



BC
NON-PROFIT
NETWORK



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STRETCHED THIN

2025 STATE OF BC'S NON-PROFIT SECTOR

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Insights to strengthen and sustain British Columbia's Non-Profit Sector

The State of BC's Non-Profit Sector Report series reveals the trends, challenges, and opportunities shaping over 32,000 non-profits across our province—highlighting areas where strategic investment can make the greatest impact.

Find all the reports at
thevantagepoint.ca/sector-reports/





Vantage Point is a British Columbia non-profit that serves other BC non-profits. With our main office on the unceded traditional lands of the xʷməθkʷəy̓əm (Musqueam), Skwxwú7mesh (Squamish), and Səlíl̓wətaʔ (Tsleil-Waututh) peoples, Vantage Point's work spans throughout the province across the lands of over 200 distinct Indigenous communities.

Contributors

Over 500 respondents from different-sized organizations that are contributing to stronger and healthier communities across BC every day generously provided their experiences and insights through the survey, making this data possible.

Members of a working group supported the design phase, reviewing and improving the draft survey questions:

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Thank you to this working group and to everyone who supported this work, completed and/or shared the survey.

About Vantage Point and the BC Non-Profit Network

Vantage Point's vision is an inclusive community, where non-profits can achieve their fullest potential and drive sustainable change throughout the province and beyond.

We promote connected communities by nurturing a strong non-profit sector. We achieve this by delivering high-quality training, resources, and advocacy that builds connection, creativity, and impact in the sector.



brought together by  **vantage point**

Vantage Point convenes the BC Non-Profit Network (BCNN). Launched in 2024, the BCNN is a broad, sectoral group that includes provincial and umbrella organizations, community non-profits and charities, and other entities supporting public benefit in BC. These organizations come together to address issues that impact all non-profits in British Columbia.

Over its first two years, the BCNN's purpose is to strengthen the sector's voice with government, build connections across the sector, enable shared research, amplify sector visibility, and advance collective advocacy.

Find out more at thevantagepoint.ca

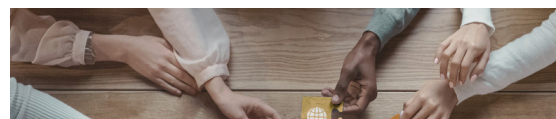




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1.0 Executive Summary

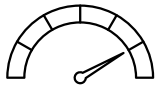
Across BC, community halls, food banks, arts groups, and health centres are serving more people than ever – but with stagnant dollars and strained teams.

British Columbia's non-profit sector represents 377,000 jobs and employs a diverse workforce that is 65% female, 31% immigrants, 6% Indigenous, and 34% visible minorities (Imagine Canada, 2025). In 2023, the sector contributed \$31.8B to our province's GDP (Imagine Canada, 2025). Non-profits are essential in our province.

The 2025 State of BC's Non-Profit Sector Survey reveals a sector stretched thin—striving to both maintain sustainability and meet rising client and community demand during uncertain times. This survey was conducted during a period marked by many changes in the federal government, U.S. tariffs threats, an unstable economy, and continued rising costs that impact both non-profits and the communities they serve.

Our province's non-profits currently operate in a challenging fiscal environment, with over four in five survey respondents experiencing increased expenses across all types, and nearly two in five reporting decreased revenues. Staff salaries and wages, the greatest program expense for non-profits, are the top increased expense, followed by administrative and operational expenses. Alarming, one in three (33%) respondents' sustainability is at risk beyond the next 12 months; organizations with operating budgets under \$1M are especially vulnerable.

More than 500 non-profit leaders across the province shared their perspectives, highlighting three interconnected themes:



Rising demand with growing complexity of needs and severity of issues

Nearly 9 in 10 organizations reported that community demand for programs, services, or activities exceeds their capacity to deliver. Not only are more people and issues requiring non-profits' response, but the needs and issues themselves are becoming increasingly complex and severe. Even as the number of clients served or engaged by the sector overall appears to be rising, the data suggests this is made possible by stretching existing staff and program capacities, as investments in the sector have not kept pace with growing demand.



Organizations are striving to pivot and respond during increasingly difficult times

Non-profits are directing time and financial resources into fund development, funder reporting, planning, and governance, likely to cope with rising costs and stagnant revenues, among other pressures explored in this report. These investments reflect both necessity and adaptability: organizations are actively strengthening internal capacities to weather challenging times while also working to stabilize their fragile funding. Without reliable revenues, non-profits are forced to redirect time and money from direct community work, programs, services, and activities, to pivot and respond to current challenges.



Supporting the people who deliver programs is both a pressure point and a priority

Recruitment and retention challenges persist in the non-profit sector due to wage gaps with other sectors, a lack of candidates with the necessary skills for specific roles, especially among rural-serving organizations, and workforce burnout and stress. These challenges continue to limit capacity across the sector. While staffing levels have remained static overall, larger non-profits are more likely to invest in competitive wages and mental health and wellbeing supports, whereas smaller organizations often cannot, leaving their teams stretched and their sustainability at risk.

Community needs are substantial and growing. A strong non-profit sector is essential to contribute to healthier and better connected communities across BC.

Our report's recommendations call for sustained investment in this vital sector through flexible, unrestricted, multi-year funding, and support for core operations and the essential non-profit workforce.

Without these investments, organizations will struggle to keep pace with the growing complexity and severity of community needs, and the commitment and perseverance demonstrated by BC's non-profits will not be enough to carry them forward. The consequences of this will be felt by all British Columbians, directly or indirectly.

• NON-PROFIT VOICES • • • • •

- “As operational and programming costs continue to rise, the stagnation or reduction in available arts funding has placed increased pressure on our team to do more with less—**stretching capacity, limiting growth, and putting beloved programs at risk.** This financial uncertainty has made long-term planning difficult, yet it has also reinforced our commitment to innovation, collaboration, and advocacy for the value of arts and culture in our region.”



British Columbia's Non-Profit Sector

Based on current data available in British Columbia as of September 2025

WITH 5.7M PEOPLE IN BC, THERE ARE:

31,900+ NON-PROFIT ORGANIZATIONS IN BC¹

OF THESE ORGANIZATIONS...

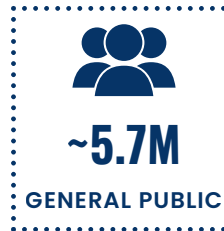


CHARITIES
(12,301 NPO)

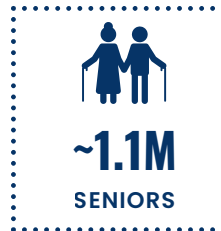


PRIVATE/PUBLIC
FOUNDATIONS (1,842 NPO)

TOP POPULATION GROUPS SERVED²



3 NPOS PER 1000
BRITISH COLUMBIANS



11 NPOS PER 1000
SENIORS

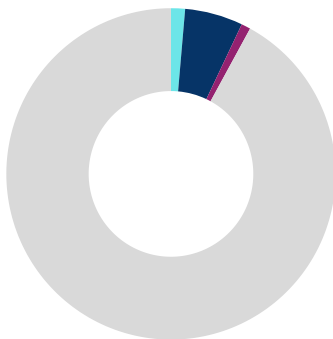


13 NPOS PER 1000
CHILDREN & YOUTH

ECONOMIC CONTRIBUTIONS (2023)

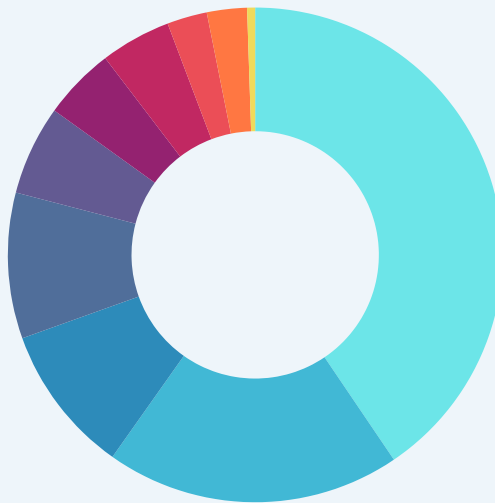
The most recent estimate of BC's nominal GDP is CAD \$304 billion, of which non-profits contributed \$31.8 billion.

- Community NPOs⁵
- Government NPOs
- Other Non-Profits
- Other Sectors



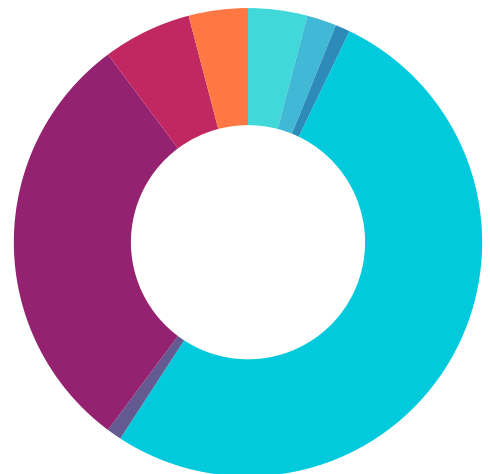
SUBSECTORS BY % OF WHOLE SECTOR⁶

- Sports and recreation
- Religion
- Grantmaking, fundraising, voluntarism promotion
- Social services and Health
- Development and housing
- Education and research
- Business and professional associations and unions
- Other areas of activity not elsewhere classified
- Law, advocacy, and politics
- Environment



SUBSECTORS BY PROPORTION OF GDP⁷

- Sports and recreation
- Religion
- Grantmaking, fundraising, voluntarism promotion
- Social services and Health
- Development and housing
- Education and research
- Business and professional associations and unions
- Other areas of activity not elsewhere classified



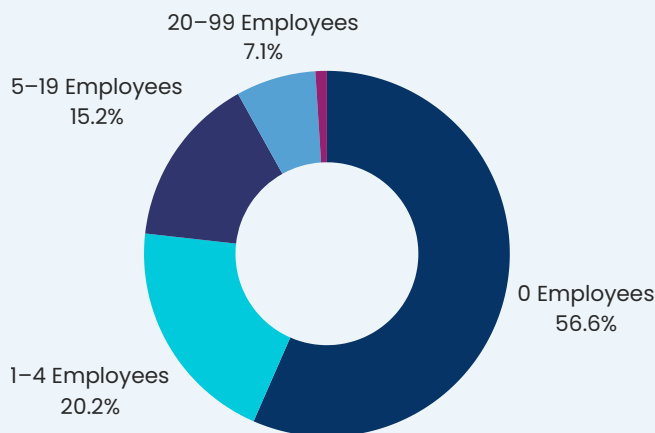
EMPLOYMENT AND VOLUNTEERISM

NON-PROFITS EMPLOY 377,000 WORKERS IN BC⁸

NON-GOVERNMENT NON-PROFITS EMPLOY 128,000 WORKERS (34%)⁹

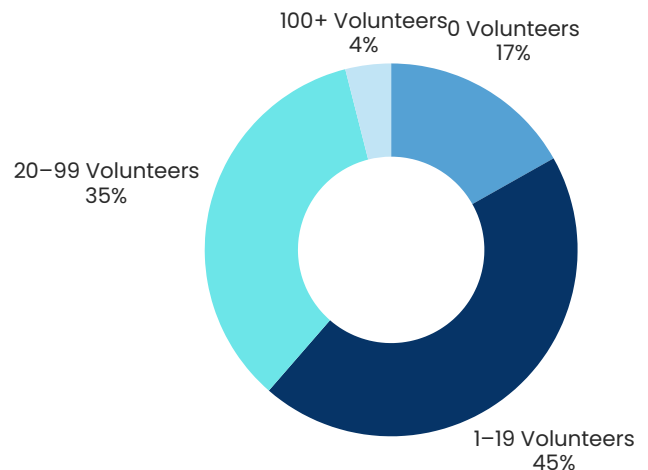
NUMBER OF EMPLOYEES¹⁰

56% of Non-Profits in BC have NO Employees

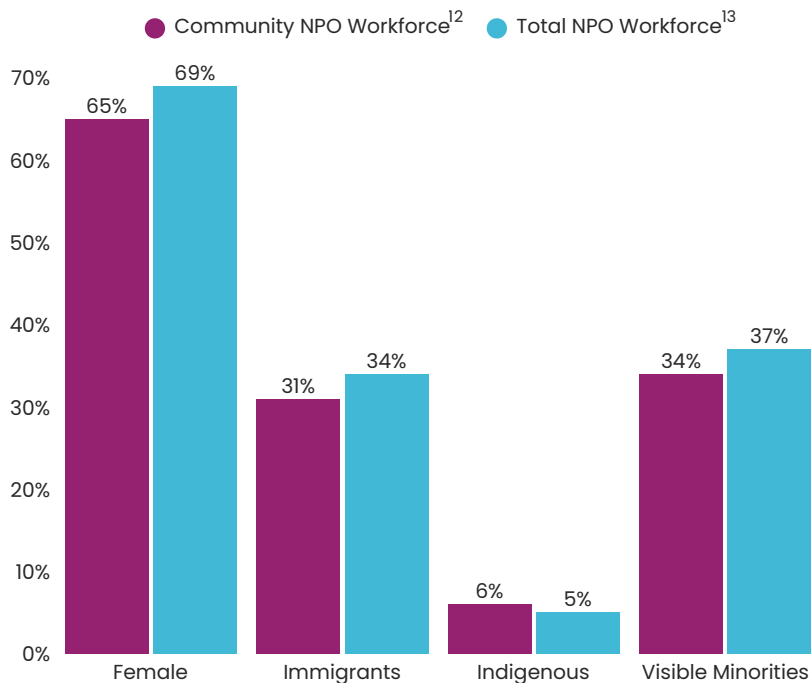


NUMBER OF VOLUNTEERS¹¹

Each Non-Profit engages an average of 27 volunteers



WORKFORCE DEMOGRAPHICS (TOTAL NPO VS COMMUNITY NPOS)



SOURCES

1. [OrgBook BC](#).
2. Author's calculations from [Table 33-10-0800-01](#) and [Population Estimates & Projections for British Columbia](#).
3. Author's calculations from [List of charities and other qualified donees](#).
4. Author's calculations from [Table 36-10-0616-01](#) and [2023-2024 Departmental Results Report](#).
5. [Statistics Canada](#) considers "community non-profits" as household-serving organizations that are independent of government and not classified to the business sector in standard measures.
6. [Table 33-10-0753-01](#).
7. [Table 36-10-0614-01](#).
8. [Table 36-10-0615-01](#).
9. [Table 36-10-0615-01](#).
10. [Table 33-10-0753-01](#).
11. [Table 33-10-0795-01](#).
12. Author's calculations from [Table 36-10-0651-01](#).
13. Author's calculations from [Table 36-10-0651-01](#).

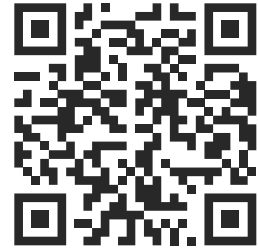
2.0 About the 2025 State of BC's Non-Profit Sector Survey

Over 500 non-profit leaders across the province, each representing one organization, participated in this year's State of BC's Non-Profit Sector Survey. The survey, conducted June 23 to July 30, 2025, included 32 questions (see Appendix) and received valid responses ranging from the mid 400s to 500s, depending on the question.

The purpose of this report is to provide high-quality data that helps us to understand how BC's non-profits are faring, both collectively and at the individual organizational level. Annual State of the Sector reports help to address the sector's long-standing data gaps, creating information that enables policy makers and other interested parties to make better, evidence-based decisions in support of BC's non-profits.

You are welcome to utilize, adapt, and build on this material for non-commercial purposes, with proper attribution to Vantage Point and the BC Non-Profit Network (BCNN). Any modifications must be clearly noted.

[Click here or scan the code to access all of the State of BC's Non-Profit Sector reports](#)



Past Reports

Vantage Point first launched the State of BC's Non-Profit Sector Survey in 2020, during the COVID-19 pandemic, to understand how BC's non-profits were being impacted. Since then, the purpose of this annual survey has been to surface both the challenges and successes of the non-profit sector, while capturing directional trends across six key organizational areas.

Impact

The State of BC's Non-Profit Sector reports have contributed to several key sector advancements, including the creation of the [Recovery and Resiliency Fund](#) – a historic \$30M investment from the Province of BC in 2022 to support organizations disproportionately affected by the COVID-19 pandemic.

Non-profits across the province have used findings from past reports to strengthen grant applications, advocate for core and administrative funding, and educate interest-holders, supporters, and boards about the realities facing the sector.

2.1 Research Focus: Directional Change Across Organizational Areas

The survey's primary research focus is to track directional change across six organizational areas: Revenues, Expenses, Programs/Services/Activities, Human Resources, Operations, and Governance. Respondents were asked if subcomponents within each area have decreased, stayed the same, or increased over the previous 12 months.

Supplemental questions in each area further surface the challenges, opportunities, and context within which organizations operate. The survey gathers organizational characteristics to support disaggregated analysis that highlights differences and similarities across types of non-profits. This report includes some disaggregated data insights from questions explored during analysis and writing. These insights are non-exhaustive.

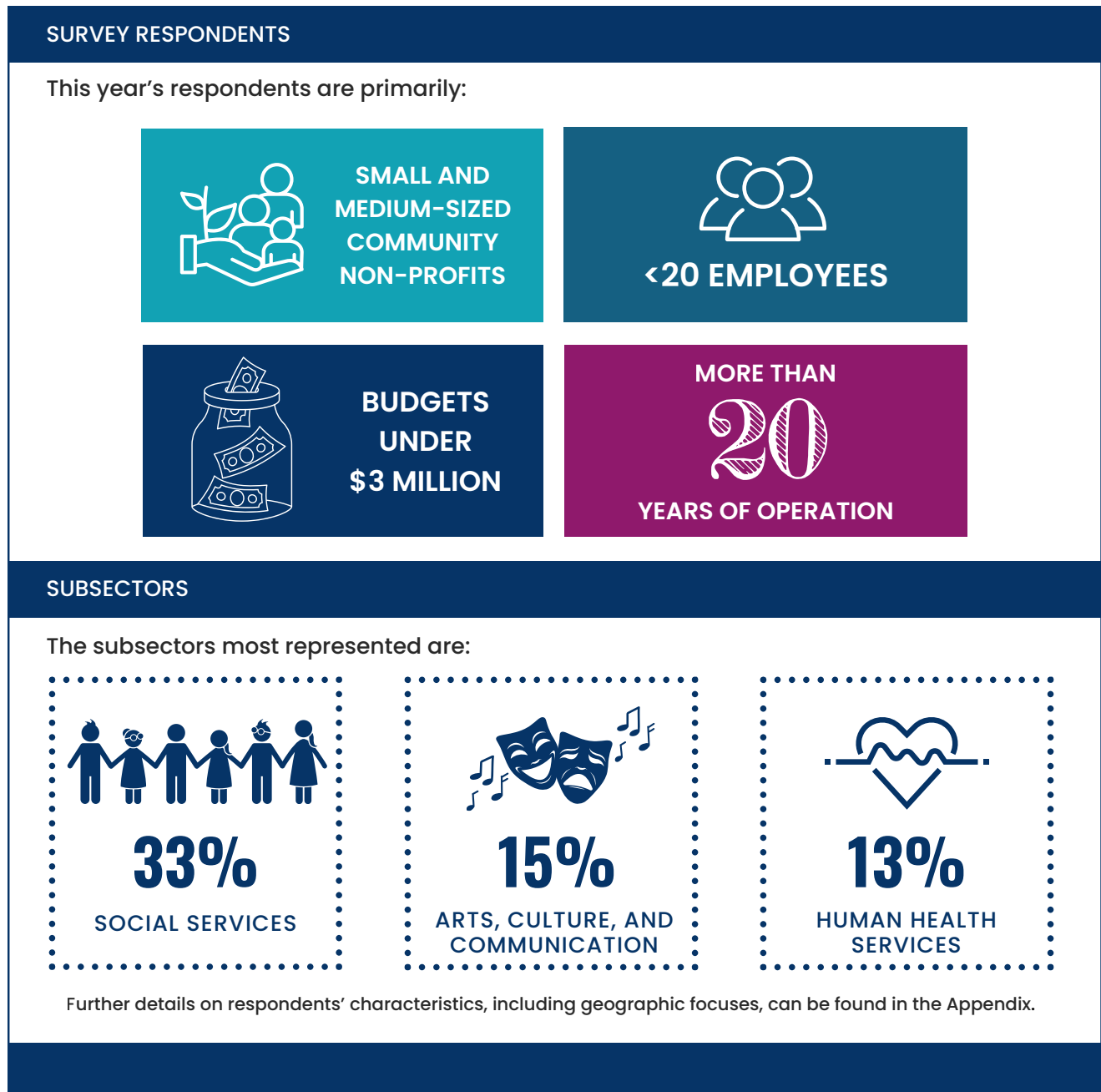
We welcome readers to explore the data further through the [online interactive dashboards](#) available late October 2025.

2.2 Respondents Overview

The 2025 Survey used an open sampling method, meaning participation was open to any organization that chose to respond. While results are, therefore, not statistically representative of the entire BC non-profit sector, they reflect systematically collected and analyzed insights and trends among a diverse set of BC non-profits, 68% (360 organizations) of which hold registered charitable status.

Figure 1

Organizational Profile of Respondents



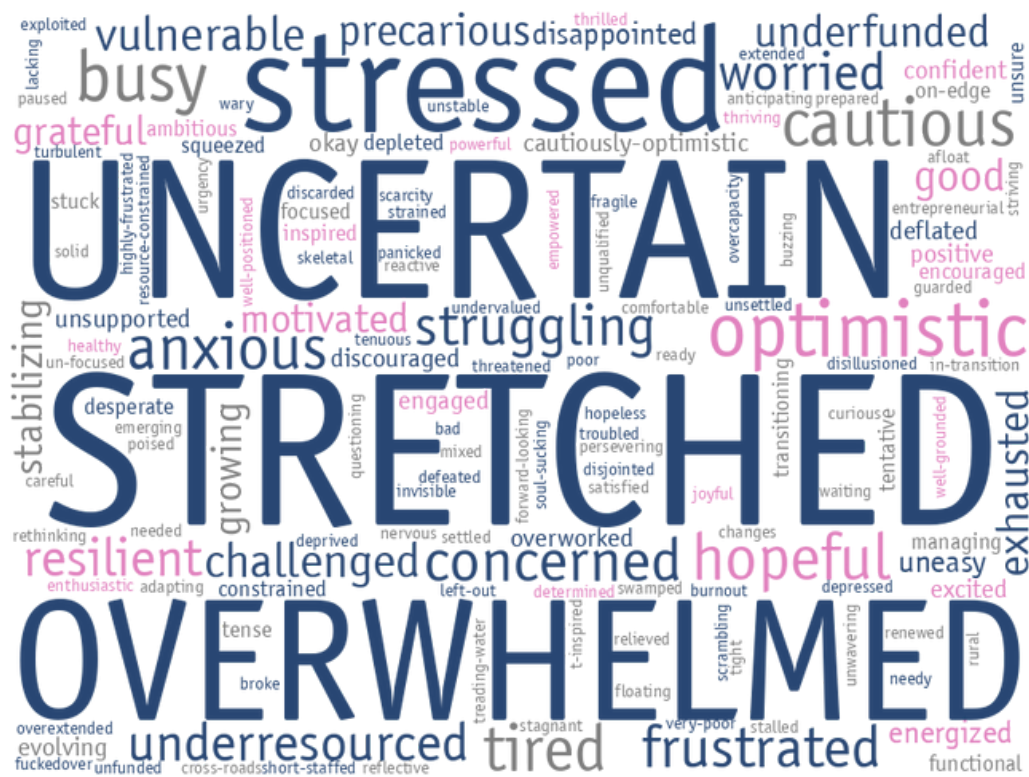
3.0 Introduction

This year's survey was circulated during an extraordinary period, both for non-profits and other sectors alike. Economic uncertainty, rapid technological change, and political turbulence—including U.S. tariff threats and the formation of a new federal government—were some of the key events that took place in the half year prior to survey circulation.

At the start of the survey, respondents are asked: "How is your organization currently feeling?" Their answers provide context for interpreting the quantitative results, and are expressed in the word cloud below.

Figure 2

Word Cloud: How is Your Organization Currently Feeling?



If one word could describe the mood of BC's non-profits this year, it would be 'stretched'.

The top three words (in full caps) are: STRETCHED, UNCERTAIN, and OVERWHELMED. Overall, from 475 valid responses, 57% of response words conveyed negative sentiment (blue), 25% conveyed neutral sentiment (grey), and 18% conveyed positive sentiment (pink).

When asked to identify the main driver of these feelings, respondents overwhelmingly referenced “funding.”

Just how “stretched,” “uncertain,” or “overwhelmed” do organizations feel?

One indicator of how an organization is faring is its confidence in its future, assessed through a simple question about how long it expects to remain sustainable.

Responses show that almost a third of respondents are confident about their organization’s sustainability for only the next 12 months (27% of respondents), and an additional 6% are currently considering dissolution or trying to avoid dissolution. In other words, one in three respondents’ (33%) sustainability is vulnerable past 12 months.

NON-PROFIT VOICES

“A number of factors contribute to feel [sic] “stretched”, **changing economic conditions related to the uncertainty surrounding trade and its implications, and statements by government actors indicating the need to shift priorities to these areas, cause some degree or worry, not to mention the practical strain of increased costs.** We have seen declining numbers of volunteers, a more challenging labour market, and yet, increased demand for our services.”



Figure 3

A Closer Look at Sustainability Vulnerability



BY AVAILABILITY OF MULTI-YEAR FUNDING

80%

Among organizations that have no sustainability concerns, 80% of respondents have at least a few multi-year funding agreements. In contrast, **among the most vulnerable organizations, 80% or more have no multi-year funding agreements**, or only a few (in the survey, a few was defined as 1-20% of funding agreements).

3.1 How to Read This Report

This section shares how to read the numbers without losing sight of the bigger story. Examining the changes occurring within different organizational areas helps us understand both the pressure points and opportunities impacting non-profits in BC.

To summarize the changes among all the respondents, a summary trend is produced.

What is a summary trend?

A summary trend uses the average to show the overall direction of responses. It combines all answers into a single number, so it doesn't reflect individual differences or the most common answer.

For example, if many respondents say their revenues slightly decreased (2) but a few say they significantly increased (5), the average could be closer to no change (3) even though "slightly decreased" was the most common response.

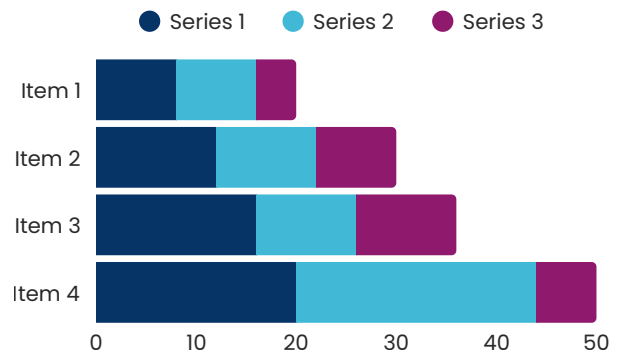
In this report, summary trends are shown on a scale:

- 1 = Significantly decreased
- 2 = Slightly decreased
- 3 = No change
- 4 = Slightly increased
- 5 = Significantly increased

Stacked Bar Charts

Showing both the average and the most common response to a survey question helps give a clearer picture of the results. While the average quantifies an overall indicator, it does not capture the full range and spread of respondents' experiences.

Stacked bar charts visualize the respective share or proportions of respondents that fall into each of the six response categories (i.e., significantly decreased, slightly decreased, stayed the same, slightly increased, significantly increased, and not applicable).



Access interactive stacked bar charts of our data here.



3.2 At A Glance: Key Summary Trends

Survey respondents were asked to consider six organizational areas and to indicate how, in their organization over the previous 12 months, subcomponents in each area have changed.

REVENUES | EXPENSES | PROGRAMS/SERVICES/ACTIVITIES | HUMAN RESOURCES | OPERATIONS | GOVERNANCE

The tables below highlight the ten highest and lowest averages across all organizational subcomponents surveyed. These averages are based on the 1–5 scale, where 1 = Significantly decreased and 5 = Significantly increased.

An average below 3 typically means more respondents reported decreases (1s and 2s) than increases (4s and 5s) and no change combined.

An average above 3 typically means more respondents reported increases than decreases and no change combined. The closer the number is to 1, the more respondents reported experiencing significant decreases. The closer the number is to 5, the more respondents reported experiencing significant increases. These are called the strongest increased or strongest decreased summary trends.

The strongest increased summary trends are in Programs/Services/Activities | Expenses | Operations

Table 1
Increased Summary Trends

10 Strongest Increased Summary Trends	
Programs/Services/Activities: Client/community demand	4.29
Programs/Services/Activities: Clients' needs complexity/Issue severity	4.27
Expenses: Total expenses	4.06
Programs/Services/Activities: Number of clients served/engaged	4.05
Operations: Investment in fund development	4.02
Expenses: Staff salaries and wages	3.99
Expenses: Administrative/operational	3.97
Expenses: Programs/services/activities	3.91
Programs/Services/Activities: Investment in relationship-building, outreach, collaborations	3.9
Operations: Investment in reporting	3.89

The strongest decreased summary trends are in Revenues

Table 2
Decreased Summary Trends

10 Strongest Decreased Summary Trends	
Revenues: Federal government	2.45
Revenues: Corporation/ business	2.65
Revenues: Financial reserves	2.65
Revenues: Provincial government	2.78
Revenues: Municipal government/regional districts	2.79
Revenues: Individual donations	2.85
Revenues: Foundations	2.91
Revenues: Goods/services sales, fees, special events	2.92
Revenues: Total revenues	3
Revenues: Investment income	3.02



IN PROGRAMS/SERVICES/ACTIVITIES

For the majority of respondents, client/community demand has gone up, and both clients' needs and the issues that non-profits are facing have become more complex and severe. These two subcomponents show the strongest increased trend among all subcomponents surveyed.



Respondents also reported strong increases in time and/or resource investments in relationship-building, outreach, and collaboration, as well as the number of clients served or engaged—though these increases are not as pronounced as the rise in client and community demand.



IN EXPENSES

For the majority of respondents, total expenses have increased. The expense categories with the strongest increases are staff salaries and wages, administrative/operational expenses, and programs/services/activities expenses.



IN OPERATIONS

Most organizations are investing more time and/or resources in fund development, and over half of respondents are investing more in external reporting to funders/government.



IN REVENUES

For all revenue sources surveyed, among respondents who have that specific source, the majority (65%-85% of respondents) reported that revenue amounts have either not changed or decreased, pulling the summary trend below 3.00. Despite this, the trend for total revenues is flat overall. Aside from the 20% of respondents whose total revenues are unchanged, there is nearly an even split among respondents who reported decreases (36% of respondents) and those who reported increases (42% of respondents).

Put simply, some organizations lost revenue and some gained revenue, but due to the weights and how the average is calculated, those changes offset each other to produce an average of no change (3.00).

A recurring theme in written responses is the anticipation of “looming cuts” in the near future.

The next section expands on these initial insights by presenting the summary trends across all six organizational areas that were surveyed.

• NON-PROFIT VOICES •

“Externally, the cuts across the public sector provincially and federally are making us nervous as we have a significant amount of federal and provincial funding.”



• NON-PROFIT VOICES •

“Funding and earned revenue [...] not keeping pace with increasing costs and inflation mean[s] we are **having to do more with less** and to dip into reserve funding in order to sustain our programming levels.”



3.3 Changes Within Organizational Areas

Each section below summarizes the key changes within an organizational area.

3.3.1 Expenses (n=438)

For the majority of respondents, total expenses have increased.

Staff salaries and wages, administrative/operational, and direct programs/services/activities costs were the subcomponents that increased for the largest proportion of respondents (73% or more).

Overall, across the board, costs have continued to rise.

Although BC's inflation has cooled to about 1.7% year-over-year as of July 2025 (BC Stats, 2025), the cumulative effect of high inflation in recent years means the cost to deliver programs, services and activities remains elevated. Respondents shared that:

- Total expenses rose on average (4.06; 84% reported an increase).
- Staff salaries and wages showed the strongest upward trend (3.99; 75% reported an increase), followed closely by administrative and operational costs (3.97; 75% reported an increase). Staff salaries are the greatest program expense for most non-profits.
- The rising trend in administrative/operational expenses is reflected in respondents' investments in multiple subcomponents within the Operations and Governance areas (see Section 3.3.5 below).
- Even unexpected expenses climbed for nearly one-third of respondents (3.56; 31% reported an increase), though this category did not apply to another third. The most common reasons for unexpected expenses shared by respondents are related to: 1) facilities and building maintenance, repairs, and renovations; 2) technology and cybersecurity maintenance and upgrades; and 3) fees associated with legal, insurance, security, and compliance needs.

Is the increased trend in staff salaries and wages expenses an indicator that non-profits are paying their staff more?

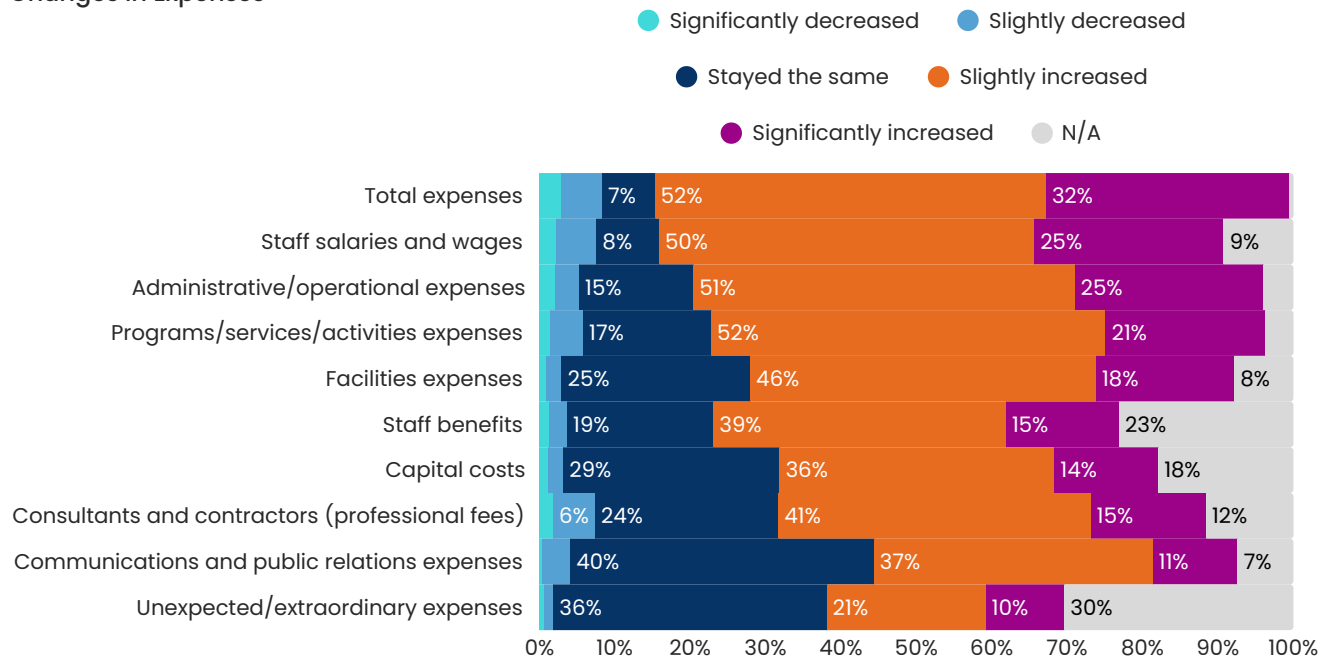
This year's Canadian Nonprofit Sector Salary and Benefits Report confirms that compensation has risen at an average rate of 5.1% to 7.1% per year (Charity Village, 2025).

Among our survey's respondents, the subcomponent of staff salaries and wages levels in the Human Resources area showed a slightly increased trend (3.67; 61% reported an increase), suggesting that BC's non-profits are paying their staff higher wages and salaries.

Prioritizing staff salaries and wages is not surprising as our survey's results also show that lower pay compared to public and private sectors is the most common factor impacting staff recruitment and retention (see Theme III in Section 4.3.1). Organizations are under pressure to increase salaries and wages to maintain staffing and ensure staff remain in place to respond to the higher demand for programs, services, and activities from community.

Figure 4

Changes in Expenses



3.3.2 Revenues (n=456)

In stark contrast to rising client demand and costs, revenues remain flat overall, with significant declines in certain sources.

On average, total revenues are flat (3.00). While 43% of respondents experienced increases in revenues, 36% experienced decreases, and 20% experienced no change. The remaining 1% responded "Not Applicable."

Government sources:

- Federal government funding had the strongest decreased trend (2.45; decreased for 30% of respondents), though this funding source was not applicable to 35% of respondents. Among respondents who do have this funding source, the decrease impacted nearly one in two organizations (decreased for 47% of respondents).
- Among respondents who receive provincial funding, 31% experienced decreases in the previous 12 months.
- Among respondents who receive municipal or regional district funding, 32% experienced decreases in the previous 12 months.

Other sources:

- For those who receive funding from corporations/businesses, approximately two in five (42%) experienced decreases. A similar proportion of respondents (37%) experienced decreases in individual donations. For those who receive funding from foundations, roughly a third (35%) experienced decreases. For those who have income-generating streams, revenues from this source increased for 33% of respondents.
- Investment income (interest earned from investments) was the revenue source most unchanged for respondents among all sources, (3.02; unchanged for 46% of respondents) though this source is not applicable to 39% of respondents.

Total Revenue: Who Experienced Increases or Decreases?

Among the 42% of respondents that experienced increased total revenue, 86% of those organizations reported increases in the number of clients served/engaged, and 72% also reported increases in staff salaries and wages levels. These findings imply that increased revenues are being invested into staffing in response to higher client and community demand.

Certain types of organizations were more likely to have experienced a decrease in their total revenue:



RURAL VS URBAN

Rural-serving organizations (serving communities with a population size of 29,999 or fewer) were slightly less likely than urban-serving organizations to experience decreases in total revenue (decreased for 34% vs. 37%). However, rural-serving organizations were more likely to have decreased foundation revenue (rural weighted average of 2.66 vs. urban weighted average of 3.02).



ORGANIZATIONAL AGE

Respondents with 50+ years of operations were least likely to experience decreases in total revenue (decreased for 25% of respondents), while newer organizations were more vulnerable to decreases: decreased for 43% of respondents that have 6-10 years of operations, and decreased for 41% of respondents that have 11-20 years of operations.

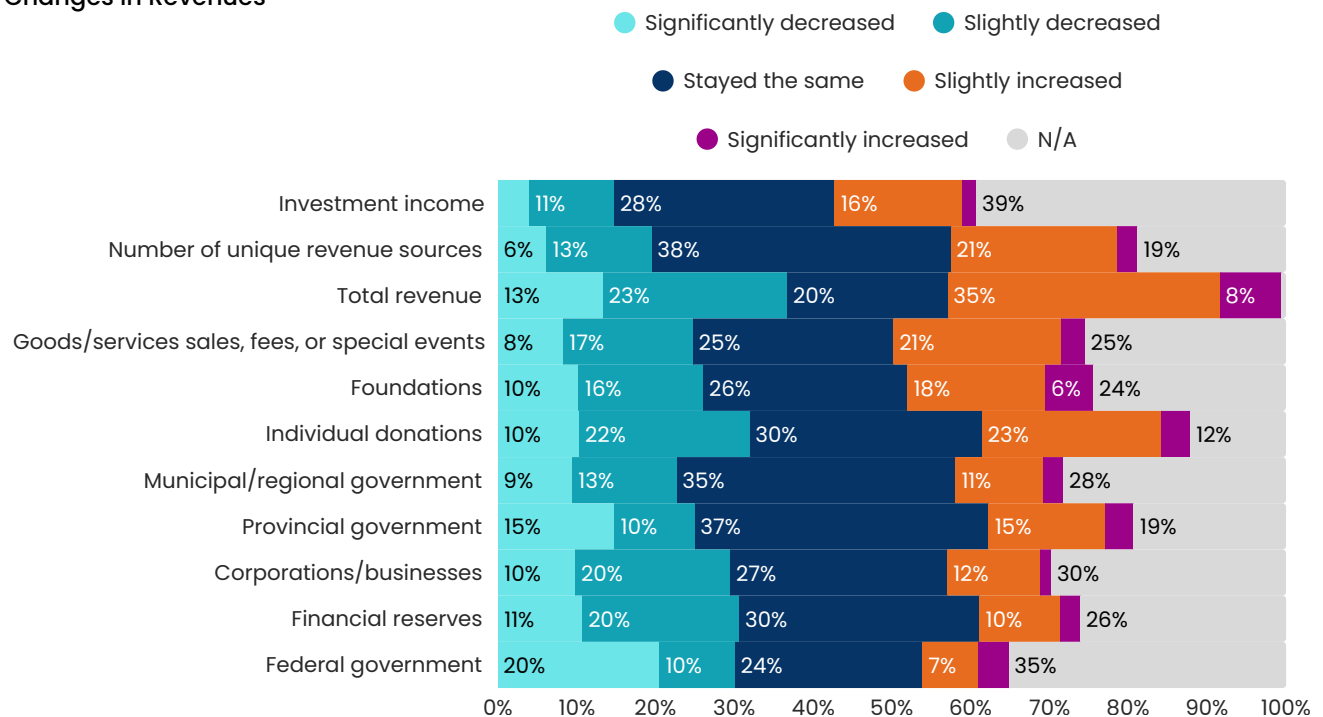


STAFF SIZE

Larger organizations showed greater resilience. Volunteer-run organizations were hardest hit by total revenue decreases (decreased for 45% of respondents), followed by those with 1-4 employees (decreased for 41% of respondents).

Figure 5

Changes in Revenues



3.3.3 Programs, Services, Activities (n=429)

Demand continues to rise sharply, both in volume and complexity. While respondents, on average, indicated an increase in the number of clients served or engaged, they reported an even stronger increase in the demand from their clients and communities.



CLIENT AND COMMUNITY DEMAND

Nearly 9 in 10 respondents reported demand for their programs, services, and activities exceeds their capacity to deliver. Client and community demand showed the strongest increased trend out of all subcomponents surveyed in this area (4.29; increased for 84% of respondents). Complexity of clients' needs and severity of issues facing respondents followed closely (4.27; increased for 77% of respondents). The number of clients served/engaged also increased, but not as strongly (4.05; increased for 78% of respondents).



HOURS OF PROGRAMS, SERVICES AND ACTIVITIES

Hours of programs, services, and activities have remained unchanged overall (3.44; unchanged for 44%, increased for 41%). This suggests that although a proportion of respondents have expanded their programs and services, a larger proportion are serving or engaging more clients without expanding their program and services.



CAPACITY TO RESPOND

A majority of respondents (85%) indicated that the demand for their programs, services, or activities is higher (44% of respondents) or much higher (41% of respondents) than their capacity to respond to the demand, signalling that organizations are feeling the pressure to expand their capacities.

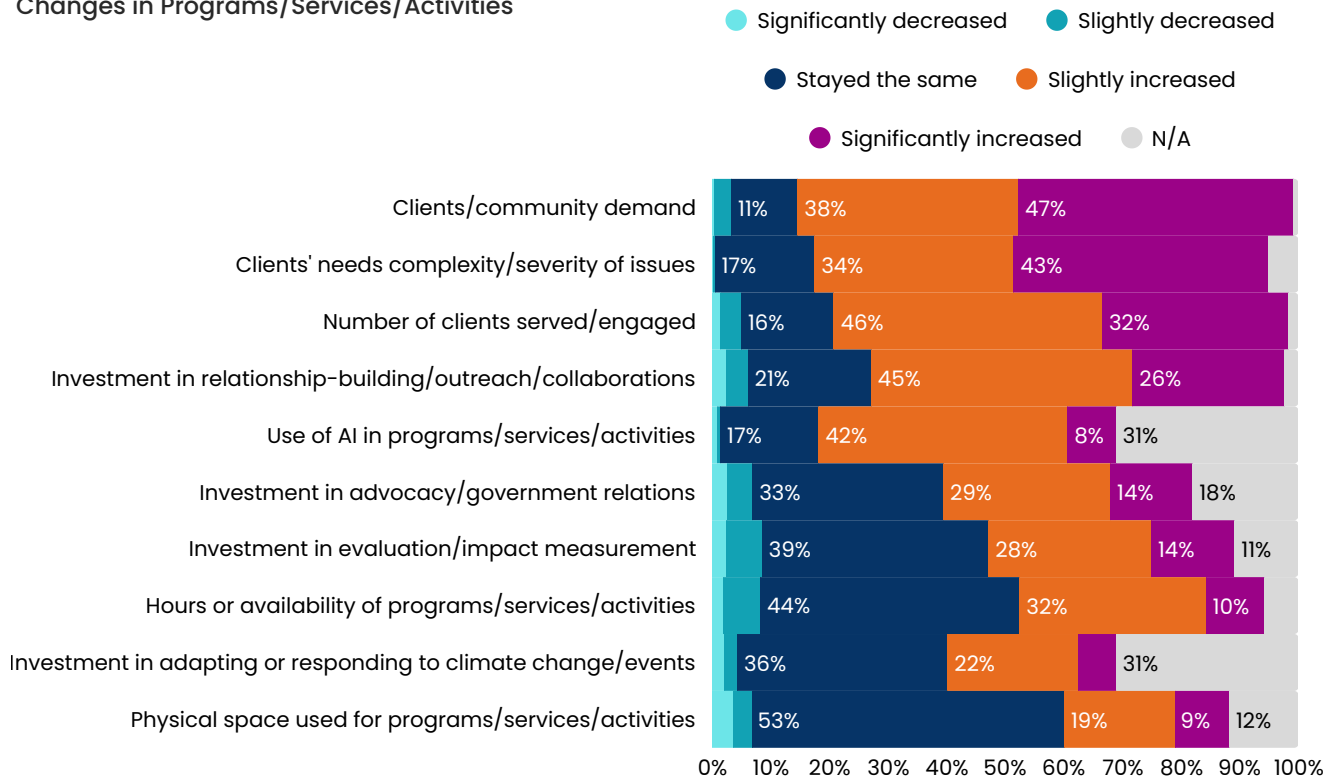
AI Across the Sector

The adoption and integration of artificial intelligence (AI) across non-profits in BC appears mixed. Approximately 50% of respondents reported increased AI usage for programs, services, and activities, while 31% reported that AI is not currently applicable for their program or service delivery. We do not know how AI is being used, its impact on organizational capacity, or why it is applicable to some organizations and not others. This remains an area of interest in future surveys.

Overall, organizations serving rural communities with a population size of 29,999 or fewer and urban-serving organizations reported similar summary trends across the Programs, Services, and Activities subcomponents. The only exception is in AI, where rural-serving organizations have a slightly weaker increased trend than urban-serving organizations (3.69 vs. 3.89), suggesting that adoption is slower among rural-serving non-profits.

Figure 6

Changes in Programs/Services/Activities



3.3.4 Human Resources (n=419)

Staffing and volunteer levels held steady, suggesting that most organizations have managed to maintain their workforce despite financial pressures. Respondents reported targeted investments in areas critical to recruitment and retention.



STAFFING LEVELS

Staffing levels have stayed the same overall, with slight pulls towards increases. The number of full-time staff stayed the same for 41% of respondents and increased for 28% of respondents. The number of part-time/temporary/contract/seasonal staff stayed the same for 38% of respondents and increased for 43% of respondents. A small proportion of respondents reported losing staff (16% lost full-time staff; 11% lost part-time/temporary/contract/seasonal staff).



STAFF MENTAL HEALTH AND SALARIES

Staff mental health and wellbeing (3.78; increased for 50% of respondents) and staff salaries and wage levels (3.67; increased for 60% of respondents) were priorities among staff recruitment and retention investments of time and/or resources. These two subcomponents were not applicable for volunteer-run organizations.

Staff Capacity is Mixed

The number of full-time staff, part-time/temporary/contract/seasonal staff, and volunteer levels have decreased or stayed the same for roughly 1 in 2 respondents.

Staff hours worked on average have also stayed the same for half of the respondents.

Some organizations have increased their staffing levels (28% of respondents increased full-time staffing levels, and 43% of respondents increased part-time/temporary/contract/seasonal staffing levels), but for a similar proportion of respondents, staffing levels have not changed (full-time staffing levels unchanged for 41% of respondents, and part-time/temporary/contract/seasonal staffing levels unchanged for 38%), suggesting that some non-profit workers are stretching to serve more community members with the same hours of program or service delivery. This could explain the feelings of being stretched and overwhelmed.

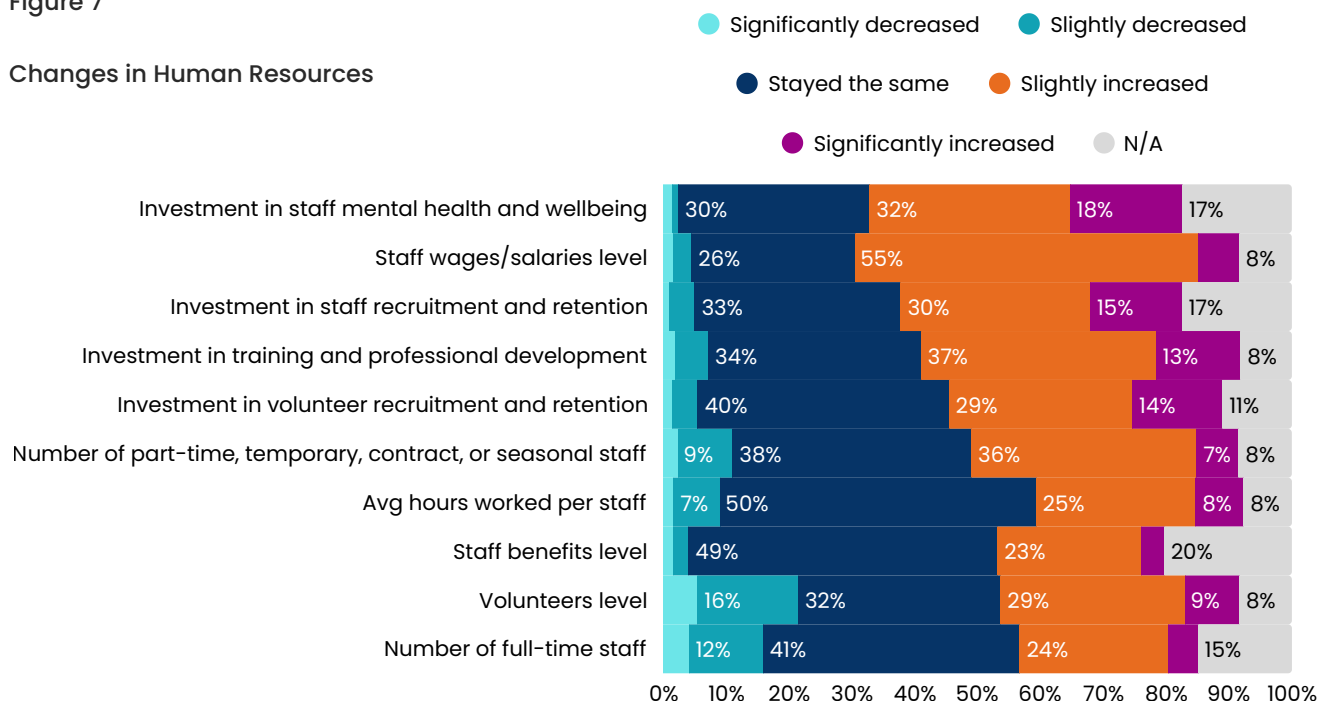
NON-PROFIT VOICES

"The demand for our services has increased rapidly, especially among seniors facing isolation and language barriers. However, available grant funding has not kept pace, leaving us without the financial support needed to meet this demand. [...] We lack a full-time paid staff member who can fully focus on program coordination and operations. Currently, we rely on part-time workers receiving minimal compensation, which makes it extremely difficult to sustain our work and plan ahead."



Figure 7

Changes in Human Resources



3.3.5 Operations & Governance (n= 413)

More than half of the respondents are making increased investments of time and/or resources in Operations & Governance subcomponents – an indicator that today’s organizations are strengthening their internal capacities.

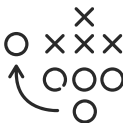
Note: Operations and Governance are separate organizational areas but presented together in this report to improve readability and report length.

Of the ten Operational & Governance subcomponents, nine have increased summary trends (3.54 to 4.02).



FUND DEVELOPMENT

Of all the surveyed subcomponents in the Operations and Governance area, the strongest increased trend is in fund development (4.02; increased for 71% of respondents). Investing in reporting to funders and government also increased significantly (3.89; increased for 62% of respondents). Likely, increased investment is in response to revenues not keeping up with expenses and increased demand and the need to look for new sources of revenue.

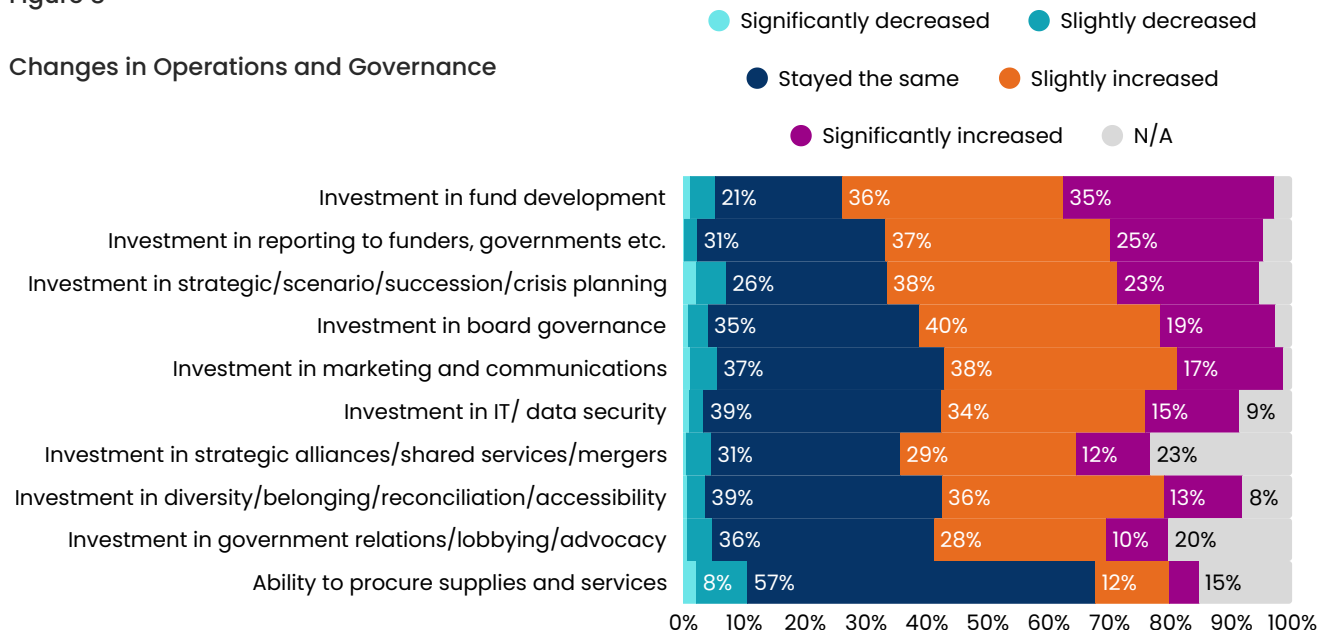


PLANNING AND GENERAL GOVERNANCE

The strongest increased trends in governance-related subcomponents are strategic/scenario/succession/crisis planning (3.79; increased for 61% of respondents), and general board governance (3.74; increased for 59% of respondents).

Overall, across all subcomponents surveyed, more respondents report increasing their investments than those that reported no change, while few reported decreases. The survey did not inquire about the immediate reasons behind these investments, during a time of flat revenues. More research is needed to understand why organizations are choosing to strengthen internal systems and core capacities and whether this is driven by the expectations and standards of interest parties such as staff, clients, board members, funders, or the public. It is reasonable to assume that increased investment in fund development is in response to usual revenues not keeping up with expenses and demands for increased services.

Figure 8



4.0 Key Themes

This section considers summary trends across all six organizational areas surveyed and examines them through the lens of three key themes that have emerged from both the qualitative and quantitative data.



Rising demand with growing complexity of needs and severity of issues



Organizations are striving to pivot and respond during increasingly difficult times



Supporting the people who deliver programs is both a pressure point and a priority

Throughout this section, you will find brackets with a weighted average indicating the summary trend, followed by the most common trend by proportion of respondents. This information describes the direction of the trend and the breakdown of how many respondents experienced either decreases, increases, or no change.

For example: Client/community demand (4.29; increased for 84% of respondents) — the weighted average is 4.29, which is an increased summary trend for this subcomponent, and 84% of respondents reported an increase.



4.1 Rising demand with growing complexity of needs and severity of issues

NON-PROFIT VOICES: DEMAND

“Demand for our programs has never been higher, and we are struggling to keep up. Every week, we see more families—many of them newcomers, low-income, or raising children with extra support needs—looking for connection, guidance, and safe spaces to grow.”

Non-profits across BC are facing compounding pressures: demand for programs and services is high, needs of clients are more complex, and community issues are increasingly severe. Organizational capacity is being stretched in unsustainable ways, forcing critical decisions about which services, programs, or activities to prioritize to meet increasing demands, often with the same or fewer resources, while also striving to protect staff wellbeing.

The trend of increased demand (4.29; increased for 84% of respondents) is so pervasive among respondents that disaggregating the data (breaking down by different respondent types) reveals little meaningful difference. The trend is widespread and shared broadly across all types of organizations.

While some organizations have successfully increased revenues to increase staffing, the overall trend for revenues and staffing levels are both flat. Non-profit workers are stretched even thinner to serve/engage with more clients (4.05; increased for 78% of respondents).

NON-PROFIT VOICES: COMPLEXITY AND SEVERITY OF DEMAND

“We are raising our profile in the community, other programs that have served similar clients have closed and we don’t have enough staff to meet the increasingly complex needs of our clients.”	“Increased complexity of seniors’ needs, including mental health and mobility issues, [are] requiring more resources per client.”	“Increasing complexity of substance use/addiction, persistent toxic drug supply, increasing waitlist for services and reduced staff capacity.”	“The severity of presentation of people we are serving has become way more complex.”
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The data suggests that demand is likely not being adequately met:

- Nearly nine in ten respondents indicated that demand exceeds their capacity. Even so, hours of programs/services/activities is overall unchanged (3.44; unchanged for 44% of respondents, increased for 41% of respondents).
- Staffing levels are overall unchanged: full-time staffing levels (3.15; unchanged for 41% of respondents), part-time/temporary/contract/seasonal staffing levels (3.39; unchanged for 38% of respondents), and volunteer levels (3.21; unchanged for 32% of respondents, increased for 28% of respondents), are falling short of matching the increased trends in demand (4.29; increased for 84% of respondents) and number of clients served (4.05; increased for 78% of respondents).

4.1.1 Factors Affecting Capacity to Meet Demand

NON-PROFIT VOICES: CAPACITY ENABLERS AND LIMITERS

“What’s helping us is the deep trust we’ve built in the community and a dedicated team that goes above and beyond. But what’s hindering us is serious: rising rent, inflation, and government contracts that consistently fund only a fraction of the true cost. We are at a tipping point—without increased investment, we simply cannot meet the growing need.” 	“Trusted community presence and adaptable, volunteer driven programs help us meet rising needs; however, rapid demand growth, scarce unrestricted funding, infrastructure gaps (data/evaluation, supervision), escalating facility costs, and burnout risk among a small core team hinder our ability to fully keep pace.” 
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Respondents submitted 358 open-ended comments on factors that enable or limit their capacity to meet demand.

By far, most responses ultimately circled back to the need for funding to expand staffing capacity.

As one respondent's success story illustrated plainly: "Demand was higher than capacity, but our two main funders just approved two additional staff to address the demand." Put simply, staffing capacity hinges on funding.

Other responses reveal two additional key capacity enablers, multi-year funding and collaboration, along with many more capacity limiters.

4.1.2 Capacity Enablers

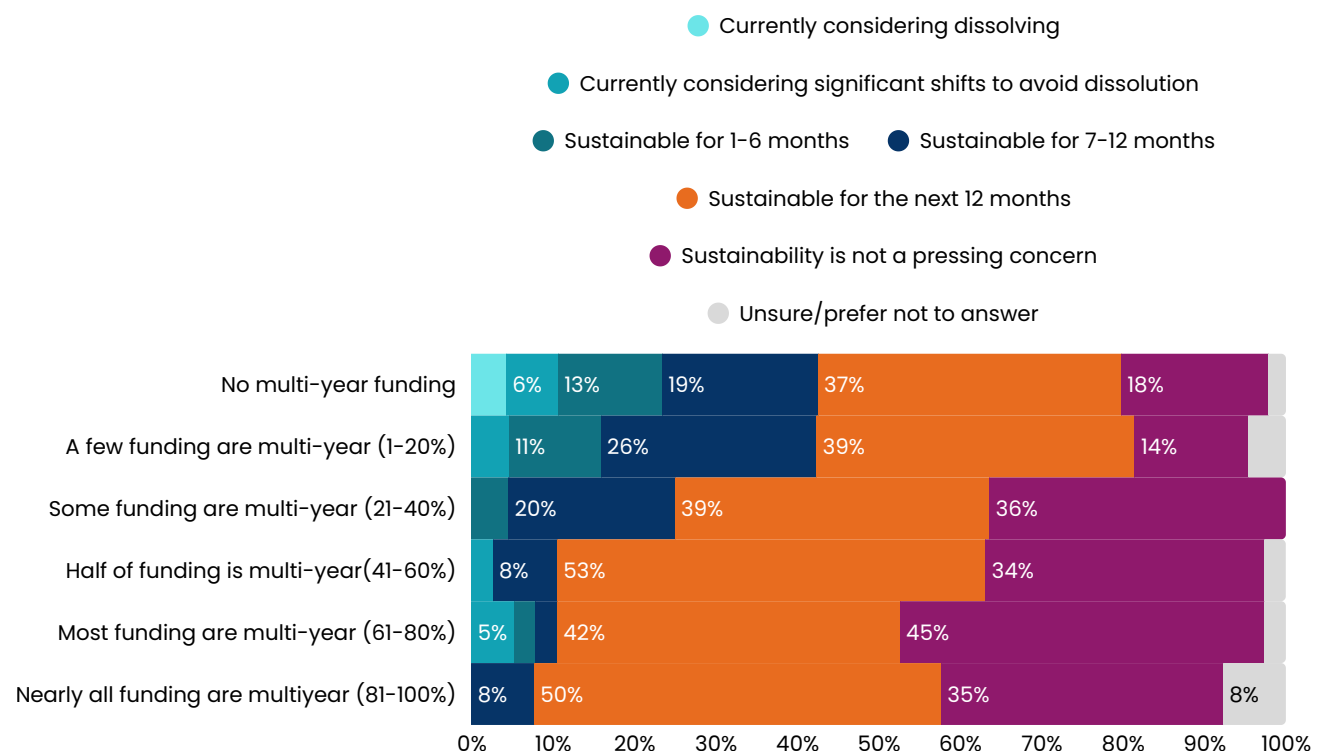
NON-PROFIT VOICES: MULTI-YEAR FUNDING

"Secure, multi-year funding that helps us retain key team members and build relationships is helping our ability to meet community demand."

.....

Figure 9

Closer Look: Sustainability and Multi-Year Funding



Why does multi-year funding matter?

Our data suggests that the presence of at least some or more multi-year funding agreements among a respondent's revenue sources is connected to confidence in their organization's sustainability. This chart illustrates that among respondents who have few or no multi-year funding agreements (top two rows), over 40% reported inability to sustain their organizations past 12 months (see portions of bars that are in shades of blue). In contrast, among respondents who have at least some to nearly all multi-year funding agreements (bottom four rows), at most 25% of respondents (portions of bars that are in shades of blue) reported inability to sustain their organizations past 12 months. Generally, when respondents have more multi-year funding agreements, it is more likely that they have greater confidence in their organizational sustainability. Of the 33% of respondents whose sustainability is at risk past 12 months, most have few or no multi-year funding.

NON-PROFIT VOICES: COLLABORATION



These quotes illustrate ways that organizations are collaborating with each other to reduce costs. In the area of Programs, Services, and Activities, respondents indicated that they are increasing their investments into relationship-building, outreach, and collaborations (3.90; increased for 78% of respondents). Interestingly, this is not reflected in the Operations & Governance subcomponent of investing in strategic alliances, shared services, or mergers, which remained relatively unchanged (3.63; increased for 41%). More research is needed to explore how these two different types of activities are carried out within organizations, and how they are linked to organizational capacity.

4.1.3 Capacity Limiters

The quotes below highlight how non-funding factors, particularly core administrative and operational capacity, can shape an organization's ability to meet demand

NON-PROFIT VOICES: OPERATIONS: LACK OF GENERAL ADMINISTRATIVE/OPERATIONS CAPACITY

"[We need support for] ...admin, advertising, promotion, accounting costs, time for fundraising, community collaboration."

"Without adequate administrative support, programs and services cannot be delivered effectively"

NON-PROFIT VOICES: OPERATIONS:
LACK OF PHYSICAL SPACE

“Significant increase in our rent has had an impact. Rent costs increased by 300% in late 2024, with another increase in June 2025.”

“Because we focus on a region where a lot of our program attendees are unhoused and therefore have limited internet access, our digital presence is insufficient to meet their needs for a schedule at a familiar location.”

“Our organization operates out of an aging building that cannot be renovated or expanded, leaving us constrained by significant space limitations.”

“We have a small one room location that cannot run more than one program at a time. This hinders our capacity to grow both our program offerings and our staffing to sustain a higher demand of services.”

“We need more space to operate, and that means we require more funding for admin costs like rent and insurance.”

NON-PROFIT VOICES: OPERATIONS:
LACK OF DATA AND EVALUATION

“[...] the lack of capacity for meaningful data collection further hinders our ability to accurately assess and respond to actual service demand.”

“There are limited funds for new programs, so we have to be sure that the programs are backed with data – but this all takes time and often seems to hold us back versus creating more programs.”

“We are so lean that we don't have the people to do the work to demonstrate that the staff work does have quantifiable impacts and produces important but sometimes less tangible deliverables.”

Respondents are sounding the alarm that demand from clients and communities is not only higher but also increasingly complex. Meeting this demand requires stable, predictable multi-year funding that directly supports staffing and operational capacity to expand existing programs or introduce new ones. This includes recruiting and retaining staff who are not only qualified and sufficient in number, but also well supported, not overburdened, and fairly compensated. Direct investments in operations enable organizations to strengthen administrative capacity, maintain adequate facilities, engage in data collection and evaluation, and perform other functions essential for meeting evolving community needs.



4.2 Organizations are striving to pivot and respond during increasingly difficult times

NON-PROFIT VOICES

“Consistent funding is always a challenge. As the ED, I have already sent out 70+ grants/outreach packages in 2025.”

Our survey results show that many organizations are investing more in their internal capacities, even as financial pressures mount. The most notable increase is in fund development (4.02; increased for 71% of respondents). Given that overall revenues remain flat, it is likely that most organizations are investing more staff time into fund development, diverting it from other needs.

It is unsurprising that non-profits are pivoting to fund development amidst increasingly difficult financial strain. With total expenses rising (4.06; increased for 84% of respondents) but total revenues remaining flat overall (3.00; decreased for 36% of respondents, increased for 42% of respondents), organizations are under pressure to intensify their search for funding and reinforce their operational supports. However, the number of unique revenue sources is also overall flat (3.01; unchanged for 38% of respondents), implying that more time and capacity are required for revenue sources to be successfully diversified.

NON-PROFIT VOICES

“There are rarely funds available to allocate to an Executive Director, who oversees everything, manages partnerships, typically acts as a bookkeeper, etc. I put in a significant amount of volunteer time.”



NON-PROFIT VOICES

“Trying to do more with less. Not enough funding to compensate for the overhead required to meet all of the reporting and accreditation requirements.”



Other Operational & Governance subcomponents also showed strong summary trend increases:

- **External reporting** (3.89; increased for 62% of respondents)
- **Planning** (3.79; increased for 61% of respondents)
- **Governance** (3.74; increased for 59% of respondents)

The trend of increased investment in governance warrants further investigation to better understand the reasoning behind the increases. Possibilities include non-profits bolstering their governance leadership to respond to mounting pressures within the sector, changing governance engagement, or an increase in resources for governance capacity-building.

Interestingly, despite the context of economic uncertainty and U.S. tariffs, the ability to procure supplies and services remained stable for most respondents (3.11; no change for 57% of respondents). The Operations & Governance subcomponent with the smallest increase is investments in government relations, lobbying, and advocacy (3.54; nonetheless still increased for 38% of respondents). However, this has a stronger increased trend among volunteer-run organizations with no employees (3.76; increased for 56% of respondents).

NON-PROFIT VOICES:

“We’ve noticed a marked increase in the amount of unsuccessful grant applications, which has resulted in us having to increase the number of submissions significantly in order to secure the necessary revenues to deliver services to the communities we serve.”

“We have to apply for countless grants to try to sustain service, which is incredibly time consuming – not only in the application, but then also in the specific tracking and reporting. Finding grants that allow for ongoing operational costs, rather than new or capital projects is also a challenge.”

“...Our ability to raise money to support our key operations [...] is a major change we are trying to navigate. Too much like chicken and egg – we are struggling to maintain current programs which leaves us struggling to try and develop alternative sources of revenue, which in turn leaves us without necessary staffing levels.”

Operations & Governance: Who is investing?

Medium-sized organizations with 5–19 employees and budgets within \$1M showed the strongest increased trends among the following Operations & Governance subcomponents:

- Fund development investments
- Board governance investments
- Marketing and communications investments
- Diversity, belonging, reconciliation, or accessibility investments

Subcomponents that stand out among certain respondent subgroups:

- Government relations, lobbying, advocacy investments: Volunteer-run organizations with budgets within \$100K
- Strategic alliances, shared services, or mergers investments: Organizations with budgets within \$300K
- IT/data security investments: Larger organizations with 100+ employees, especially those with more than \$10M
- Strategic/scenario/succession/crisis planning and reporting to funders/government: Larger organizations with 20–99 employees and budgets of \$3M–\$9.9M

With expenses high and revenues flat, non-profits are being forced to invest more in fund development, even as some funding sources may be harder to access. In particular, decreases were reported among the following:

- federal government (2.45; decreased for 47% of respondents who have this revenue source)
- corporations/businesses (2.65; decreased for 42% of respondents who have this revenue source)
- individual donations (2.85; decreased for 37% of respondents who have this revenue source)
- income-generated revenues such as goods/services sales, fees, or special events (2.92; decreased for 33% of respondents who have this revenue source)

Non-profits are therefore facing pressure on two fronts:

- externally, from rising client and community demand
- internally, from the need to strengthen operational and governance capacities in response

Our data shows that organizations are prioritizing planning, board governance, and fund development as key strategies to navigate these uncertain and challenging times.



4.3 Supporting the people who deliver programs is both a pressure point and a priority

Non-profits are investing in their people—staff and volunteers alike— with particular attention to salaries and wages, as well as mental health and wellbeing supports. These investments reflect both the urgency of addressing persistent recruitment and retention challenges and the recognition that staff and volunteers are essential to organizational capacity and ability to meet the rising demand for programs, services, and activities.

NON-PROFIT VOICES

“There is not enough staff to do the work [and] not enough money to hire enough staff to do the work.”

“Burnout is a factor, and I worry that we will lose our momentum. We had a paid position as an Executive Director, and we can no longer afford to pay her for the hours she works. They have resigned, and the board is thin.”

Recruitment and Retention Investments

Nearly one in two respondents report increased investments in staff recruitment and retention (3.65; increased for 45% of respondents). The data suggests that investments are largely focused on retention rather than recruitment, bolstered by increased mental health and wellbeing supports (3.78; increased for 50% of respondents), and increased salaries and wages (3.67; increased for 60% of respondents).

These increases indicate that non-profits recognize that salaries and wages must reflect the cost of living, and that stress and burnout are urgent issues affecting the non-profit workforce. This is encouraging, especially given that many staff are stretching to meet increased demand and growing complexity, as discussed in Theme I. This year's Changemaker Wellbeing Index highlighted that nearly 4 out of 5 non-profit workers feel burned out and exhausted at least occasionally, and that their wellbeing is jeopardized by key stressors including income insufficiency and the inability to save, heavy workloads, and mental health pressures (Future of Good, 2025). Alarming, one in three non-profit workers in Canada are food insecure (Future of Good, 2025).

Training and professional development investments also show an increased summary trend (3.60; increased for 51% of respondents). This could indicate that organizations are supporting staff with upskilling to navigate both the increased complexity of clients' needs and the heightened severity of issues.

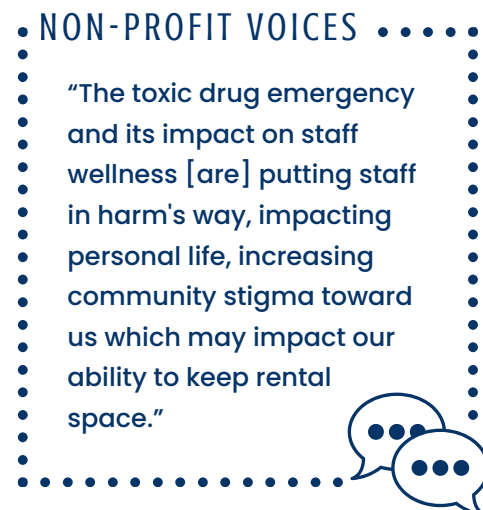
Staff benefits were least likely to have increased in the previous 12 months (3.30; stayed the same for 49% of respondents). A small proportion of respondents (27%) increased benefits, but for most respondents, it stayed the same.

Smaller Organizations Falling Behind

Across the six Human Resources investment subcomponents surveyed, organizations with 1-4 employees consistently scored lower summary trends compared to organizations with more employees.

In mental health and wellbeing investments, smaller organizations were far more likely to report that investments were "not applicable" (26% of respondents). Staff in smaller organizations were also more likely to experience increased hours without corresponding increases in human resource investments. These workers are most likely to feel overwhelmed and stretched. The number of part-time/seasonal/temporary/contract staff increased more on average (3.39; increased for 38% of respondents) than full-time staff (3.15; increased for 28% of respondents).

At the same time, the average number of hours worked has slightly increased (3.32; increased for 35% of respondents), suggesting that roughly a third of respondents are stretching existing staffing teams rather than expanding them for programs, services, and activities delivery.



4.3.1 Factors Impacting Staff Recruitment and Retention

This year, we asked respondents to identify the most common factors impacting staff recruitment and retention. Three challenges stood out most clearly:

- Wage discrepancy compared to public/private sectors was the most common factor (shared among 52% of respondents)
- Lack of candidates with needed skill sets (47% of respondents)
- Work burnout and stress (43% of respondents)

Notably, for small organizations (1-4 employees), the second most common factor affecting recruitment and retention was uncompetitive indirect compensation, rather than lack of candidates with needed skill sets. Small organizations also ranked lack of paid learning and advancement opportunities higher (7th) compared to large organizations, among which it ranked much lower (9th-11th). For larger organizations (100+ employees), the nature of the work was cited as frequently as the lack of candidates with needed skill sets.

While challenges such as work-related burnout, stress, and limited advancement opportunities are not unique to the non-profit sector, the fact that lower pay compared with the public and private sectors is the most commonly cited factor affecting recruitment and retention suggests that non-profits face a structural disadvantage in competing for talent.

Characteristics of Organizations Most Impacted by Wellbeing-Related Factors

Organizations that selected 1) work-related burnout and stress, 2) demanding and difficult nature of the job, or 3) managing constant/high turnovers as the top factor impeding recruitment and retention tend to be those with \$1M-2.9M operating budgets, 5-19 employees, and 21-50 years of operation. They were also predominantly social services organizations, although this subsector is overrepresented among survey respondents.

Factors Affecting Recruitment & Retention: Rural vs. Urban Differences

Among rural-serving organizations (those serving communities with a population size of 29,999 or fewer), lack of candidates with needed skill sets is more likely to be a top factor than for urban-serving organizations (ranked 1st vs. ranked 2nd). Rural-serving organizations were also more likely to cite a general lack of candidates as a challenge (ranked 4th); whereas this factor ranked 9th among urban-serving organizations.

Overall, respondents appear to be maintaining current staffing levels by directing limited resources toward wages/salaries and wellbeing retention strategies. Smaller organizations are less able to make these investments and are disproportionately vulnerable—both in terms of staff strain and long-term sustainability.

5.0 Recommendations

Amidst trade tensions, US tariffs, a tightening federal government, and an unstable economy across the country creating uncertainty for funders, policy makers, and communities, the 2025 State of BC's Non-Profit Sector Report highlights the impacts of these factors on non-profits throughout the province. These same non-profits serve as a safety net for everyday British Columbians.

To address the challenges our respondents have identified, we recommend the following:

1. Expand Multi-Year Funding Agreements

WHAT OUR DATA SHOWS

One in three (33% of respondents) respondents' sustainability is at risk past the next 12 months, and organizations with budgets under \$1M are especially vulnerable. The presence of multi-year funding agreements within an organization is connected to fewer concerns about sustainability. Qualitative responses point to multi-year funding as a key enabler of organizational capacity, staff retention, and collaboration with other non-profits. Despite this, 59% of our survey's respondents report relying primarily on short term, project-based funding.

RECOMMENDATION

Government ministries and other funders should increase the availability of multi-year funding agreements for existing programs that have proven efficacy, especially for small and mid-sized organizations. Short-term, project-based funding impedes non-profits' abilities to offer consistent services, supports, and activities, retain staff with the necessary skill sets, and work effectively with other non-profits. Multi-year funding ensures that non-profits are sustainable and have the organizational capacity to meet the increasing demand of communities across BC.

NON-PROFIT VOICES

"Our current funding is year-to-year, with delays in confirming funding and poor communication about the situation. It is incredibly stressful, with excess time spent on contingency planning (including preparing for lay-offs), ongoing budget and workplan adjustments. [...] We are left hanging again and again, eating up reserves to cover this gap and unable to fully recoup our losses."

Sector Snapshot Poll, April 2025

2. Recognize and Resource Administrative Capacity and Core Expenses

WHAT OUR DATA SHOWS

Eighty-four percent of survey respondents indicated that their total expenses are increasing, with expenses rising or remaining steady across all types. No differences were observed between urban-serving and rural-serving organizations in this regard. Staff salaries and wages were the most increased expense, followed by administrative/operational expenses. Meanwhile, total revenues remained flat on average for the sector. In the area of Operations and Governance, more than half of respondents reported investing time and/or resources—with fund development, reporting to funders and government, and planning at the top of the list. Our analysis of

qualitative responses identified three key factors limiting organizational capacity: insufficient funding for general administrative capacity and infrastructure, inadequate physical space, and limited data and evaluation resources.

Conversely, collaboration with other non-profits, often led by an organization's core team, was highlighted as a critical factor enabling organizations to meet community demand.

RECOMMENDATION

Funding agreements should allow a flexible, unrestricted percentage of expenses to be allocated to administration, infrastructure, physical space, and data collection and evaluation. Currently, the percentage of allowable administrative expenses varies between 5-15% within the sector. This cap does not reflect true costs. Supporting core costs with a flexible, unrestricted percentage allows non-profits to maintain their operations. Furthermore, the provision of dedicated streams of core funding would enable non-profits to collaborate with other non-profits, and to enhance services, supports, and activities for British Columbians.

NON-PROFIT VOICES

"The rapidly increasing operations costs and exponentially increasing compliance requirements by funders, it is becoming impossible for non-profits to cover the cost with the traditional 10-15% "overhead" funding, which cannot absorb the expertise non-profits have to pay for to get in compliance with the various cybersecurity, data management and privacy requirements or to create the capacity to operate virtually."

.....

3. Strengthen the Non-Profit Workforce Through Fair Compensation and Sector-Focused HR Supports

WHAT OUR DATA SHOWS

When considering their programs, services, and activities, respondents reported the strongest increases in client and community demand, complexity of clients' needs, and severity of community issues.

Nearly 9 in 10 respondents indicated that the demand exceeds their capacity to respond to it, despite increases to clients served/engaged.

By contrast, our data shows that staffing levels have stayed the same on average for the sector. Staff salaries and wages were the expenses that showed the strongest increase on average, while staff mental health and wellbeing investments also increased for 50% of respondents.

Respondents were least likely to indicate increased investment into staff benefits. Among all sizes of organizations, those with 1-4 employees were the least likely to report investments into mental health and human resources.

When asked about staff recruitment and retention, respondents identified wage discrepancy compared to public/private sectors, a lack of candidates with the needed skills sets, and work burnout and stress as the top three barriers.

NON-PROFIT VOICES

"Due to the large number of staff members who are wheelchair users, we have had to pull mobility devices out of our benefits package to manage unsustainable increases to the cost of the benefit plan. We now self-fund wheelchairs and other mobility devices and there is concern that the tariffs will have a significant impact on the costs of these devices."

.....

Among rural-serving organizations, the lack of candidates with the needed skill sets was more likely to be a top factor than it was for urban-serving organizations.

RECOMMENDATION

Government should partner with BC's non-profit sector to co-develop a dedicated non-profit workforce strategy with concrete solutions to address the wage discrepancy between the non-profit and public/private sectors, attract candidates with the needed skills sets, especially to rural areas, and ensure staff mental health and wellbeing supports are accessible to non-profit workers across all organizational sizes. A dedicated non-profit workforce strategy would strengthen this vital sector and address the rising demand and complex needs facing non-profits across the province.

6.0 Conclusion

This year's State of BC's Non-Profit Sector Survey underscores what many within the sector already know: **British Columbia's non-profits are stretched thin.** They are responding to rising demand and growing complexity while managing overall flat revenues and increasing costs. Their story is one of strain and struggle but also one of adaptation and perseverance. Although limited with time and resources, organizations are actively strengthening operations and governance, investing in their people, and finding ways to support communities despite numerous barriers and pressures.

The findings in this 2025 State of BC's Non-Profit Sector Report only amplify this urgent message.

NON-PROFIT VOICES

"Our budget in the last 7 years has increased 5-fold but our administrative team has seen no increase in time. We do not have the capacity to do more as there is no funding for administrative overhead."

.....

"Rising costs and underfunded administrative support further limit our flexibility to respond. Despite these challenges, strong community relationships and a dedicated team help us continue delivering core programs, but we are stretched thin and unable to fully meet the needs of the seniors we serve."

.....

However, these efforts to pivot and respond should not be mistaken for sustainability. Looking ahead, most responding organizations anticipate the challenges identified in this report will continue to intensify. The sector has been sounding the alarm about a tipping point, where non-profits face the trilemma of rising demand, shrinking financial resources, and an overburdened workforce (Charity Insights Canada Project, 2025).

The non-profit sector's ability to partially meet rising demand with constrained resources has its limits. Without meaningful shifts in funding—particularly for core and administrative support, multi-year agreements, and human resource investments—the vulnerabilities highlighted here will persist deeper as community needs evolve.

The commitment of BC's non-profits, powered by dedicated staff and volunteers, is clear. Organizations continue to show up for communities, channeling growth primarily into their programs, their services, and their people whenever possible. Yet this focus has deepened the long-standing challenge of underfunded core administration and operations, leaving organizational capacities weak and stretched. Chronic underinvestment in foundational areas stifles both impact and innovation.

The challenge ahead requires not only ensuring non-profits have the resources and stability to deliver essential services across BC but also equipping them to adapt in rapidly changing times.

The call to action is urgent: policymakers and funders must strengthen funding mechanisms, adequately support core operations, and inspire the next generation of talent to join and sustain BC's non-profit sector. When we invest in the sector, we invest in stronger, healthier, better-connected communities—and in the shared safety net that supports BC residents when they need it most.

7.0 References

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APPENDIX A

About the Respondents

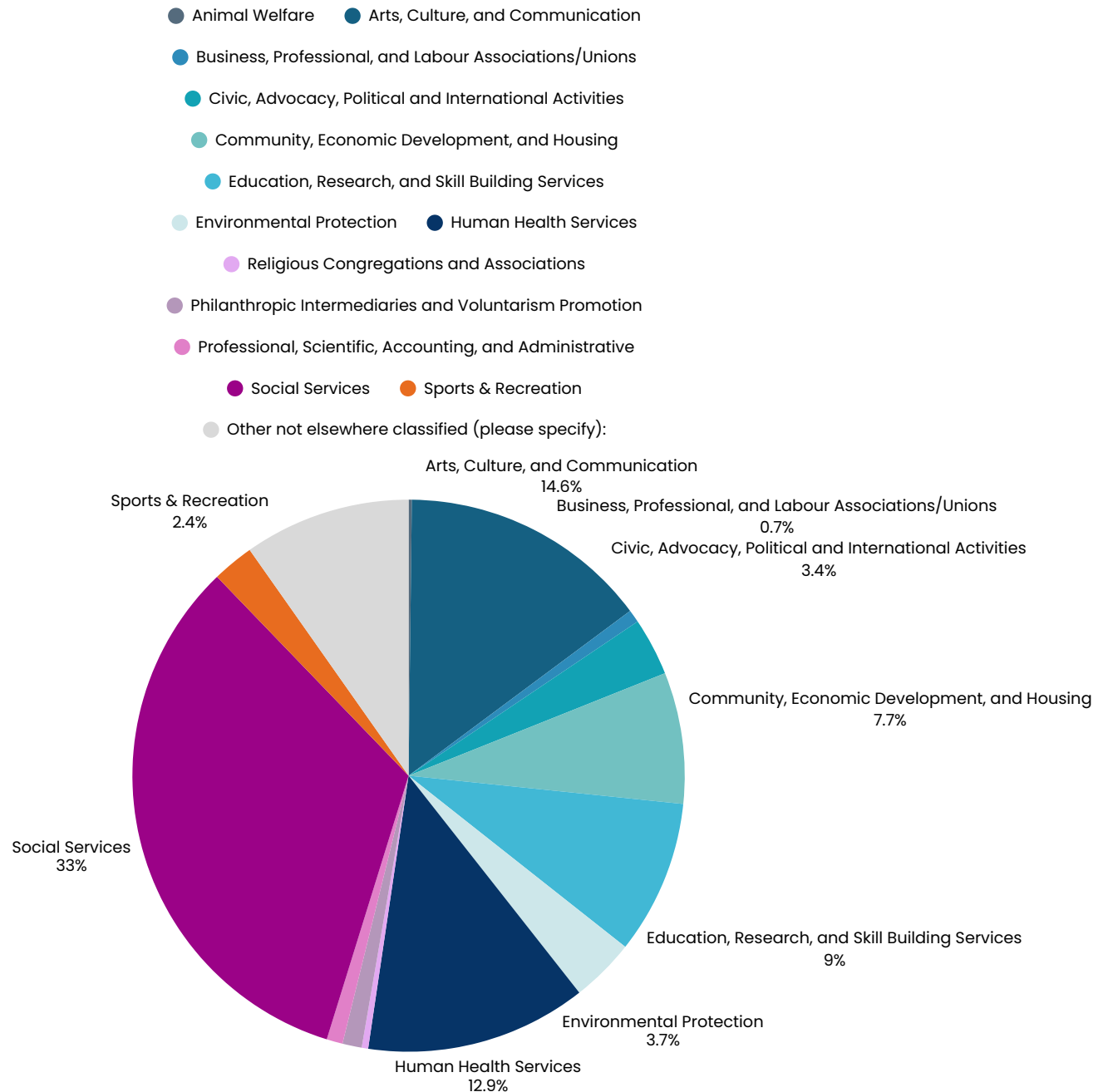
A. Primary Geographic Focus (n=533)

Geographic Focus	Responses %	Responses Counts
Province-wide	26%	136
Regional within Canada	5.25%	28
National	6.94%	37
International	2.63%	14
Metro Vancouver		
• Vancouver	23%	124
• Burnaby, New Westminster	12%	64
• Surrey, White Rock	10%	52
• Richmond	9%	49
• Coquitlam, Port Coquitlam, Port Moody	8.26%	44
• North Shore and Bowen Island	7.88%	42
• Tsawwassen, Delta, Tsawwassen First Nation	6.38%	34
• Pitt Meadows, Maple Ridge	6.38%	34
• Langley	6.00%	32
Fraser Valley Regional District	6.19%	33
Islands and Western Coast		
• Capital Regional District - Greater Victoria and Southern Gulf Islands	9.94%	53
• Nanaimo Regional District	3.94%	21
• Comox Valley Regional District	2.63%	14
• Cowichan Valley Regional District	2.63%	14

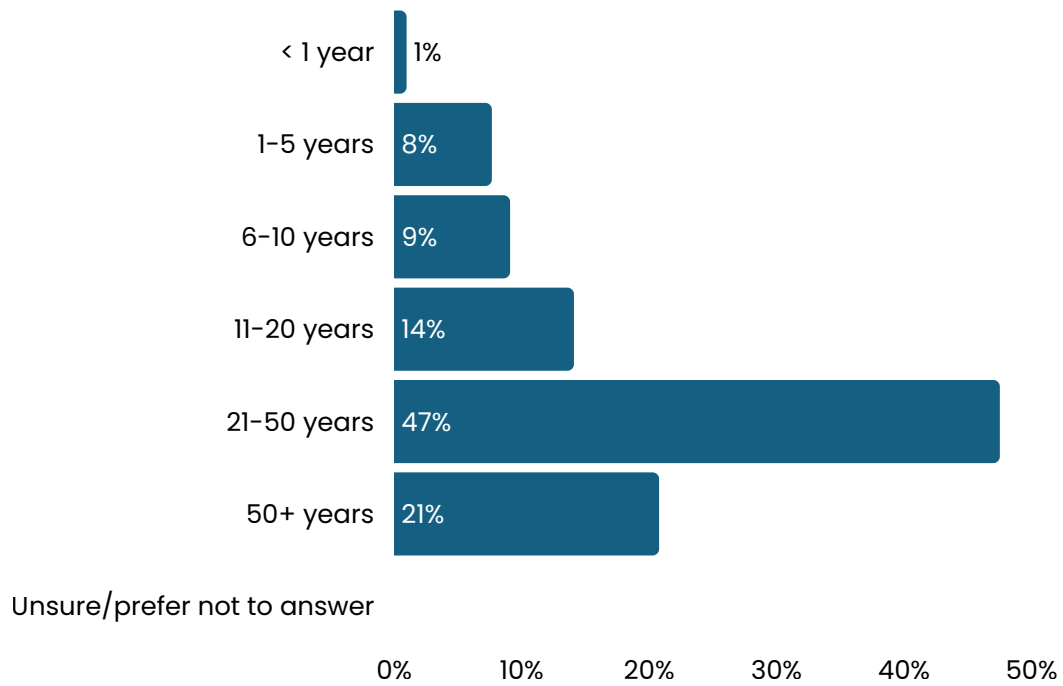
Geographic Focus	Responses %	Responses Counts
• Sunshine Coast Regional District	2.25%	12
• Alberni-Clayoquot Regional District	1.88%	10
• qathet Regional District	1.13%	6
• Mount Waddington Regional District	0.94%	5
• Strathcona Regional District, Central Coast Regional District	0.94%	5
Thompson Okanagan		
• Central Okanagan Regional District	4.88%	26
• Okanagan-Similkameen Regional District	4.13%	22
• North Okanagan Regional District	3.00%	16
• Thompson-Nicola Regional District	2.63%	14
Eastern BC		
• Central Kootenay Regional District	3.38%	18
• Kootenay Boundary Regional District	3.00%	16
• Columbia Shuswap Regional District	1.69%	9
• East Kootenay Regional District	1.69%	9
Cariboo and Squamish-Lillooet		
• Cariboo Regional District	3.00%	16
• Squamish-Lillooet Regional District	2.25%	12
Northern BC		
• Fraser-Fort George Regional District	2.81%	15
• Peace River Regional District	1.69%	9
• Bulkley-Nechako Regional District	1.50%	8

Geographic Focus	Responses %	Responses Counts
• Kitimat-Stikine Regional District	1.50%	8
• Northern Rockies Regional Municipality, Stikine	1.31%	7
• North Coast Regional District	0.94%	5
Total Respondents:		533

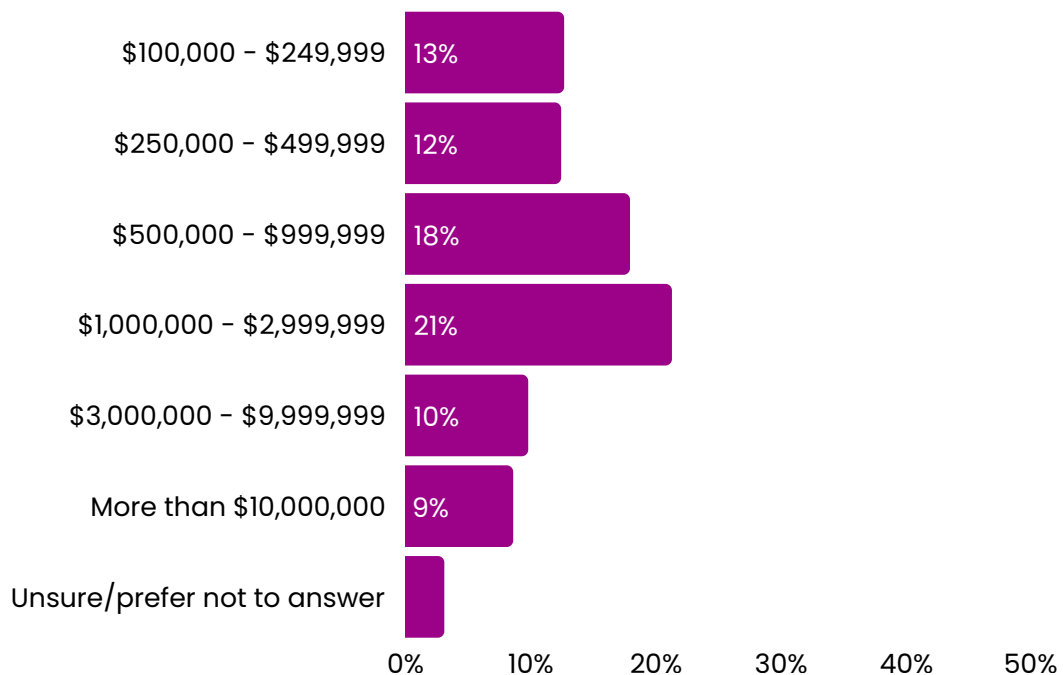
B. Subsectors (n=533)



C. Years of Operations (n=419)



D. Budget Sizes (n=418)



APPENDIX B

2025 State of BC's Non-Profit Sector Survey: Full List of Questions

#	Questions	Response Options
Page 2. Eligibility and Consent		
1	*This survey is designed to have one response per BC-based non-profit organization and should be completed by the CEO/Executive Director, or someone tasked by the CEO/Executive Director who has organization-level knowledge. I confirm that I have the organizational knowledge needed to complete this survey on behalf of my organization. By clicking "Yes", I also consent to participating in this survey and having my responses, including any written comments, used for purposes such as analysis, publication, reporting, and presentations. • Yes • No > Disqualification page: This survey is designed to have one response per BC-based non-profit organization and should be completed by the CEO/Executive Director, or someone tasked by the CEO/Executive Director who has organization-level knowledge. Please ask the appropriate team member to complete this survey, thank you!	Multiple Choice (Requires answer)
2	*What is the current legal status of your organization? Check all that apply: • Unincorporated grassroots or community group (not a registered organization) • Incorporated non-profit (i.e., under BC Societies Act or federal Not-for-profit Corporations Act) • Registered charity (have charitable tax status with the CRA) • Other (please specify)	Checkboxes (Requires answer)
3	*The federal government classifies non-profits into three categories. Which category best describes you? • Community organization or other organizations not aligned with the options below • Business organization (business associations, professional associations, unions, chambers of commerce, condominium strata, etc.) • Quasi-governmental organization (heavily influenced by government, such as hospitals, public educational institutions, legislatively created organization, etc.)	Multiple Choice (Requires answer)

#	Questions	Response Options
Page 2. Eligibility and Consent		
4	*Which regional district(s) represent the primary geographic scope/focus of your organization? Check all that apply. To see which region(s) you are in, please click here. Skip this question if you are unsure/prefer not to answer. • Our focus is province-wide • Our focus is regional within Canada (e.g., western Canada or BC/Yukon) • Our focus is national • Our focus is international • Alberni-Clayoquot Regional District • Bulkley-Nechako Regional District • Capital Regional District – Greater Victoria and Southern Gulf Islands • Cariboo Regional District • Central Coast Regional District • Central Kootenay Regional District • Central Okanagan Regional District • Columbia Shuswap Regional District • Comox Valley Regional District • Cowichan Valley Regional District • East Kootenay Regional District • Fraser Valley Regional District • Fraser-Fort George Regional District • Kitimat-Stikine Regional District • Kootenay Boundary Regional District • Metro Vancouver – Vancouver • Metro Vancouver – North Shore and Bowen Island • Metro Vancouver – Burnaby, New Westminister • Metro Vancouver – Coquitlam, Port Coquitlam, Port Moody • Metro Vancouver – Richmond • Metro Vancouver – Tsawwassen, Delta, Tsawwassen First Nation • Metro Vancouver – Surrey, White Rock • Metro Vancouver – Langley • Metro Vancouver – Pitt Meadows, Maple Ridge • Mount Waddington Regional District • Nanaimo Regional District • North Coast Regional District • North Okanagan Regional District • Northern Rockies Regional Municipality • Okanagan-Similkameen Regional District • Peace River Regional District • qathet Regional District • Squamish-Lillooet Regional District • Stikine Region • Strathcona Regional District • Sunshine Coast Regional District • Thompson-Nicola Regional District	Multiple Choice (Requires answer)

#	Questions	Response Options
Page 2. Eligibility and Consent		
5	*What subsector does your organization primarily belong to? Choose one that best reflects your priority area. • Animal Welfare • Arts, Culture, and Communication • Business, Professional, and Labour Associations/Unions • Civic, Advocacy, Political and International Activities • Community, Economic Development, and Housing > Logic question • Education, Research, and Skill Building Services • Environmental Protection • Human Health Services • Religious Congregations and Associations • Philanthropic Intermediaries and Voluntarism Promotion • Professional, Scientific, Accounting, and Administrative Services • Social Services • Sports & Recreation • Other not elsewhere classified	Dropdown (Requires answer)
Page 4. Housing Subsector		
6	Logic question: *Are you from the housing subsector, specifically? • Yes • No • Unsure/prefer not to answer	Multiple Choice (Requires answer)
Page 5. Setting the Context		
7	Share one word that describes how your organization is feeling right now.	Comment Box
8	In the past 12 months, what has been the primary factor (internal or external) that has contributed to how your organization is feeling right now?	Comment Box
9	Now think about the next 12 months ahead. What do you foresee as the primary challenge?	Comment Box
Page 6. Revenue (50% progress) Consider what you know about the past 12 months. This is meant to be a gut check. We do not expect you to look up specific numbers.		

#	Questions	Response Options
10	Over the last 12 months, what are the overall trends in your actual revenue? Select N/A for any row that does not apply to you. For any row where you are unsure or prefer not to answer, please skip it and proceed to the next. • Total revenue • From goods/services sales, fees, or special events • From foundations • From municipal government/ regional districts • From provincial government • From federal government • From investment income • From individual donations • From corporations/businesses • Financial reserves • Number of unique revenue sources	Matrix/ Rating Scale • Significantly decreased • Slightly decreased • Stayed the same • Slightly increased • Significantly increased • N/A
11	What were the sizes of your revenue sources in the last 12 months? Please rank from largest to smallest. Select N/A for any row that does not apply to you. Skip this question if you are unsure or prefer not to answer. • Goods/services sales, fees, or special events • Foundations • Municipal government/ regional districts • Provincial government • Federal government • Investment income • Individual donations • Corporations/businesses • Accessing financial reserves	Ranking
12	Approximately what percentage of your organization's total revenues are unrestricted (i.e. funds that can be used flexibly, with few or no limits on how they're spent)? • 0% • 1-20% • 20-40% • 40-60% • 60-80% • 80-100% • Unsure/prefer not to answer • N/A	Dropdown

#	Questions	Response Options
13	What proportion of your current <u>funding agreements</u> are multi-year (i.e., committed for more than one year)? This helps us understand how many agreements provide longer-term stability for your organization. If unsure, please estimate. • None (0%) • A few (1–20%) • Some (21–40%) • About half (41–60%) • Most (61–80%) • Nearly all (81–100%) • Unsure/prefer not to say • N/A (no funding agreements)	Multiple Choice
Page 7. Expenses Consider what you know about the past 12 months. This is meant to be a gut check. We do not expect you to look up specific numbers.		
14	Over the last 12 months, what are the overall trends in your expenses? Select N/A for any row that does not apply to you. For any row where you are unsure or prefer not to answer, please skip it and proceed to the next. • Total expenses • Staff salaries and wages (full-time and part-time) • Staff benefits (health/dental, RRSPs, leave payouts, etc.) • Consultants and contractors (professional fees) • Programs/services/activities (direct expenses) • Administrative/operational expenses (including staffing and direct costs) • Facilities (rent or lease, utilities, insurance, property taxes, etc.) • Capital costs (furniture, computers, major upgrades or renovations, etc.) • Communications and public relations (newsletters, social media, media relations, branding, etc.) • Unbudgeted/unexpected/extraordinary expenses If unbudgeted/unexpected/extraordinary expenses increased, please explain: Comment Box	Matrix/ Rating Scale

#	Questions	Response Options
15	In your organization's current budget, approximately what percentage is allocated to administrative/operational expenses (i.e. all costs not related to direct programs and services delivery)? • 0% • 5% • 10% • 15% • 20% • 25% • 30% • 35% • 40% • 45% • 50% or more • Unsure/prefer not to say	Dropdown
16	Funding agreements typically limit the percentage of allowable administrative/operational expenses. Ideally, what would be a supportive AND realistic allowable administrative/operational expenses percentage? • 0% • 5% • 10% • 15% • 20% • 25% • 30% • 35% • 40% • 45% • 50+% • Unsure/prefer not to say	Dropdown
17	Please explain why you chose this percentage.	Comment Box
Page 8. Programs, Service, and Activities Consider what you know about the past 12 months. This is meant to be a gut check. We do not expect you to look up specific numbers.		

#	Questions	Response Options
18	Over the last 12 months, what overall trend best describes each of the following aspects of programs, services, or activities? Select N/A for any rows that does not apply to you. For any row where you are unsure or prefer not to answer, please skip it and proceed to the next. • Overall demand from clients and communit(ies) • Complexity of clients' needs or severity of issue(s) • Number of clients served or engaged • Hours or availability of programs/services/activities • Resources (time or money) spent on advocacy, government relations • Resources (time or money) spent on evaluation or impact measurement • Resources (time or money) spent relationship-building, outreach, and/or collaborations • Amount of physical space used to deliver programs, services, and activities • Resources (time or money) spent on adapting or responding to climate change/events • Use of AI in programs, services, and activities	Matrix/ Rating Scale
19	How does your organization's current capacity to deliver programs/services/activities compare to the current level of demand? • Demand is much higher than capacity • Demand is higher than capacity • Demand is roughly equal to capacity • Demand is lower than capacity • Demand is much lower than capacity • Unsure/prefer not to answer	Multiple Choice
20	Please briefly describe the key factors that are helping or hindering your organization's ability to meet demand:	Comment Box

#	Questions	Response Options
21	Over the last 12 months, what are the overall trends in your human resources? Select N/A for any rows that do not apply to you. For any row where you are unsure or prefer not to answer, please skip it and proceed to the next. • Level of volunteer involvement • Number of full-time staff • Number of part-time, temporary, contract, or seasonal staff • Staff hours (i.e., average hours worked per staff member) • Levels of wages/salaries offered to staff • Level of benefits offered to staff • Resources (time or money) spent on recruitment and retention of volunteers • Resources (time or money) spent on recruitment and retention of staff • Staff absences/use of sick leave • Resources (time or money) spent on HR issues related to staff mental health and wellbeing • Resources (time or money) spent on training and professional development	Matrix/ Rating Scale
22	*How many paid employees does your organization currently have? • 0 – we are entirely volunteer-run > Logic: skip Page 10 • 1 – 4 employees • 5 – 19 employees • 20 – 99 employees • 100 + employees • Unsure/prefer not to answer	Dropdown (Requires answer)
Page 10. Employer-only Questions		
23	In the past 12 months, what factors have affected your organization's ability to recruit and/or retain staff? Select all that apply: • Demanding and difficult nature of the work • Uncompetitive indirect compensation packages (e.g. pension plan, health benefits) • Lower pay than similar jobs in public/private sectors • Work-related burnout and stress • General lack of candidates in your region • Lack of candidates with needed skill sets • Managing constant/high turnovers • Short-term precarious contracts • Lack of paid learning/advancement opportunities • Staff reluctance to return to in-person work • Lack of affordable accessible childcare services for staff • Cost of housing/need to relocate • Unsure/prefer not to answer • Other, please specify: • None of the above	Checkboxes

#	Questions	Response Options
24	*Does your organization employ workers covered by a union contract or collective agreement? • Yes • No • Partially • Currently unionizing • Unsure/prefer not to answer	Multiple Choice (Requires answer)
Page 11. Operations and Governance Consider what you know about the past 12 months. This is meant to be a gut check. We do not expect you to look up specific numbers.		
25	Over the last 12 months, what overall trends best describes each of the following aspects of your operations and governance? Select N/A for rows that do not apply to you. For any row where you are unsure or prefer not to answer, please skip it and proceed to the next. • Resources (time or money) spent on strategic, scenario, succession or crisis planning • Resources (time or money) spent on fund development, including grant proposals and fundraising • Resources (time or money) spent on reporting to funders, governments etc. • Resources (time or money) spent on board governance (structure, processes, recruitment, engagement, etc.) • Resources (time or money) spent on marketing and communications • Resources (time or money) spent on IT/ data security • Resources (time or money) spent on strategic alliances, shared services, or merger with another organization • Resources (time or money) spent on diversity, belonging, reconciliation, or accessibility • Resources (time or money) spent on government relations, lobbying, and advocacy activities • Ability to procure supplies and services	Matrix/ Rating Scale
26	Currently, which of the following statements best describes your organization's sustainability? • Sustainability is not a pressing concern • We can sustain our organization beyond the next 12 months • We can sustain our organization for 7-12 months • We can sustain our organization for 1-6 months • We are currently considering significant shifts to avoid dissolution • We are currently considering dissolving • Unsure/prefer not to answer	Multiple Choice

#	Questions	Response Options
27	Currently, what is your organization's top priority for training or capacity-building? Choose the area that, if strengthened, would have the greatest impact on your organization's effectiveness or sustainability. • Board development • Leadership development (staff) • Government relations and advocacy • Strategic planning • Organizational capacity planning • Change management • Diversity, equity & inclusion • AI strategy & integration • None of the above • Unsure / Prefer not to answer • Other (please specify)	Multiple Choice
Page 12. Organizational Characteristics This section focuses on the types of organizations that have responded to this survey. We ask these questions so that: • We can disaggregate survey results to see if different types of organizations are experiencing different trends. • We can promote the survey to types of organizations that we have not heard from.		
28	*Are the people and/or communities you serve primarily from a geography in BC that is considered rural and remote? Rural is defined as a community with a population size of 29,999 or fewer. Remote is defined as a community or geographic location with a population of less than 5,000 and at least 100 km from a city of > 29,000 or a geographic location without year-round road access. • Yes • No • Unsure/prefer not to answer	Multiple Choice (Requires answer)
29	*How long has your organization been operating? • Less than 1 year • 1-5 years • 6-10 years • 11-20 years • 21-50 years • 50+ years • Unsure/prefer not to answer	Dropdown (Requires answer)

#	Questions	Response Options
30	*Does your organization primarily serve any of the following groups? Select all that apply: • Women, including those who identify as women • 2SLGBTQIA+ • Indigenous Peoples • Racialized Peoples • Newcomers, immigrants, or refugees • Persons with disabilities, physical/mental illnesses • People whose first language is French • None of the above • Other (please specify): _____	Checkboxes (Requires answer)
31	In the last 12 months, what was your organization's approximate operating budget? • 0 - \$99,999 • \$100,000 - \$249,999 • \$250,000 - \$499,999 • \$500,000 - \$999,999 • \$1,000,000 - \$2,999,999 • \$3,000,000 - \$9,999,999 • More than \$10,000,000 • Unsure/prefer not to answer	Dropdown (Requires answer)
32	Has your organization used the State of the Non-Profit Sector reports in the past 12 months? • Yes • No If yes, how has this information influenced your activities? Comment Box	Multiple Choice

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