.	9	3	5	3
arts/culture/rec.	14	8	5	8
youth/seniors	11	4	3	3
service club	20	5	5	5
<b>Total</b>	<b>71</b>	<b>23</b>	<b>24</b>	<b>22</b>

## 7.0 Funding Issues and Challenges

Table 18 identifies a number of funding issues and challenges from the voluntary sector point of view. About one-third of the organizations as a whole, and 23 of the 48 who received government funding noted that it came with restrictions. These situations were more likely to be the case for economic development, youth/senior, and service clubs. Respondents cited a number of examples:

- ! Restrictions on when the money could be spent. Some organizations cited examples of how they had to spend all of the money in the grant or contract before the end of the fiscal year even though they wanted to hold the money until later when they needed to purchase equipment or implement a program. Other examples cited related to the desire to hire someone during a season other than summer, but that employment support programs targeted the summer months only. A further extension of this was the example cited by one group where they had to provide three financial status reports throughout the grant time frame. If all three reports were not completed on time the funding would have been revoked.
- ! Restrictions on what the money could be spent for. One group cited the example of how they wanted to sponsor an after school program to keep children active and busy since many would be going home while their parents were still working. However, they were told that the funds could be used for communications purposes only, not for actual programs.
- ! Amount awarded based on last year's expenditures rather than projections for the upcoming year. More than one group identified that their budget for ongoing programs was reduced because they did not spend all of their allocation in one year. However, they expected an increase in the number of program participants the following year, but would now be unable to accommodate all registrants because of the reduction in program funds.
- ! The need to obtain approval by municipal council. Some of the emergency service organizations identified that any new capital expenditures had to be approved by municipal council. One extreme example noted a number of restrictions placed on the organization as a result of the funds provided:

In order to receive the funding provided by the Municipality, we had to agree to certain terms. These terms include restrictions on the hours the Youth Center is open and closed, that the noise level must be kept down at all events, and that the youth must complete surveys the municipality puts together whenever necessary. There are additional restrictions associated with funding from the Municipal government which goes towards paying for out-of- town trips and events.

- ! The need to find matching funds from another department, government level or organization before final approval. Several respondents identified the frustrating exercise imposed upon them when a potential funder requested that matching funds be sought before approval was granted. Respondents noted that the funding criteria for the same project proposal or application varied significantly from department to department, and between levels of government. Also, they noted that the timelines for applications and decisions varied

significantly. This posed problems for starting projects and programs, as decisions about funding from one or more partners might be delayed.

The last time we were denied was because we could not raise our share of the money (\$22,000) and have it in the bank account. Therefore, the provincial government denied us funding assistance.

- ! Money only given as reimbursements requiring the organization to pay the up front costs, for which most do have sufficient funds). In a few cases it was noted that the organization had to make purchases or pay employees out of their existing budget, and then complete the paperwork to get reimbursed from the government program. This placed an unnecessary strain on the financial operations of these organizations.

About 40% of those who received funding noted that the nature of the funding forced them to change their mission and goals somewhat. On a relative basis, this was more likely to be the case for service clubs and social service and health service organizations.

About one-quarter of the organizations identified that some parts of their mission or objectives or in fact all of it, were not eligible for government funding assistance. This was largely restricted to arts/culture/recreation organizations and service clubs.

Of the 27 organizations who use corporate donations or funding, 17 of them noted that the corporate body expected some sort of promotion of their company as a result of the funds given. This was especially the case for arts/culture/recreation, social service, and economic development organizations.

Table 18 Funding Challenges by Type of Organization

<b>Organization Type</b>	<b>Sample</b>	<b>Government Funds Came with Restrictions</b>	<b>Government Funding Changed the Mission</b>	<b>Mission Not Eligible for Funding</b>	<b>Corporate Sponsor Wants Promotion</b>
social service	12	4	4	1	4
health service	5	3	2	1	0
local econ. dev.	9	4	2	2	3
arts/culture/rec.	14	4	5	8	6
youth/seniors	11	5	1	1	1
service club	20	3	2	5	3
<b>Total</b>	<b>71</b>	<b>23</b>	<b>16</b>	<b>18</b>	<b>17</b>

## 8.0 Conclusions and Recommendations

Voluntary organizations are essential to the fabric of the community, the "glue" which holds together many disparate parts. The overriding importance and pervasiveness of voluntary presence in community activities is a strong indicator of the importance of social infrastructure in the community. This report has provided a summary of a range of topics and issues raised through our investigation of **The Role of Voluntary Organizations in Rural Canada: Impacts of Changing Availability of Operational and Program Funding**. Undertaken as part of a larger project interested in the processes of change and adjustment in rural and small town communities, the research is coordinated through the Canadian Rural Restructuring Foundation. This report is based upon research work in nine field study sites from across Canada and is one of three substantive reports produced by the research team.

Most volunteer sector organizations are very clear about their purposes, goals, and the roles they play in the communities they serve. Nearly all have codified sense of purpose through formal mandates or mission statements. Helping organizations see the value of having a mission statement, and it is likely that working with them to develop such a statement may help them achieve more success in securing funding assistance.

One of the key challenges for volunteer sector organizations in rural and small town Canada concerns membership. While some groups have maintained viable membership numbers and have developed effective recruitment strategies, some organizations reported to us that they had lost a significant number of members. Lack of membership almost always results in a reduction of elimination of services. This process is negatively recursive as remaining members find it difficult to support and be active in an organization whose ability to provide meaningful services has been eroded. It became clear in the research that voluntary organizations tend to use very few recruitment strategies and there is a lack of sophistication among these groups when it comes to recruiting new members. Volunteer sector organizations could benefit from an education program designed to improve recruitment success. Such a program may include publication of brochures or handbooks useful to community groups or simply the facilitation of increased "sharing of membership success stories" among such groups.

While all organizations report that they and their work is "known" in the communities they serve, only about half have any sort of local physical presence through such means as office space. This is not a "luxury" issue as office space for community groups is important to help with a range of issues from client contact, to service delivery, to membership recruitment, to community visibility. Where possible, incentives to assist the maintenance of community office space should be investigated. Innovative examples may include tax breaks for organizations donating space or the creation of volunteer organization "incubator facilities" which would function much like small business incubators by providing space and service on a collective basis to reduce the costs to individual groups.

Only about one-quarter of volunteer sector organizations reported having full time paid staff while an additional one-third reported having part time paid staff. The lack of paid staff does pose limitations for client contact, service delivery, organization management, and devoting time to lengthy application processes. Where possible employment support to voluntary organizations should be provided to assist with this range of tasks. The value of such employment opportunities in rural places should not be underestimated. Where costs are a constraint models such as the volunteer organization “incubator facility” described above could benefit many groups collectively.

Most of the organizations interviewed provided some type of direct service to individuals in the community and others provided both direct and indirect "services" to the community at large. Consistently identified by organizations in both of these broad categories is the fact that if they ceased to exist, there would likely be no other organization to step in and fill the void, especially cases where direct services are provided to individuals. It is extremely important to determine if there are alternative delivery mechanisms for meeting the needs of those affected by funding cuts which might reduce or eliminate important program support to individuals. Where there are to be changes in funding allocation from a pattern of past approvals some form of interim adjustment funding must be developed.

The two largest issues facing most volunteer organizations are a lack of members (or little participation from those that they do have), and little or no funding. On the first point, the voluntary sector as a whole requires new people to participate, new leadership to emerge, and a sense among their members that they as individuals make a difference by virtue of their contribution. This is challenging when many volunteers perceive there to be little or no funding to assist them. Continued partnership development with government, the private sector, and community is required; however, government must play a leadership role here is facilitating those meaningful partnerships.

More organizations have formal relationships with municipal governments, with fewer having relationships with the federal government. Groups described a mixed bag of experiences, ranging from healthy and committed relationships to one of isolation, lack of cooperation, and opposing perspectives on issues and solutions. This is hardly surprising given the broad range of organization types, mandates, and locations.

Municipal governments are most often involved with in-kind support such as facilities, advertising, some staffing and space provision. With over half of interviewed volunteer sector organizations dependent upon government funding, the provincial government is the most important level for providing this funding. It is important to note that in some cases the voluntary organization acts as an important conduit within the community for people to access services and employment without the organization actually delivering them, often financed through provincial government programs. It is therefore critical that changes in eligibility and outcome evaluation which may change the mix of recipient organizations or result in fewer dollars, be examined closely and interim or adjustment funding or mechanism be incorporated in such change proposals.

Most types of organizations engage in many different types of activities and strategies for funding operations and activities. It was most common for organizations to identify three or more revenue streams. The most common strategies involve a mix of fund-raising, membership fees, revenue from services, and private donations. Organizations are working hard to foster partnerships and develop local financial support as a preferred option. Senior government departments can assist with this development of local partnerships through the provision of seed grants or long term effective financial partnering. This would provide a foundation for voluntary sector groups to then develop local support.

At present, few organizations have long term financial agreements with government for either programs or operations. There are important implications and “costs” for not having such long term arrangements in place. When organizations have to apply each year for funding it places in jeopardy their ability to plan for a successful event or program, to do the necessary promotion well in advance to ensure participation and, in some cases, to hire the right people to carry out the project or program. Longer term, multi year arrangements provide better chances for quality events and programming. Further, annual applications divert organizational time and resources, something which, in the common case of declining membership levels, can greatly affect the ability of groups to function.

Many organizations noted that they are unaware of funding opportunities or that the guidelines they receive are not clear or do not provide sufficient time to complete all the requirements of a complex application form. Most rely on direct mail from government or information they find in a government publication. An important finding is that very few are using the Internet. There is an opportunity here for VolNet to make a difference, and for local community access centres to serve as quality providers of government program information to community organizations. Such efforts need to be further supported. Strategic options include selectively targeting educational training or funding to ‘leading organizations’ from which local knowledge can diffuse; continue to support Internet infrastructure development in rural communities; petition other levels of government to join coordinated efforts to develop information centres in rural and small town locations as ‘one-stop-shopping’ outlets that can achieve client population economies of scale; support rural research projects to identify barriers and opportunities in the role of the Internet in non-metropolitan Canada.

Government funding agencies must also continue to ensure that information continues to be effectively disseminated to voluntary sector organization without reliance upon the Internet. As noted in the Education Strategy report (developed in conjunction with this report) access to timely information is critical to success:

- We often cannot get our questions answered by anyone.
- The information may be shared, but it seems that larger organizations are the ones who are always successful in receiving funding.

- We often don't get information from government, or when we do, it is incomplete and not helpful.
- It does not seem to be as well publicized in rural areas as in urban.
- No it is not completely open; the government could do more by directly mailing letters of information to the interested organizations.
- It is open, but only if you are used to dealing with government bureaucracy.
- It is not a completely open process. You need to know who to talk to.
- We are not in the loop the way that we should be. It seems that dissemination problems are getting worse.

Strategic options for government agencies to address these communications issues (aside from the Internet issues noted above) include:

- Providing more explicit instructions about criteria, process, time lines, and regulations in the applications packages.
- Providing more opportunity for staff to meet face-to-face with organizations, or be accessible via telephone 1-800 number, to explain programs and assist with application procedures.
- Mailing forms and information directly to the organizations.
- Publishing comprehensive listings of funds that are available, and how to get applications packages.
- Developing centralized reference and referral services which volunteer sector groups can contact for information and assistance.

For those applying for provincial or federal government assistance, many noted that the process was long and time consuming, and the level of detail and the amount of information required was unnecessarily high, demanding too much time. Many suggestions for improvement were made, including more timely receipt of funding information and better communication from government staff about how to complete the application. About two-thirds of organizations who did apply for funding and were unsuccessful felt that they were aware of the reasons why they were unsuccessfully. There is much room for improvement on the part of funding agencies in terms of communication back to the applicants about the decision-making process and criteria. About half of the organizations which received funding noted that it came with restrictions, ranging from time limits on spending to requiring the organization to spend from its operating budget first then

being reimbursed. Restrictions such as these do pose program delivery problems and need to be examined closely.

## **RECOMMENDATIONS**

### ***Assistance to organizational development***

- Volunteer sector organizations can use help to develop or refine mission/mandate statements. This will help them be more effective in their communities and more successful with targeted funding applications. Assistance should be available through educational media.
- Volunteer sector organizations can benefit from an education program designed to improve membership recruitment. Such may include brochures or handbooks useful to community groups, or the facilitation of increased “sharing of membership success stories”.
- Incentives or assistance to maintain community office space should be enhanced. Innovative examples may include tax breaks or the creation of volunteer organization “incubator facilities” to function like small business incubators by providing space and services on a collective basis to reduce costs to tenants.
- Where possible, employment support to voluntary organizations should be provided. Such employment opportunities in rural places are very important. Examples such as a volunteer organization “incubator facility” could benefit many groups.

### ***Communication:***

- Government and community organizations need to find an effective solution for using the Internet as a more effective tool for exchanging information about funding programs and opportunities. This will require more aggressive and active work by local community access centres to assist voluntary organizations, their staff and volunteers. The government must dedicate some resources to facilitate local staffing of these centres to enhance this work.
- Internet information sites and opportunities, such as Industry Canada’s VolNet, must be made known through traditional information sources, namely by direct mail and other hard copy forms.

### ***Funding Procedures:***

- Government should consider modifications to the funding application process and procedure, including but not limited to:
  - longer term grants and program arrangements

- new forms of accountability (e.g. shorter interim reports; a more flexible approach to providing evidence for success other than fiscal ones; granting agencies bear the cost for accountability assessments)
- more consistency across departments so that the process (including deadlines for application and the evaluation procedure used) and form (including the content required) are the same, and allowing for "partnership" proposals to be more easily prepared.
- Annual funding applications divert organizational time and resources, something which can greatly affect the ability of groups to function. Longer term funding arrangement which provide a modicum of certainty should be encouraged.
- Government funding agencies need to improve their communication back to the organizations about the decision-making process, approval criteria, and reasons for individual funding application success or failure.
- Restrictions of funding can significantly limit or hamper an organization's ability to deliver the needed service. Restrictions which pose program delivery problems need to be examined and either more carefully justified or eliminated.

### *Adjustments during funding program changes*

- Where there are to be changes in funding allocation from a pattern of past approvals some form of interim adjustment funding must be developed. This is critically important for organizations providing services to individuals.
- It is critical that changes in eligibility and outcome evaluation in funding competitions which may change the mix of recipient organizations, or result in fewer dollars, be examined closely and interim or adjustment funding or mechanisms be prepared.
- Senior government agencies can assist with development of local partnerships or private sector sponsorship through provision of seed grants or long term financial partnering which would provide a base of funding upon which voluntary sector groups could develop local support.

## **FURTHER WORK**

There is still more work to be done in this area. This project was developed as a pilot study within the NRE research program of the CRRF. While the sample used here is small and from a limited number of communities, there is an opportunity through the NRE network to extend the research to a further 20 sites across Canada so as to test the robustness of findings or test some of the solutions and ideas suggested by these pilot study results. For example, more contextual information is needed about which funding programs and agencies are successful in facilitating

local initiatives and which are not, and about the impacts, if any, of funding constraints on local communities. There is also a need to examine more closely contextual issues related to the voluntary sector's use and non-use of the Internet, including local capacity, connectivity hardware and costs, and much more. Since government programs are increasingly communicated through the Internet, it will be critically important to determine why some communities or organizations are being left behind. As researchers, there is a need to further refine the survey instrument such that it more explicitly captures the contextual information noted above. Researchers within and outside of the NRE network interested in the voluntary sector should be encouraged to make use of this instrument.

**Appendix A:**

**Interview Guide**

**New Rural Economy  
Role of the Voluntary Sector in Rural Canada**

Interviewee Name

Address

Phone number Home

Work

Fax number

E-mail address

Organization's name

Organization's address

Organization's phone number

Organization's fax number

Organization's e-mail address

Organization's URL

Interviewer

Community name

NRE cell number

Population size

Date of interview

Instructions to Interviewers:

1. This is an interview guide, not a survey instrument. Ask the question and listen for the answers. Ask the interviewee to elaborate or explain further their answers, where appropriate. Some answers may overlap. If you come to a question for which information or an answer has already been given, simply fill in the answer and continue on - do not ask the interviewee to repeat the answer.

2. Ideally, you should bring a tape recorder with you and ask permission to record the interview. You can then play back the interview to doublecheck your answers and notes to ensure they are accurate.

3. Once the interview is completed and reviewed, enter the information into the spreadsheet provided on disk. Note that the numbering of questions below is designed to correspond with the numbering in the spreadsheet. For some questions, there is no space provided in the spreadsheet. Record this information in a separate text file.

4. Explain that the information will be used to understand the problems faced by voluntary organizations in rural Canada and the benefits they provide to rural communities. Explain that this research project is being conducted in 8 rural communities across Canada, and between 12 and 20 voluntary organizations in each community are being interviewed.

5. Make clear that the information will be made available to partners in the NRE network, that individual persons will not be identified, and that information about specific organizations will not be released beyond the network of researchers in the NRE project.

## 10 Organization's Goals and Structure

### 10.1 GOALS

10.1.1. When was your organization established? (Note to interviewer: We are interested in the local volunteer group only - if they are an affiliate or chapter of a larger provincial or national organization, only record the year for the establishment of the local chapter).

Year \_\_\_\_\_

10.1.2. How would you describe the focus of your organization? (Please circle all that apply)

a Environment & Wildlife

b Multidomain

c Arts & Culture

d Health

e Law & Justice

f Social services

g Foreign & international organizations

h Sports & recreation

i Society & public benefit

j Religious organizations

k Education and youth development

l Employment & economic interests

m Other (Please specify) \_\_\_\_\_

10.1.3. Do you have a "mission statement"? Yes    No

Mission Statement:

10.1.4. What are your organization's goals?

10.1.5/6. What are some of the activities that your organization are involved in? Which are the most important? (Note to interviewer: There can be more than one “most important”.)

Activity	Involved In	Most Important	Comment/List
a Organizing or supervising events			
b Canvassing, campaigning, fundraising			
c Office work			
d Providing information			
e Teaching/coaching			
f Providing care or support			
g Leading/organizing a self-help group			
h Maintenance/repair			
i Collecting/ serving/delivering food			
j Other (Please specify)			

## 10.2 STRUCTURE

10.2.1. Does your organization have a president/chairperson?      Yes    No

10.2.2. Is the president elected?                      Yes    No (Please explain)

10.2.3. If yes, by whom?

10.2.4. Does your organization have a board of directors?                      Yes    No

10.2.5. If yes, are they elected or appointed? Yes    No    Mix of Elected and Appointed

10.2.6. If yes, how many directors are on the board?                      # \_\_\_\_\_

10.2.7. How many members (defined as those assisting in some way in making decisions, delivering a service, etc) make up your organization?

Total \_\_\_\_\_

10.2.8. How many would you consider to be “core” or “active”? (Note to interviewer: Allow the respondent to define for themselves what they consider to constitute a core or active person.)

Core/Active \_\_\_\_\_

## 10.3 DEMOGRAPHICS

10.3.1. What is the gender split among your **total** members?

\_\_\_\_\_ % Female

\_\_\_\_\_ % Male

10.3.2. What is the age split among your **total** members?

\_\_\_\_\_ % less than 29 years of age

\_\_\_\_\_ % 30 - 44 years of age

\_\_\_\_\_ % 45 - 64 years of age

\_\_\_\_\_ % 65 years of age or more

10.3.3. How many new members has your organization recruited within the last year? (Note to interviewers: Do not count as a new member those people who replace someone who represents a permanent stakeholder group. For example, if the Town of XXX has a “permanent” spot on the board of directors, but the actual individual changes every two years, this is not a “new” member.)

\_\_\_\_\_ Number of new members

10.3.4. How does your organization recruit members? (Please specify.)

10.3.5. How many members has your organization lost within the last year? (See note for 10.3.3)  
\_\_\_\_\_ Number of members lost

10.3.6. If you have lost members, please explain what you feel are the reasons for why you have lost them. (Note to interviewers: Circle any that they mention in their explanation, and then record further notes below.)

- a Chose to retire due to age
- b Chose to retire because after lengthy service to our organization
- c Lost interest
- d Moved away
- e No longer agree with mission/goals
- f Lack of time or ability to participate
- g Personality conflicts
- h Other (Please specify)

10.3.7. How often does your organization formally meet?  
# of meetings per year \_\_\_\_\_

10.3.8. Where do the **majority** of your formal meetings take place?

- a Local church
- b Local community centre or hall
- c School
- d Someone's home
- e Local mall or commercial establishment
- f Civic building (library, town hall, etc)
- g Hospital or community health centre
- h No fixed meeting place - we move around
- i Other (Please specify)

10.3.9. How do you pay for meeting space?

- a Rent/Lease
- b Subsidized rent
- c We own the building where we meet
- d Free (in-kind donation)
- e No meeting space
- f Other (Please specify)

## 10.4 CLIENTS

10.4.1. Do you have clients? Yes No

10.4.2. If yes, please describe the clients who benefit from the service you provide.

10.4.3. What is the geographic “reach” of your services? Explain.

- a This community only
- b This community and the immediate surrounding communities
- c Widely beyond this community
- d Other (please specify)

10.4.4. On a scale of one (no contribution) to five (major contribution), describe how your organization makes a contribution to the economy of the community. Explain.

No contribution 1                      2            3            4            5 major contribution

10.4.5. On a scale of one (no contribution) to five (major contribution), describe how your organization makes a contribution to the social well-being of your community. Explain.

No contribution 1                      2            3            4            5 major contribution

10.4.6. What would be the impact in your community if your organization ceased to exist?

10.4.7. Who would fill the gap?

10.4.8/9/10/11. How does your organization communicate with its members? With clients? With funders? With others? Circle all that apply. (Note to interviewer: Ask the interviewee if they have a newsletter and to whom is it circulated; ask if they have a website and to whom is it intended to serve; etc)

Activity	Members	Clients	Funders	Others	Comment
a Newsletter					
b Website					
c E-mail					
d Word of mouth/ use other organizations					
e Personal contact					
f Post notices in prominent places					
g Information brochures					
h Reports given to other organizations					
i Run stories in media					
j Advertise in media					
k Other (Please specify)					

10.4.12. Does your organization have office space?

a Yes, our own

b Yes, shared with other organizations

c No, but a business/organization provides us with some office support

d No

10.4.13. If yes, is it staffed?

a Full-time paid staff (more than 20 hrs per week) # \_\_\_\_\_

b Part-time paid staff (less than 20 hrs per week) # \_\_\_\_\_

c Staffed by volunteers # \_\_\_\_\_

10.4.14. Collectively, how many hours per week, are worked by your paid staff? (Note to interviewer: For example, if they have 2 full time at 35 hours each and 2 part time at 15 hours each, then the answer would be 100 hours. We are interested in the total paid working hours, per week).

# of total hours per week \_\_\_\_\_

10.4.15. Collectively, how many volunteer hours per month, in a typical or average month, are contributed by your members in the **direct provision** of services in the community (include meeting time as well)?

# of total hours per month \_\_\_\_\_

10.4.16. Are volunteers compensated for their time and expense?    Yes    No

10.4.17. If yes, please describe how. (Note to interviewer: Circle any of these as they are mentioned in the response, and write comments below.)

- a Yes, for their time and expenses
- b Yes, for their time only
- c Yes, for their expenses only
- d Yes, for certain types of expenses only
- e No compensation

10.4.18. Has this changed over time, and if so, why and how?

10.4.19. Describe the current challenges facing your organization?

(Note to interviewers: Ask this question without the response categories first. Check any of the answers they give in the “Open” column. Then ask them if they face any of the remaining possible challenges they did not identify on their own. Record those in the “Probed” column.)

Challenge	Open Response	Probed Response	Comments
a No funding			
b Lack of members			
c Little participation by members			
d Lack of meeting space			
e Lack of local support			
f First objectives were too ambitious			
g Poor management			
h Lack of new leadership			
i Lack of partners or outside networks (isolation)			
j The need to revisit our objectives			
k Psychological burnout			
l Communication problems			
m Other (Please specify)			

## 11 Networks and Relationships

11.1.1. Describe your relationship with other local volunteer groups, businesses, institutions. Do you work together to provide services, share space, etc? Is the relationship positive or frustrating? Why? Please give specific examples.

11.1.2. Describe your relationship with “parent” organizations, particularly if you are a local chapter of a regional or national or international organization. What type of support and resources do you receive? Is the relationship positive or frustrating? Why? Please give specific examples.

11.1.3. Do you have any relationship with any of the following levels of government:

- a Federal
- b Provincial
- c Municipal

11.1.4. Describe your relationship with the federal government, provincial government, and municipal government. Do you receive funding, information, resources, or moral support? Is the relationship positive or frustrating? Why? Please give specific examples.

Federal

Provincial

Municipal

## 12 Finances and Resources

### 12.1 FUNDING

12.1.1. Does your organization have charitable status?      Yes    No

12.1.2. Over the last five years, what has been your annual average total **operating** budget? Give your best estimate.

\$\_\_\_\_\_ average annual operating budget

12.1.3. Do you have capital assets?                      Yes    No

12.1.4. Do you produce an Annual Report?    Yes    No

12.1.5. Are your financial statements audited?      Yes    No

12.1.6. From where does your group receive its current funding? Describe in detail the nature of the funding/programs. (Note to interviewers: Ask this question without the response categories first. Check any of the answers they give in the “Open” column. Then ask if they use any of the remaining possible funding sources they did not identify on their own. Record those in the “Probed” column.)

Source	Open Response	Probed Response	Comment/Description
a Private donations			
b Corporate donations			
c Government Grants - Federal			
d Government Grants - Provincial			
e Government Grants - Federal			
f Government Programs - Federal			
g Government Programs - Provincial			
h Government Programs - Municipal			
i Personal funds from members			
j Membership fees			
k Revenue from services provided			
l Fundraising in the community			
m Other (Please specify)			

12.1.7. Describe how the sources of funding for your organization have changed over the years.

12.1.8. What factors, in your opinion, have contributed to these changes?

12.1.9. How have the various sources of funding directly supported your goals and objectives?  
(Note to interviewers: Ask them to name specific sources such as a program or a corporate sponsor, and to relate it to their goals and objectives.)

12.1.10. What was the money used for?

12.1.11. Did any of the money come with restrictions?      Yes    No

12.1.12. If yes, please describe the restrictions.

12.1.13. Has the funding or its conditions altered your mission, goals and objectives? Yes No

12.1.14. If yes, in what ways?

12.1.15. If yes, describe your feelings about these changes.

12.1.16. Are there elements in your mission (or objectives) that do not seem to be eligible for any grants or other support?      Yes    No

12.1.17. If yes, please elaborate.

12.1.18. Do you have corporate sponsorship?      Yes    No

12.1.19. If yes, is there a required or implicit understanding that you will advertise their product/service with your literature?      Yes    No



### 12.3 FUNDING INFORMATION

12.3.1/2/3/4. How do you find out about funding opportunities? How do you prefer to find out? (Note to interviewers: Ask this question without the response categories first. Check any of the answers they give in the “O - Open” column. Then ask about any of the remaining possible answers they did not identify on their own. Record those in the “P - Probed” column.)

Source	About Gov't Funds		Prefer About Gov't Funds		About Other Sources		Prefer About Other Sources		Comments
	O	P	O	P	O	P	O	P	
a Media									
b Word of mouth									
c Direct contact with gov't staff person									
d Through elected politicians									
e Internet									
f Publications released by gov't agency or dept									
g Direct mail from gov't funder to our organization									
h Fundraising database									
i Other (Please specify)									

12.3.5. Does the dissemination of information about various government programs and grants appear to be completely open? Explain.

12.3.6. Describe the process of applying to government for funding?

12.3.7. How helpful were government staff?

Not helpful                      1            2            3            4            5            Extremely helpful

12.3.8. What could be changed to make it easier for your organization?

12.3.9. Approximately how much time each year is involved in preparing various applications?  
Please give estimate in number of days.

# \_\_\_\_\_ days

12.3.10. If you have applied for government funding for this organization, have you ever been unsuccessful or refused? Were you applying as part of a competitive application process or simply applying for assistance through other means? Explain.

a Yes, applied and unsuccessful in competitive process

b Yes, applied and refused support

c No, we have always been successful

d Never asked for government funding

12.3.11. Are you aware of the reasoning behind the government not granting your request for support? Yes No

12.3.12. Please explain in more detail either the reasoning or lack of explanation.

12.3.13. If you requested government funding and were unsuccessful, how have you survived or operated to maintain your activities and objectives?

12.3.14. Do you feel you understand the decision-making process applied to grant proposals, including the time-lines? Yes No

12.3.15. Do you feel you understand the criteria being applied to the decision(s)? Yes No

12.3.16. Would you like to know which applications were successful? Yes No

12.3.17. Have you ever seen or requested an example of successful applications? Yes No

12.3.18. Would this be of interest to you?    Yes    No

12.3.19. Did you involve people from outside your organization as "consultant(s)" to give you advice on the submission(s)? Please explain.            Yes    No

### **13 OTHER COMMENTS OR OBSERVATIONS**

For the interviewer:

How long did the interview take?

How was the respondent contacted?

What changes would you propose for the interview?

## **Appendix B:**

### **Brief Summary of Each Field Site**

- ! Blissfield and Neguac, NB.
- ! St. Francoise and St. Damase, QC
- ! Blenheim and Tweed, ON
- ! Ferintosh, AB
- ! Tumbler Ridge and Mackenzie, BC