Building a Stronger VOLUNTARY SECTOR

HOW THE VSI IS MAKING A DIFFERENCE

Autumn 2002

BUILDING A STRONGER VOLUNTARY SECTOR: HOW THE VSI IS MAKING A DIFFERENCE

VOLUNTARY SECTOR STEERING GROUP REPORT

TO
THE VOLUNTARY SECTOR IN CANADA

AUTUMN 2002

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LEADERSHIP STRUCTURES FOR THE VSI

The **Voluntary Sector Steering Group** is composed of members of the Voluntary Sector Roundtable, together with those playing the following roles:

- voluntary sector co-chairs of Joint Tables;

- Chairs of Sector Working Groups;

- voluntary sector members of the Joint Coordinating Committee; and

- one representative each from visible minority and Aboriginal reference groups.

The **federal government leadership** is composed of:

- a Reference Group of Ministers, headed by The Honourable Lucienne Robillard, President of the Treasury Board;

- Deputy Secretary to the Cabinet, Machinery of Government, Privy Council Office, and the Voluntary Sector Task Force;

- Assistant Deputy Ministers Executive Committee;

- government members of the Joint Coordinating Committee; and

- government co-chairs of Joint Tables.

The Voluntary Sector Steering Group expresses its appreciation for the Government of Canada's decision to make a major investment in the voluntary sector through the Voluntary Sector Initiative. The Sector recognizes this significant contribution and commitment by the Government of Canada and by the many public servants who devoted so much of their time, effort, and insight to this undertaking.

This report is from the Voluntary Sector Steering Group to the voluntary sector and does not necessarily represent the views of the Government of Canada or the voluntary sector.

BACKGROUND:
HISTORICAL INFORMATION

The Voluntary Sector Steering Group is proud to report on the progress achieved during the first two years of the Voluntary Sector Initiative (VSI) and the expected results for the three remaining years. This work is providing sector organizations – large and small – with practical ways to make it easier to deliver your mission.

But first, a bit of history…

The voluntary not-for-profit sector was showing signs of severe strain in the 1990s. Globalization, years of public-sector restructuring including downloading of services by governments, and other factors had left many voluntary sector organizations overworked and under-resourced as they faced increased demand for their services. Simultaneously, financial factors, e.g., the shift from core operational funding to project funding, and funding cuts to a wide variety of groups (particularly those engaged in advocacy), had left many organizations in tough financial shape and struggling to keep qualified staff. Moreover, the sector was routinely described as "special interest" groups, with its legitimacy increasingly questioned.

The sector is diverse in terms of purpose, e.g., service delivery, advocacy, minority and ethnic communities, arts and culture, international development, sports and recreation, faith, and environment. This diversity, combined with the lack of a national voice to speak for the voluntary sector, makes effective response to changes and criticisms difficult. In this climate, national voluntary organizations realized the need for collaborative action by a national coalition – one that could exercise more effective, broadly based leadership on behalf of the sector.

In 1995, a group of 12 national umbrella organizations came together as a Voluntary Sector Roundtable to strengthen the voice of the sector. The Roundtable established an independent panel of inquiry, chaired by Ed Broadbent, to examine the state of the sector. In February 1999, the Broadbent Panel on Accountability and Governance in the Voluntary Sector released its final report entitled *Building on Strength: Improving Governance and Accountability in Canada's Voluntary Sector*. That report, with its 41 recommendations, received a great deal of attention, putting the issue "on the radar screen."

At that time, the federal government was looking at its relationship with the voluntary sector, and recognized the need for a strong sector to carry out programs and offer services that would improve the quality of life for Canadians. It sought to respond better to the challenges of constrained budgets by relying on the voluntary sector for service delivery and partnerships, and to "engage" Canadians by reaching out to those who were already active in the voluntary sector.

After the Broadbent Panel report was released, voluntary sector members and federal officials met together in three groups, each of which tackled one of the following goals: to make recommendations on sector-government relationships; to strengthen the voluntary sector's capacity; and to improve regulations and legislation that governs the sector. Their August 1999 report, entitled *Working Together: A Government of Canada/ Voluntary Sector Joint Initiative*, contained 26 recommendations for action.

The 1999 Speech from the Throne reinforced the federal government's stated commitment to build its relationship with the sector, the result the Voluntary Sector Roundtable had been seeking. In June 2000, the federal government announced a five-year funding commitment of $94.6-million for the Voluntary Sector Initiative (see Appendix 1 to learn how VSI money is being spent).

In the first two years of the VSI, groups known as Joint Tables – formed of equal numbers of representatives of the voluntary sector and the federal government – worked on policy and program recommendations in seven areas. Two of the most important issues – advocacy and funding – have been, and continue to be, addressed by sector-only working groups made up of staff or volunteers of voluntary organizations.

The Voluntary Sector Steering Group (see Appendix 2 for a list of members) has provided political and strategic leadership for the voluntary sector in the Initiative and more widely. As this front-end phase of the VSI concludes, the Group will be replaced in this leadership role by a new Voluntary Sector Forum to guide the remaining three years of the Initiative.

The Steering Group is eager to report on its work during the first two years of the VSI and on anticipated results for the future.

INTRODUCTION:
THE VSI – WHAT'S IN IT FOR THE VOLUNTARY SECTOR?

The first two years of the Voluntary Sector Initiative have produced research, actions, and achievements (see Appendix 3 for a detailed list). How will this strengthen the voluntary sector? We know there is no "quick fix," and not all things will benefit (or benefit equally) all voluntary organizations. Some outcomes will help the sector as a whole, while others will help certain types of organizations – large, small, national, regional, or local – in carrying out their mission. Our goal has been to put support, tools, and information in the hands of the voluntary sector – volunteers and staff, individual organizations, and networks – so you can do your work.

We began the process with hopes and dreams; some of these dreams have been realized, others are proving more difficult. Some are in progress; we remain hopeful. The voluntary sector took on the fundamental challenge of joint work; building trust and working collaboratively took priority over advocacy. As with most pioneering efforts, the tasks were challenging and the results reflect compromises.

Over its first two years, the VSI has established the foundation for a better relationship with the federal government, gathered information, and initiated projects that will benefit not-for-profit organizations. The work of the remaining three years (see Appendix 4 for a timeline of activities and events) will concentrate on putting those agreements and understandings into practice, and making the practical information and tools accessible to all organizations, especially those that are small and medium-sized. Some benefits will be more concrete than others, but all will help the voluntary sector in doing its important work and in being recognized, valued, and supported by the people of Canada, by governments, and by the sector itself.

The VSI recognizes that the voluntary sector is the third pillar of Canadian society, equal in importance to the public and private sectors (see Appendix 5 for more detail on the sector and its contributions to Canadian society). It validates the importance of voluntary organizations in the life of our communities, whatever form these take.

In looking back over the first two years and forward to the final three years of the VSI, we ask the following question: "What difference does the VSI's work make?"

In the next four sections of the report, we answer that question. The work of the VSI is in the following areas:

- building a sustainable relationship between the federal government and the voluntary sector;

- strengthening the capacity of the voluntary sector;

- improving the rules and regulations within which the voluntary sector operates; and

- achieving greater inclusion and developing networks.

PART 1:
BUILDING THE RELATIONSHIP

The VSI process has focused on the relationship between the voluntary sector and the federal government. In this process, we have come to understand that although our fundamental values are similar, the voluntary sector and the federal government function in different ways, with different organizational cultures. We have gained a much better understanding of the way in which government works, and this knowledge will be useful as we continue to develop and strengthen our relationship.

THE ACCORD AND THE CODES

An Accord Between the Government of Canada and the Voluntary Sector, launched in December 2001, has changed the relationship between the government and the sector. This document represents a public commitment to more open, transparent, consistent, and collaborative ways of working together. It sets out the values and the principles that underpin the relationship as well as commitments to action. Most importantly, it identifies the steps that will need to be taken to give life to the Accord, such as:

- the development of appropriate organizational structures on both sides;
- processes for monitoring changes to the relationship;
- regular meetings between Ministers and voluntary sector organizations; and
- the development of Codes of Good Practice.

In 2002, subsequent to the development of the Accord, two Codes of Good Practice were developed: one on funding and the other on policy dialogue. The funding code's goal is to improve collaboration on funding policies and practices while the code on policy dialogue is intended to enhance the various ways by which the sector contributes to the public policy process. Both codes contain a number of good practices already being used by departments, agencies, and voluntary sector organizations. Ultimately, on the voluntary sector's side, the codes' power to influence and change behaviour will come when we know about them, make reference to them, and urge that they be implemented in their respective contexts and dealings with government departments and agencies.

Although the Accord and the two codes were developed to build and strengthen the relationship between the voluntary sector and the federal government, the process of reaching the Accord has yielded important benefits to the sector. As a valuable by-product of consultations and field tests on the Accord and the codes, the sector has come to recognize its own strength, value, and potential as well as its capacity to be pro-active.

The Accord and the Codes of Good Practice set the foundation for a new way of doing business. Although changing attitudes and behaviours is a long-term process, a good, solid foundation has now been built.

What's to Come – The new relationship forged by the Accord will be developed over the next three years and into the future. The Voluntary Sector Forum, which replaces the Voluntary Sector Steering Group in October 2002, will work with and across government departments to ensure that the Accord and Codes of Good Practice are widely known and put into practice.

Other future activities include:

- sessions to raise awareness about the Accord and the Codes of Good Practice and how these documents can be used by both the voluntary sector and the federal government;
- an Annual Report on the Relationship; and
- regular meetings with Ministers.

PUBLIC POLICY

Under the VSI's Sectoral Involvement in Departmental Policy Development (SIDPD), more than 100 voluntary organizations are partnering with federal government departments, working on developing policy and on processes to involve organizations in public policy. The multi- and cross-sectoral projects being funded include those contributing to building networks, alliances, and other mechanisms among voluntary organizations as well as those supporting knowledge development and dissemination activities on particular policy issues, while strengthening policy know-how in the sector.

Specific examples of SIDPD projects include:

- Sport Policy Advisory Collective;

- Giving a Voice to the Heritage Voluntary Sector;

- Northern Native Broadcast Access Program;

- Building Policy Capacity of the Youth Environmental Community;

- Health Canada and Voluntary Organizations Working in Health Innovative Policy Development;

- Aboriginal Women's Justice Consultation;

- Review and Determination of Housing Issues for Veterans and Seniors;

- Peacebuilding and Human Security;

- Women and Policy Development in Controlling HIV Infection and AIDS;

- Developing Policy Capacity in the Visible Minority Community;

- Cultural Diversity Policy Framework Development: Immigrant and Refugee Sectoral Engagement Project; and

- Connecting People to Policy: A National Initiative to Build Capacity of the Disability Community to Participate in and Contribute to the Policy Process.

Policy Internships and Fellowships provide opportunities for government employees to work in the voluntary sector for up to one year, and vice versa. Participants get valuable experience in policy and other areas; their "home" organization/department benefits from increased understanding of the other's environment.

What's to Come – Over the next two years, these projects will build policy capacity in the sector, make government departments more aware of what voluntary organizations can contribute to policy, and result in better policies. An evaluation of SIDPD projects will begin in 2004.

A toolkit on policy development for voluntary sector organizations is also being developed. This primarily on-line resource will guide users through the policy development process and suggest how voluntary organizations can be effective in policy areas.

ADVOCACY

The voluntary sector asserts its need, right, and responsibility to speak out on behalf of its members and clients – especially those who are disadvantaged or marginalized, and whose voices are rarely heard and respected. Advocacy is how the sector identifies and promotes ideas and activities that have a public benefit; it also positively engages individuals in our society. Advocacy is a sensitive and complicated issue, but the sector's frontline work means that it is well-informed and experienced in almost every aspect of community life in Canada.

The current rules, which are extremely difficult to understand or explain, have a "chill factor," causing many charities to avoid all advocacy activity for fear of losing their right to issue tax receipts and receive donations and foundation grants. We are seeking changes to allow non-partisan public policy work, public education and awareness initiatives undertaken by registered charities to further their charitable purposes as charitable activity. Changes in the rules and regulations that currently restrict advocacy would allow registered charities to play a more meaningful role in the public policy process. As well, instead of delivering the same services over and over again, organizations could also advocate for a change in policy and programs that would result in those services no longer being needed.

The Accord recognizes the legitimacy, value, and contribution of advocacy (not just service delivery), and the Code on Policy Dialogue confirms it. Useful resources produced by the Advocacy Working Group will help to enhance, support, and recognize the value of advocacy work done by voluntary sector organizations (see Appendix 3, especially the position paper entitled *Advocacy – The Sound of Citizens' Voices*).

What's to Come – Work on change and modernization in the regulation of advocacy is continuing on a variety of fronts, including:

- reinforcing the importance of collective voice;
- having advocacy widely recognized as being as valuable as services; and
- translating this agreed-upon value of advocacy into changes in the *Income Tax Act* that would increase the allowable percentage of an organization's budget to be spent on advocacy from the current 10% limit.

PART 2:
STRENGTHENING CAPACITY

Voluntary sector organizations need increased ability to carry out their mission. The VSI has made this a priority. Capacity has four elements – financial, human resources, knowledge, and information management/ information technology. To help organizations develop in these areas, the VSI has funded and delivered a variety of tools and information.

FINANCING

In addition to the Code of Good Practice on Funding, the VSI has carried out projects on the all-important issue of advancing the sector's need for financial sustainability. For example:

- research on how different kinds of sector organizations are financed and the impact of changing approaches by funders, particularly the reluctance to fund operational costs and sustaining organizational infrastructure;

- advice to federal government departments on adapting good practices that could make the funding process more effective for recipients;

- creation of a toolkit for sector organizations that want to improve their management of scarce funds; and

- initial research into new mechanisms and models of funding emerging in other countries that are applicable to Canada.

What's to Come – The VSI will continue to work on:

- simplifying the process for applying and accounting for government funding;

- expanding the process to other funders; and

- creating tools to help sector organizations develop their own plans for long-term financial sustainability.

HUMAN RESOURCES

Voluntary organizations use volunteers and/or paid staff. Having the right people with the right skills is central to the successful operation of voluntary organizations. The VSI has produced a number of tools and materials to help find, train, and retain qualified staff and volunteers.

- ■ The National Learning Initiative develops a common set of skills and competencies needed by senior people in organizations, which is particularly useful in the hiring process, as well as looks at existing training opportunities and links them to skills needed to run a voluntary sector organization.

- ■ Consolidated information on the trends having an influence on the workforce and workplace in both the short and the long term will inform voluntary organizations.

- ■ Another major program being developed – the Human Resources Support Services (HRSS) – will provide practical information on these services, including pay and benefits, as well as access to those who can help organizations function as effectively and efficiently as possible.

Celebrating volunteers and their contribution has been a very visible component of the VSI. From the International Year of Volunteers to the Canada Volunteerism Initiative, an important part of the VSI's work is having volunteerism viewed as an integral part of community life. The International Year of Volunteers put a media focus on volunteerism throughout 2001, leading to more awareness among the public of the value and role of volunteers across Canada.

As a permanent legacy to the International Year, a new Canada Volunteerism Initiative was announced together with the Accord in December 2001 to help organizations with their volunteer programs, promote volunteering, and conduct research.

What's to Come – The participation of volunteers will be encouraged through the Canada Volunteerism Initiative (CVI) which will result in: a regional network in each province to develop tools, resources, etc. and how to use them; and analysis and research to improve our knowledge about volunteerism in Canada. In 2003, CVI centres will open across the country.

NEW KNOWLEDGE

Voluntary organizations need good statistical data to plan and run their operations. The VSI has been creating ways to put information in the hands of organizations that can use it and pinpoint where efforts need to be made to strengthen the sector in the future.

- To determine and quantify the sector's economic contribution to the national economy, Statistics Canada has created a separate "account" on data relating to the voluntary sector, similar to data released regularly on the Gross National Product (GNP). This means that information on the size, scope, and nature of the not-for-profit sector will be a permanent feature in Canada's official economic statistics. These data are available to policy analysts and researchers, and can be used to support a case for tax benefits and other measures that will assist voluntary organizations. This information will also reinforce the legitimacy of the voluntary sector in the eyes of the public.

- The National Survey of Giving, Volunteering and Participating – which reported in August 2001 – provides information on individuals' patterns of contributing time and/or money.

What's to Come – First estimates from Statistics Canada's Satellite Account of Nonprofit Institutions will provide long-awaited insight into the economic contribution of Canada's not-for-profit sector.

The Canada Survey of Giving, Volunteering and Participating (formerly the National Survey of Giving, Volunteering and Participating) will permit regular surveys on these activities. Up to now, this surveying was done on an intermittent basis. In addition, more detailed analysis will be done on the 2001 Survey.

The National Survey of Voluntary Organisations will be carried out from 2003 to 2005 and will tell us more about who we are. It is the first large-scale survey of voluntary organizations' operations in Canada.

AWARENESS

The VSI has produced various "how to" tools designed to increase organizations' ability to do communications work. For example, the paper entitled "Telling Our Story" describes what works (telling the stories of people) and what doesn't work (articulating the needs of an organization, rather than people) when seeking media coverage.

What's to Come – A national awareness campaign on the voluntary sector and its organizations will begin in spring and summer of 2003. It will contribute to recognition and understanding within the sector, and more generally, of what makes up the sector and how important it is in communities.

INFORMATION MANAGEMENT/INFORMATION TECHNOLOGY

Information management and technology are increasingly important to voluntary organizations, but are often difficult and costly to purchase and maintain, especially for small and medium-sized groups. An environmental scan and national survey of technology needs have identified what the sector requires most in terms of technology.

What's to Come – Four programs to be developed in 2003 are:

- a portal for the voluntary sector;
- a virtual store, that uses bulk buying, to help not-for-profit organizations buy technology products at better prices;
- a centralized funders' directory; and
- locally based resource centres to provide technology support.

PART 3:
IMPROVING REGULATIONS

The federal laws and regulations governing not-for-profit organizations and registered charities are cumbersome, often outdated, and difficult to understand. Improving the regulatory environment and making it easier for voluntary sector organizations to comply with rules have been an important focus of the VSI's work.

Results to date include:

- Form T3010 – the annual information sheet that all voluntary organizations must complete for the Canada Customs and Revenue Agency – has been shortened significantly; the new, easier form is particularly welcomed by small organizations.

- The important issue of directors' liability has been studied as part of the review of the *Canada Corporations Act*. Several research papers and a handbook on liability have been developed, but the search for solutions to the fundamental liability issues continues.

- Efforts to simplify the process for applying for government funding have begun, and will continue.

- The Code of Good Practice on Funding recommends ways to create more stable funding.

What's to Come – Final recommendations of the Joint Regulatory Table, scheduled for release in early 2003, will focus on:

- changing the rules so that qualifying for and maintaining charitable status will be a more transparent process, i.e., more open, easier to understand and follow;

- recommending a more accessible process to appeal decisions on charitable status;

- instituting less harsh penalties for organizations that unintentionally do not follow the rules;

- developing models for alternative ways to govern and support registered charities, providing more accessible ways to seek information and guidance;

- elaborating models for providing oversight of the voluntary sector;

- clarifying the rules for organization-run businesses that will help groups follow the rules while diversifying their funding base; and

- amending laws regarding incorporation that will help not-for-profit organizations govern themselves more effectively.

Two large issues not yet addressed jointly in the VSI are advocacy and the question of charitable definition. They remain as challenges in the relationship between the voluntary sector and the federal government. The following questions illustrate this situation.

- How can we clarify the rules on what the Canada Customs and Revenue Agency regards as permissible advocacy activity by charitable organizations?

- Which organizations should have access to the benefits of the *Income Tax Act*, for example, the ability to issue tax receipts?

PART 4:
STRENGTHENING THE SECTOR THROUGH
GREATER INCLUSION AND NETWORKING

Some of the VSI's major accomplishments resulted from how the work was carried out and what happened along the way, as much as from the formal work.

NETWORKING

The origins of the VSI lay with sector organizations beginning to work collaboratively at a national level. The many meetings and consultations held during the Accord process and other VSI-related areas promoted opportunities for sector networking. They have also created and strengthened networks, especially regional and local networks, that are resulting – and will result – in more collaboration within the voluntary sector.

To date, 11 networks and coalitions have formed a Canadian Federation of Voluntary Sector Networks. Similar networks and coalitions of sector organizations are taking shape in communities and provinces and territories across Canada, and the VSI has provided opportunities to foster and facilitate this growing strength. More than 140 engagement sessions and consultations were held in almost 40 different towns and cities, in every province and territory, usually led by local organizations. This approach validated and demonstrated the potential strength and capacity of the voluntary sector, to the sector as well as to others.

DIVERSITY

As the VSI has allowed the voluntary sector to better develop its own infrastructure and see its own strength, the sector has increased its inclusiveness by reinforcing diversity. Throughout the consultation process, the voluntary sector has learned to recognize and value its diversity and take concrete steps to achieve greater inclusion of groups often left at the margins. Two under-represented groups came together as reference groups to the VSI Secretariat: the National Reference Group of Visible Minority Organizations, and the Aboriginal Reference Group, including leaders of voluntary organizations within Aboriginal communities, including First Nations.

The VSI commissioned research on visible minorities, small organizations, and gender issues. In addition, a video entitled *It's Our Way*, sponsored by the Joint Awareness Table, depicts voluntary activity in Aboriginal communities to educate both mainstream and Aboriginal communities themselves.

What's to Come – The emerging National Aboriginal Voluntary Organization, along with other developing networks, will bring more and stronger voices into public policy debates and strengthen their involvement within the voluntary sector. Creating and strengthening linkages across the sector will be an important on-going priority.
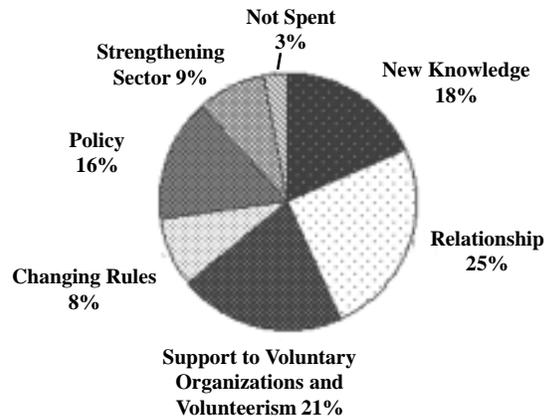
CONCLUSION

The Voluntary Sector Steering Group takes great pride in the work accomplished by so many individuals, organizations, and government departments over the past two years of the VSI. This work has yielded an impressive array of information, resources, and tools that voluntary sector organizations can use to enhance their operations as they carry out the important work of improving the quality of life for all Canadians.

APPENDICES

1. HOW VSI MONEY IS BEING SPENT

The funds allocated by the Voluntary Sector Initiative are being spent over five years. The pie chart (at right) shows what the funds are being spent on. As much as possible, the VSI's work is being carried out by organizations that are part of the voluntary sector. Final reports on expenditures will be produced as the remaining three years unfold.

Pie chart labels:
- Not Spent 3%
- Strengthening Sector 9%
- Policy 16%
- Changing Rules 8%
- Support to Voluntary Organizations and Volunteerism 21%
- Relationship 25%
- New Knowledge 18%

Strengthening Sector includes the work of the VSI Secretariat, the Advocacy Working Group, the Working Group on Financing, and consultations/focus groups held by all Tables.

Policy includes development of materials for policy workshops, the Policy Internships and Fellowships, the Code of Good Practice on Policy Dialogue, and projects under Sectoral Involvement in Departmental Policy Development that focus on policy.

Changing Rules includes the work of the Joint Regulatory Table (except for consultations) and the work on directors' liability within the review of the *Canada Corporations Act*.

Support to Voluntary Organizations and Volunteerism includes the International Year of Volunteers, the Human Resources Support Services, and the National Learning Initiative.

Relationship includes the development of the Accord (except for consultations and field tests), the work of the Voluntary Sector Task Force, and projects under Sectoral Involvement in Departmental Policy Development that focus on building the relationship between government and the sector.

New Knowledge includes the National Survey of Giving, Participating and Volunteering along with analysis and dissemination of results; the National Survey of Voluntary Organizations; dissemination of research conducted as part of the VSI; and plans for the Canada Survey of Giving, Participating and Volunteering.

2.   THE MEMBERS OF THE VOLUNTARY SECTOR STEERING GROUP

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Volunteer Canada

Marlene Deboisbriand *
United Way of Canada

Colleen Ford *
Canadian Parks and Recreation Association

Bonnie Greene *
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Lynne Toupin ●
Canadian Co-operative Association

Michael Weil ◆
YMCA of Montreal

Megan Williams *●
Canadian Conference of the Arts

Bob Wyatt ●
The Muttart Foundation

* Member of the Voluntary Sector Roundtable
● Denotes Co-Chair/Chair of VSI Joint Table/Working Group
◆ Member of Joint Coordinating Committee
v Appointed as volunteer
a Representative of a Reference Group

The position indicated was that in effect at the time of their appointment to the Voluntary Sector Steering Group.

Several have changed positions over the course of their tenure.

Accord:

D *The Accord* (December 2001):

The purpose of the Accord is to strengthen the ability of both the voluntary sector and the Government of Canada to better serve Canadians. The Accord represents a public commitment to more open, transparent, consistent, and collaborative ways of working together.

D *A Code of Good Practice on Funding* (Fall 2002):

The goal of this Code is to improve collaboration between the Government of Canada and the voluntary sector on funding policies and practices.

D *A Code of Good Practice on Policy Dialogue* (Fall 2002):

The goal of this Code is to improve collaboration between the two parties on policy dialogue, and to strengthen the capacity of voluntary sector organizations to carry out their mission and contribute to the public good.

D *Voluntary Sector-Federal Government Accord: Approaches to Ratification or Endorsement* (Summer 2001): This paper explores some potential models or approaches that could be used in the voluntary sector to obtain the ratification or endorsement of a draft Accord.

D *A Federal Government-Voluntary Sector Accord: Implications for Canada's Voluntary Sector* (February 2001): This paper explores the implications of a Canadian accord for the voluntary sector.

D *The Development of an Accord Between the Government of Canada and the Voluntary Sector: A Project Outline* (August 4, 2000) (SECOR): This paper looks at: the different steps to be undertaken to develop the Accord Project; ways to engage in the consultation process; and the key success factors and potential obstacles leading to the development of an Accord.

D *Accord Development Outline* (August 2000) (PriceWaterhouseCoopers): This paper suggests how voluntary sector organizations could lead the development of such an Accord.

D *Accord Consultation Document Outline* (August 2000) (Public Policy Forum): This paper reflects three primary messages, gained from a series of interviews and group discussions regarding the proposed draft Accord consultations.

D *Consulting the Community: A Report on the First Round of Cross-Canada Consultations on An Accord Between the Government of Canada and the Voluntary Sector* (June 2001)

D *Voluntary Sector Initiative Accord Consultation with Business* (September 2001)

D *Voluntary Sector Initiative Accord Consultation with Labour* (September 2001)

D *National Aboriginal Organizations, Draft Accord Analysis: Summary Report of the Opinions of Some National Aboriginal Organizations in Canada on the Voluntary Sector Draft Accord* (October 2001) (prepared by the Voluntary Sector Task Force)

D *Host Organizations Conference* (November 2001) (evaluation and assessment of the Accord consultation process)

D *Expanding the Dialogue – Round 2: Overview Report of the September/October 2001 Consultations of An Accord Between the Government of Canada and the Voluntary Sector* (November 2001)

D *Building Relationships: Using Good Practices as a Catalyst* (June 2002) Joint Accord Table Focus Groups on the Draft Codes of Good Practice, Facilitators' Report

D Documents
V Videos
P Programs
O Other

Strengthening the Sector

Communications

▣ VSI Website (Joint)
The VSI website is the electronic source for all VSI information.   *http://www.vsi-isbc.ca*

▣ Updates
Twelve newsletters were produced and distributed to individuals and sector organizations.

▣ Presentation on the Voluntary Sector Initiative (PowerPoint presentation) (updated September 2002): This overview of the beginnings of the VSI and its components gives facts about the voluntary sector and looks at the VSI's accomplishments.

Research

▣ Public Opinion Research on the Voluntary Sector (October 2001)
Public Opinion Research on the Voluntary Sector (March 2002)
The Voluntary Sector Task Force commissioned these two surveys of Canadian public opinion on the voluntary sector and the government's efforts to support volunteerism and civic participation in Canada.

▣ Managing at the Margins – Gender Issues in the Canadian Voluntary Sector (March 2002): This paper outlines some of the challenges faced by women volunteers and paid staff in the voluntary sector, identifies research gaps, and makes recommendations.

▣ Caught in the Middle: What small, Non-Profit Organizations Need to Survive and Flourish (December 2001): Commissioned by the VSI to learn more about small, non-profit, community-based organizations, this paper was used as the basis for discussion with small organizations about their needs and hopes.

▣ Visible Minority Communities in Canada (November 2001): This report gathers, consolidates, and documents available information on visible minority communities in Canada with specific reference to demographics, community institutions, and major issues.

▣ From Kitchen Tables to Joint Tables: A Joint Consultation and Engagement Framework for the Voluntary Sector Initiative, Joint Coordinating Committee (November 23 & 24, 2000): This paper describes the objectives, the strategic assumptions, and the guiding principles underpinning consultation and engagement in the VSI.

Reference Groups' Involvement

▣ Strategic Planning for Aboriginal Input (July 2001): This report describes the discussion, recommendations, and suggested approach to pursue for engaging and involving the Aboriginal community within the VSI.

▣ Reports on Visible Minority Community Consultations: Halifax, Montreal, London, Toronto, and Ottawa (Fall 2001) and Winnipeg, Saskatoon, Calgary, and Vancouver (Winter 2002)

Speeches

D **The Window is Open; What About the Door?** (February 19, 2002): A speech by Bob Wyatt, Executive Director, The Muttart Foundation and Voluntary Sector Co-Chair of the Joint Regulatory Table, to the Non-Profit Law Section, Canadian Bar Association, Alberta.

D **Remarks by Mr. Mel Cappe to the Arthur Kroeger College of Public Affairs Leadership Forum Awards Dinner** (February 6, 2002): A speech by Mr. Mel Cappe, Clerk of the Privy Council and Secretary to the Cabinet.

D **Ceremony Marking the Closing of the International Year of Volunteers** (December 5, 2001): A speech by The Hon. Lucienne Robillard, President of the Treasury Board, Minister responsible for Infrastructure, and Member of Parliament for Westmount-Ville-Marie.

D **FADOQ'S Presidents' Days** (October 17, 2001): A speech by The Hon. Lucienne Robillard.

D **CIVICUS 2001 World Assembly, Vancouver, B.C.** (August 20, 2001): A speech by The Hon. Lucienne Robillard.

D **Speaking Notes for the Honourable Hedy Fry, Secretary of State (Status of Women) (Multiculturalism) for the 2001 Canadian Forum on Volunteerism** (August 16, 2001): A speech by The Hon. Hedy Fry.

D **Telling Our Story – Communicating the Value of Philanthropy and the Voluntary Sector** (April 23, 2001): A speech by The Hon. Lucienne Robillard.

D **Strengthening Voluntary Sector/Government Relations in Canada** (October 21, 2000): A speech by Patrick Johnston, President and CEO, Canadian Centre for Philanthropy.

D **A Meeting with the Coalition of National Voluntary Organizations** (September 1, 2000): A speech by The Hon. Lucienne Robillard.

D **A Meeting with the Voluntary Sector** (June 9, 2000): A speech by The Hon. Lucienne Robillard.

D **Voluntary Sector** (April 13, 2000): A speech by The Hon. Lucienne Robillard.

D **A Meeting with the Coalition of National Voluntary Organizations** (September 17, 1999): A speech by Mr. Ian Green, Deputy Secretary to the Cabinet, to the 1999 National Conference and AGM of the Coalition of National Voluntary Organizations.

D **Building a New Relationship with the Voluntary Sector** (May 31, 1999): A speech by Mel Cappe, Clerk of the Privy Council and Secretary to the Cabinet.

D Documents
V Videos
P Programs
O Other

Information Management / Information Technology (IM/IT)

Recommended Programs:

P A Funding Exchange

P Portal for the Voluntary Sector

P Changing Funding Practices

P Technology Awareness Campaign

P Access to IT Planning Hardware and Software, Training and Technical Support

D *Information Management/Information Technology and Voluntary Sector – Environmental Scan* (March 2001): This environmental scan specified the research hypotheses for the needs analysis and provided the initial view of key issues framing the program to be developed by the IM/IT Joint Table, plus a literature review.

D *Technology Needs of the Canadian Voluntary Sector* (January 2002): This national survey identified the sector's needs and priorities in relation to technology and, through analyzing the results, noted options for potential funding.

D *Strengthening Voluntary Sector Capacity Through Technology: Report of the Joint Table on Information Management/Information Technology of the Voluntary Sector Initiative* (September 2002): This final report identifies six main challenges facing voluntary sector organizations and the sector in making more effective use of IM/IT and recommends a strategy to respond to these challenges.

Awareness

P National Campaign to Increase Understanding and Awareness of the Voluntary Sector

D *Telling Our Story – Communicating the Value of Philanthropy and the Voluntary Sector* (April 2001): This is an open-ended exploration of communications themes for the voluntary sector to consider.

D *An Opinion Survey of Decision-Makers in Canada on Key Issues Dealing With the Role of the Voluntary Sector in Canadian Society* (August 2002) (EKOS Research Associates Inc.)

V *It's Our Way* (August 2002): A video that features a view of the voluntary sector from the perspective of First Nations, Metis and Inuit peoples.

D *Awareness Joint Table Consultation Report* (March 2002)

D *Scan of Research on Public Attitudes Towards the Voluntary Sector – Final Report* (February 2001).

Volunteerism

P The Canada Volunteerism Initiative (CVI)

The CVI will establish three national centres within existing voluntary sector organizations to oversee delivery of programs.

P Information, Capacity-Building and Awareness Centre will administer the following four programs: Information Clearinghouse; Outreach and Awareness; Networking, Training, and Capacity-Building; and Local Network Administration.

P Community Support Centre will administer the Pilot and Demonstration Projects (developing and testing new and innovative methods and models for encouraging, sustaining, and supporting volunteerism).

P Knowledge Development Centre will administer the Research and Analysis program.

D *The Canada Volunteerism Initiative Report* (December 2001): This report recommended: the establishment of regionally based, nationally connected volunteer resources networks; dedicated resources to analysis and research; a multi-year campaign of promotion, recognition, and outreach; and a forum to lead the involvement of all sectors in this work.

D *Environmental Scan on Volunteering in Canada* (May 2001): This environmental scan reviews existing research on public attitudes and opinions about volunteering, reports on the results of a small number of key informant interviews and outlines current strengths in volunteering, suggests areas for improvement, and identifies current gaps in information about volunteering.

D *Sharing Your Views on Proposals for the National Volunteerism Initiative* (November 2001): This is a summary report on National Volunteerism Initiative (NVI) consultations.

D Documents
V Videos
P Programs
O Other

Human Resources

P Human Resources Support Services

Human Resources Support Services will produce the following deliverables:

- an awareness campaign targeted at boards of directors about the importance and benefits of investing in human resource (HR) capacity;

- a web-based inventory of best HR practices and policies;

- community-based pilots on peer learning networks for skills and knowledge development in HR;

- negotiated partnerships with other sectors to access training for voluntary sector staff at minimal or no cost;

- an inventory of existing retirement and benefit plans and a strategy to improve access to benefits plans;

- a typology of organizations and their HR needs; and,

- a plan to address the sector's long-term HR needs.

P National Learning Initiative

The National Learning Initiative develops a common set of skills/competencies needed by senior people in organizations.

D ***Backgrounder on Trends in the Changing Workforce and Workplace*** (August 2001): This paper provides an overview of the trends that will have an impact on the workforce and workplace, both in the short and long term.

D ***Backgrounder on the Literature on (Paid) Human Resources in the Canadian Voluntary Sector*** (August 2001): This is a literature review and analysis done on human resources in the Canadian voluntary sector since 1997.

D ***Results from a Web Survey on the Voluntary Sector as an Employer of Choice*** (Fall 2001): This on-line survey was designed to provide information for a think tank to develop an action plan to help the voluntary sector become more of an employer that attracts, optimizes, and holds top talent.

D ***Human Resources: Our Future – Proceeding of the Human Resources Think Tank*** (October 2001): The Think Tank brought together 20 individuals from the private, public, and voluntary sector to assist the Capacity Joint Table's Human Resources Committees in determining where to invest funds.

New Knowledge

P **National Survey of Voluntary Organizations (NSVO)**

The NSVO is a first-time, large-scale survey of voluntary organizations' operations in Canada.

P **National/Canada Survey of Giving, Volunteering and Participating (N/CSGVP)**

The National/Canada Survey of Giving, Volunteering and Participating provides information and analysis on individuals' patterns of contributing time and/or money.

P **Satellite Account**

Statistics Canada's Satellite Account of Non-profit Institutions and Volunteering provides information on the size, scope, and nature of the not-for-profit sector.

D Documents
V Videos
P Programs
O Other

Advocacy

D *The Sound of Citizens' Voices* (September 2002):

This position paper offers some new thinking and perspectives on advocacy in order to move quickly toward innovative and much-needed changes.

D *Backgrounder on Advocacy from the Advocacy Working Group (AWG)* (April 2001):
This backgrounder provides a brief overview of the sector's concerns with regard to advocacy and the definition of charity.

D *Regulation of Advocacy in the Voluntary Sector: Current Challenges and Some Responses* (January 2002): This paper provides a background and context on the issue of advocacy from the perspective of the voluntary sector and establishes a framework for further discussion.

D *The Sound of Citizens' Voices* (July 2002): This report of the February/March 2002 consultations presents the clear message given by participants, i.e., strengthen the content and language of the January position paper, provide concrete and specific recommendations for action, and continue to raise awareness of the issue in the sector, government, and with the general public.

Policy

D *Toolkit on Policy Development*

The Capacity Joint Table is preparing a toolkit on policy development that will be a primarily on-line resource.

P **Sectoral Involvement in Departmental Policy Development (SIDPD)**

SIDPD funds projects that will enhance policy development in departments and strengthen the voluntary sector's capacity to contribute to departmental policy development.

D *The Code of Good Practice on Policy Dialogue*

P **Policy Internships and Fellowships (PIAF)**

PIAF allows people from government to work in the voluntary sector for up to one year, and vice versa.

D *VSI Policy Workshops* (March 2002): This is a report on the VSI policy workshops that had two objectives: provide voluntary sector representatives with a basic understanding of the federal policy-making process; and facilitate the representatives' sharing and developing of tools and strategies for contributing to policy-making.

Financing/Funding

D ***Guide to Improving Funding Practices Between the Government of Canada and the Voluntary Sector*** (January 2002):

This tool was developed by the Voluntary Sector Project Office of the Treasury Board Secretariat to bring greater clarity, consistency, and transparency to the funding relationship between the two sectors.

D ***Financial Management and Accountability Toolkit*** (Fall 2002):

A toolkit on financial management and accountability is being developed; it will be a primarily on-line resource.

D ***Sources and Mechanisms of Funding and Their Impact on Sustainability of Voluntary Organizations*** (Fall 2002):

This project studied the impact of funding sources and mechanisms on the long-term sustainability of Canadian voluntary sector organizations.

D ***The Code of Good Practice on Funding***

D ***Strategic Investment Approach*** (June 2002): This paper discusses Strategic Investment – an innovative approach that uses existing funding mechanisms to strengthen the capacity of organizations in specific areas and enhance their ability to work collaboratively with federal government departments and agencies on agreed-upon goals over a specified period of time.

D ***Inventory of Financial Management and Accountability Tools and Resources*** (Fall 2001)

D ***Supporting Organizational Infrastructure in the Voluntary Sector*** (May 2002): This background paper identifies the cumulative effect of shifts in funding patterns as well as some of the implications for voluntary organizations.

D ***An Overview of the Funding of Canada's Voluntary Sector*** (September 2001): This review was undertaken to bring together the "in the field" experience of voluntary sector organizations with the literature on non-profit funding; it provides an overview of today's situation and proposes priorities for future action.

D ***Inventory of Alternate Financing Models*** (April 2002)

D ■ ***Think Tank on Innovation in Financing*** (October 2001): Representatives from the voluntary and private sectors came together to explore the issue of new and innovative ideas for financing the voluntary sector. A Summary of Discussions at the think tank is available.

D Documents
V Videos
P Programs
O Other

Changing the Rules

D *Improving the Regulatory Environment for the Charitable Sector – Interim Recommendations* (August 7, 2002):

This is a discussion document for a series of consultations on recommendations to improve the legislative and regulatory environment in which the sector operates.

D
- *Location of Registered Charities in Canada*
- *Institutional Reform: Regulatory Control over Universities, Schools and Hospitals*
- *Accessibility and Transparency: Applicants that are not Registered*
- *Administrative Tribunals and Their Composition*
- *Determination of "Charitable Status" – Court vs. Tribunals*
- *The Power of Administrative Tribunal to Grant Injunctive Relief*
- *Oral versus Paper Hearing*
- *Tax Court versus Federal Court*
- *Fees and Costs in the Tax Court and Federal Court of Canada*
- *Who Should Impose Intermediate Sanctions?*
- *Procedural Fairness and the Compliance Program*
- *Financial Penalties on Directors, Officers, and Employees*

P *Canada Corporations Act Review:* **Directors' Liability**

D *Draft Framework for a New Not-for-Profit Corporations Act and Reform of the Canada Corporations Act, Discussion Issues for a New Not-for-Profit Corporations Act. A Supplement to the Draft Framework for a New Not-for-Profit Corporations Act* (March 2002): This framework paper sets out draft proposals for a new Not-for-Profit Corporations Act.

D *A Study of the Liabilities Facing Directors and Officers of Non-Profit Corporations in Canada* (March 2001): This study comprises a review of legislation in Canada imposing liability on directors and officers of non-profit organizations.

D *Vicarious Liability in the Non-Profit Sector* (January 2002): This report attempts to outline the nature of the challenges faced by for-profit entities, and to suggest some legal and policy options for dealing with them.

D *Primer for Directors of Not-for-profit Corporations* (Handbook) (forthcoming) This primer is designed to help directors do a good job, as well as protect themselves from potential claims arising from their actions or decisions.

4. TIMELINE FOR FUTURE ACTIVITIES AND EVENTS

■ March 2003 – Joint Regulatory Table recommendations

■ Spring/Summer 2003 – National Awareness Campaign starts

■ 2003 – Human Resources Support Services

■ 2003 – Information Management/Information Technology projects; policy toolkit; financing toolkit

■ 2003 – Canada Volunteerism Initiative Centres open

■ 2003-2005 – National Survey of Voluntary Organizations

■ 2004 – launch of evaluation of SIDPD (Sectoral Involvement in Departmental Policy Development) projects

■ 2004 – evaluation of the VSI starts

5.   ABOUT THE VOLUNTARY SECTOR

The sector employs more than 1.3 million people in communities across Canada; and 6.5 million Canadians volunteer their time to a voluntary sector organization. The sector consists of approximately 180,000 not-for-profit organizations (of which about 80,000 are registered charities). These organizations touch virtually all aspects of our society from social justice, human rights, environment, health and faith, to arts and culture, international development, sports and recreation. They deliver services critical to Canadians, advocate for common causes, support economic and community development in Canada and worldwide, and raise funds. The sector has been instrumental in the development of most of the public services we rely on today as essential aspects of a caring society; for example, schools, hospitals, assistance to the disadvantaged, and care for children in need all began as volunteer initiatives. Voluntary sector organizations bring their knowledge, expertise, and compassion gained from working with communities and individuals to public policy debates and identify priorities to governments.