

Funding Matters: A Warning And An Opportunity

Recommendations: A Road To Travel

2004



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A United Way Member Agency

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2004

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FUNDING MATTERS: A WARNING AND AN OPPORTUNITY RECOMMENDATIONS: A ROAD TO TRAVEL

Introduction

The workshop, *Funding Matters: A Warning and An Opportunity*, took place November 25, 2003. Over one hundred and fifty individuals attended. The purpose of this workshop was to provide an opportunity for Halton nonprofit and voluntary agencies as well as other representatives of the community to dialogue about:

- the changing funding landscape in Canada, Ontario and the Region of Halton
- the impact of these changes on the financial capacity and long term sustainability of nonprofit and voluntary organizations
- the economic and social contribution of nonprofit and voluntary organizations
- the nature of the funding regime and the restructuring of the nonprofit and voluntary sector and
- needed changes to build the capacity of nonprofit organizations and the voluntary sector in Halton.

The keynote speaker, Katherine Scott, highlighted the salient findings of her important study, *Funding Matters: The Impact of Canada's New Funding Regime on Nonprofit and Voluntary Organizations*. Panellists, with diverse experience and knowledge of Halton, commented from their vantage point on the ideas and analysis presented. They were: Theresa Greer, Executive Director, Halton Helping Hands; Adelina Urbanski, Commissioner, Community and Social Services, Regional Municipality of Halton; Chris Stoate, President, LaserNetworks; Marg Garey, Director, Peel-Halton-Dufferin Human Resources Development Canada; and Winston Tinglin, CEO, United Way of Burlington and Greater Hamilton. Peter Clutterbuck, Consultant to the Social Planning Council of Ontario, concluded the presentations with insights on the *Social Sector's Economic Contribution*.

The proceedings of this workshop are hosted on Community Development Halton's website www.cdhalton.ca and are comprised of: i) five *Community Dispatches* summarizing the

important findings from the document, *Funding Matters: The Impact of Canada's New Funding Regime on Nonprofit and Voluntary Organizations*; ii) the Power Point presentations of conference speakers Katherine Scott and Peter Clutterbuck; and iii) the conference recommendations entitled, *Recommendations: A Road to Travel*.

Context

The last section, *Recommendations: A Road to Travel*, of the proceedings flows from the deliberation of conference participants around three questions.

1. Does the report, *Funding Matters: The Impact of Canada's New Funding Regime on Nonprofit and Voluntary Organizations*, the commentary of the panel, the observations regarding the economic contribution of the sector and the discussions of the day reflect the situation of Halton nonprofit and voluntary organizations, funders and funded?
2. What do you consider to be the most important or most urgent concerns in relation to the situation of the nonprofit and voluntary sector?
3. What recommendations for action do you believe are necessary to give leadership to addressing and resolving the concerns raised today?

The recorded notes of the participant's commentary at the roundtable discussions are attached in Appendix 1. There is overwhelming consensus by conference participants that the dimensions and characteristics of the funding regime that emerged during the 1990s have been identified clearly in the study, *Funding Matters: The Impact of Canada's New Funding Regime on Nonprofit and Voluntary Organizations*. Those present observe that the nature of funding to the nonprofit and voluntary sector, along with the ramifications of this funding model, affect the capacity and sustainability of the sector in Halton. In other words, Halton's local reality is described accurately by this study. Comments such as "Katherine Scott's analysis is exactly on target" are noted continuously. Other observations capture the complexity of the issues such that the need for a profound and broad-based community dialogue emerges.

The conference participants in their response to question 2 reiterate and confirm the points made by the keynote speakers and panellists but elaborate from their Halton experience. They

identified some important issues that separate the Halton experience from that of many communities. They are:

- The geography of Halton with its diverse and quite distinct communities of Burlington, Oakville, Milton and Halton Hills present challenges to the nonprofit and voluntary sector to meet service needs across this urban/rural space. For example, communication about the work of the nonprofit and voluntary sector also represents a challenge as each municipality has its own newspaper. There is not one easy source of community news and information that spans Halton. This applies to all forms of media not just the print media.
- The history of Halton and its communities has produced the perception that the development of the human service infrastructure has lagged behind that of other areas. However, the demographics of Halton and its municipalities are changing, thus, the demand for diverse and accessible human services is growing. While there is acknowledgement of Halton's changing human face, there has not been a corresponding investment in the social infrastructure necessary to accommodate the needs of its changing population.
- The nonprofit and voluntary sector has a strong history of partnership and collaboration that constitutes a community asset on which to reinvest in social infrastructure.
- The existence of four United Ways, each located in one of the four municipalities that comprise Halton, distinguishes service provision in this area from that of other communities. One or more of these United Ways funds many human service agencies serving Halton. The diagnosis of the workshop participants is that four United Ways create inefficiencies in the funding regime, foster confusion, erode collaboration, dissipate energies in responding to four separate organizations, complicate communication and create fundraising difficulties that may affect the overall amount of campaign. This structure of four United Ways dilutes the infrastructure of caring that exists and that is needed in our community.

The conference participants are in search of leadership to articulate a social vision for Halton, followed by thoughtful and sustainable changes, based on the collective ingenuity of all community actors, as to how charitable dollars and government grants can best support and nurture the work of nonprofit and voluntary sector.

Recommendations

Funding model

The present funding model is not sustainable and affects negatively in multiple ways the nonprofit and voluntary sector and, ultimately, the community as documented in the study, *Funding Matters: The Impact of Canada's New Funding Regime on Nonprofit and Voluntary Organizations*, and as substantiated in the commentary flowing from the conference. In fact, the sector is being restructured and the combined stresses it faces are threatening the capacity of nonprofit and voluntary agencies to sustain their activities. Trends show bigger agencies and groups are better able to weather the storm of funding change than smaller agencies and groups. Ultimately, a funding model reflects the value placed on the sector not only as a source of caring but also as a foundation for building social capital and creating democratic processes in a community. The challenge associated with the well being of the sector is quite simply, what do we want as a society, what do we consider to be a public good and, thus, not dispensable. It challenges us to face the real cost of delivering services.

1. The Conference participants recommend that Regional Chairman, Joyce Savoline, convene a round table to actively engage a broad representation of community and of the funded and the funders to address and resolve the issues of inadequate and diminishing infrastructure faced by Halton nonprofit and voluntary sector organizations, many of them outlined in *Funding Matters: The Impact of Canada's New Funding Regime on Nonprofit and Voluntary Organization*. In addition, the round table will work to inform the public of the impact on community of the funding issues. Of particular importance are:

- Common understandings of the nature of the sector
- Data and information needs that sustain a cohesive and caring community
- Stability and predictability of core funding
 - Funding regime – funding source, funding mix, and funding mechanisms
 - Financial volatility and loss of infrastructure
 - Mission drift
 - Timeframes – Annual vs. Multi-year
 - Adequacy – levels of service vs. levels of funding, disparities in funding between jurisdictions, rising costs of doing business
 - Project funding – restructuring, competition
 - Grant requirements, onerous paperwork and accountability demands
 - Partnership, real and imagined
 - Role of respective governments and other funders; who subsidizes who; downloading
 - Role of private sector, private sector partnership – viability
 - Trust – diminishing, yet a necessary condition in building social and human capital
 - Human resources – hiring, maintenance, retention and capacity development
 - Building the capacity of agencies – ongoing and of high quality

An important subtext of the deliberations of this roundtable is a special subcommittee to explore the issue of four United Ways serving Halton.

Four United Ways

The agencies and community assembled in this workshop indicate unequivocally that the presence of four independent United Ways is a barrier to the continued development of a human service infrastructure in Halton. There were multiple reasons given for this assessment.

2. The conference participants recommend that the four United Ways—the United Way of Burlington and Greater Hamilton, the United Way of Oakville, the United Way of Milton

and the United Way of Halton Hills—under the umbrella of the Regional Chair’s round table form a task force with the active participation of local corporate leadership, community based leadership, municipal and Regional leadership and human service system leadership along with national and provincial leaders in the United Way movement with a view to unify their activities **to act as one powerful community investment force** in Halton. Policies, administrative functions, fundraising, strategic directions, priorities, allocation strategies and standards must be such that the nonprofit and voluntary sector no longer negotiate with four separate organizations.

Funders

Conference participants identify a paradox described as a lack of understanding of the issues of the sector by funders and, conversely, a lack of understanding of the needs of funders. The issues and needs of both groups have to be clearly articulated and shared in order for the two to work together to build a viable and vibrant nonprofit and voluntary sector.

3. The conference participants recommend that the Halton Major Funders Committee open a dialogue with the agency community so that understanding is created. In some situations, participants recommend that the Halton Major Funders Committee invite members of the agency community to the table to inform discussion and enhance knowledge of the sector.
4. The conference participants recommend that funders, through the Halton Major Funders Committee, open a broad dialogue about best practices in funding and develop strategies to implement them.
5. The conference participants recommend that funders in Halton become proactive in resolving the issues facing the sector, not only assuming leadership in recognizing the impact of the present funding model but also providing leadership in transforming it.

Accountability

The conference participants recognize the importance of accountability and that charitable dollars are well invested. However, they believe that accountability must be revisited to reflect the needs of the sector to be accountable to their multiple publics, that accountability to the community or public must take precedence over accountability defined by business type deliverables, and that accountability expectations be reasonable and proportionate to risk, so that onerous demands are not placed on agencies and organizations.

6. The conference participants recommend that a dialogue table comprised of funders and funded be constituted to revisit what is accountability and what are reasonable ways of “rendering accountable” to the multiple publics of a nonprofit and voluntary sector organization. The requirements of funders and those of the agencies need to be better communicated and mutually understood so that the interests of both can be served. Venues for dialogue are to be created by the Halton Major Funders Committee and a newly constituted leadership group of Halton’s nonprofit and voluntary sector to address the issue of accountability.

7. The conference participants recommend that the Halton Major Funders Committee organize a session where their learnings, over the past decade, about best practices be shared with the community of nonprofit and voluntary organizations.

Volunteers and Voluntary Sector

The nonprofit and voluntary sector brings together many members of the community to contribute to its social and economic development. The activities of nonprofit and voluntary organizations often represent that place where the active engagement of community residents occurs. This involvement is important in creating awareness about community and provides a vehicle for participatory democracy. When given an economic value, this volunteer contribution is worth hundreds of thousands of dollars to a community. The rich interaction of volunteers, a community’s social capital, must be nurtured and supported adequately. However, common

perceptions associated with volunteer organizations and their needs must be dispelled in order to respect and use the talents of volunteers in an agency and in the community.

8. The conference participants recommend that in the community dialogues flowing from this conference, the role of volunteers, their contribution to community and their needs be adequately recognized and taken into consideration by all. Moreover, the relationship between the funding model and its impact on volunteers needs to be acknowledged.

Sector Mobilization

The conference participants concur with the description of the state of the social sector presented in the study, *Funding Matters: The Impact of Canada's New Funding Regime on Nonprofit and Voluntary Organizations*. Strong sentiment suggests that the sector must mobilize in order to educate citizens as to its role and importance and to advocate for funding practices and program partnerships that build the capacity of the sector to contribute to human well being and democratic citizenship. The funding crisis of the social sector is a political issue.

9. The conference participants recommend that the nonprofit and voluntary agencies of Halton come together and unite to form a collaborative that will give leadership to the issues restructuring the sector, document the changing circumstances of the sector, paint a picture of community life without the sector, articulate the sector's needs in order to carry out their mandates and advocate with one voice to government and the general public.
10. The conference participants recommend that Community Development Halton take an active role in convening Halton's nonprofit and voluntary sector.

Advocacy

Evidence based advocacy is an area of activity central to the role and mandate of many organizations in the nonprofit and voluntary sector. Historically, the roots of the sector grew out of giving voice and support to those most vulnerable. Participants concurred that advocacy

activities and the research substantiating the situation of people as they live in our communities have not been supported over the decade of the 1990s and, in fact, have been silenced. Advocacy is part of strengthening leadership in the sector and is part of the dialogue moving human services from those based on charity to those based on justice and human rights.

11. The conference participants recommend the role of advocacy be recognized as critical to raising the awareness of the public and as essential in creating a full dialogue on understanding and resolving the issues that affect the well being and quality of life of people and the communities in which they live.

12. The conference participants recommend that community based information, the basis of program planning and advocacy, be recognized as a necessary and valued function in strengthening the nonprofit and voluntary sector.

Community Awareness

The nonprofit and voluntary sector is often described as one of the pillars of a democratic and civic society. Yet, conference participants identify the invisibility of the sector as a major detriment to public understanding of their work and its importance in building caring and socially inclusive communities where opportunity exists for all. Even less discussed is the economic role and contribution of the nonprofit and voluntary sector in a community. Conference participants also note that the public remains unaware of the impact of the downloading of human services to Regional government and then the impact of further downloading on to the nonprofit and voluntary sector.

13. The conference participants recommend that a promotional strategy be elaborated to educate the public, business and the mass media on the contribution of this sector to the quality of people's lives and its impact on the prosperity of the community. The promotional campaign is to make the sector visible and recognized as essential. This activity would be a focus of the newly created Halton nonprofit and voluntary sector leadership collaborative.

Appendix 1

Question 1:

Does the report, *Funding Matters: The Impact of Canada’s New Funding Regime on Nonprofit and Voluntary Organizations*, the commentary of the panel, the observations regarding the economic contribution of the sector and the discussions of the day reflect the situation of Halton nonprofit and voluntary organizations, funders and funded?

Table 1:

Yes

Table 2:

N/A

Table 3:

- Yes, except – there are a variety of agencies that are 100% funded
- Accountability is very important
 - ensuring dollars are well spent and well used
- Issue of communication in the Halton Region – 4 distinct communities with their own newspapers, transportation systems – Difficult to inform the public of what we all do
- Halton does have a strong history of partnership and collaboration e.g. Healthy Communities Fund of Halton

Table 4:

- Yes! See-Sawing, sustainability issues. Constantly trying to respond to funding opportunities – how to make them fit.
- *wage structure issue – very real, turnover expected every 3 years in one agency. Commitment is work/family friendly environment compensates in part for lack of \$\$. but – future uncertain. Younger staff more demanding. Also expectations of youth volunteers – hope /expectation that they will be paid. Individualistic thinking is contributing to this - less emphasis /expectation of “giving back” / community focus without compensation
- Administrative – costs escalating, particularly insurance costs.

Table 5:

- Yes – we are dealing with the same issues
- Yes – definitely
- Yes we have worked in partnership but only to a certain point. We need to collaborate on issues more. Not enough focus on issue of diversity in Halton or impact of implementation

- Yes, it paints a fairly accurate picture of the Halton region, particularly issues identified in the Funding Matters report
- Yes.

Table 6

- Katherine Scott articulated exactly on target
- System not functioning very well and will self-destruct
- Panel looking to agencies to help define the parameters to be considered by funders
- *Funders not saying what do we need to do/change to do business with agencies they're funding
- *Agencies have a paper relationship with funders
- *Revisit what constitutes accountability
- Smaller sector expects to share in larger pot
- Do funders continue to fund new agencies
- Variety of accountability procedures would be helpful for agencies
- *Look at donor dollars and efficacy of 4 United Ways
- Variety of funding models – funders would look to a useful dialogue
- Sustainability

Table 7

Funders

- Clearly reflects Halton
- Struggle ensuring accountability
- Agency feedback re: scale of application
- Short term, not sustainable e.g. loaned reps now 'core'
- Outcome measurement need for all funders in Halton to speak the same language
- Sustainability measurement (code for exit strategy?)

Funders

- Yes
- Dependency relationship looking for next fix
- Aging volunteer population no recognition of the actual work of the agencies
- Disassociation of reality from the mainstream public, funders, officials
- Nothing new but good to document and quantify the reality
- Advocacy chill harm reductions and needle exchange Curbs our ability to represent those with no voice
- Chasing funders takes effort and generates loss of focus

Table 8

- Yes! for the funded
- Funders meeting in Halton already happening - using the report for discussion and planning and working with the community “Halton Major Funders Network”
- Government provincial & federal not doing that yet
- Would be good to have agencies at the funders discussion table

Funder Question

Is the structure in the not-for profit sector the appropriate structure? Agencies which cover more than one geographical area vs. the structure, the same across the areas? Should they be the same?

- Some services are networked well within the region to ensure non duplication of services and some are not
- Everyone wants the funding to remain in geographical area
- Funder network is important

Table 9

1. Lots of relevance to Halton
2. Most regions in Ontario feeling the situation as presented
3. Halton fastest growing area both challenge and opportunity
4. Historical disparities in funding in Halton
5. Fair share for (Peel) task force
6. Under funding of Sector

Table 10

Yes

Growth – Yes going up \$

Very unstable funding

Increase service no increase funding

Table 11

We can't afford to wait for a crisis to happen.

- Yes
- Clear that measurement /outcome here to stay, important to work together to educate the community

Table 12

Yes

Table 13

Yes

Question 2:

What do you consider to be the most important or most urgent concerns in relation to the situation of the nonprofit and voluntary sector?

Table 1

- Government downloading
- Politicization of funders
- Small organizations have no infrastructure – project funding
- Lack of government funding – more organization in fundraising business
- Advocacy chill – from justice to charity mode
- Searching for partners
- Pressure on corporations – demand for \$ and partnerships
- Application processes (use of consultant?) Reporting processes
- Administration support for organizations
- Program funding – Funding by sites/targets – no core funding

Table 2

N/A

Table 3

1. Sustainability of funding
2. Infrastructure – spend so much time maintaining this that we don't spend enough time 'doing' our core business
3. competing amongst ourselves for the same 'shrinking' dollar
4. Staff retention – our sector is often seen as a 'stepping stone' in someone's career.

Table 4

Milton:

Growing population, young families, year maternity leave

Acton/Georgetown:

Also population issues excellent that families are making use of resources but managing increased demand creates challenges

CAS

Provincially funded but increased caseload, results in increased need for community resources to support families and children at risk. More complex needs, insufficient resources to manage demand for increased services

- Partnerships are a requirement; make creative solutions possible but no resources to support their development. Take away from program planning
- Youth needs – not being addressed
- Need to identify core issues to assist funders/community to address priorities
- Lack of information about where to apply for funding what other people are applying for - competitive environment

Table 5

- Sustained funding that is not all project-based.
- Take off blinders to the issues in our Region.
- Maintaining funding as it relates to our individual needs but also ensuring we address others needs.
- Issues as raised in the *Funding Matters* presentation.
- Stop band-aid funding everything and balance out addressing sustainability
- The demand that downloading has placed on the sector
- To ensure implementation of a process that addresses the issues raised in today's workshop so they are not lost
- Not to let the findings of the report get lost by the wayside.

Table 6

- Applications and outcomes pieces are so diverse among funders
- Have funders come together with agencies to discuss requirements that need funders accountability needs and agency needs
- What good for what people, for what cash. *Carver*
- Strategies for improving agencies/funders infrastructure
- **Four United Ways in Halton – need to look at amalgamation
- Perceptions of social service agencies amongst members of the public

Table 7

- Lack of sustainable, core funding
- Communication among funders in Halton – should simplify, share and simplify accessibility
- Lack of policy governance and functional board operators, board training
- Decision makers not always responding to what is known at the local level eg policy set at national level, implementation at local level
- Importance of getting on the radio channels and voice needed
- Capacity building for agencies

- Increasing polarization

Table 8

1. Awareness

- Increased Awareness for the general public regarding human services
- Community needs to realize that these services are essential/important
- “Voluntary Sector” is a misnomer and needs to be highlighted as a professional sector
- Need for a public awareness campaign
- How do we get the community at large to be interested and engaged
- *Difficult because if people have had to access human services, they probably don’t want it publicized e.g. homeless.

Question: How do we make the general public aware of the services without getting too personal?

Halton – not in my back yard syndrome great community but has problems

2. Stability of Funding:

- Government should decide what it is going to fund
- Lack of funding for infrastructure and stability especially in Halton where the community as a whole is growing, the organizations need to be able to deal with the rising population

3. Advocacy

- To redefine advocacy

4. Private Partnerships/fundraising

- Don’t work well
- Lots of red tape – discouraging
- Private sector doesn’t want the red tape – difficult to give some corporations the recognition that they want – difficult to get the media
- Private sector does not want to contribute to long term operational funding they prefer bricks and mortar one time gifts
- Agencies competing for donors/funders – where do we go for \$
- Some agencies it is difficult to make their case (something to sell) for fundraising should these agencies be funded differently?
- Cuts in a government sources = agencies feeling pressured to fundraise – is it realistic???

Table 9

- 1 Fastest growth area with historical inequities in funding compared to other regions
2. Chronic under funding based on the perception of an affluent community

Table 10

- Human Resources
- Adequate income and benefits
- Training \$ shortages for staff development

- Funding – can't provide quality services and not provide adequate and stable core funding
- Volunteer Recruitment
- If no resources to support and recruit volunteers
- The restructuring of the sector to be strong or the poorly paid deliverers of government services

Table 11

- Lack of funding
- Need to be on government radar, private sector radar
- Lack of core/administrative funding
- Perception that Halton has few social needs under servicing of North Halton
- Sustainability issue
- Funding gaps between application and allocation
- Clear broadly disseminated demographic information
- Competition with large non profit institutions
- Need shift in social values to fully support meeting the needs of the vulnerable
- Need community buy-in
- Growing loss of volunteers

Table 12

- Amount of time devoted to seeking, developing and submitting grants
- Clearer and better communicated funder priorities
- Lack of vision – clarity of purpose and vision for the social priorities
- Social agenda should be a major priority to economic development

Table 13

- Money!
- Sustainable Funding
- Government has and the funding so much, services cannot be provided
- Approval process on government funding has become a slow process forcing organizations dependant on funding to work ahead with “assumed funding” Programs must go ahead
- Volunteer burn out – a real issue, only so many hours to give

Question 3:

What recommendations for action do you believe are necessary to give leadership to addressing and resolving the concerns raised today?

Table 1

- Advocacy/Lobbying – very strategic
- Politicians invite key corporate sector people to contribute
- United Way of Halton! – Funders
- Need for education of community – awareness
- Role of CDH – lead agency for review
- Use of United Ways to review current issues
- Use of Board members
- Breakfast meetings focussed!
- Municipalities have space – could be used by non-profits
- Standardization of boundaries – Federal/Provincial/Municipal
- Use of technology in funding applications – e-mail.

Table 2

1. Process of asking for grants streamlined so it doesn't drain resources
2. Build / increased attitude of trust amongst competing agencies: between funders/applicants
3. Quantify the Benefits of the nonprofit sector in tangible terms and state or imply the repercussions of the agency/service not being available
4. Establish process to research, streamline application process eg. Statement of intent
5. Educate donors
6. Develop board – supported professional and agency standards (Depends on political climate)
7. Make issue political

Lack of Trust - Address

5. Inter - agency
2. Agency – Funder
3. Lack of understanding leads to belief that funder asking too much of applicant
4. Application should reflect how project fits in applicant's vision/mission, not funders shows that agency not just 'funding shopping' and will do any project just to attract \$
5. Develop professional standards, enhanced by boards.

Funders need to educate and play a more proactive role in changing status quo.

1. speak out regarding status quo
2. Educate ‘funded’ on need for requirements

Table 3

- Need to ‘educate’ the general public on the mandate and benefits of our sector
- Centre for Excellence for the not for profit sector

Most Important

Develop a ‘network’ to advocate for our sector

- Broker information and services
- Communication network i.e. web site
- Offer a similar session as today for agency ‘Board members’ to ensure they are also aware of the challenges

Table 4

- Advocacy/Awareness of needs in the community – private sector and role of volunteer sector at meeting needs of Community
- client groups
- mobilization of the sector/common voice – funders
- United Ways needs to improve promotion of community needs with private sector
- Days of Sharing – Private sector employers spend a day with an agency
- Funders to look at multi-year funding and whether they are going to be wide or deep
- Transportation issues – accessibility issues

*CDH to identify need, common, flag facilitate sectoral discussions. Determine what can be done together – bring agencies /funders/ private sector together. Begin with data/understanding of community needs. Share responsibility – develop role will amongst all parties

In summary:

- Facilitate sectoral discussion
- Begin with data and understanding of community needs
- Determine what can be done together (agencies/funders/private sector)
- Share responsibilities and develop political will amongst all parties

Table 5:

- Form an association of the non-profit sector that speaks and lobbies with one voice to government and the general public.
- That a commission be struck by people that are interested in addressing the “Funding Matters” issues that is inclusive of funders, all government levels, and a cross-section of

non-profit groups both organized and grass roots with member selection in a non-partisan method and chaired by the Halton Regional chairperson

- Educate the public on our sector issues.
- To support the work and capacity of small homeless grassroots organizations through a special /slush fund

Table 6

- Funders and agencies have their own constraints – need to move to active participation, active engagement
- Funders and agencies have goals for the common good
- Need to look at funding time framed from short to longer term – sustainability
- Address the funding concept of funding deeper or wider
- Continue the dialogue about both agency and funders infrastructure that is more user friendly
- **Funders and agencies need to speak with one voice - approach Joyce Savoline to create a regional work group to explore this dialogue – develop outcomes with Trillium support; co chaired by rep from funders side and provider side
- Community Development Halton to facilitate this process
- Common application outcome/methodology
- Four Halton United Ways coming together if not physically then have standardized policies/procedures – enlarge this to all U.W s as some Halton services cross into Peel as well

Table 7

1. Funders: Address common opportunities together common language, outcome measurement streamlining and simplifying and find ways of communication between funders and funded to manage upwards – power of common vision – share expertise
2. *Funders consortium and agency association; Communication channel support
3. Capacity Building for agencies, An Institute of Excellence Round table learning assistance with Human resources benefits etc; look for ways to create greater efficiencies to loosen up more funding for agencies
4. *Agency governance – education board management

Table 8

Awareness:

- Public awareness campaign highlighting the importance and the positive work that the human services agencies do
- Awareness and educating the funders, politician and general public about Halton and the issues and the needs for human services

Stability of Funding:

- Develop a commission where funders and funded agencies can discuss and strategize around working together to stabilize the not for profit sector in Halton (We have a project for them already).
- Organize a task force that analyses the level of services to the level of funding in Halton and compares it to the provincial average. In this way we can build a case for Halton to ensure they get their fair share of funding for human services (this recommendation is based on the success of the “Fair Share Task Force of Peel”
- Need to build the case for Halton to get it’s Fair Share similar to Peel, need to do the research in order to ensure that not for profit sector is supported MOBILIZE a Task Force]
- Need to be organized and consider long term needs and planning

Analyzed services vs. funding

Table 9

1. Need for community to be educated and to become aware of the sector’s work and its needs
2. Getting real #s within various sectors to make a logical and compelling case
3. Getting the impact across to funders and communities of the Voluntary Sector What would community look like without us
 - a) speaks to our role
 - b) speaks to our work and its importance
4. Need a marketing strategy - needs investment by government and funders; “Community Investment Sector” is a better name

Table 10

- Public Education is the Key – to recognize the value of the sector
- No awareness of the network of services
- Media – want an angle
- A professional well funded advertising campaign
- This will take to levels of government this will take a long time
- Have funders group tell organizations about learned best practises
- In recognition, Regional chair to convene a commission to investigate the role of the voluntary to change the new funding regime

- It would be a timely matter for the United Ways to examine a process to amalgamate in Halton to reduce 4 administration structures and take the lead in this initiative
- To raise more \$, we need a rationalization of the work of United Ways of Halton
- Rationale behind Trillium funding, who makes the informed weighted decisions- we want a response and participation in community strategy

Table 11

The development of a collective voice don't want to leave having done nothing

Opportunities to network

An organization that provides support to small NPs with marketing, fund raising publicity etc.

Need to look at our social, economic, environmental environments more holistically – healthy community

Need to develop community vision that holistically describes what our communities need in all the sectors and how we as a community intend to meet those needs

Publicize what's in the benefit in corporate giving for business?

Publicize the Ford model, TD Canada Trust, Cumis

Suggested action: form steering committee to develop collective voice

Collect studies, pull information together, develop vision/clarity about needs, present to political bodies/media. Report back to loose network of NPs create region-wide suggested actions, promote private sector involvement, work on community education and a buy in. Ask government agency to supply coordinator – either fund position or provide in-kind staff – or run through Community Development Halton

Table 12

Create a federation of volunteer and non-profit organizations that can speak with one voice to government and the community

Table 13

- If there is apathy within the public – nothing shifts
- Concrete examples – real examples presented to public grabs their attention – how do we move ahead
- There is a perception that a volunteer staffed organization doesn't need anything else because it is volunteer
- We need to channel our energies and efforts to ensure that the public understands issues and needs and communication with our funders
- We (in this room) are preaching to the choir
- We need to develop a process to communicate this information to others outside of this room
- Good idea to present to Municipal Bodies (councils etc)

- The major funders group – represented by local government and major funding bodies in the Halton area. People are not aware that these groups talk together and try to communicate issues back out.
- Why are we not doing sustainability funding? How can we address this?
- Challenge for funders – went to project based funding to allow for more funding for more organizations Vs sustainable funding for a few
- We must focus on the things that we can control
- Application Process – volunteers who are already stretched out the limit are spending too long filling them out we must streamline process
- If we're going to get together to effect change charging us to get together doesn't allow for everyone to get together around the table.
- Why do we have 4 United Way Agencies in the Halton area? It seems very redundant
- Social services has been decimated by changes in funding common sense revolution did not 'fit' Canadian values
- Raising the profile of the non-profit sector by marketing what we do and talk the language of business"
- Being strategic, having a plan, we can't do everything at once. We need to make the time to make these plans and communicate our needs to the public and our funders
- Educating the average citizen to what our organizations do
- We have an image problem in Halton because "we don't have problems in Halton" because we are amongst the wealthiest communities in Canada.
- A Marketing/message to communicate the fact that there are issues is Key
- Business/citizens understand economics, newspapers understand economics
- When funders hear needs/concerns from the non-profit sector they should be supporting an education process for the community, funders can support "Marketing 101" workshops for agencies/non-profit to learn to communicate their message.
- Step back from our individual agency needs and benefit together.