



*The Nonprofit and Voluntary  
Sector in Quebec*

REGIONAL HIGHLIGHTS OF THE NATIONAL SURVEY  
OF NONPROFIT AND VOLUNTARY ORGANIZATIONS

---

AUTHORS: L'ALLIANCE DE RECHERCHE UNIVERSITÉS-COMMUNAUTÉS  
EN ÉCONOMIE SOCIALE – ÉQUIPE UQAM :

DENIS BUSSIÈRES . SÉBASTIEN CHARTRAND . GUY CUCUMEL  
LOUIS JOLIN . RICHARD NICOL . YVES VAILLANCOURT

EDITOR: RICHARD NICOL

Imagine  Canada  
Give. Volunteer. Engage.  
Donner. S'engager. Agir.

 *économie sociale*  
ALLIANCES DE RECHERCHE UNIVERSITÉS-COMMUNAUTÉS  
COMMUNITY-UNIVERSITY RESEARCH ALLIANCES 

© 2006 Imagine Canada

Copyright for *The Nonprofit and Voluntary Sector in Quebec: Regional Highlights from the National Survey of Nonprofit and Voluntary Organizations* is relinquished for nonprofit and voluntary organizations for non-commercial use. All nonprofit and voluntary organizations are encouraged to photocopy and distribute this report, with proper acknowledgement to the author and Imagine Canada.

For more information on Imagine Canada's research program, please go to [www.imaginecanada.ca](http://www.imaginecanada.ca).

Imagine Canada  
425 University Avenue, Suite 900  
Toronto ON Canada M5G 1T6  
Telephone: 416.597.2293 / 1.800.263.1178  
Fax: 416.597.2294  
Email: [research@imaginecanada.ca](mailto:research@imaginecanada.ca)

ISBN: 1-55401-118-3

---

This research study received funding from the Voluntary Sector Initiative through the Social Development Partnerships Program of Social Development Canada (SDC). The opinions expressed in this report are not necessarily the opinions of the Government of Canada.

Canada 

The Nonprofit and Voluntary Sector in Quebec

Regional Highlights from the National Survey of Nonprofit and Voluntary Organizations

by

L'Alliance de recherche universités-communautés en économie sociale  
– équipe UQAM:

Denis Bussières  
Sébastien Chartrand  
Guy Cucumel  
Louis Jolin  
Richard Nicol  
Yves Vaillancourt

Editor  
Richard Nicol

Collaboration by Sébastien Chartrand

# Table of Contents

<b>Table of Contents</b> .....	<b>i</b>
<b>List of Figures</b> .....	<b>iii</b>
<b>List of Tables</b> .....	<b>v</b>
<b>Foreword</b> .....	<b>vi</b>
<b>Introduction</b> .....	<b>1</b>
<b>Methodology</b> .....	<b>2</b>
<b>Highlights</b> .....	<b>3</b>
Main characteristics .....	3
Financial resources.....	3
Human resources .....	4
Change in organizations .....	4
Challenges .....	5
<b>Main characteristics</b> .....	<b>6</b>
Number of organizations .....	6
Areas of activity .....	6
Main recipients – groups receiving services .....	6
Members.....	7
Conclusion.....	7
<b>Financial Resources</b> .....	<b>9</b>
Breakdown of revenues .....	9
Revenue sources .....	10
<i>Revenue sources including Hospitals, Universities and Colleges</i> .....	10
<i>Revenue sources excluding Hospitals, Universities and Colleges</i> .....	13
Transfer of revenues to other organizations .....	14
Contributions of goods and services .....	15
Diversity of revenue sources .....	15
Conclusion.....	15
<b>Human Resources</b> .....	<b>17</b>
Volunteers .....	17
<i>Number of volunteers</i> .....	17
<i>Breakdown of volunteers by activity area</i> .....	18
Employees.....	18

<i>Number of employees</i> .....	18
<i>Breakdown of employees per area of activity</i> .....	19
Conclusion.....	19
<b>Change in Organizations</b> .....	<b>21</b>
Change in revenues.....	21
<i>In relation to reliance on a revenue sources</i> .....	21
Change in volunteers.....	21
Change in employment .....	22
Correlations between changes in revenue, volunteers and employment .....	23
Conclusion.....	23
<b>Challenges</b> .....	<b>24</b>
The nature and seriousness of problems encountered.....	24
Problems in relation to levels of revenues .....	25
Problems in relation to dependence on one revenue source.....	26
<i>Conclusion</i> .....	26
<b>General Conclusion</b> .....	<b>27</b>
<b>Appendix</b> .....	<b>28</b>

# List of Figures

Figure 1: Percentage of organizations and number of organizations per 100,000 population by region .....	28
Figure 2: Percentage of organizations in Quebec and Canada by primary activity area .....	29
Figure 3: Main geographic areas served .....	30
Figure 4: Population served.....	31
Figure 5: Membership composition.....	32
Figure 6: Primary beneficiaries of services or products .....	32
Figure 7: Percentage of organizations and percentage of total revenues by region .....	33
Figure 8: Percentage of organizations and percentage of total revenues by primary activity area.....	34
Figure 9: Percentage of organizations and percentage of total revenues by revenue size, excluding Hospitals, Universities and Colleges .....	35
Figure 10: Sources of revenue .....	35
Figure 11: Sources of revenue by primary activity area.....	36
Figure 12: Percentage of total number of organizations and percentage of total donation value by primary activity area.....	37
Figure 13: Sources of government revenue by primary activity area .....	38
Figure 14: Sources of revenue, excluding Hospitals, Universities and Colleges..	39
Figure 15: Sources of government revenue by revenue size, excluding Hospitals, Universities and Colleges.....	40
Figure 16: Percentage of organizations receiving in-kind donations by region ...	40
Figure 17: Revenue dependency by region .....	41
Figure 18: Percentage of organizations, percentage of volunteers, and percentage of paid staff by region.....	41
Figure 19: Percentage of organizations by number of volunteers .....	42
Figure 20: Percentage of organizations and percentage of volunteers by revenue size .....	42
Figure 21: Percentage of organizations and percentage of volunteers by primary activity area .....	43
Figure 22: Percentage of organizations and paid staff by revenue size.....	44
Figure 23: Percentage of organizations and paid staff by revenue size, excluding Hospitals, Universities and Colleges.....	44
Figure 24: Percentage of organizations and paid staff by primary activity area..	45
Figure 25: Reported change in revenues over the past three years by region .....	46

Figure 26: Reported change in revenues over the past three years by revenue dependency .....	46
Figure 27: Reported change in volunteers over the past three years by region....	47
Figure 28: Reported change in volunteers over the past three years by number of volunteers .....	47
Figure 29: Reported change in paid staff over the past three years by region.....	48
Figure 30: Reported change in paid staff over the past three years by number of paid staff .....	48
Figure 31: Reported change in paid staff over the past three years by reported change in revenues.....	49
Figure 32: Reported change in volunteers over the past three years by reported change in paid staff .....	49
Figure 33: Reported change in volunteers over the past three years by reported change in revenues.....	50

# List of Tables

Table 1: Detailed sources of revenue.....	51
Table 2: Detailed sources of revenue, excluding Hospitals, Universities and Colleges.....	52
Table 3: Percentage of organizations that receive in-kind donations.....	53
Table 4: Approximate value of in-kind donations received by organizations.....	53
Table 5: Number of paid staff.....	53
Table 6: Financial issues by revenue size .....	54
Table 7: External funding issues by revenue size.....	55
Table 8: Paid staff issues by revenue size .....	56
Table 9: Volunteer issues by revenue size .....	57
Table 10: Structural issues by revenue size .....	58
Table 11: Financial issues by revenue dependency.....	59
Table 12: External funding issues by revenue dependency.....	59
Table 13: Paid staff issues by revenue dependency .....	60
Table 14: Volunteer issues by revenue dependency .....	60
Table 15: Structural issues by revenue dependency .....	61
Table 16: Financial issues by primary activity area .....	62
Table 17: External funding issues by primary activity area.....	63
Table 18: Paid staff issues by primary activity area.....	64
Table 19: Volunteer issues by primary activity area.....	65
Table 20: Structural issues by primary activity area .....	66



# Foreword

This report expands on the National Survey of Nonprofit and Voluntary Organizations (NSNVO). First, discussion groups were held in several Canadian cities, including Montreal and Quebec City. Then a qualitative report was published.<sup>1</sup> This report included an annotated bibliography whose core points of analysis found an echo in subsequent works.

In the wake of the qualitative report, the National Survey's quantitative report was published on September 20, 2004.<sup>2</sup> It's an invaluable contribution to the understanding of the nonprofit sector in Canada. Its findings were presented to stakeholders in all regions of Canada. In Quebec, two roundtable discussions were held, in Montreal and Quebec City, and led to the production of a detailed report on the findings of the national roundtables.<sup>3</sup> That report brings together both the comments made by the participants at the two Quebec roundtables and a preliminary analysis of some of the findings collected through all respondents. Presenting the findings dealing with Quebec only without putting them into perspective would not serve the upcoming discussions. That's why we have elected to compare results with other provinces and with Canada as a whole.

This regional report is the first major step in the publication of the findings. It provides a comprehensive look at the findings for Quebec. It may appear austere and simple to many. Our first goal was to put together a global statistical base that any interested party could check. Each region of Canada wrote its own report using the same headings, which will make it easy to later compare results between regions. Those reports are therefore regional complements to *Cornerstones of Community*.

The entire team – four researchers and two research professionals – worked closely on each main section of the survey. Each section was an opportunity for us to highlight our concerns and to continue our comparative study of regional

---

<sup>1</sup> *The Capacity to Serve: A Qualitative Study of the Challenges Facing Canada's Nonprofit and Voluntary Organizations in Canada*. This document can be downloaded from the following website address: [http://www.nonprofitscan.ca/Files/nsnvo/capacity\\_to\\_serve\\_may\\_2003.pdf](http://www.nonprofitscan.ca/Files/nsnvo/capacity_to_serve_may_2003.pdf)

<sup>2</sup> *Cornerstones of Community: Highlights of the National Survey of Nonprofit and Voluntary Organizations*. This document can be downloaded from the following website address: [http://www.nonprofitscan.ca/Files/nsnvo/nsnvo\\_report\\_english.pdf](http://www.nonprofitscan.ca/Files/nsnvo/nsnvo_report_english.pdf)

<sup>3</sup> *Strengthening the Capacity of Nonprofit and Voluntary Organizations to Serve Canadians: Recommendations Based on the National Survey of Nonprofit and Voluntary Organizations*, summary of round tables held across Canada. This report is available from Imagine Canada and ARUC-ES.

variations. Henceforth, the doors are open to explore new avenues of research.  
Happy reading!

# Introduction

This report is the first full portrait of nonprofit organizations in Quebec. We first discuss the importance of associations in the province. Indeed, Quebec has the largest concentration of nonprofit organizations in Canada and has a higher per capita number of organizations than most other provinces. The organizations are mainly active at the local level and provide services to the general public, mostly in the areas of Sports and Recreation as well as Social Services. Their revenues and human resources are lower than those of their counterparts in Ontario for instance, and their main source of revenue is government subsidies. Lastly, the majority of organizations consider that their overreliance on project-based funding is a major problem.

# Methodology

NSNVO data were collected by Statistics Canada via personal interviews with 13,000 individuals representing incorporated nonprofit organizations and registered charities<sup>4</sup> in 2003. The NSNVO defines nonprofit and voluntary organizations as:

- non-governmental (i.e., are institutionally separate from government);
- non-profit distributing (i.e., do not return any profits generated to their owners or directors);
- self-governing (i.e., are independent and able to regulate their own activities);
- voluntary (i.e., they benefit to some degree from voluntary contributions of time or money); and
- formally incorporated or registered under specific legislation<sup>5</sup> with provincial, territorial, or federal governments.

## *Symbols:*

The following symbols have been used in this publication:

\* Suppressed to meet the confidentiality requirements of the *Statistics Act*.

E Use with caution.

---

<sup>4</sup> Registered charities are organizations that have obtained registered charitable status from the Government of Canada.

<sup>5</sup> The NSNVO excluded grass-roots organizations or citizens' groups that are not formally incorporated or registered with provincial, territorial, or federal governments. It also excluded some registered charities that are considered to be public sector agencies (e.g., school boards, public libraries, and public schools).

# Highlights

## Main characteristics

The survey showed the importance of associations in Quebec, which number twice as many organizations per resident as Ontario and has the largest number of nonprofit organizations (NPO) in Canada. Those NPOs are mostly active in the areas of Sports and Recreation as well as Social Services and are mostly made up of individual members. They mainly work at the local level, instead of regionally or nationally, and provide services directly to the general public, instead of specific professional categories.

This large number of organizations can be explained partly by the strong contingent of Sports and Recreation organizations, whose creation has been encouraged by the Government of Quebec since the 1970s. Government contribution is also evident in the number of Social Services organizations. Moreover, we notice a large number of professional and trade associations in Quebec, which reflects the high unionization rate in the province. Of special note is the fact that the Religious organizations subsector is quite small compared to the rest of Canada. Lastly, the Arts and Culture subsector is similar in size to the Canadian average.

## Financial resources

Quebec organizations, however, have less financial resources than organizations in other provinces. The average revenue of Quebec organizations is half that of Ontario organizations, and that difference can not be explained solely by the relative wealth of the two provinces. Indeed, Ontario is home to a large number of high-revenue organizations that operate across Canada, which is only marginally the case in Quebec. Often these are national organizations with their head office in Ontario.

A very significant finding that illustrates the relationships between nonprofit organizations and civil society on one hand, and political society on the other, has to do with the revenue sources of nonprofit organizations, depending on the province or territory. A large proportion of Quebec organizations' revenues comes from government sources (most significantly from the Quebec government) while that proportion is less than half in Ontario and Canadian

organizations. Perhaps even more significant is the fact that the greater proportion of Quebec organizations' revenues comes from government subsidies and contributions, and very little comes from government payments for goods and services. Canadian organizations receive a greater part of their revenues from gifts and donations than Quebec organizations do.

## Human resources

Quebec organizations have less financial resources than those in Ontario and also seem to have less human resources. Many organizations rely on volunteers to operate. Volunteering is as common in Quebec organizations as elsewhere in Canada, both in terms of volunteers and volunteered hours. The majority of those volunteers are active in the area of Social Services and in organizations with annual revenues between \$100,000 and \$250,000. When board members are excluded, close to one-third of organizations have no volunteers. However, more than half of organizations in Quebec cannot rely on a significant paid workforce. Most organizations have no employees, and one-quarter of them has only a few. In fact, close to one-third of paid employees work in Hospitals, Universities and Colleges, and more than half of them in organizations with revenues of \$1 million or more.

## Change in organizations

Close to half of Quebec's organizations report revenues have been stable and one-quarter say that the number of volunteers has increased in the last three years. For more than half of those organizations, this number has remained stable, and for less than one-fifth of them it has decreased. One-quarter of organizations in Quebec saw the number of their employees increase while one-tenth of them experienced a decrease. In general, organizations did not experience great variations in their staff. Depending on the respondents, for close to two-thirds of organizations the number of employees remained stable over the last three years. Almost two-thirds of organizations with stable revenues also saw their number of volunteers remain stable.

## Challenges

A majority of organizations report problems with their overreliance on project-based funding, with obtaining funding from other organizations, and with cuts in government funding. Moreover, Quebec organizations seem to experience greater difficulty in recruiting board members than do Canadian organizations. Lastly, these problems affect all organizations, regardless of revenue, but they affect a greater number of them as their revenue increases.

# Main characteristics

In this first section we define the object of study in Quebec by comparing the findings with Canada. We pose the following questions: how many organizations are there in Quebec and in Canada, in what sectors specifically do they work, and who are their clients? It is important to note that comparisons will be made between Quebec and Canada, including Quebec, and to keep in mind that the population of Quebec accounts for less than 24% of the Canadian population.<sup>6</sup>

## Number of organizations

Quebec has the largest number of organizations per capita (46,000 compared with 161,000 in Canada), which translates into 617 organizations per 100,000 inhabitants and 29% of all organizations in Canada (Figure 1). Ontario has 45,000 organizations (28% of all organizations in Canada), which represents 369 organizations per 100,000 inhabitants.

## Areas of activity

In Quebec, the Sports and Recreation area has the largest number of organizations with 26% (Figure 2). In Canada, 21% of respondents are active in this area. Next comes Social Services with 15% of organizations compared with 12% in Canada. Lastly, 11% of organizations in Quebec versus 19% in Canada are active in the area of Religion. In a proportion that compares closely to Canada (9%), 8% of organizations in Quebec are involved in the area of Arts and Culture.

## Main recipients – groups receiving services

When it comes to territory, interesting variations can be noted: 59% of organizations in Quebec work in their neighbourhood and at the local level compared with 64% of organizations in Canada; 26% work in a region of the province compared with 19% in Canada, and 1% are involved in more than one

---

<sup>6</sup> In 2003, Quebec's population numbered 7 509 900 inhabitants. Canada's population was 31 752 800 inhabitants. Quebec's population therefore accounted for almost 24% of Canada's population in 2003. Sources: [http://www.stat.gouv.qc.ca/regions/lequebec/population\\_que/occufter20.htm](http://www.stat.gouv.qc.ca/regions/lequebec/population_que/occufter20.htm), [http://www.statcan.ca/francais/Pgdb/demo02\\_f.htm](http://www.statcan.ca/francais/Pgdb/demo02_f.htm)



province compared with 2% (Figure 3). These numbers suggest that Quebec has few inter-provincial or Canada-wide organizations.

We note that 73% of organizations in Canada and 59% of them in Quebec provide services directly to individuals. Moreover, 46% of those organizations in Canada and 47% in Quebec provide services directly to the general public (Figure 4). Other recipients are children and youth (21% of organizations in Quebec vs. 23% in Canada), as well as seniors (8% of organizations in Quebec vs. 11% in Canada).

## Members

There are more than 139 million individual members in various organizations in Canada with approximately 29 million in Quebec. An individual can, of course, be a member of several organizations and an organization can be a member of another organization. Slightly less than 30,000 organizations, or 63% of organizations in Quebec, have individual members (Figure 5). That is the case for more than 106,000 organizations in Canada (66%). In Quebec and in Canada, 3% of organizations include organizations as members. Lastly, 12% of organizations (5,600) have both individuals and organizations as members in Quebec compared to 10% (16,600) in Canada. It is noteworthy that 22% of organizations in Quebec say that they have no members, compared to 21% in Canada.

Forty-four per cent of organizations in Quebec report that it is their members who benefit most from their services (Figure 6). That rate is 39% in Canada. Furthermore, 13% of organizations in Quebec provide services to non-members, compared to 15% of organizations in Canada that do so. Lastly, 43% of organizations in Quebec say that they offer their services to both members and non-members. In Canada, 46% of organizations say that they do so. In Quebec, 24% of organizations offer specific advantages or benefits to their members, other than being entitled to vote or to receive a newsletter, compared with 27% of organizations in Canada.

## Conclusion

Quebec has twice as many organizations per 100 000 inhabitants as Ontario and accounts for 29% of NPOs in Canada. They are mostly made up of individual members, representing more than 29 million people, and are mostly active in the

areas of Sports and Recreation and Social Services. They work mostly at the local level and offer their services directly to the public.

Figures one through six show the importance of associations in Quebec. While there are more organizations in Quebec than in Ontario, despite Quebec's smaller population, this is explained on one hand by the larger number of Sports and Recreation organizations (26% vs. 16% in Ontario) and the fact that since the 1970s the Government of Quebec has encouraged the creation of sports and recreation organizations that have a legal status granted by a provincial law. They are provincial sports and recreation organizations that receive concrete support from the government (support to head office, funding policy, etc.) and that, in turn, support the development of local and regional sports and recreation organizations in the province as a whole.

The figures also show, to a lesser but still significant extent, the relative importance of Social Services organizations, which also receive support from the government. Quebec's high rate of unionization may also explain why it is in this province (along with Newfoundland and Labrador and the Territories) that the largest number of professional and trade associations can be found.

On the other hand, as a result of the loss of influence of religion in Quebec in the wake of the Quiet Revolution, Quebec (along with the Territories) has the smallest number of Religious organizations (the difference is obvious when we compare with Ontario: in this province, 23% of organizations have Religion as their main area of activity in Ontario compared to 11% in Quebec. That figure is 19% in Canada as a whole).

# Financial Resources

This section deals with revenues and revenue types. Quebec's situation is different from that of other provinces in several respects. We present revenue sources and distribution as well as contributions of goods and services. In this area more specifically, we present results with or without Hospitals, Universities and Colleges which, according to many, tends to produce a distorted image of our object of study in Quebec where hospitals, for example, are public institutions. Thus we are able to present the findings with or without Hospitals, Universities and Colleges. This analysis is important to properly size up the scope and disparities within our object of study.

## Breakdown of revenues

If we look at results **including** Hospitals, Universities and Colleges, Quebec organizations account for 22% of total revenues in Canada, or more than \$25 billion, while they represent 29% of all organizations (Figure 7). Such revenues are over \$47 billion in Ontario, or 43% of revenues of organizations in Canada and 28% of all organizations. When Hospitals, Universities and Colleges are **excluded** from the calculation, the portion of revenues of Quebec-based organizations represents 23% of total revenues in Canada while the portion of Ontario-based organizations is 39%. This is a significant difference. Hospitals, Universities and Colleges represent less than 1% of organizations in Quebec but account for 32% of revenues in the province, or more than \$8 billion out of a total of \$25 billion. In Canada, Hospitals, Universities and Colleges represent 1% of organizations and account for 33% of revenues, or almost \$37 billion out of nearly \$112 billion (Figure 8).

When results for Hospitals, Universities and Colleges are **included**, we note that Arts and Culture organizations in Quebec, representing 8% of all organizations in the province, account for 3% of total organizations' revenues (Figure 8). In Canada, they represent 9% of all organizations and also account for 3% of revenues. Furthermore, while Sports and Recreation organizations make up 26% of all organizations in Quebec, they account for only 5% of total revenues. In Canada, they represent 21% of organizations and 5% of total revenues. In Quebec, Social Services organizations make up 15% of all organizations but account for 10% of total revenues. In Canada, Social Services organizations represent 12% of organizations and 10% of total revenues.

**Excluding** Hospitals, Universities and Colleges, organizations with revenues of \$10 million or more account for less than 1% of organizations in Quebec and 36% of total revenues (Figure 9). In Canada, they also represent 1% of organizations but 41%<sup>E</sup> of total revenues. Organizations with revenues between \$1 million and \$10 million represent 6% of organizations in Quebec and 38% of revenues. In Canada, they represent 6% of organizations but 36% of revenues. Lastly, organizations with revenues of less than \$30,000 represent 45% of organizations in Quebec, but account for only 1% of revenues. In Canada, they represent 42% of organizations and account for 1% of revenues, the same percentage as organizations in Quebec.

## Revenue sources

Revenue sources vary and while revenue predominantly comes from government, it must be separated into two categories: one including Hospitals, Universities and Colleges, and one excluding Hospitals, Universities and Colleges.

### Revenue sources including Hospitals, Universities and Colleges

First, revenues from government account for approximately \$15 billion in Quebec (60% of revenues, Figure 10) and for \$54 billion in Canada (49% of revenues in Canada), while revenues from non-governmental sources, excluding gifts and donations, represent \$7 billion (28% of revenues) compared with \$40 billion (35% of revenues in Canada). Gifts and donations represent \$2 billion (8% of revenues) compared with \$14 billion (13% of revenues in Canada). Thus, public funding appears to be greater in Quebec than in Canada.

The purchase of goods and services by the provincial government represents almost \$2 billion (or 8% of revenues) in Quebec out of a total of \$17 billion (15% of revenues) in Canada (Table 1). The federal government's portion is much smaller with 1% of total revenues both in Quebec and in Canada. The total purchase of goods and services by federal, provincial and municipal governments amounts to approximately \$2 billion (9% of total revenues) in Quebec compared with \$20 billion (18% of revenues) in Canada.

---

<sup>E</sup> Use with caution.

Federal subsidies represent more than \$2.5 billion (or 10% of revenues) in Quebec versus \$6 billion (5% of revenues) in Canada (Table 1). This means that almost half of federal subsidies in Canada go to Quebec organizations. Provincial subsidies represent \$10 billion (39% of revenues) in Quebec versus \$27 billion (24% of revenues) in Canada. Membership dues of Quebec-based organizations represent more than \$2 billion (8% of all revenues) compared with \$12 billion in Canada (11% of all revenues). The sale of goods and services (excluding to governments) totals almost \$4 billion (16% of total revenues) in Quebec compared with almost \$22 billion (20% of revenues) in Canada.

Individual donations amount to \$700 million in Quebec (3% of all revenues, Table 1) and to more than \$8 billion<sup>E</sup> in Canada (8%<sup>E</sup> of total revenues). Corporate sponsorships and donations represent \$523 million in Quebec (2% of total revenues) and almost \$3 billion in Canada (3% of all revenues).

### *Sources of Revenues by Activity Area*

Significant differences exist depending on the area of activity of organizations.

#### **Revenues from government**

The percentage of revenues from government is in order, as follows: Health (82%<sup>E</sup>, Figure 11), Hospitals, Universities and Colleges (81%), Social Services (73%), Grantmaking, Fundraising, and Voluntarism Promotion organizations (69%) and Law, Advocacy, and Politics organizations (64%). In Canada, it is 73% for Hospitals, Universities and Colleges, 70% for Health, 66% for Social Services, 47% for Law, Advocacy, and Politics organizations and 46% for Education and Research organizations.

#### **Revenues from self-funding (excluding donations)<sup>7</sup>**

The percentage of revenues from self-funding is 70% for Professional and Trade organizations, 59% for Sports and Recreation organizations, 58%<sup>E</sup> for Environmental organizations and 57% for Religious organizations (Figure 11). In Canada, it is 85% for Professional and Trade organizations, 65% for Sports and Recreation organizations, 50% for Arts and Culture organizations and 44% for Environmental organizations.

#### **Gifts and donations**

The percentage of revenues from gifts and donations in Quebec per activity area is 31%<sup>E</sup> for International organizations, 29% for Religious organizations, 16% for

---

<sup>E</sup> Use with caution.

<sup>7</sup> The terms used in the National Survey of Nonprofit and Voluntary Organizations are: “revenues from non-government sources”; we prefer to use “revenues from self-funding”.

Grantmaking, Fundraising, and Voluntarism Promotion organizations and 11% for Arts and Culture and Sports and Recreation organizations, respectively (Figure 11). In Canada, it is 64%<sup>E</sup> for Religious organizations, 39% for International organizations, 32% for Grantmaking, Fundraising, and Voluntarism Promotion organizations, and 23% for Environmental organizations. When it comes to gifts and donations, the differences between Quebec and Canada are very significant.

#### Percentage of the value of gift and donations per activity area

Religious organizations receive the largest percentage of gifts and donations of the value of with 39% (Figure 12). They are followed, in order, by Grantmaking, Fundraising, and Voluntarism Promotion organizations (34%), Social Services organizations (9%), and Education and Research organizations (4%). In Canada, Religious organizations also come in first with 47%<sup>E</sup> of total gifts and donations. Next come Grantmaking, Fundraising, and Voluntarism Promotion organizations (20%), Health and Social Services organizations, respectively (6%) and Hospitals, Universities and Colleges (5%).

#### Percentage of revenues from government per level of government and activity area

Federal government funding represents 86% of government funding in the area of Grantmaking, Fundraising, and Voluntarism Promotion organizations, 82%<sup>E</sup> in the area of International organizations, 33%<sup>E</sup> in the area of Development and Housing and 25%<sup>E</sup> in the area of Professional and Trade associations (Figure 13). In Canada, the figures are as follows: International organizations (92%), Grantmaking, Fundraising, and Voluntarism Promotion organizations (63%), Law, Advocacy, and Politics organizations (59%<sup>E</sup>) and Education and Research organizations (40%).

Provincial government funding represents 99%<sup>E</sup> of funding in the area of Health, 93% in Social Services, 92% for Hospitals, Universities and Colleges, 92% for Education and Research organizations, 83%<sup>E</sup> in the areas of Law, Advocacy, and Politics organizations and Religious organizations<sup>E</sup>, respectively (Figure 13). In Canada, it is 96% for Hospitals, Universities and Colleges, 86% for Health, 82% for Social Services and 71%<sup>E</sup> for Religious organizations.

Local government funding represents 21%<sup>E</sup> of revenues in the area of Sports and Recreation, 16% in the area of the Arts and Culture and 8% in the area of Development and Housing (Figure 13). In Canada, it is 35%<sup>E</sup> in the area of the

---

<sup>E</sup> Use with caution.

Environment, 22%<sup>E</sup> in the area of Religion, and 21% in the areas of Arts and Culture and Sports and Recreation, respectively.

## Revenue sources excluding Hospitals, Universities and Colleges<sup>8</sup>

Revenues from governments total approximately \$8.4 billion in Quebec (49% of revenues, Figure 14) compared to more than \$27 billion in Canada (36% of revenues). Such a difference deserves further analysis. Revenues from self-funding amount to \$6 billion (36% of revenues in Quebec) versus \$32 billion in Canada (43% of revenues) while gifts and donations represent more than \$1.6 billion (10% of revenues in Quebec) versus close to \$13 billion<sup>E</sup> (17%<sup>E</sup> of revenues in Canada).

When revenues from governments are broken down in Quebec, 70% come from the provincial government, 27% from the federal government and 3% from municipalities.

The purchase of goods and services by the provincial government amounts to slightly more than \$1 billion (or 6% of revenues, Table 2) in Quebec vs. \$8.5 billion (11% of revenues) in Canada. Such purchases by the federal government represent 2% of total revenues in Canada and 1% in Quebec. The total purchase of goods and services by the federal and provincial governments is approximately \$1.2 billion (7% of total revenues) in Quebec versus slightly more than \$11 billion (15% of revenues) in Canada. Federal subsidies represent close to \$2.1 billion (13% of revenues) in Quebec versus \$5 billion (7% of revenues) in Canada: that is half of all federal subsidies in Canada. The same can be said of provincial subsidies, which represent almost \$5 billion (28% of revenues) in Quebec out of \$10 billion<sup>E</sup> (13%<sup>E</sup> of revenues) in Canada.

Membership fees of organizations in Quebec represent almost \$2 billion (11% of all revenues) out of \$11.7 billion in Canada (16% of revenues). The sale of goods and services totals \$3.2 billion (19% of total revenues) in Quebec out of almost \$16 billion (21% of revenues) in Canada. Individual donations amount to \$680 million (4% of all revenues) in Quebec out of almost \$8 billion in Canada (11% of total revenues). Corporate sponsorships, donations or grants represent \$434

---

<sup>8</sup> When Hospitals, Universities and Colleges are excluded from calculations, significant differences exist in the revenue sources of NPOs. We therefore added this special section.

<sup>E</sup> Use with caution.

million in Quebec (3% of total revenues) out of more than \$2.5 billion in Canada (3% of all revenues).

### *Revenue sources by revenue categories of organizations*

In Quebec, government funding accounts for 68% of revenues of organizations with revenues of \$10 million or more, 49% of revenues of organizations with revenues between \$500,000 and \$999,999 and 45% of revenues of organizations with revenues between \$250,000 and \$499,999 (Figure 15). In Canada, government funding represents 41%<sup>E</sup>, 35% and 27% of revenues, respectively, for the same revenues categories of organizations.

In Quebec, self-funding revenues (excluding donations) represent 57% of revenues of organizations with revenues of less than \$29,999, 44% of revenues of organizations with revenues between \$1 and \$10 million and 43% of revenues of organizations with revenues between \$100,000 and \$249,999 (Figure 15). In Canada, they represent 51% of revenues of organizations with revenues of less than \$29,999, 45% of revenues of organizations with revenues of \$10 million or more and 44% of revenues of organizations with revenues between \$30,000 and \$99,999.

Gifts and donations account for 22% of revenues of organizations with revenues between \$30,000 and \$99,999, 21% of revenues of those with revenues less than \$30,000 and 16% of revenues of those with revenues between \$100,000 and \$249,999 (Figure 15). In Canada, they represent 34% of revenues of organizations with revenues of less than \$30,000, 32% of revenues of those with revenues between \$100,000 and \$249,999 and, lastly, 31% of revenues of organizations with revenues of less than \$30,000.

## Transfer of revenues to other organizations

In Quebec, 19% of organizations transferred funds to other organizations. In Canada, 27% of organizations did the same. Organizations in Quebec transferred more than \$700 million to organizations in Canada, more than \$4 million to the Canadian government and more than \$188 millions to organizations located outside of Canada. For their part, organizations in Canada transferred \$4.5 billion to organizations in Canada, \$176 million to the Canadian government and more than \$613 million to organizations outside of Canada.

---

<sup>E</sup> Use with caution.



## Contributions of goods and services

In this matter, 17% of organizations received donations in the form of goods and services (\$323 million or 1% of their revenues), and 13% in the form of services (\$85 million or less than 1% of their revenues). In Canada, 21% of organizations received donations of goods or services (\$1.8 billion or 2% of their revenues) and 15% in services (\$527 million or less than 1%) (See tables 3, 4).

In British Columbia and Alberta, 36% of organizations received donations in the form of goods and services. That figure was 29% in the rest of the Prairies and 27% in the Atlantic Provinces (Figure 16). Quebec came in last, with 24% compared with a Canadian average of 28%.

## Diversity of revenue sources

Across the provinces, it is in Quebec that organizations depend most on revenues from government (25%), in British Columbia that they rely most on revenues from self-funding (51%) and in the Atlantic Provinces that they depend most on gifts and donations (34%).

## Conclusion

The average revenue of Quebec organizations is half the average revenue of Ontario organizations and that difference can not be explained solely by the relative wealth of the two provinces. Indeed, Ontario is home to a large number of organizations with high revenues that operate across Canada (14% compared with 4% in the rest of Canada – and 1% in Quebec). Often they are national organizations with their head office in Ontario.

A very significant finding illustrates the relationship between nonprofit organizations and civil society, on one hand, and political society, on the other. It has to do with the revenue sources of NPOs based on the province or territory. Sixty per cent of Quebec organizations' revenues come from government sources (most significantly from the Quebec government); that proportion is only 45% in Ontario and 49% for all organizations in Canada.

Moreover, perhaps even more significant is the fact that 51% of revenues of Quebec organizations come from government subsidies and contributions, and only 9% come from government payments for goods and services. In Ontario, the 45% figure breaks down as follows: 21% in payments for goods and services and 24% for subsidies and contributions. In Canada, the figures are 18% in payments for goods and services and 31% in subsidies. The government of Quebec would seem, more than any other government, to support NPOs in relation to their own mandate or to specific mandates and not through the purchase of goods and services as it could do with other types of businesses.

Excluding Hospitals, Universities and Colleges, when we look at revenues from donations from individuals and from corporations, 4% of revenues of organizations in Quebec come from donations compared to 11% for organizations in Canada. Given the smaller proportion of donations in Quebec, does that mean that Quebecers more than Canadians prefer government aid for nonprofit organizations?

How should we interpret the fact that 16% of organizations in Quebec, compared with 20% of organizations in Canada, have a self-funding activity related to the delivery of goods and services, especially when we know the strength of social economy enterprises in Quebec? There are two possible answers. One, the importance of public funding impacts the percentage of other revenue sources; moreover, the National Survey of Nonprofit and Voluntary Organizations did not take into account cooperatives, which play a great part in the social economy of Quebec.

# Human Resources

This section deals with human resources in organizations. First, we look at volunteers, some of which are board members: their number, and their breakdown in relation to revenues and to area of activity. Then, we will look at employees and their status.

We note that 40% of volunteers and 47%<sup>E</sup> of employees are in Ontario, which is home to 28% of organizations in Canada (Figure 18). By comparison, 23%<sup>E</sup> of volunteers and 23% of employees are located in Quebec, which is home to 29% of all organizations in Canada. In Alberta, those figures are 13% and 9%, respectively, with 12% of organizations in Canada.

## Volunteers

When board members are included, there are almost 4.4 million volunteers in Quebec out of a total of 19 million volunteers in Canada. Excluding board members, volunteers number 4 million in Quebec and almost 18 million in Canada. Volunteers contribute 555 million hours in Quebec compared with 2.3 billion hours in Canada. In Quebec, board members contribute more than 59 million hours and other volunteers 496 million hours.

## Number of volunteers

Even if some organizations have no volunteers other than their board members, the number of volunteers fluctuates based on the revenues and activity areas of organizations.

### *Organizations and the number of volunteers*

In Quebec, excluding board members, 31% of organizations have no volunteers (Figure 19). This is the case for 21% of organizations in Canada. Back in Quebec, 23% of organizations number between 10 and 24 volunteers, 19% have between 1 and 9 volunteers and 19% between 25 and 99 volunteers. In Canada, 26% of organizations have between 25 and 99 volunteers, 23% between 10 and 24 volunteers and 16% between 1 and 9 volunteers.

---

<sup>E</sup> Use with caution.

## Breakdown of volunteers in relation to revenues size of organizations

In Quebec, 63%<sup>E</sup> of volunteers are involved with organizations with annual revenues between \$100,000 and \$249,999 (Figure 20). This revenue category corresponds to 17% of organizations in Quebec. In Canada, this category represents 16% of organizations and 26%<sup>E</sup> of volunteers and, in the category of revenues of \$10 million or more, where we find only 1% of all organizations, there are 20% of volunteers. In Quebec, only 6% of volunteers are in the \$10 million or more revenue category.

## Breakdown of volunteers by activity area

In Quebec, Social Services organizations represent 15% of all organizations in the province (Figure 21). They account for 57%<sup>E</sup> of all volunteers compared with 16% in the area of Sports and Recreation (26% of organizations) and 7% in the area of Religion (11% of organizations). In Canada, volunteers are concentrated in the area of Sports and Recreation (28%), Social Services (19%<sup>E</sup>) and Religion (11%).

## Employees

This section deals with the number of employees and their concentration by revenue size and activity area.

### Number of employees

With regard to employees, 145,000 work (number based on completed T4 slips for income tax purposes) in the area of Hospitals, Universities and Colleges in Quebec (83,000 permanent, 73,000 full-time) and 324,000 in the other organizations (173,000 permanent, 181,000 full-time, see table 5).

In Canada, Hospitals, Universities and Colleges account for almost 696,000 employees (494,000 permanent and 341,000 full-time). They number 1.3 million for all other areas (827,000<sup>E</sup> permanent and 807,000<sup>E</sup> full-time).

---

<sup>E</sup> Use with caution.

### *Concentration of employees by revenue size*

Excluding Hospitals, Universities and Colleges, 56% of employees work in organizations with revenues of \$1 million or more (Figure 23). That number is 61% in Canada. When we include all organizations, 5% of employees work for those organizations with revenues of less than \$99,999, and which account for 65% of Quebec organizations. In Canada, 10%<sup>E</sup> of employees work at organizations of this revenue size, organizations that represent 63% of all organizations (See Figure 22).

### *Concentration of employees by area of activity*

When we exclude Hospitals, Universities and Colleges, we note that 54% of organizations in Quebec have no employees. The situation is the same for Canada as a whole. Among Quebec's Hospitals, Universities and Colleges, 53% have 100 employees or more and 19% have no employees at all; in Canada, the corresponding figures are 39% and 31%, respectively. Among all organizations in Quebec, 24% have between 1 and 4 employees. The figure is 26% in Canada.

## Breakdown of employees per area of activity

In Quebec, 31% (34% in Canada) of employees work in Hospitals, Universities and Colleges, 17% (15% in Canada) in the area of Social Services and 12% (9% in Canada) in the area of Health (Figure 24).

## Conclusion

If we exclude board members, 23% of all volunteers in Canada are in Quebec and account for 24% of the number of volunteered hours. Excluding board members, the percentage is 23%. When we include board members, volunteers contribute 555 million hours in Quebec toward a total of 2.3 billion hours in Canada.

Excluding board members, 31% of organizations in Quebec have no volunteers. Among those that have volunteers, 63%<sup>E</sup> of volunteers are found in organizations with revenues between \$100,000 and \$249,999, representing 17% of organizations.

Also noteworthy is the fact that 57% of volunteers are concentrated in the area of Social Services, which represents 15% of organizations in Quebec, 16% are in the

---

<sup>E</sup> Use with caution.

area of Sports and Recreation (26% of organizations) and 7% in the area of Religion (11% of organizations).

The majority (54%) of organizations have no employees. Among all organizations in Quebec, 24% have between 1 and 4 employees. Therefore a large majority of organizations have a minimal employee structure.

Finally, we note that many organizations rely on volunteers to operate. Average organizations have more volunteers and employees, which suggests that they have more difficulty when it comes to governance and financing. Organizations in Quebec have less financial resources than organizations in Ontario and also seem to have less human resources.

# Change in Organizations

Based on our research, the biggest challenges facing organizations in the future clearly have to do with management and governance. The following results illustrate the situation currently faced by managers of nonprofit and voluntary organizations.

## Change in revenues

In Canada, 42% of organizations report that their revenues have been stable over the last three years, 36% report that they have increased and 22% report that they have decreased.

35% of organizations in Quebec report their revenues have increased, 47% report they have remained stable and 19% report they have decreased. In Ontario, the figures are 39%, 40% and 21%, respectively. In the Prairies, they are 35%, 41% and 23%, respectively.

## In relation to reliance on a revenue sources

While the situation is similar in the other regions of Canada, 19% of Quebec's organizations report that their non-government revenues, excluding donations, decreased in the last three years compared with 23% of organizations in Canada (Figure 26). Among Quebec-based organizations, 28% say revenues from gifts and donations increased in the last three years compared with 35% of organizations in Canada.

## Change in volunteers

Twenty-four per cent of organizations in Quebec (28% in Canada) report that their number of volunteers increased in the last three years, 58% (54% in Canada) report that their number of volunteers remained stable and 18% (18% in Canada) report that it decreased (Figure 27).

Across the provinces, Quebec has the largest number of organizations reporting that the number of their volunteers is stable (58%, Figure 27) while it is the lowest in Alberta (49%). It's in Ontario that the decrease and the increase in

volunteers are most pronounced, with 14% and 31% of organizations, respectively.

Seventy-one per cent of organizations that have between 1 and 9 volunteers report that the number of their volunteers has been stable (Figure 28). Sixty-eight per cent of these organizations in Canada also report that the number of volunteers has remained stable. Almost two-thirds (61%) of organizations with 200 volunteers or more report that the number of volunteers is stable. That is true for 48% of organizations with that number of volunteers in Canada.

In Quebec and in Canada, 39% of organizations with between 100 and 199 volunteers stated an increase in the number of their volunteers and 20% of organizations with between 10 and 24 volunteers indicated a decrease.

## Change in employment

Among all organizations in Quebec, 63% report that the number of their employees has remained stable in the last three years while 26% say that that number has increased. In Canada, the number of employees has remained stable in 59% of organizations (See Figure 29).

In Quebec, the percentage of organizations whose number of employees has increased is 26%, compared to 30% in Canada (Figure 29). The percentage of organizations in Quebec whose number of employees has decreased is 10% compared to 18% (the highest decrease) in Manitoba, Saskatchewan and the Territories. According to respondents, the percentage of organizations whose number of employees has not changed in the last three years is 63% in Quebec.

In Quebec, 67% of organizations with between 1 to 4 employees report that their number of employees has remained the same over the last three years, compared to 70% of organizations in Canada that have between 1 and 4 employees (Figure 30).

In Quebec, 55% of organizations with 100 employees or more and 54% of those with 10 to 24 employees indicated an increase in the number of their employees. In Canada 56% of organizations with more than 100 employees, 45% of organizations with 10 to 24 employees and organizations with 25 to 99 employees report that their revenues increased.



## Correlations between changes in revenue, volunteers and employment

There are relative correlations between variation in the number of employees and of the number of volunteers. The same can be said between variations in the number of human resources and of the revenues of organizations.

In Quebec, 54% of organizations where revenues had increased over the last three years also saw the number of employees grow. In Canada, 47% of organizations reported the same. For 67% of organizations in Quebec (73% of organizations in Canada), a stable number of employees means stable revenues (Figure 31).

Forty-five per cent of organizations that reported an increase in the number of their employees in Quebec also declared an increase of the number of volunteers (Figure 32). In Canada, the percentage was 48%.

In Quebec, 64% of organizations that reported stable revenues in the last three years said that they maintained the same level of volunteers. In Canada, this is also the case for 64% of organizations. In Quebec, 39% of organizations that reported increased revenues in the last three years said that they increased the number of volunteers during that period. This is so for 43% of organizations in Canada. Furthermore, 28% of organizations in Quebec whose revenues decreased in the last three years saw the number of their volunteers decrease. It was the case for 35% of organizations in Canada (Figure 33).

## Conclusion

In Quebec, in the last three years, 47% of organizations indicated stable revenues and 24% an increase in the number of their volunteers, 58% reported that the number of volunteers remained stable and 18% reported that it decreased. In Quebec 26% of organizations saw an increase in the number of their employees while 10% recorded a decrease. According to respondents, the percentage of organizations whose number of employees remained unchanged in the last three years was 63%.

Forty-five per cent of organizations that reported an increase in employees in Quebec also indicated an increase in volunteers. A strong majority of organizations that reported stable revenues in the last three years indicated a stable number of volunteers.

An increase in revenues and employees has an important impact on volunteering. Stable revenues stabilise the number of volunteers.

## Challenges<sup>9</sup>

This section highlights the main challenges faced by organizations, particularly with recruiting board members and volunteers and with revenues, and will look at the correlations between those two elements.

### The nature and seriousness of problems encountered

Among organizations in Quebec, 68% say they experienced difficulties because of an overreliance on project-based funding. For 31% of organizations, this was a serious problem. In Canada, 61% of organizations (53% in Ontario) indicated that they also suffered from that problem, but only a quarter (25%) of organizations in Canada (23% in Ontario) reported that it was a serious problem.

Sixty-five per cent (65%) of organizations reported difficulties recruiting board members. For 29% of organizations, it was a moderate problem. In Canada, 56% of organizations (49% in Ontario) shared this opinion, and for a quarter (25%) of organizations in Canada (22% in Ontario), it was a moderate problem.

Among organizations that received external funding during the 2001-2003 period, 62% in Quebec said they had difficulties as a result of cuts in government funding and this caused a serious problem for 34% of them. In Canada, 65% of organizations (68% in Ontario) also indicated having difficulties.

---

<sup>9</sup> This section refers to table 6 through 20, which can be found in the Appendix.

## Problems in relation to levels of revenues<sup>10</sup>

Among all organizations, 61% of those reporting revenues of less than \$29,999 had difficulties recruiting board members, 60% relied too heavily on project-based funding and 53% reported having difficulty planning for the future.

In the group of organizations with revenues between \$30,000 and \$100,000, 72% had difficulties recruiting board members, 67% had them with project-based funding and 64% recruiting volunteers that suit their needs.

In the group of organizations with revenues between \$100,000 and \$250,000, 75% of them reported having problems with project-based funding, 71% experienced difficulties with recruiting board members and cuts to government funding and 70% with recruiting volunteers that suit their needs.

In the group of organizations with revenues between \$500,000 and \$1 million, 77% of them reported having problems with project-based funding. Sixty-seven per cent (67%) of organizations with revenues between \$1 million and \$10 million reported having the same problems.

In the group of organizations with revenues of \$10 million or more, 77% said they had problems with cuts to government budgets.

Excluding Hospitals, Universities and Colleges, as we indicated on page 8 (Table 2) when we look at revenues from donations from individuals, 4% of revenues of organizations in Quebec came from gifts compared to 11% of the revenues of Canadian organizations. Surprisingly, fewer organizations in Quebec (46%) than in Canada (48%) experienced problems obtaining funds from individuals. Yet, they received far fewer gifts and donations than elsewhere in Canada.

---

<sup>10</sup> See tables 6, 7, 9, and 10.

## Problems in relation to dependence on one revenue source<sup>11</sup>

In Quebec, 79% of organizations (74% in Canada) that depend on government financing said they had difficulties obtaining financing from other organizations, 76% (23% in Canada) retaining their employees, 75% (78% in Canada) with cuts to government funding and 74% (67% in Canada) recruiting board members. Furthermore, 82% of organizations in Quebec (18% in Canada) that depend on revenues from non-governmental sources had difficulties retaining their employees, 65% (58% in Canada) recruiting board members and 59% (54% in Canada) depended excessively on project-based funding.

## Conclusion

Organizations in Quebec seem to experience greater difficulty recruiting board members than organizations in Canada. Despite government support, the majority of organizations in Quebec report difficulties obtaining funding from other organizations. Surprisingly, fewer organizations in Quebec (46%) than in Canada (48%) report difficulty obtaining funds from individual donors. Yet, they receive far fewer gifts and donations than elsewhere in Canada. It is as though the real challenge resides not in further developing corporate sponsorships but in the relationship to government whose support can always be thrown into question and has been on several occasions.

---

<sup>11</sup> See tables 11, 12, 13, and 14.

# General Conclusion

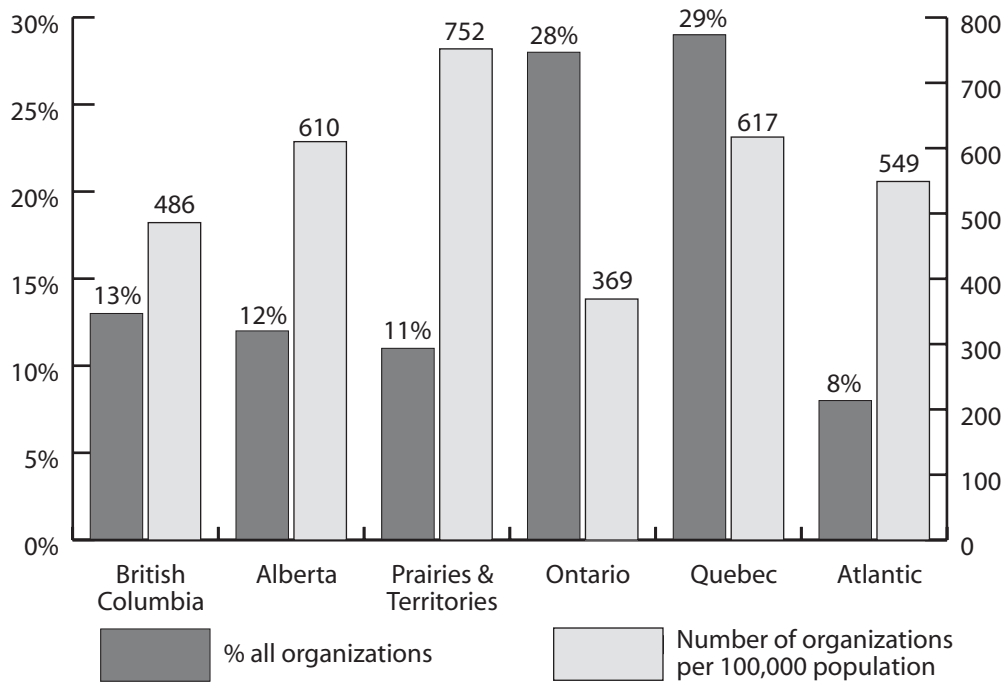
Following the publication and release in 2003 of a qualitative report based on NSNVO findings and in 2004 of a quantitative report on Canada as a whole, this first report dealing specifically with nonprofit and voluntary organizations in Quebec makes for an important contribution to our understanding of that sector.

The roundtable discussions held in Montreal and Quebec City in October 2004 provided an opportunity to compare analyses and identify issues in order to gain a better understanding of the situation and the difficulties experienced by the various associations in Quebec. The research team was therefore better equipped and enlightened with the necessary knowledge to prepare this report, which can be a solid instrument of understanding and development.

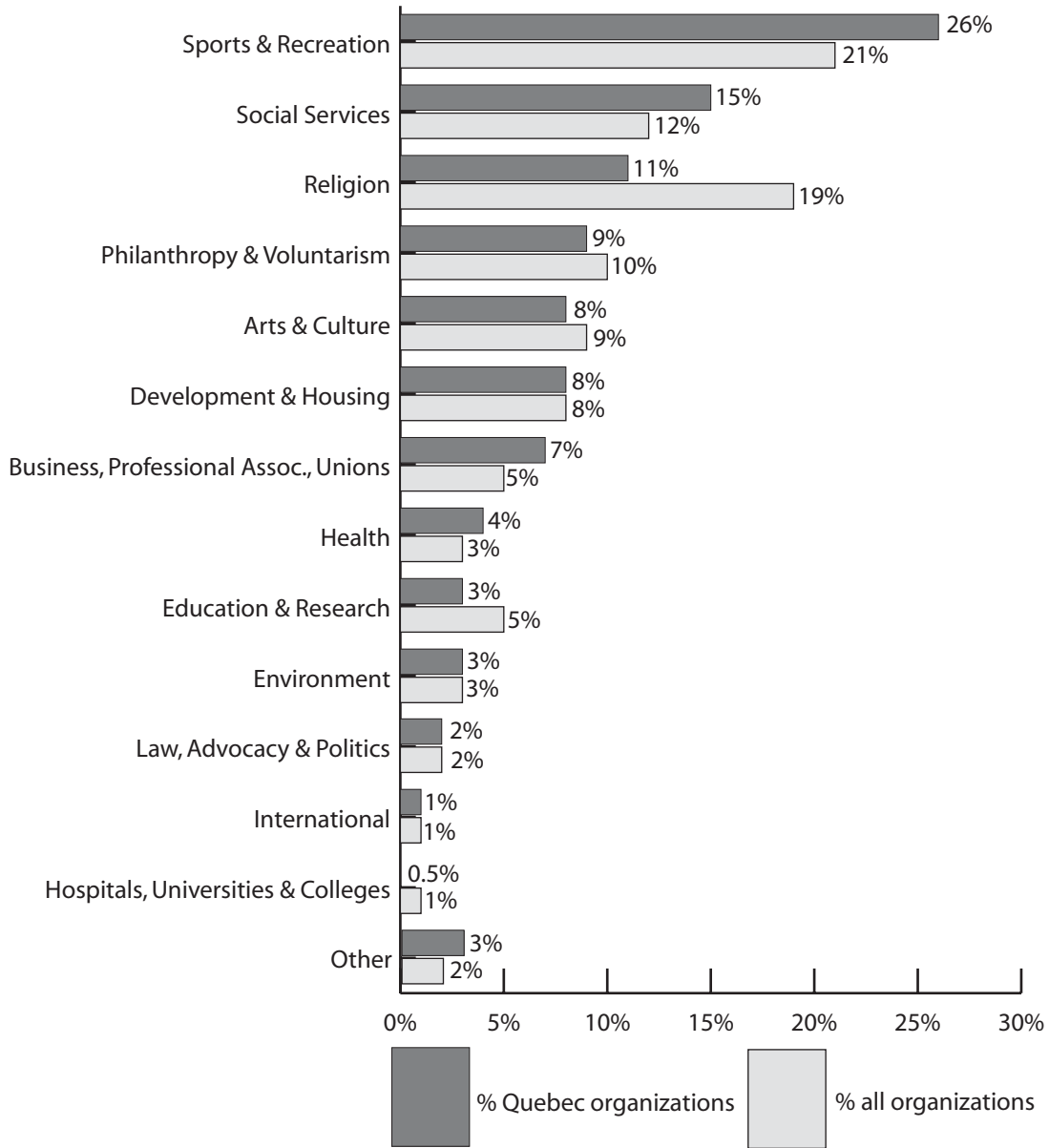
Looking to the future, the database available through Imagine Canada leads us to believe new comparative studies can be done between Quebec and other provinces, or between Quebec and Canada. This report therefore represents another milestone in an overall approach that could produce several significant documents for associations and research organizations in the next five years.

# Appendix

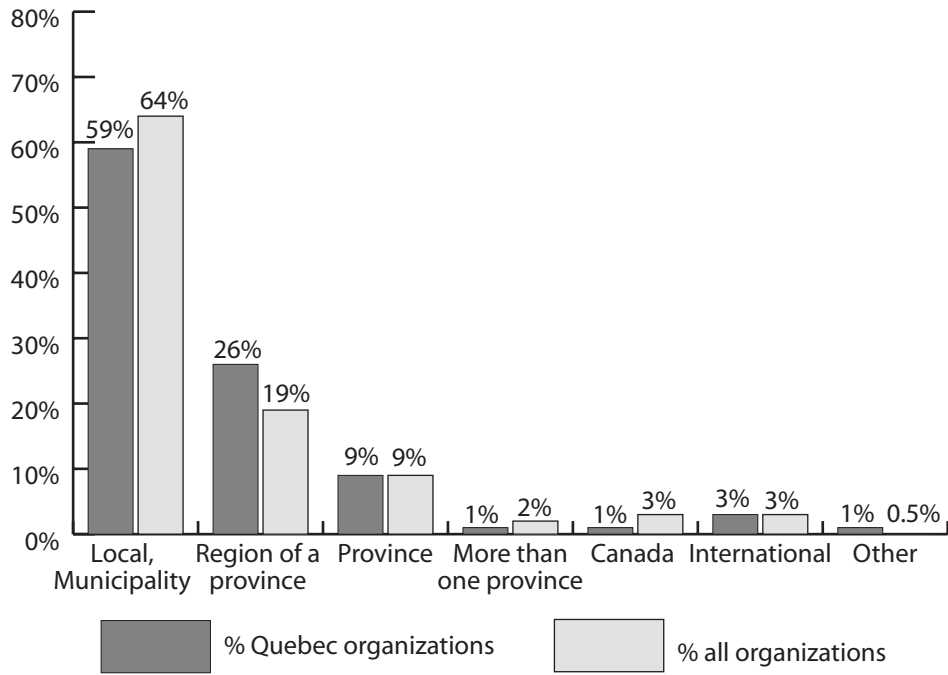
*Figure 1: Percentage of organizations and number of organizations per 100,000 population by region*



**Figure 2: Percentage of organizations in Quebec and Canada by primary activity area**

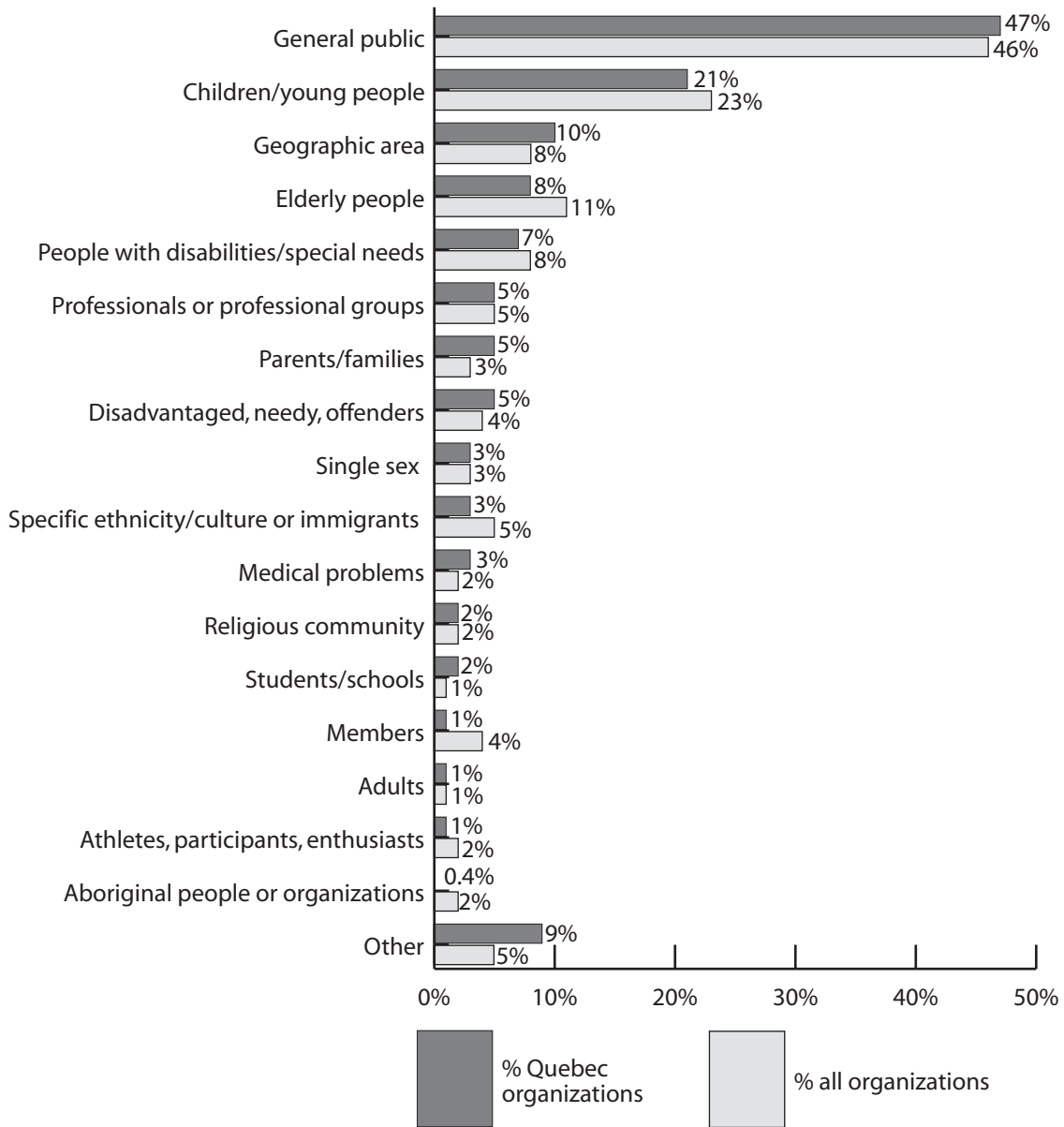


*Figure 3: Main geographic areas served*

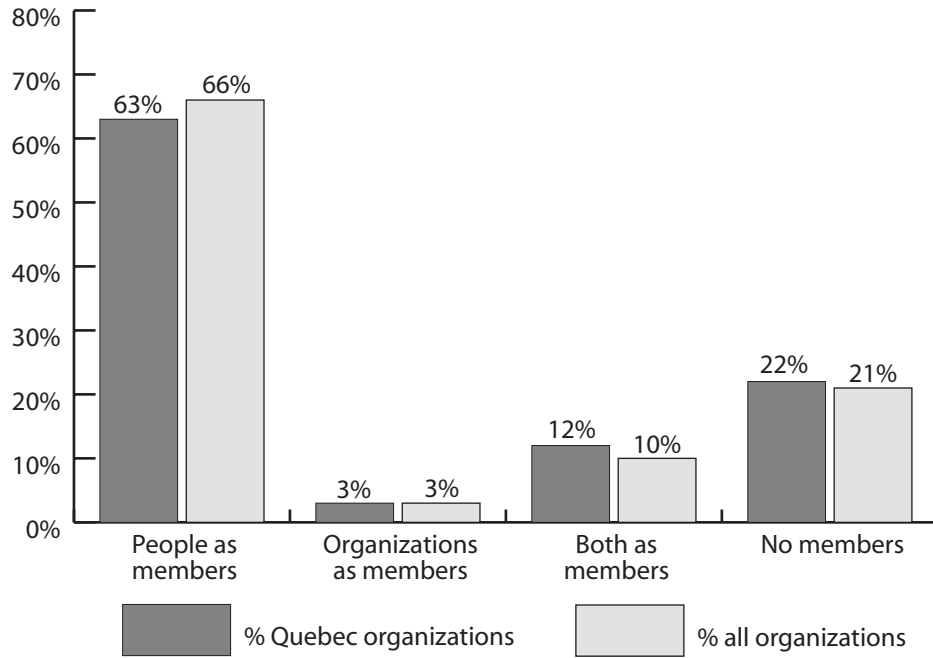




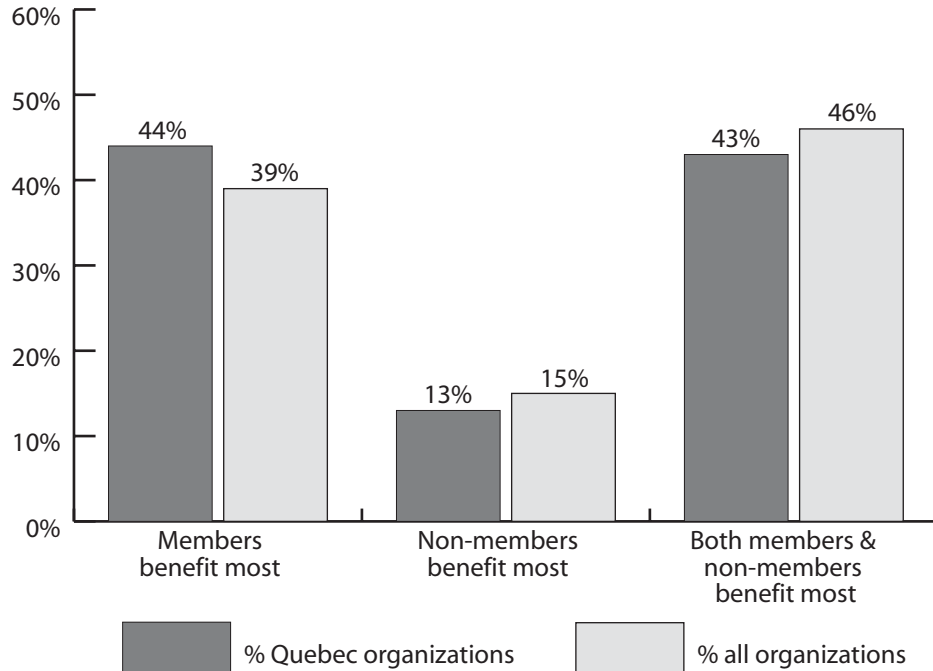
**Figure 4: Population served**



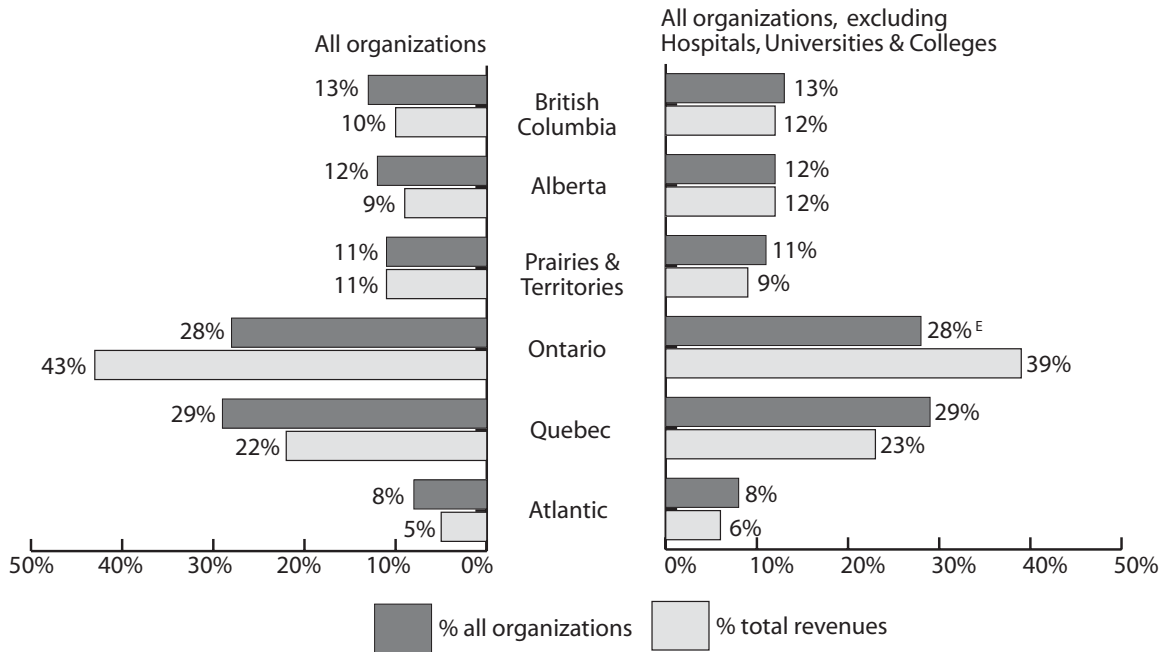
**Figure 5: Membership composition**



**Figure 6: Primary beneficiaries of services or products**

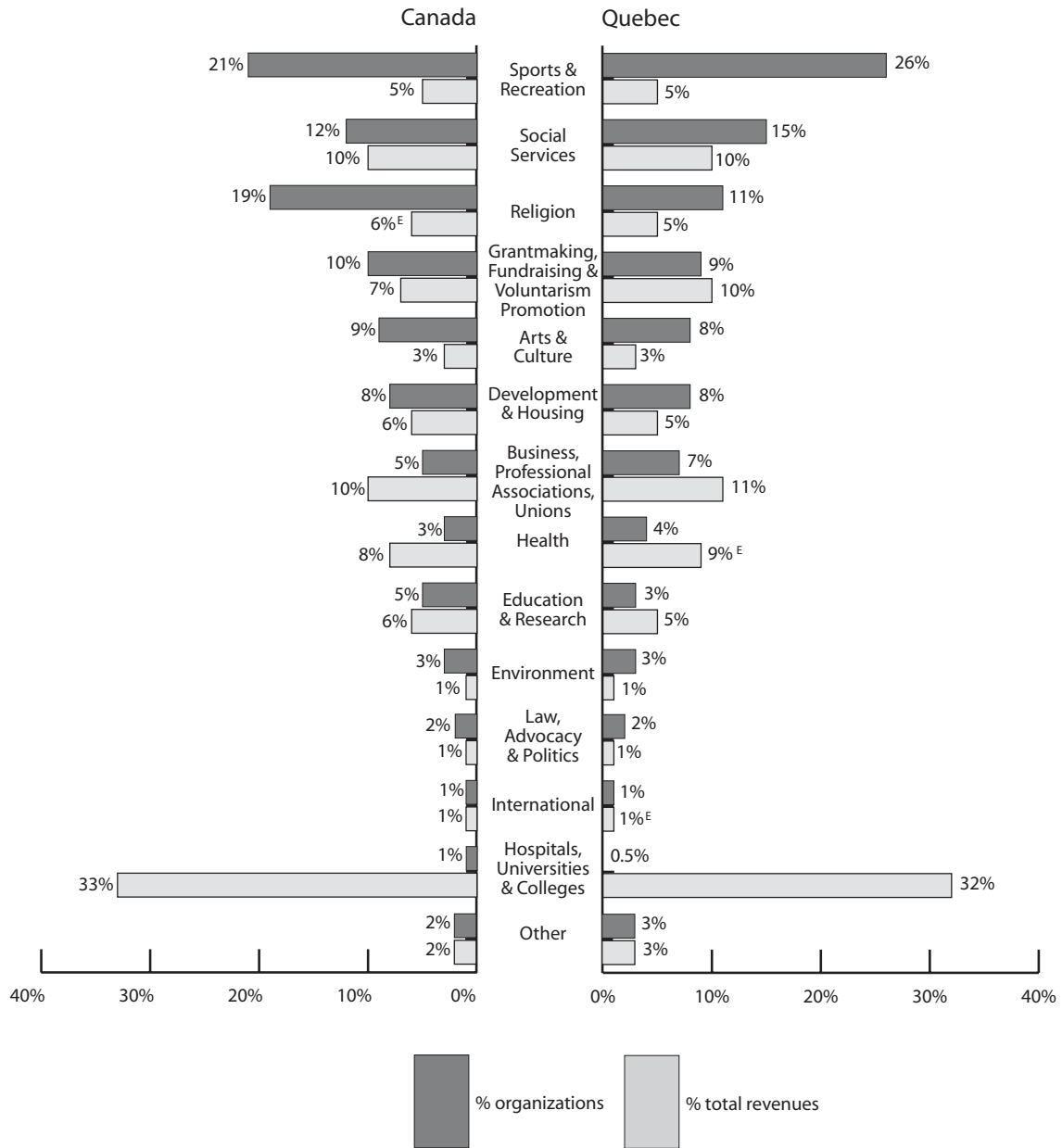


*Figure 7: Percentage of organizations and percentage of total revenues by region*



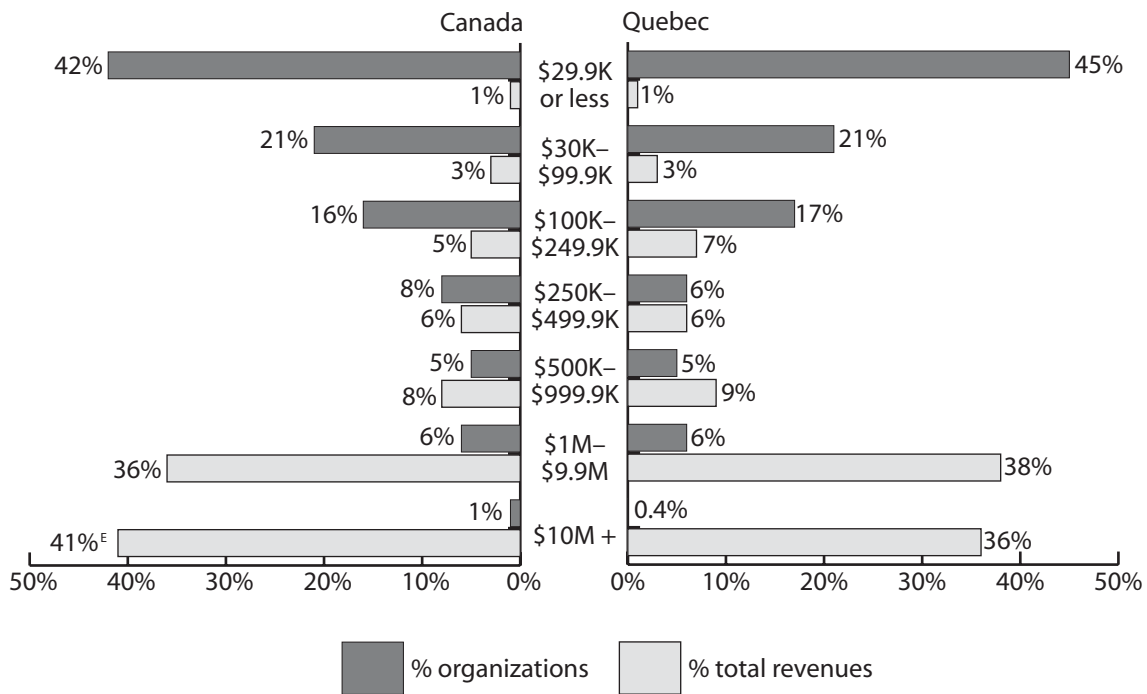
E Use with caution.

**Figure 8: Percentage of organizations and percentage of total revenues by primary activity area**



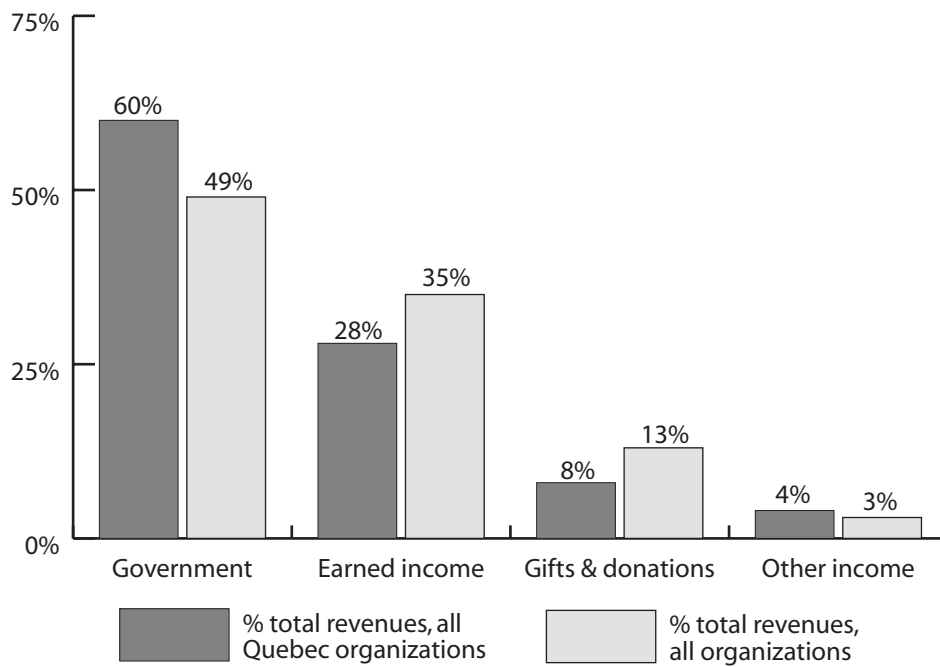
<sup>E</sup> Use with caution.

**Figure 9: Percentage of organizations and percentage of total revenues by revenue size, excluding Hospitals, Universities and Colleges**

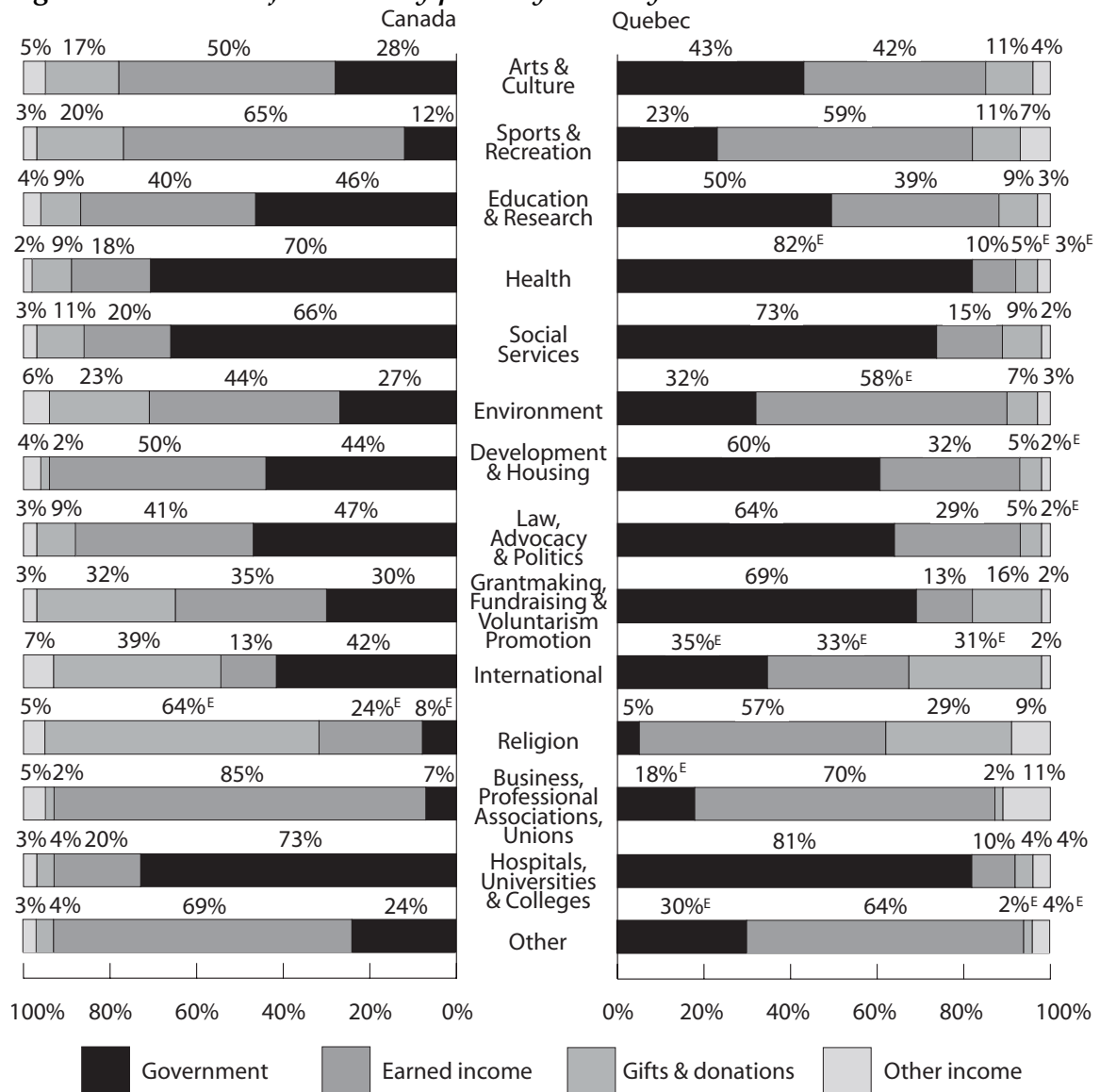


E Use with caution.

**Figure 10: Sources of revenue**

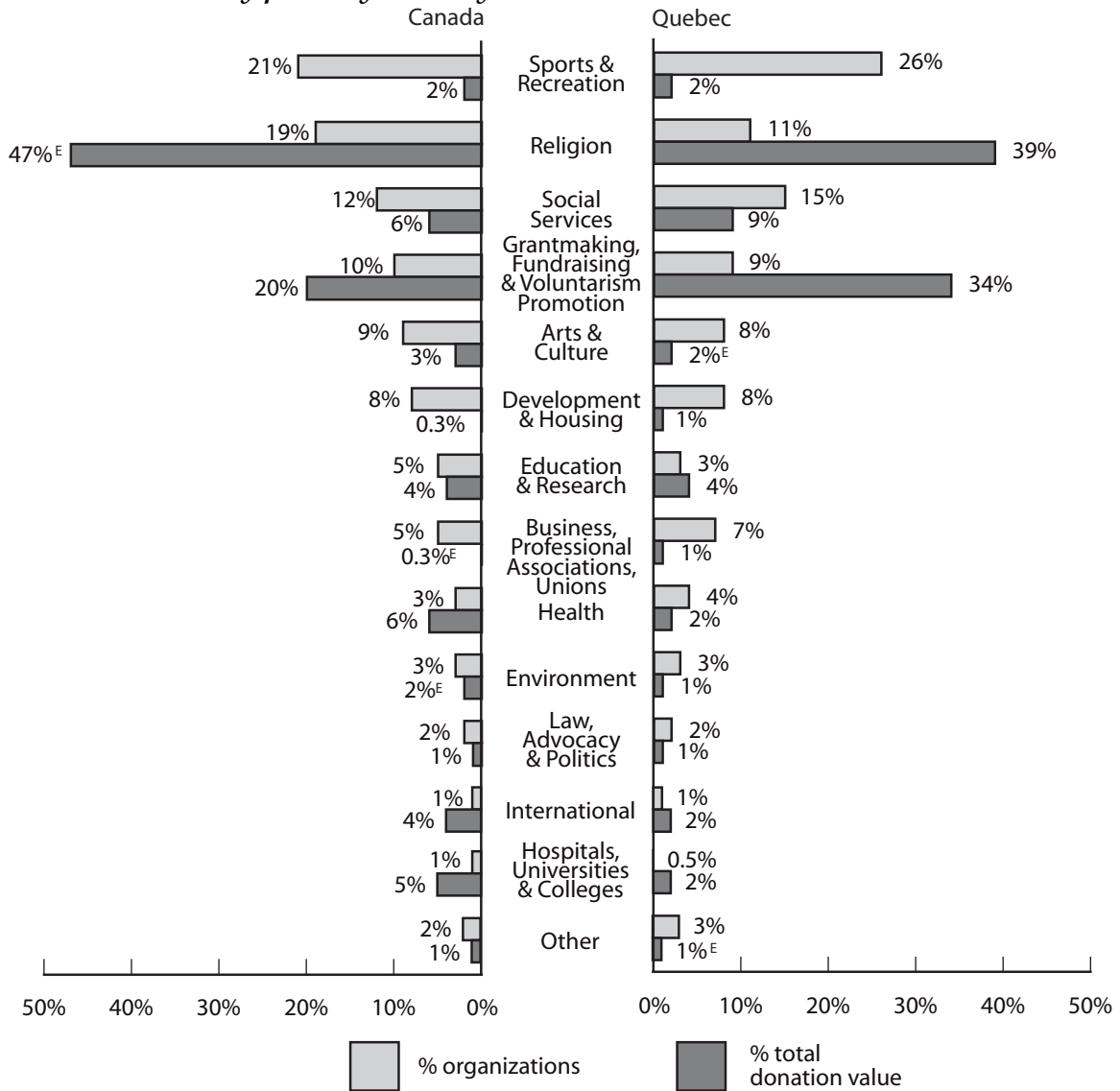


**Figure 11: Sources of revenue by primary activity area**



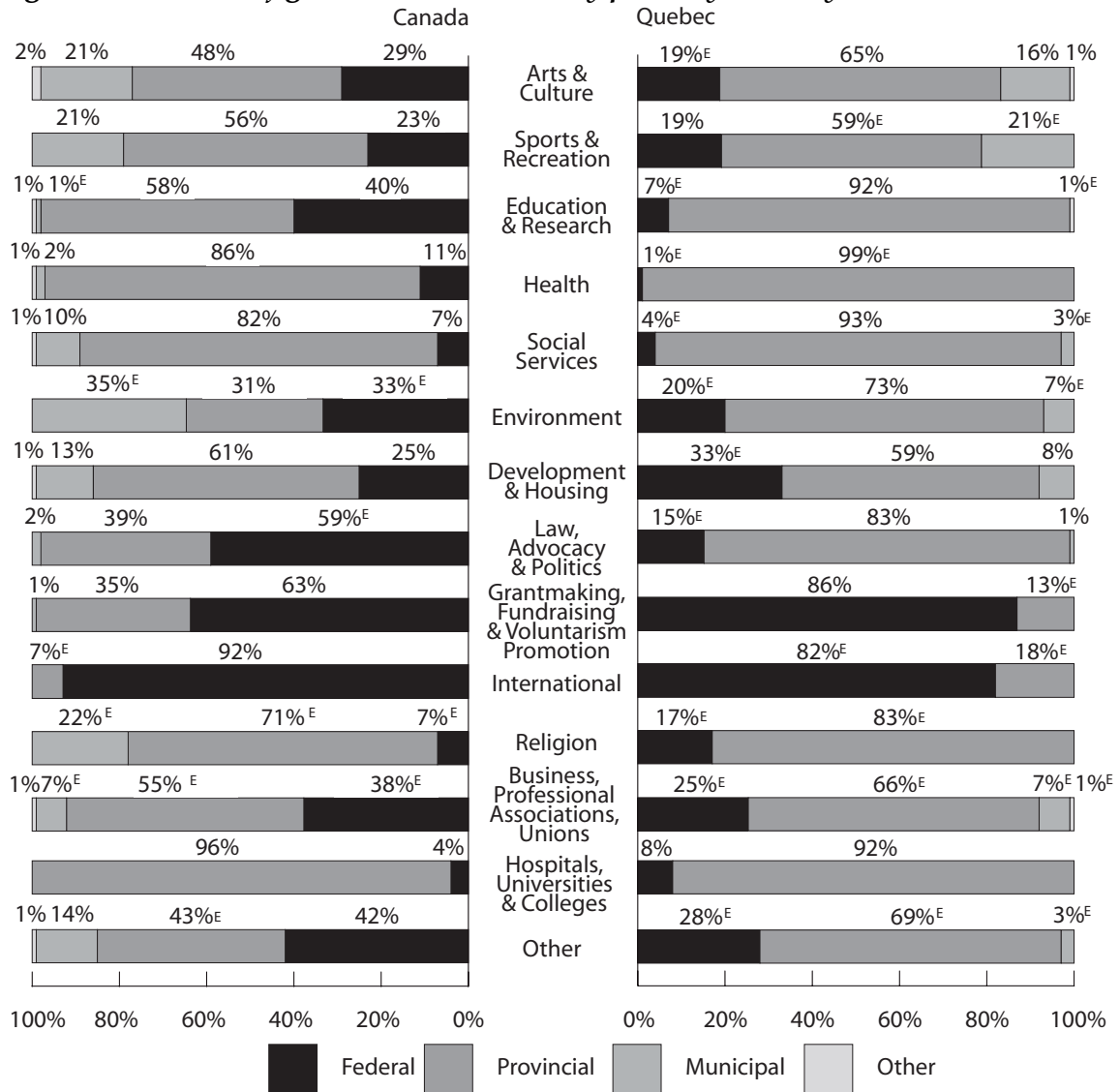
E Use with caution.

**Figure 12: Percentage of total number of organizations and percentage of total donation value by primary activity area**



<sup>E</sup> Use with caution.

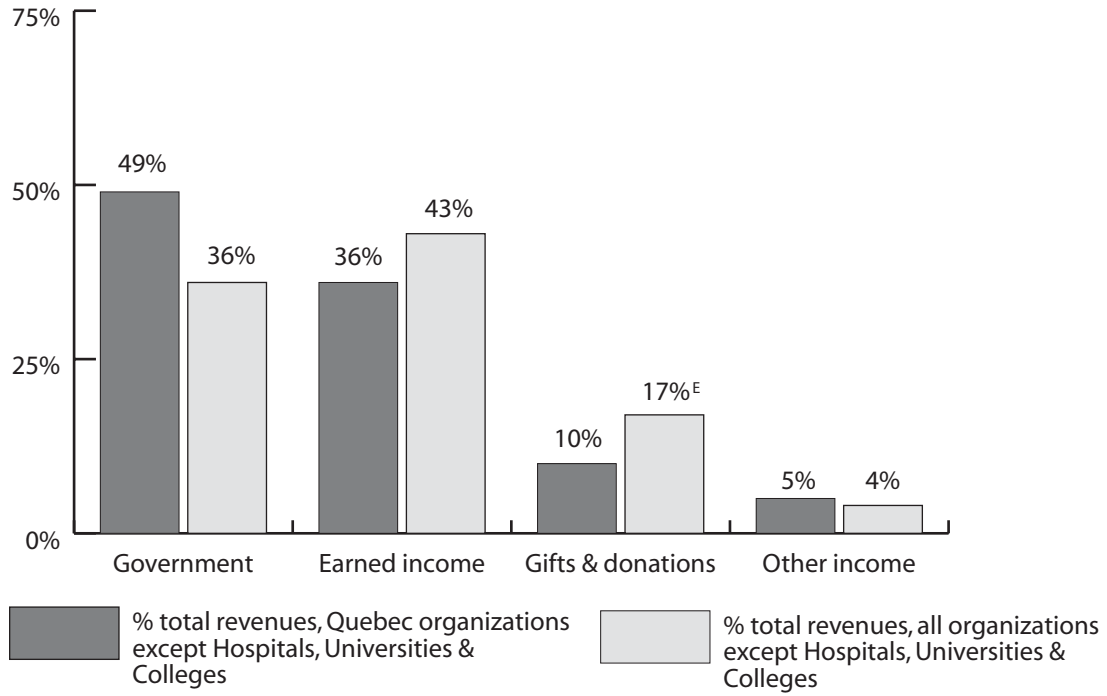
**Figure 13: Sources of government revenue by primary activity area**



E Use with caution.

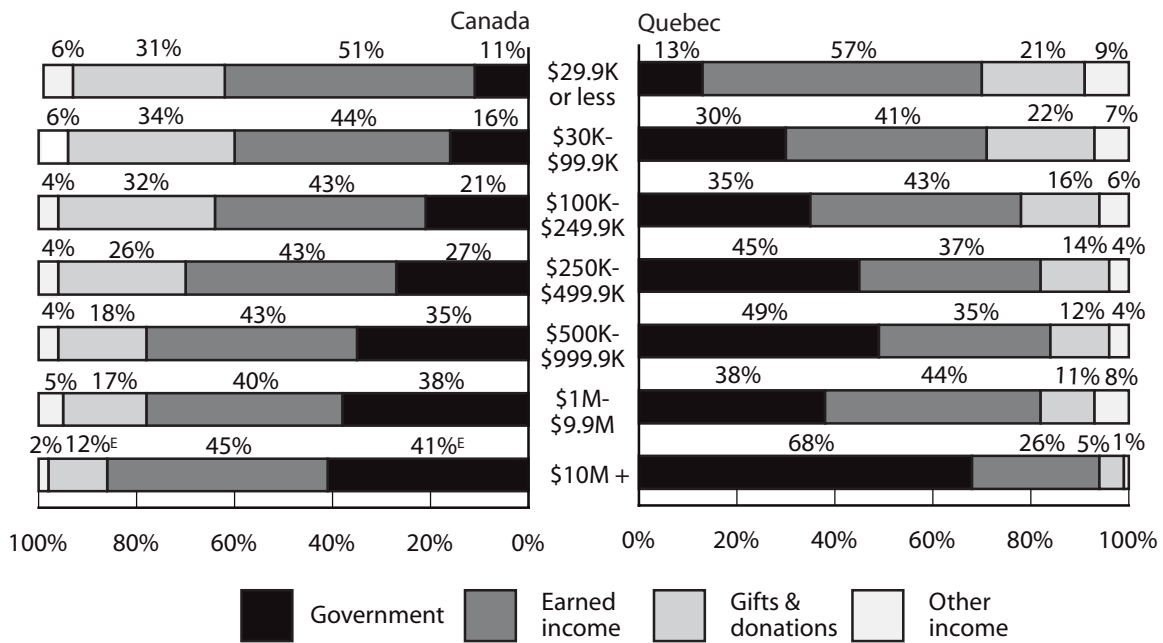


**Figure 14: Sources of revenue, excluding Hospitals, Universities and Colleges**



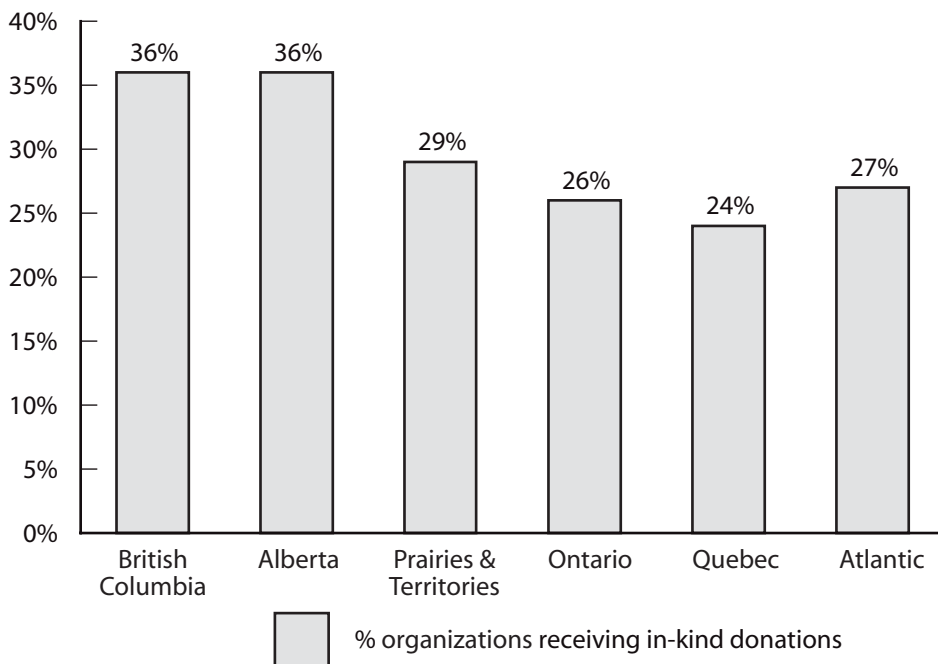
E Use with caution.

**Figure 15: Sources of government revenue by revenue size, excluding Hospitals, Universities and Colleges**

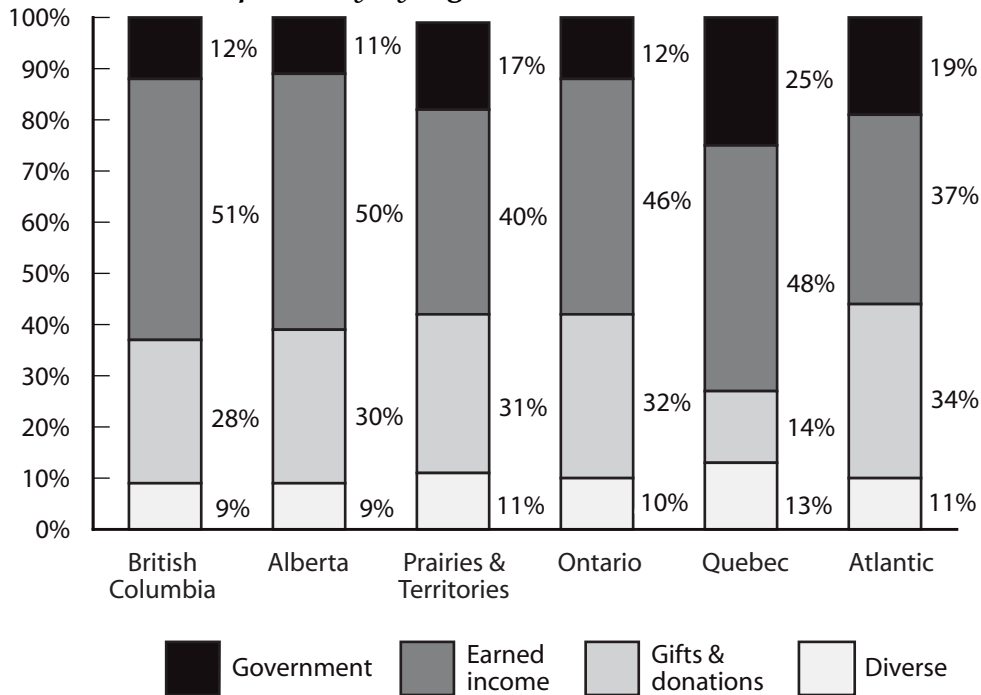


E Use with caution.

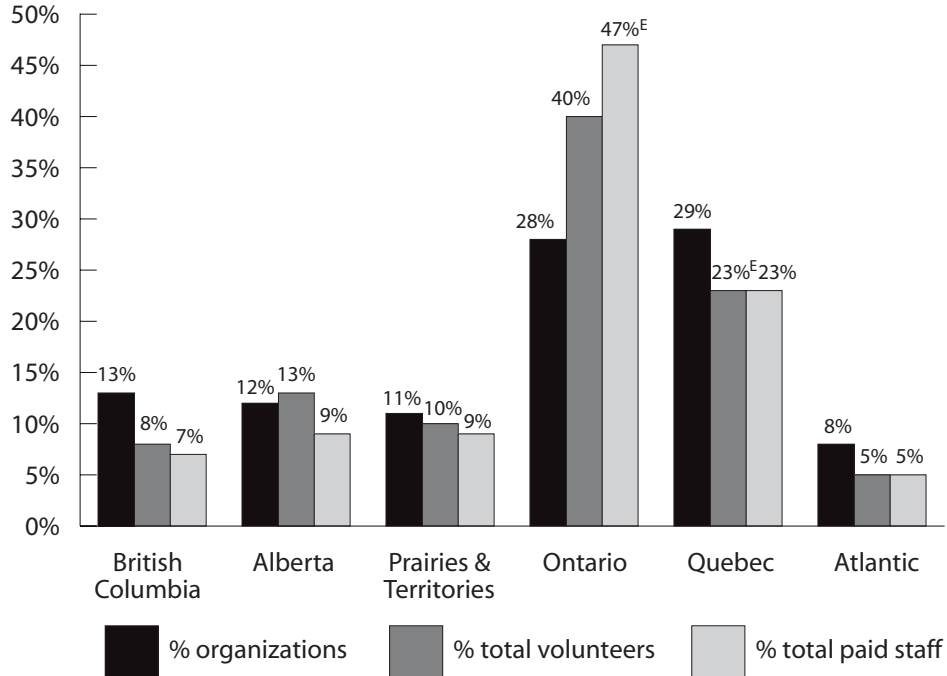
**Figure 16: Percentage of organizations receiving in-kind donations by region**



**Figure 17: Revenue dependency by region**

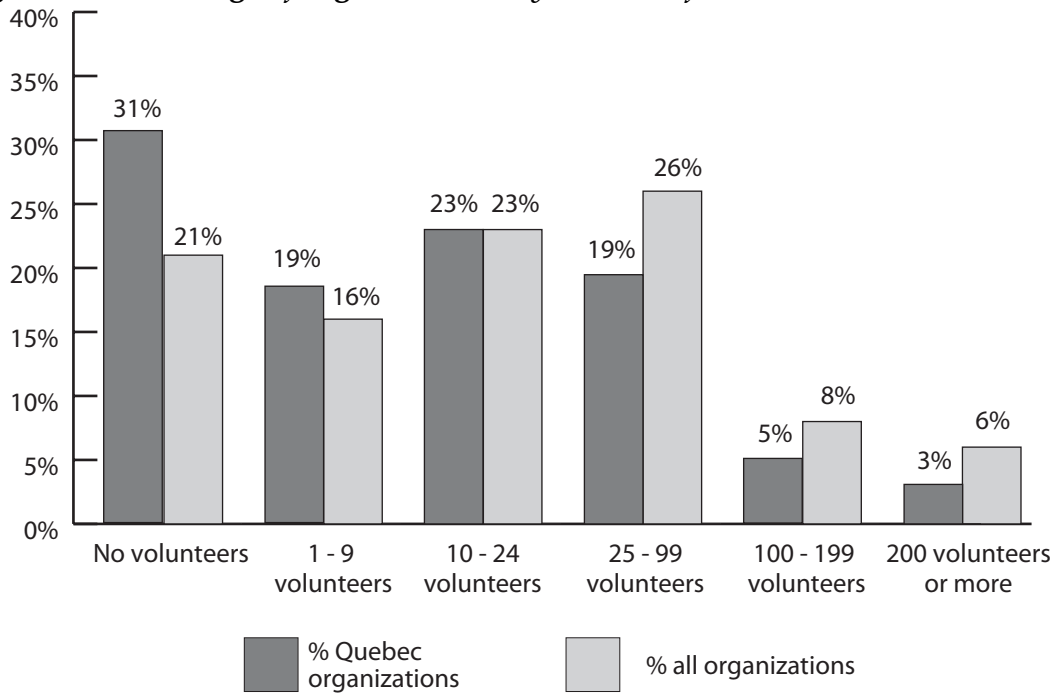


**Figure 18: Percentage of organizations, percentage of volunteers, and percentage of paid staff by region**

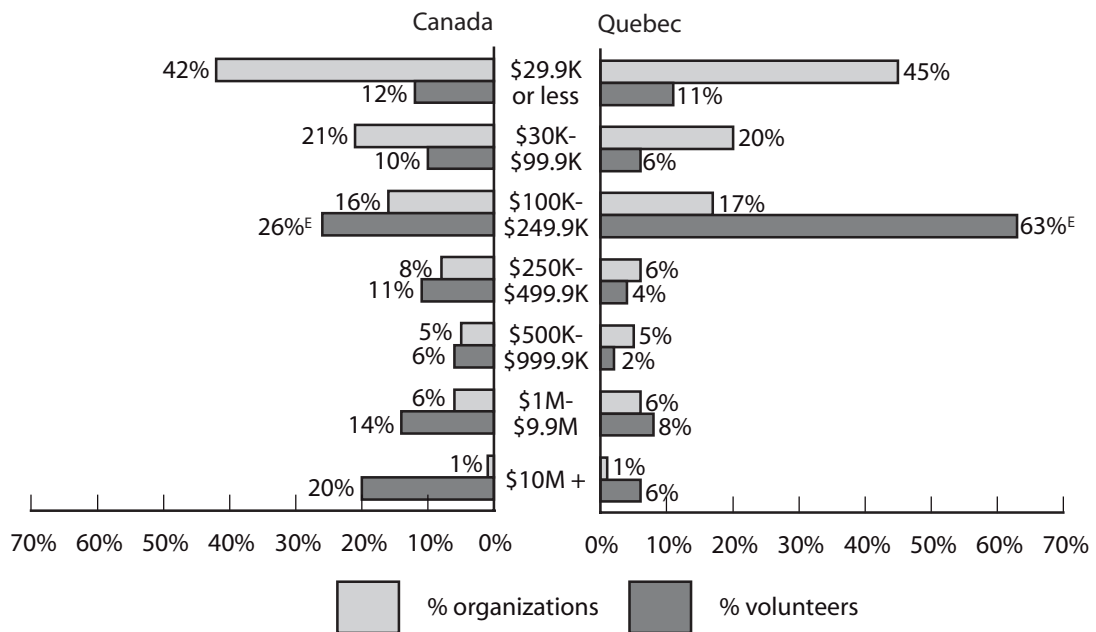


<sup>E</sup> Use with caution.

**Figure 19: Percentage of organizations by number of volunteers**

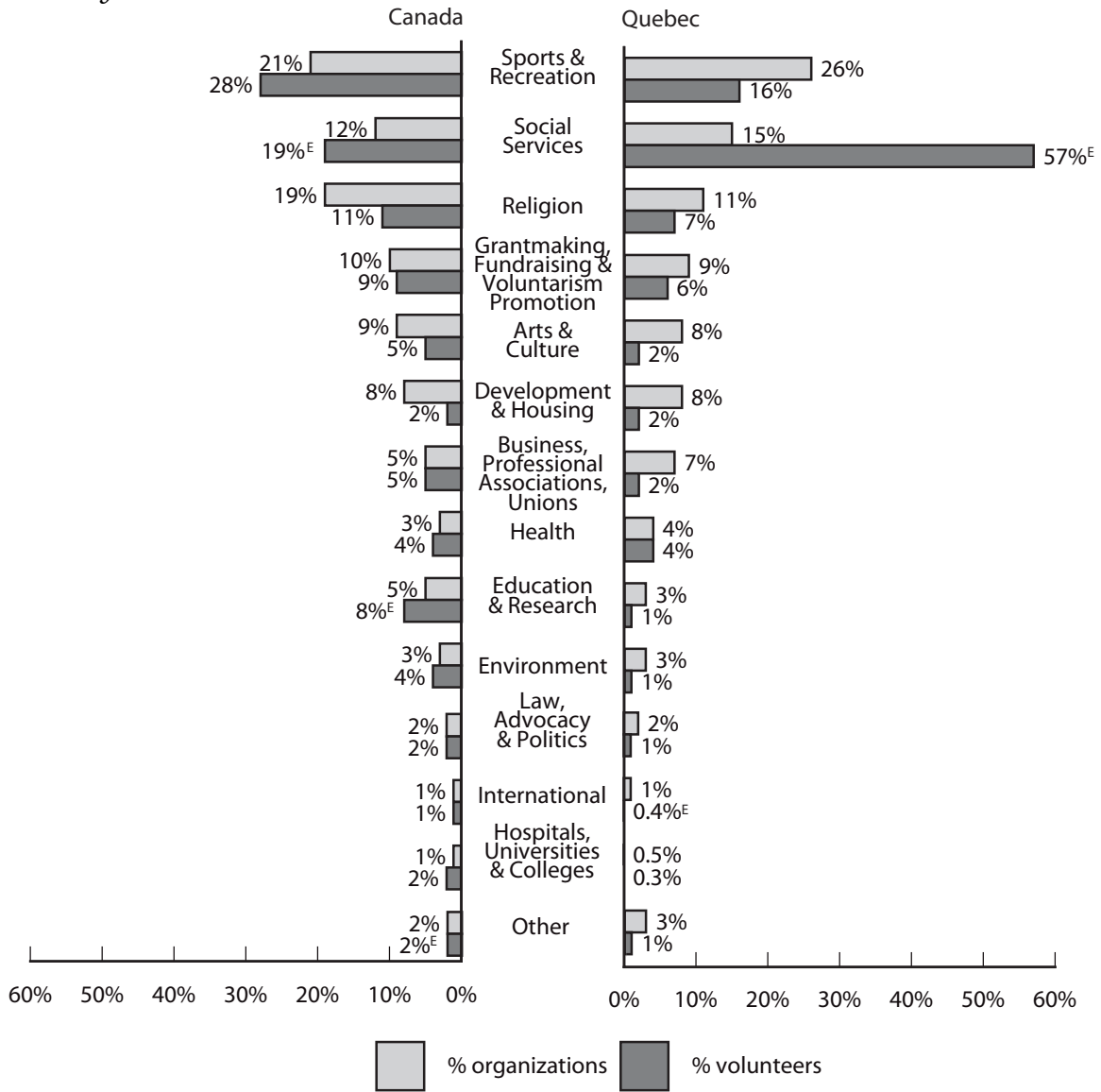


**Figure 20: Percentage of organizations and percentage of volunteers by revenue size**



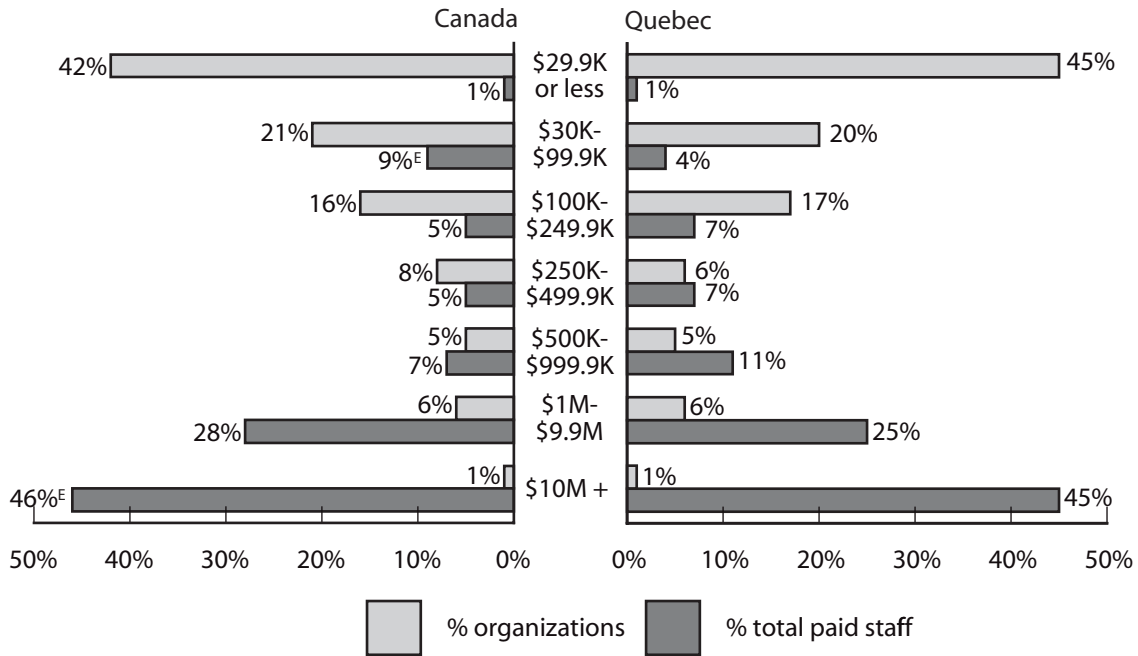
<sup>E</sup> Use with caution.

**Figure 21: Percentage of organizations and percentage of volunteers by primary activity area**



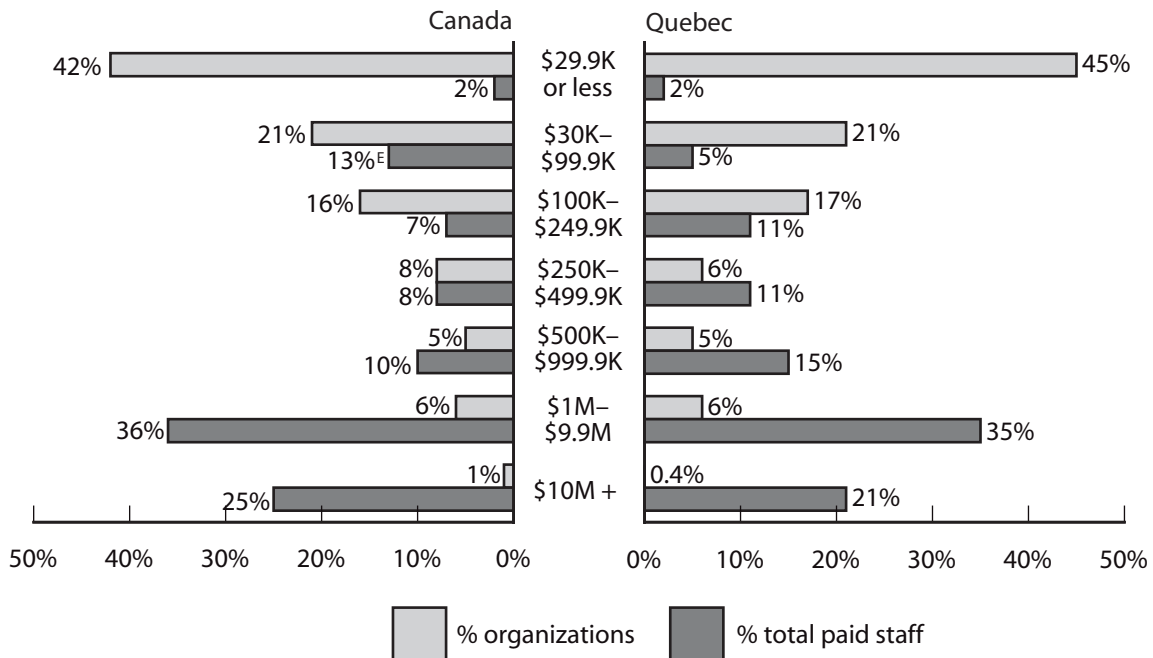
E Use with caution.

**Figure 22: Percentage of organizations and paid staff by revenue size**



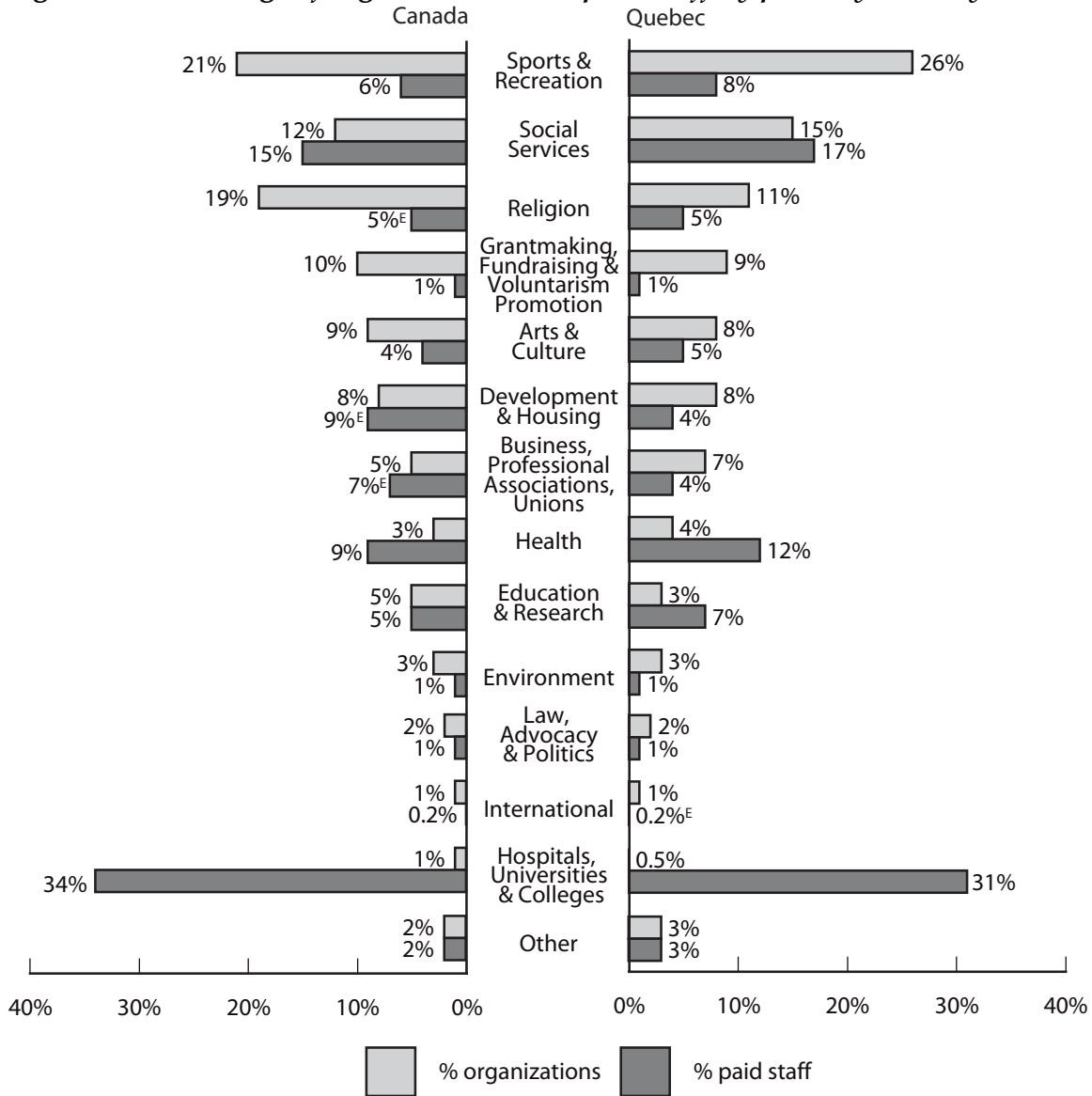
E Use with caution.

**Figure 23: Percentage of organizations and paid staff by revenue size, excluding Hospitals, Universities and Colleges**



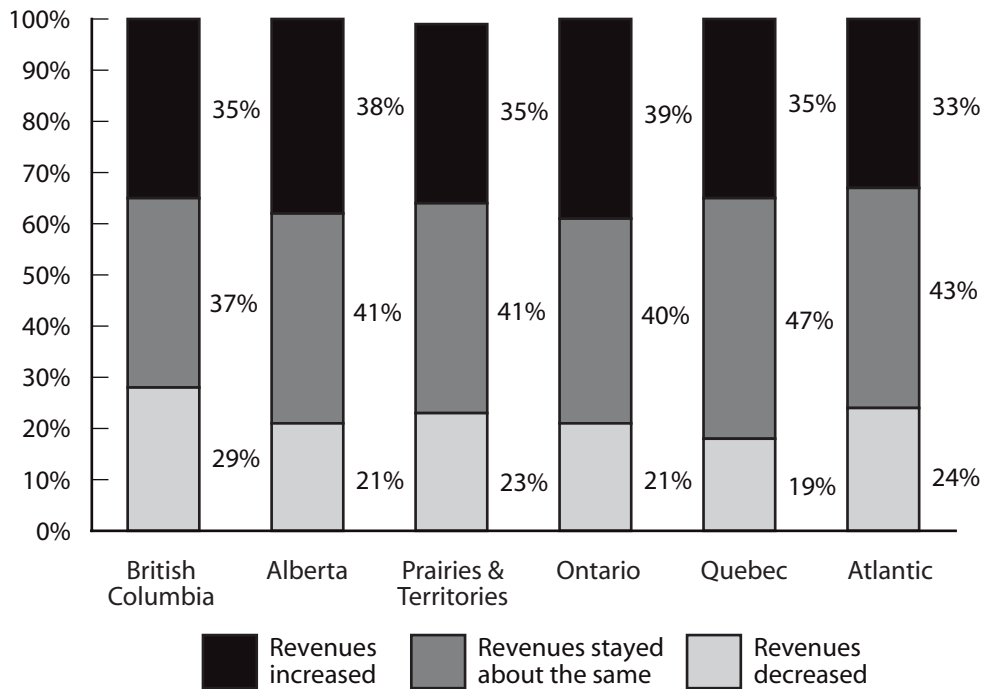
E Use with caution.

**Figure 24: Percentage of organizations and paid staff by primary activity area**

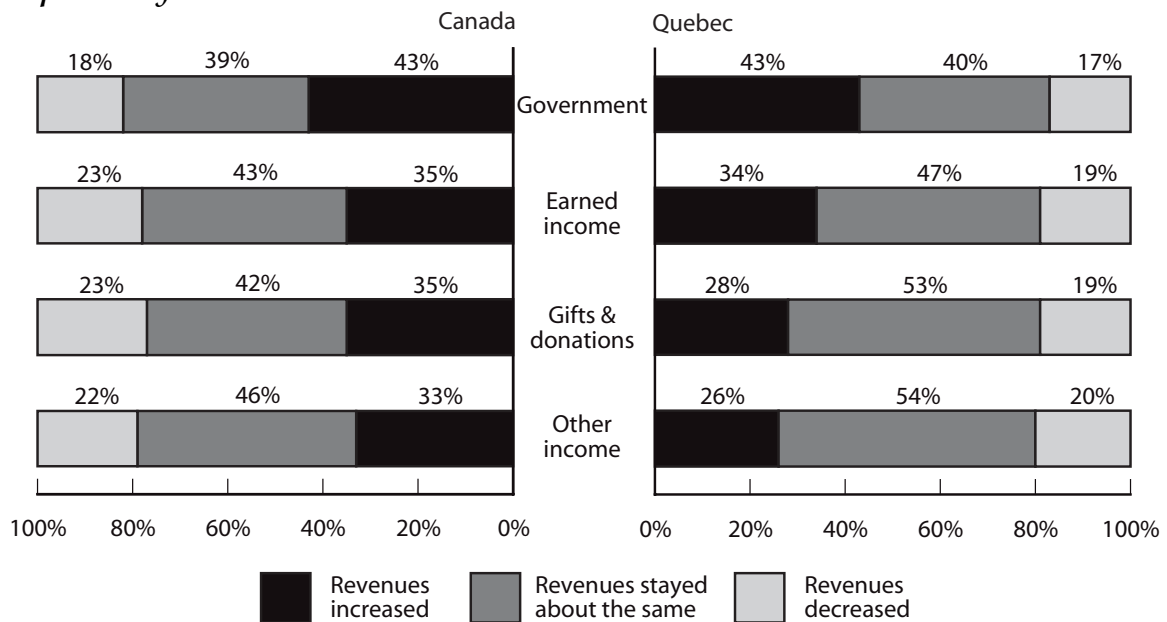


E Use with caution.

**Figure 25: Reported change in revenues over the past three years by region**

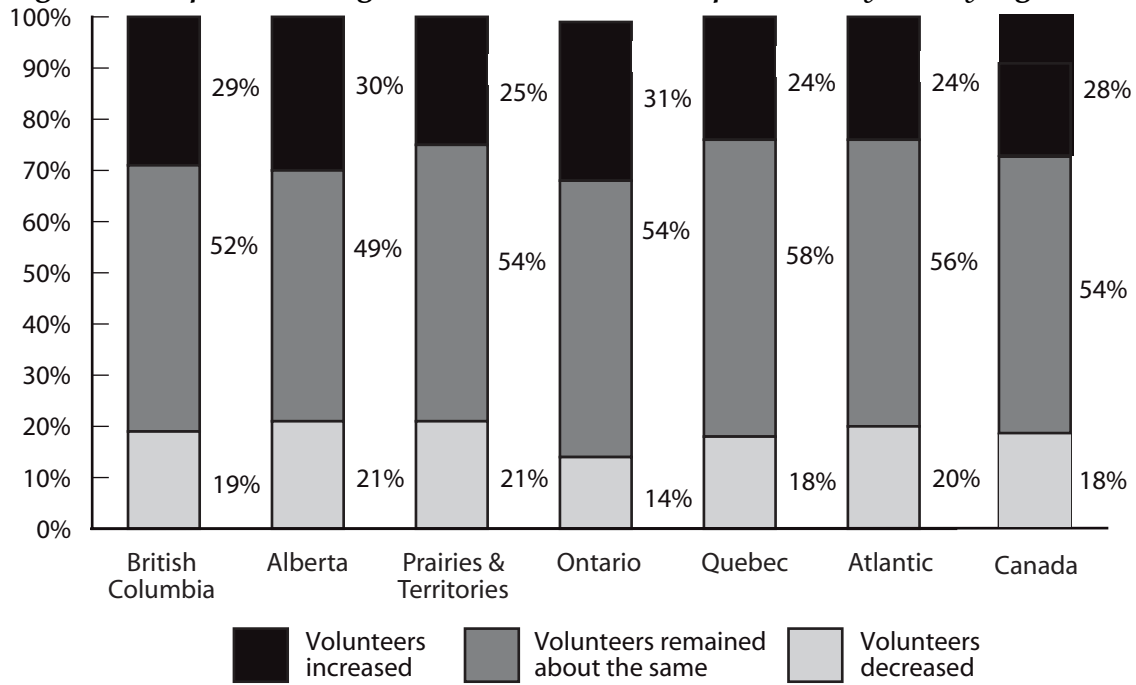


**Figure 26: Reported change in revenues over the past three years by revenue dependency**

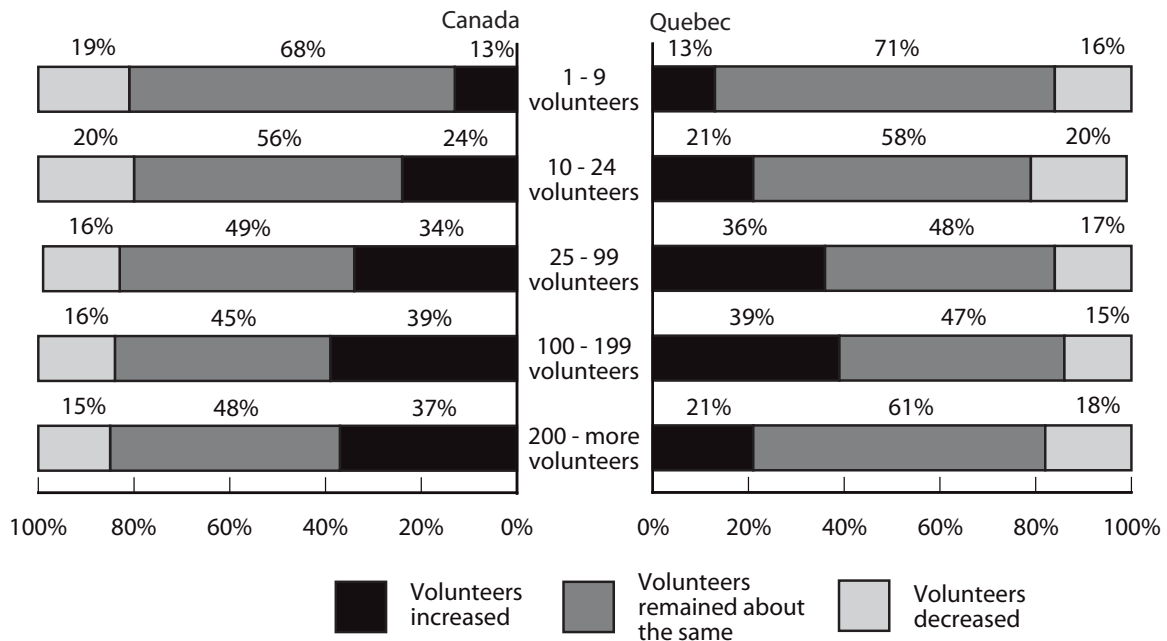




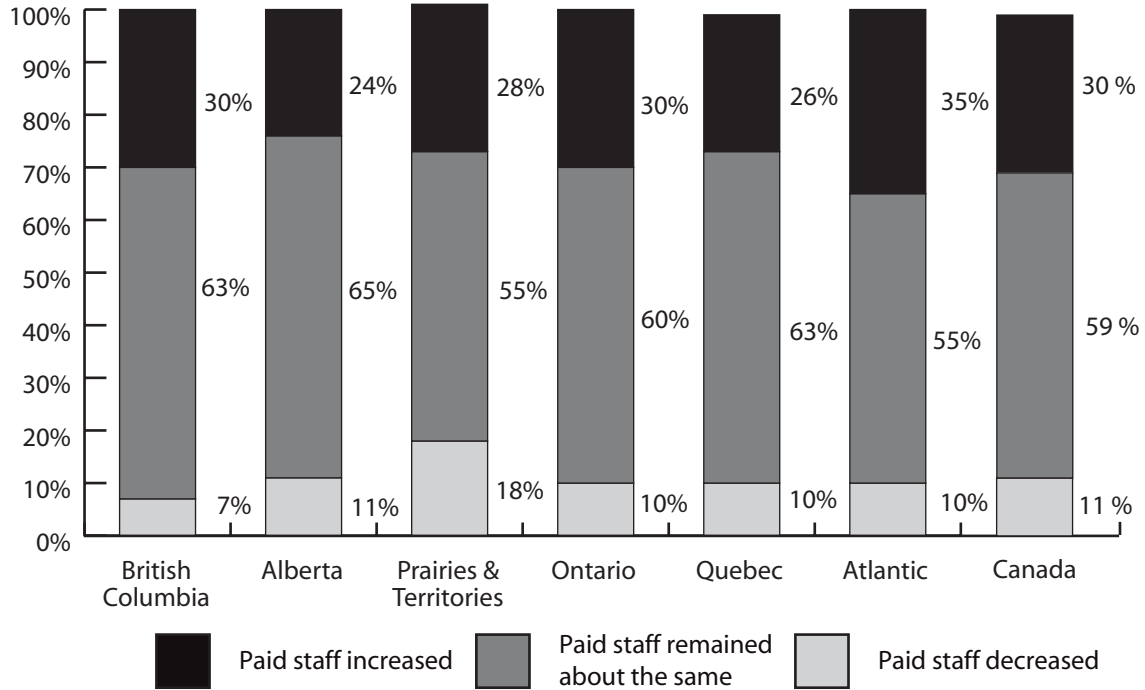
**Figure 27: Reported change in volunteers over the past three years by region**



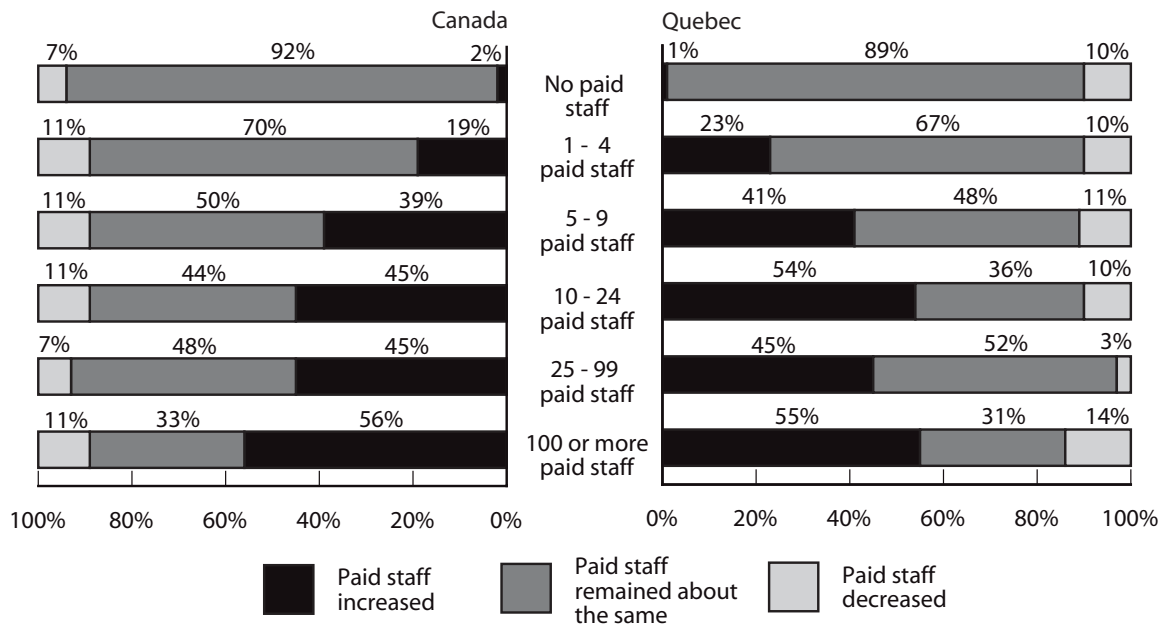
**Figure 28: Reported change in volunteers over the past three years by number of volunteers**



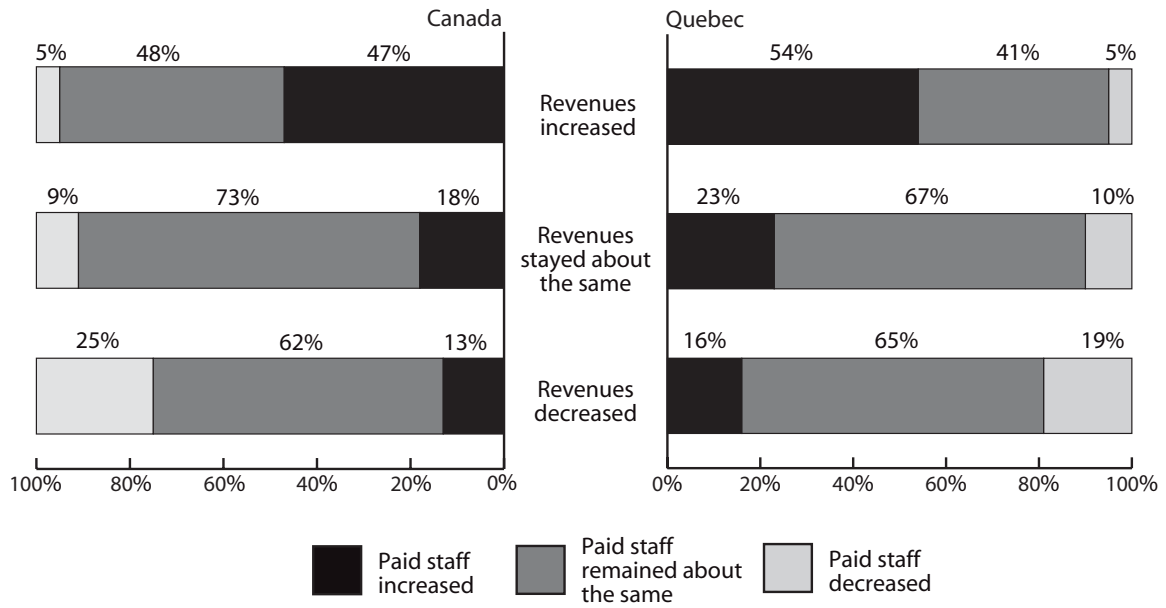
**Figure 29: Reported change in paid staff over the past three years by region**



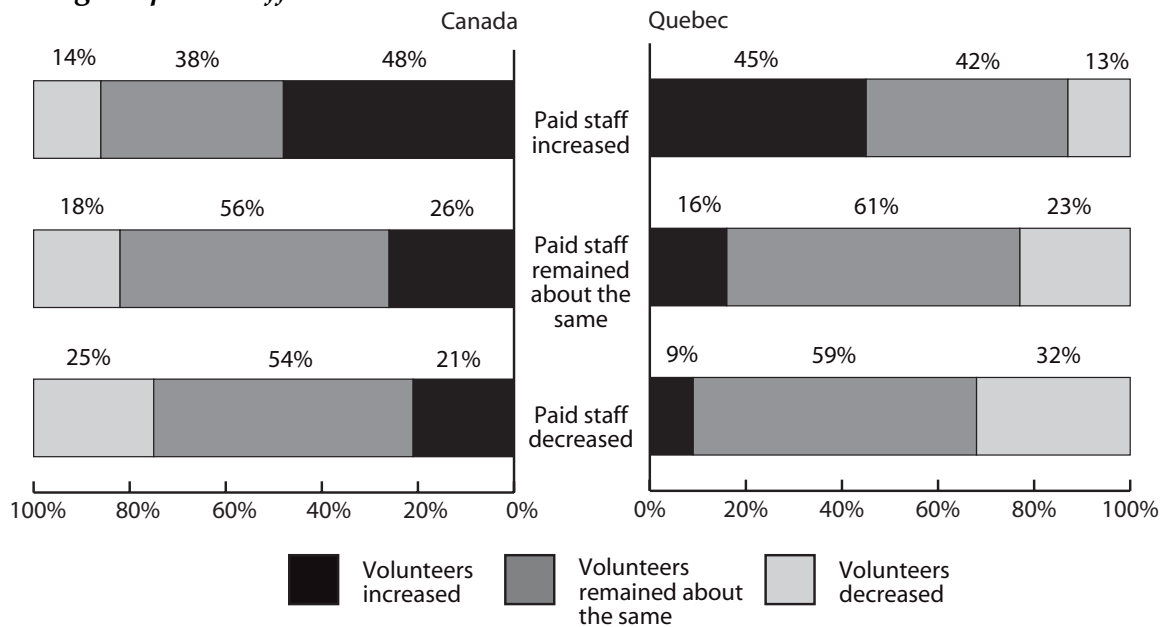
**Figure 30: Reported change in paid staff over the past three years by number of paid staff**



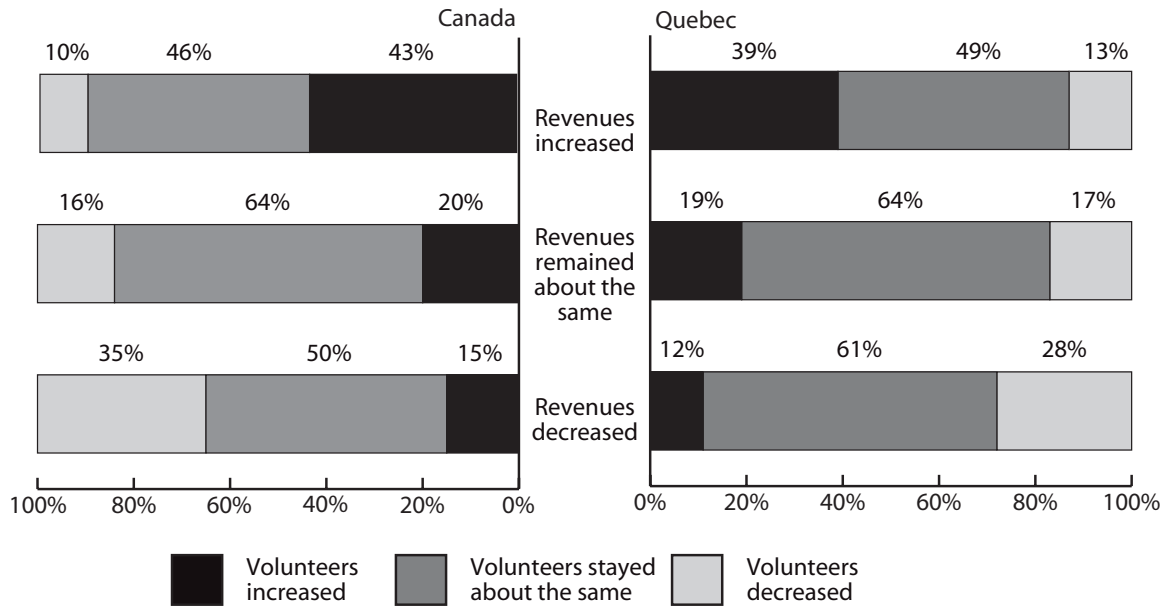
**Figure 31: Reported change in paid staff over the past three years by reported change in revenues**



**Figure 32: Reported change in volunteers over the past three years by reported change in paid staff**



**Figure 33: Reported change in volunteers over the past three years by reported change in revenues**



*Table 1: Detailed sources of revenue*

	Quebec organizations		All organizations	
	Revenues	% total revenues	Revenues	% total revenues
<b>Revenue from government</b>				
Government payments for goods and services				
Payments from the federal government	\$156,059,837	1%	\$1,629,494,890	1%
Payments from provincial government	\$1,973,273,014	8%	\$17,202,528,730	15%
Payments from municipal government	\$71,986,766	0%	\$1,035,070,183	1%
Government payments from other	\$3,946,708	0%	\$85,258,416	0%
<b>Total government payments for goods and services</b>	<b>\$2,205,335,385</b>	<b>9%</b>	<b>\$19,952,383,088</b>	<b>18%</b>
Government grants and contributions				
Grants from the federal government	\$2,619,518,943	10%	\$6,039,958,845	5%
Grants from provincial government	\$9,893,473,384	39%	\$26,944,104,382	24%
Grants from municipal government	\$225,343,846	1%	\$1,068,108,183	1%
Government grants from other	\$25,955,452	0%	\$155,583,730	0%
<b>Total government grants</b>	<b>\$12,764,480,464</b>	<b>51%</b>	<b>\$34,207,876,777</b>	<b>31%</b>
<b>Total revenues from government</b>	<b>\$14,969,815,850</b>	<b>60%</b>	<b>\$54,160,259,865</b>	<b>49%</b>
<b>Earned income from non-governmental sources</b>				
Charitable gaming	\$123,980,835	0%	\$1,242,885,015	1%
Membership fees	\$2,017,204,709	8%	\$12,033,551,619	11%
Fees for goods or services (non-government)	\$3,960,044,100	16%	\$21,844,521,113	20%
Investment income (including interest)	\$844,105,651	3%	\$4,173,428,911	4%
<b>Total revenues from earned income</b>	<b>\$6,945,335,296</b>	<b>28%</b>	<b>\$39,294,386,657</b>	<b>35%</b>
<b>Gifts and donations</b>				
Individual donations	\$696,988,013	3%	\$8,369,669,565	8%
Fundraising organizations/family community foundations	\$302,514,892	1%	\$1,137,834,369	1%
Disbursements from nonprofits	\$505,002,944	2%	\$1,935,468,417	2%
Corporate sponsorships, donations or grants	\$523,410,811	2%	\$2,815,372,908	3%
<b>Total revenues from gifts and donations</b>	<b>\$2,027,916,660</b>	<b>8%</b>	<b>\$14,258,345,259</b>	<b>13%</b>
<b>Other income</b>	<b>\$1,108,953,158</b>	<b>4%</b>	<b>\$3,882,569,114</b>	<b>3%</b>
<b>Total revenues</b>	<b>\$25,052,020,965</b>	<b>100%</b>	<b>\$111,595,560,896</b>	<b>100%</b>

*Table 2: Detailed sources of revenue, excluding Hospitals, Universities and Colleges*

	Quebec organizations, excluding Hospitals, Universities & Colleges		All organizations, excluding Hospitals, Universities & Colleges	
	Amount	% total revenues	Amount	% total revenues
<b>Revenue from government</b>				
Government payments for goods and services				
Payments from the federal government	\$119,832,129	1%	\$1,505,063,091	2%
Payments from provincial government	\$1,054,675,266	6%	\$8,551,956,531	11%
Payments from municipal government	\$64,371,932	0%	\$1,001,668,540	1%
Government payments from other	\$3,449,200	0%	\$84,760,908	0%
<b>Total government payments for goods and services</b>	<b>\$1,242,397,585</b>	<b>7%</b>	<b>\$11,143,479,938</b>	<b>15%</b>
Government grants and contributions				
Grants from the federal government	\$2,125,601,160	13%	\$5,205,314,016	7%
Grants from provincial government	\$4,798,146,002	28%	\$9,756,379,277	13%
Grants from municipal government	\$214,935,783	1%	\$995,148,362	1%
Government grants from other	\$20,793,655	0%	\$119,625,599	0%
<b>Total government grants</b>	<b>\$7,159,665,440</b>	<b>42%</b>	<b>\$16,076,588,892</b>	<b>22%</b>
<b>Total revenues from government</b>	<b>\$8,402,063,026</b>	<b>49%</b>	<b>\$27,220,068,830</b>	<b>36%</b>
<b>Earned income from non-governmental sources</b>				
Charitable gaming	\$123,878,975	1%	\$1,229,768,874	2%
Membership fees	\$1,945,780,073	11%	\$11,699,530,741	16%
Fees for goods or services (non-government)	\$3,233,207,953	19%	\$15,843,379,066	21%
Investment income (including interest)	\$818,221,337	5%	\$3,196,448,914	4%
<b>Total revenues from earned income</b>	<b>\$6,121,088,338</b>	<b>36%</b>	<b>\$31,969,127,594</b>	<b>43%</b>
<b>Gifts and donations</b>				
Individual donations	\$680,006,634	4%	\$7,991,880,133	11%
Fundraising organizations/family community foundations	\$285,292,068	2%	\$993,244,007	1%
Disbursements from nonprofits	\$273,651,448	2%	\$1,242,260,766	2%
Corporate sponsorships, donations or grants	\$434,405,834	3%	\$2,575,685,869	3%
<b>Total revenues from gifts and donations</b>	<b>\$1,673,355,983</b>	<b>10%</b>	<b>\$12,803,070,775</b>	<b>17%</b>
<b>Other income</b>	<b>\$795,629,018</b>	<b>5%</b>	<b>\$2,770,494,686</b>	<b>4%</b>
<b>Total revenues</b>	<b>\$16,992,136,365</b>	<b>100%</b>	<b>\$74,762,761,886</b>	<b>100%</b>

*Table 3: Percentage of organizations that receive in-kind donations*

	Quebec	Canada
Receive in-kind donations of goods or materials	17%	21%
Receive donations of in-kind business services	13%	15%

*Table 4: Approximate value of in-kind donations received by organizations*

	Quebec		Canada	
	Dollar value	Percentage of total revenues	Dollar value	Percentage of total revenues
Approximate value of in-kind donations of goods and materials	\$323,295,124	1%	\$1,822,095,032	2%
Approximate value of in-kind business services	\$85,435,694	0.3%	\$527,142,627	0.5%
<b>Total revenues</b>	<b>\$25,052,020,965</b>	<b>100%</b>	<b>\$111,595,560,896</b>	<b>100%</b>

*Table 5: Number of paid staff*

		Number of paid employees (T4)	Number of permanent employees (T4)	Number of Non-permanent employees	Number of full-time employees (T4)	Number of Part-time employees
<b>Hospitals, Universities &amp; Colleges</b>	Quebec	145,255	83,176	62,078	73,011	72,243
	Canada	695,755	493,592	202,163	340,662	355,094
<b>All Organizations excluding Hospitals, Universities, &amp; Colleges</b>	Quebec	324,330	173,917	150,413	181,225	143,104
	Canada	1,335,988	827,171	508,817	806,953	529,035
<b>All Organizations</b>	Quebec	469,584	257,093	212,491	254,237	215,348
	Canada	2,031,744	1,320,763	710,980	1,147,615	884,129

*Table 6: Financial issues by revenue size*

		Difficulty earning revenues	Difficulty obtaining funding from other organizations	Difficulty obtaining funding from individuals	Difficulty competing with other organizations
\$29.9K or less	Quebec	44%	42%	40%	34%
	Canada	42%	41%	43%	38%
\$30K–\$99.9K	Quebec	39%	56%	50%	38%
	Canada	40%	46%	51%	41%
\$100K–\$249.9K	Quebec	59%	67%	59%	49%
	Canada	44%	53%	54%	47%
\$250K–\$499.9K	Quebec	53%	72%	58%	55%
	Canada	43%	56%	51%	51%
\$500K–\$999.9K	Quebec	42%	62%	51%	34%
	Canada	43%	60%	48%	49%
\$1M–\$9.9M	Quebec	39%	52%	37%	42%
	Canada	40%	60%	47%	55%
\$10M +	Quebec	22%	49%	27%	44%
	Canada	22%	61%	40%	53%
All organizations	Quebec	45%	53%	46%	39%
	Canada	42%	48%	48%	43%



*Table 7: External funding issues by revenue size*

		Over-reliance on project funding	Unwillingness to fund core operations	Need to modify programs	Reporting requirements of funders	Reductions in government funding
\$29.9K or less	Quebec	60%	45%	39%	30%	47%
	Canada	54%	50%	38%	29%	54%
\$30K–\$99.9K	Quebec	67%	63%	53%	55%	63%
	Canada	61%	61%	46%	44%	61%
\$100K–\$249.9K	Quebec	75%	65%	59%	56%	71%
	Canada	69%	66%	52%	50%	72%
\$250K–\$499.9K	Quebec	74%	66%	57%	59%	78%
	Canada	64%	65%	50%	52%	73%
\$500K–\$999.9K	Quebec	77%	62%	48%	56%	60%
	Canada	61%	67%	48%	44%	67%
\$1M–\$9.9M	Quebec	67%	53%	49%	45%	66%
	Canada	60%	68%	55%	51%	74%
\$10M +	Quebec	70%	51%	49%	53%	77%
	Canada	52%	60%	51%	45%	81%
All organizations	Quebec	68%	57%	50%	47%	62%
	Canada	61%	61%	47%	43%	65%

*Table 8: Paid staff issues by revenue size*

		Difficulty obtaining type of paid staff	Difficulty retaining paid staff	Difficulty providing staff training and development
\$29.9K or less	Quebec	12%	20%	12%
	Canada	13%	23%	14%
\$30K–\$99.9K	Quebec	30%	19%	34%
	Canada	28%	16%	26%
\$100K–\$249.9K	Quebec	49%	24%	40%
	Canada	40%	17%	38%
\$250K–\$499.9K	Quebec	61%	16%	42%
	Canada	45%	17%	42%
\$500K–\$999.9K	Quebec	63%	27%	46%
	Canada	49%	23%	46%
\$1M–\$9.9M	Quebec	49%	16%	38%
	Canada	55%	20%	49%
\$10M +	Quebec	71%	23%	35%
	Canada	66%	24%	50%
<b>All organizations</b>	Quebec	30%	20%	26%
	Canada	28%	19%	27%

*Table 9: Volunteer issues by revenue size*

		Difficulty obtaining board members	Difficulty training board members	Difficulty recruiting type of volunteers	Difficulty retaining volunteers	Lack of paid staff to recruit or manage volunteers	Difficulty providing training for volunteers
\$29.9K or less	Quebec	61%	29%	51%	42%	19%	29%
	Canada	53%	26%	51%	45%	22%	28%
\$30K–\$99.9K	Quebec	72%	38%	64%	53%	38%	38%
	Canada	61%	36%	61%	52%	36%	37%
\$100K–\$249.9K	Quebec	71%	46%	70%	49%	47%	45%
	Canada	60%	43%	68%	57%	45%	46%
\$250K–\$499.9K	Quebec	71%	35%	64%	51%	53%	51%
	Canada	59%	42%	65%	57%	52%	54%
\$500K–\$999.9K	Quebec	61%	45%	44%	32%	46%	52%
	Canada	51%	44%	55%	42%	51%	47%
\$1M–\$9.9M	Quebec	56%	37%	49%	41%	41%	40%
	Canada	50%	43%	53%	46%	49%	47%
\$10M +	Quebec	57%	30%	43%	37%	36%	45%
	Canada	42%	33%	54%	51%	45%	48%
All organizations	Quebec	65%	35%	57%	45%	33%	37%
	Canada	56%	34%	57%	49%	35%	38%

*Table 10: Structural issues by revenue size*

		Difficulty collaborating with other organizations	Difficulty planning for the future	Difficulty participating in policy development	Lack of internal capacity	Increasing demands for services or products	Difficulty adapting to change
\$29.9K or less	Quebec	23%	53%	35%	32%	33%	36%
	Canada	21%	53%	31%	28%	33%	33%
\$30K–\$99.9K	Quebec	26%	57%	43%	48%	48%	47%
	Canada	24%	61%	37%	41%	42%	42%
\$100K–\$249.9K	Quebec	29%	65%	58%	59%	65%	53%
	Canada	25%	62%	47%	50%	52%	49%
\$250K–\$499.9K	Quebec	33%	63%	52%	45%	56%	43%
	Canada	30%	68%	47%	50%	57%	47%
\$500K–\$999.9K	Quebec	23%	57%	62%	55%	62%	44%
	Canada	26%	59%	50%	54%	52%	45%
\$1M–\$9.9M	Quebec	26%	55%	61%	40%	61%	50%
	Canada	27%	64%	58%	54%	61%	52%
\$10M +	Quebec	21%	47%	39%	58%	65%	61%
	Canada	27%	64%	55%	57%	64%	69%
All organizations	Quebec	25%	57%	45%	42%	46%	43%
	Canada	24%	58%	39%	39%	43%	41%

*Table 11: Financial issues by revenue dependency*

		Difficulty earning revenues	Difficulty obtaining funding from other organizations	Difficulty obtaining funding from individuals	Difficulty competing with other organizations
<b>Government dependent</b>	Quebec	48%	79%	57%	50%
	Canada	48%	74%	58%	57%
<b>Earned revenues dependent</b>	Quebec	44%	43%	39%	33%
	Canada	45%	46%	42%	41%
<b>Grants and donations dependent</b>	Quebec	42%	45%	52%	38%
	Canada	28%	32%	48%	34%
<b>Diverse</b>	Quebec	48%	46%	48%	42%
	Canada	49%	53%	52%	49%
<b>All organizations</b>	Quebec	45%	53%	46%	39%
	Canada	42%	48%	48%	43%

*Table 12: External funding issues by revenue dependency*

		Over-reliance on project funding	Unwillingness to fund core operations	Need to modify programs	Reporting requirements of funders	Reductions in government funding
<b>Government dependent</b>	Quebec	80%	70%	62%	62%	75%
	Canada	71%	72%	58%	55%	78%
<b>Earned revenues dependent</b>	Quebec	59%	45%	42%	36%	52%
	Canada	54%	52%	40%	36%	59%
<b>Grants and donations dependent</b>	Quebec	59%	47%	35%	22%	43%
	Canada	53%	53%	39%	29%	48%
<b>Diverse</b>	Quebec	61%	55%	38%	44%	58%
	Canada	60%	64%	47%	45%	68%
<b>All organizations</b>	Quebec	68%	57%	50%	47%	62%
	Canada	61%	61%	47%	43%	65%

*Table 13: Paid staff issues by revenue dependency*

		Difficulty obtaining type of paid staff	Difficulty retaining paid staff	Difficulty providing staff training and development
<b>Government dependent</b>	Quebec	56%	76%	48%
	Canada	52%	23%	50%
<b>Earned revenues dependent</b>	Quebec	20%	82%	19%
	Canada	22%	18%	21%
<b>Grants and donations dependent</b>	Quebec	25%	82%	18%
	Canada	24%	14%	22%
<b>Diverse</b>	Quebec	24%	84%	19%
	Canada	27%	18%	25%
<b>All organizations</b>	Quebec	30%	80%	26%
	Canada	28%	19%	27%

*Table 14: Volunteer issues by revenue dependency*

		Difficulty obtaining board members	Difficulty training board members	Difficulty recruiting type of volunteers	Difficulty retaining volunteers	Lack of paid staff to recruit or manage volunteers	Difficulty providing training for volunteers
<b>Government dependent</b>	Quebec	74%	52%	64%	51%	59%	53%
	Canada	67%	52%	65%	55%	59%	54%
<b>Earned revenues dependent</b>	Quebec	65%	31%	54%	44%	23%	31%
	Canada	58%	31%	57%	49%	29%	34%
<b>Grants and donations dependent</b>	Quebec	53%	24%	54%	42%	25%	32%
	Canada	44%	29%	54%	47%	29%	35%
<b>Diverse</b>	Quebec	60%	32%	57%	43%	32%	37%
	Canada	56%	34%	57%	47%	38%	36%
<b>All organizations</b>	Quebec	65%	35%	57%	45%	33%	37%
	Canada	56%	34%	57%	49%	35%	38%

*Table 15: Structural issues by revenue dependency*

		Difficulty collaborating with other organizations	Difficulty planning for the future	Difficulty participating in policy development	Lack of internal capacity	Increasing demands for services or products	Difficulty adapting to change
<b>Government dependent</b>	Quebec	32%	68%	67%	63%	65%	54%
	Canada	31%	70%	61%	60%	63%	50%
<b>Earned revenues dependent</b>	Quebec	23%	53%	38%	36%	38%	40%
	Canada	22%	56%	36%	34%	38%	39%
<b>Grants and donations dependent</b>	Quebec	25%	53%	34%	31%	46%	38%
	Canada	20%	55%	31%	35%	38%	41%
<b>Diverse</b>	Quebec	21%	51%	37%	36%	39%	34%
	Canada	27%	58%	39%	39%	41%	37%
<b>All organizations</b>	Quebec	25%	57%	45%	42%	46%	43%
	Canada	24%	58%	39%	39%	43%	41%

*Table 16: Financial issues by primary activity area*

	Region	Difficulty Earning Revenues	Difficulty Obtaining Funding from Other Organizations	Difficulty Obtaining Funding from Individuals	Difficulty Competing with Other Organizations
<b>Arts and Culture</b>	Quebec	61%	77%	61%	49%
	Canada	60%	70%	63%	59%
<b>Sports and Recreation</b>	Quebec	45%	49%	37%	39%
	Canada	51%	53%	47%	49%
<b>Education and Research</b>	Quebec	53%	61%	60%	48%
	Canada	52%	59%	55%	55%
<b>Health</b>	Quebec	58%	79%	67%	55%
	Canada	52%	73%	63%	61%
<b>Social Services</b>	Quebec	40%	70%	56%	49%
	Canada	43%	67%	60%	57%
<b>Environment</b>	Quebec	52%	62%	48%	29%
	Canada	50%	60%	53%	44%
<b>Development and Housing</b>	Quebec	36%	43%	24%	24%
	Canada	27%	38%	22%	26%
<b>Law, Advocacy and Politics</b>	Quebec	42%	74%	54%	35%
	Canada	53%	66%	57%	55%
<b>Grantmaking, Fundraising and Promoting Volunteerism</b>	Quebec	43%	45%	52%	51%
	Canada	32%	38%	47%	47%
<b>International</b>	Quebec	47%	66%	58%	65%
	Canada	38%	64%	60%	58%
<b>Religion</b>	Quebec	46%	27%	57%	23%
	Canada	26%	20%	44%	20%
<b>Business or Professional Associations or Unions</b>	Quebec	40%	34%	26%	26%
	Canada	43%	36%	24%	30%
<b>Hospitals, Universities and Colleges</b>	Quebec	14%	58%	27%	52%
	Canada	26%	63%	63%	58%
<b>Other</b>	Quebec	53%	58%	46%	42%
	Canada	49%	51%	34%	39%
<b>All Organizations</b>	Quebec	45%	53%	46%	39%
	Canada	42%	48%	48%	43%



*Table 17: External funding issues by primary activity area*

		Over-reliance on Project Funding	Unwillingness to Fund Core Operations	Need to Modify Programs	Reporting Requirements of Funders	Reductions in Government Funding
<b>Arts and Culture</b>	Quebec	79%	64%	64%	44%	68%
	Canada	71%	70%	57%	45%	74%
<b>Sports and Recreation</b>	Quebec	57%	46%	40%	41%	57%
	Canada	55%	54%	39%	37%	61%
<b>Education and Research</b>	Quebec	69%	68%	58%	75%	81%
	Canada	64%	64%	52%	48%	69%
<b>Health</b>	Quebec	86%	87%	48%	65%	77%
	Canada	78%	85%	55%	61%	79%
<b>Social Services</b>	Quebec	77%	67%	59%	57%	65%
	Canada	70%	71%	56%	53%	73%
<b>Environment</b>	Quebec	74%	67%	69%	48%	72%
	Canada	64%	71%	57%	49%	75%
<b>Development and Housing</b>	Quebec	67%	41%	46%	42%	65%
	Canada	55%	49%	38%	39%	67%
<b>Law, Advocacy and Politics</b>	Quebec	89%	76%	53%	68%	68%
	Canada	62%	72%	52%	49%	63%
<b>Grantmaking, Fundraising and Promoting Volunteerism</b>	Quebec	63%	47%	37%	32%	42%
	Canada	48%	46%	36%	30%	49%
<b>International</b>	Quebec	56%	78%	56%	59%	38%
	Canada	60%	65%	53%	63%	70%
<b>Religion</b>	Quebec	49%	43%	34%	4%	31%
	Canada	40%	36%	25%	11%	26%
<b>Business or Professional Associations or Unions</b>	Quebec	53%	50%	48%	31%	62%
	Canada	42%	44%	43%	30%	57%
<b>Hospitals, Universities and Colleges</b>	Quebec	77%	40%	43%	46%	88%
	Canada	68%	66%	59%	55%	82%
<b>Other</b>	Quebec	70%	50%	55%	53%	55%
	Canada	52%	38%	44%	39%	51%
<b>All Organizations</b>	Quebec	68%	57%	50%	47%	62%
	Canada	61%	61%	47%	43%	65%

*Table 18: Paid staff issues by primary activity area*

		Difficulty Obtaining Type of Paid Staff	Difficulty Retaining Paid Staff	Difficulty Providing Staff Training and Development
Arts And Culture	Quebec	40%	22%	32%
	Canada	38%	23%	35%
Sports and Recreation	Quebec	18%	25%	17%
	Canada	19%	25%	19%
Education and Research	Quebec	43%	34%	40%
	Canada	39%	27%	33%
Health	Quebec	55%	40%	45%
	Canada	54%	35%	46%
Social Services	Quebec	58%	24%	46%
	Canada	49%	24%	47%
Environment	Quebec	18%	34%	21%
	Canada	24%	25%	23%
Development and Housing	Quebec	28%	6%	26%
	Canada	21%	7%	23%
Law, Advocacy and Politics	Quebec	30%	12%	44%
	Canada	32%	7%	37%
Grant-making, Fundraising and Promoting Volunteerism	Quebec	15%	17%	12%
	Canada	14%	17%	13%
International	Quebec	25%		23%
	Canada	32%	2%	37%
Religion	Quebec	25%	12%	18%
	Canada	25%	12%	22%
Business or Professional Associations or Unions	Quebec	23%	14%	23%
	Canada	25%	13%	27%
Hospitals, Universities and Colleges	Quebec	55%	48%	32%
	Canada	50%	39%	41%
Other	Quebec	26%	1%	35%
	Canada	32%	3%	27%
All Organizations	Quebec	30%	20%	26%
	Canada	28%	19%	27%

*Table 19: Volunteer issues by primary activity area*

		Difficulty Obtaining Board Members	Difficulty Training Board Members	Difficulty Recruiting Type of Volunteers	Difficulty Retaining Volunteers	Lack of Paid Staff to Recruit or Manage Volunteers	Difficulty Providing Training for Volunteers
<b>Arts And Culture</b>	Quebec	63%	33%	62%	48%	42%	33%
	Canada	59%	42%	64%	54%	46%	43%
<b>Sports and Recreation</b>	Quebec	71%	32%	61%	54%	24%	35%
	Canada	64%	32%	65%	58%	26%	33%
<b>Education and Research</b>	Quebec	65%	36%	69%	52%	37%	33%
	Canada	58%	37%	59%	53%	38%	36%
<b>Health</b>	Quebec	74%	60%	69%	50%	62%	66%
	Canada	67%	52%	71%	53%	56%	54%
<b>Social Services</b>	Quebec	71%	49%	61%	48%	49%	45%
	Canada	64%	47%	62%	52%	50%	47%
<b>Environment</b>	Quebec	70%	37%	50%	39%	27%	42%
	Canada	59%	35%	52%	48%	34%	42%
<b>Development and Housing</b>	Quebec	61%	31%	34%	25%	29%	41%
	Canada	58%	27%	42%	36%	31%	32%
<b>Law, Advocacy and Politics</b>	Quebec	74%	66%	74%	66%	60%	60%
	Canada	70%	51%	74%	61%	55%	52%
<b>Grant-making, Fundraising and Promoting Volunteerism</b>	Quebec	51%	25%	49%	36%	21%	28%
	Canada	44%	25%	45%	37%	24%	30%
<b>International</b>	Quebec	56%	55%	65%	47%	65%	59%
	Canada	46%	44%	53%	46%	54%	51%
<b>Religion</b>	Quebec	55%	21%	59%	43%	21%	23%
	Canada	42%	27%	55%	48%	26%	33%
<b>Business or Professional Associations or Unions</b>	Quebec	67%	39%	54%	41%	31%	31%
	Canada	56%	34%	54%	44%	43%	41%
<b>Hospitals, Universities and Colleges</b>	Quebec	65%	35%	57%	45%	33%	37%
	Canada	56%	34%	57%	49%	35%	38%
<b>Other</b>	Quebec	61%	32%	44%	35%	34%	63%
	Canada	49%	31%	43%	37%	38%	44%
<b>All Organizations</b>	Quebec	73%	44%	56%	44%	43%	45%
	Canada	60%	40%	52%	45%	42%	39%

*Table 20: Structural issues by primary activity area*

		Difficulty Collaborating with Other Organizations	Difficulty Planning for the Future	Difficulty Participating in Policy Development	Lack of Internal Capacity	Increasing Demands for Services or Products	Difficulty Adapting to Change
<b>Arts and Culture</b>	Quebec	29%	64%	49%	57%	44%	42%
	Canada	28%	67%	41%	51%	41%	45%
<b>Sports and Recreation</b>	Quebec	31%	55%	39%	33%	39%	40%
	Canada	27%	58%	36%	32%	40%	40%
<b>Education and Research</b>	Quebec	44%	69%	52%	67%	60%	51%
	Canada	29%	57%	46%	47%	51%	36%
<b>Health</b>	Quebec	29%	58%	65%	65%	78%	56%
	Canada	32%	68%	62%	63%	70%	51%
<b>Social Services</b>	Quebec	24%	63%	62%	54%	68%	49%
	Canada	30%	67%	54%	54%	65%	45%
<b>Environment</b>	Quebec	25%	62%	65%	45%	42%	49%
	Canada	27%	65%	56%	49%	40%	47%
<b>Development and Housing</b>	Quebec	20%	44%	41%	35%	36%	35%
	Canada	14%	47%	33%	28%	31%	28%
<b>Law, Advocacy and Politics</b>	Quebec	38%	69%	58%	72%	61%	46%
	Canada	35%	68%	57%	59%	57%	41%
<b>Grantmaking, Fundraising and Promoting Volunteerism</b>	Quebec	24%	54%	35%	32%	49%	37%
	Canada	23%	54%	29%	28%	42%	33%
<b>International</b>	Quebec	47%	78%	41%	51%	54%	61%
	Canada	40%	72%	38%	60%	52%	48%
<b>Religion</b>	Quebec	12%	61%	24%	26%	33%	45%
	Canada	14%	54%	27%	31%	32%	45%
<b>Business or Professional Associations or Unions</b>	Quebec	22%	45%	47%	46%	36%	39%
	Canada	23%	54%	47%	45%	38%	42%
<b>Hospitals, Universities and Colleges</b>	Quebec	21%	61%	55%	41%	62%	54%
	Canada	30%	72%	55%	59%	58%	63%
<b>Other</b>	Quebec	16%	49%	41%	47%	33%	34%
	Canada	19%	53%	42%	37%	38%	34%
<b>All Organizations</b>	Quebec	25%	57%	45%	42%	46%	43%
	Canada	24%	58%	39%	39%	43%	41%





Imagine Canada  
425 University Avenue, Suite 900  
Toronto, Ontario  
Canada M5G 1T6  
Tel: 416.597.2293 / 1.800.263.1178  
Fax: 416.597.2294  
[research@imaginecanada.ca](mailto:research@imaginecanada.ca)