

# **Settlement Services and the Public Good**

*Ted Richmond*  
*(Laidlaw Foundation)*

**&**

*John Shields*  
*(Joint Centre of Excellence for Research on*  
*Immigration and Settlement – Toronto (CERIS) &*  
*Ryerson University)*

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## **Introduction**

The intent of our talk is to put into the open some of the larger questions that have arisen out of the changing nature of the relationship between funders and nonprofit service providers. These are questions, that for the most part, have not been debated publicly. Much of the issues raised in this paper are beyond the control of individual community-based service providers or public service administrators as they ultimately concern public policy issues. Hence, these comments should not be taken as a blaming exercise. Nonetheless, it is important to raise such issues since it is vital that we all have a better understanding of the context in which our publicly supported services are delivered and administered. Settlement services after all are a vital public good.

### **1) Central Argument and Key Questions**

#### ***Core Overarching Position Statement:***

Over the last number of decades governments have been restructuring their relationships with nonprofit organizations. While this restructuring has taken place under the inclusive title of ‘building partnerships’, in actual fact the kinds of relationships that have generally been fostered are top down contractual ones. The contractual relationship that has been developed between the state and nonprofit organizations is, in effect, serving to transform the nonprofit sector, moving it away from its core mission, commercializing the sector’s operations and compromising its autonomy.

In the not too distant past, a good part of the Canadian Way of linking the state and the nonprofit sector involved a strong community capacity building model that included a significant grass roots advocacy role for civil society organizations — the kind of relationships that broaden and deepen democracy and civil society.<sup>1</sup> Under the guiding influence of a new political direction — neoliberalism (a program embraced in various degrees by all the major Canadian political parties) — this relationship has changed into a “contracting regime”. This is a development model that privileges business-like relationships and individual-centred notions of societal relationships. These developments have profound implications for inclusive citizenship, the health of civil society and the development of cohesive communities. In summary, rather than promoting civil society and democracy these new ‘partnerships’ have tended to work, at least in very many respects, at cross purposes to these goals.

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<sup>1</sup> The community capacity building model of nonprofit sector state support is one that is strongly rooted in the Province of Quebec’s relationship to the community sector through its ‘social economy’ initiatives (see: Noël 2002; Vaillancourt and Tremblay 2002; White 2001; and Lèvesque and Ninacs 2000).

### ***Solutions, A Modest Proposal:***

In the short to medium term we need both a principled and pragmatic response to this situation. Most importantly we need to put into place a more balanced funding system, one that does not put all the funding eggs, if you will, into the “contract” funding basket. We need to restore a core funding base for nonprofit service providers, and hence create funding mechanism that will provide nonprofits with the capacity to both effectively service, but also, and importantly, represent communities — this is the way in which social capital and socially cohesive communities<sup>2</sup> are built on the ground. In short, government funders need to financially support the missions of the organizations themselves not just projects.

It must be made clear that the fundamental issue around government financial support is not about the levels of financing, (although there are important issues here) but with the character/nature of the financing itself; i.e., the emphasis on short-term, unstable, “contract” rather than longer term and more stable base funding. It has been this aspect of the changed funding system, rather than the level of government funding dollars, that has served to fundamentally destabilize the NGO sector in Canada.

In addition, the government imposed accountability systems that go along with new forms of state-NGO financing must be modified and made more flexible in ways that would allow nonprofit organizations to be responsive to changing community needs and to facilitate real dialogue and give-and-take between community service delivers and the state funders.

The Independent Blue Ribbon Panel on Grants and Contributions Programs (2006a & 2006b) significantly has raised similar concerns. Consequently, there is growing recognition that action is needed on these questions, issues that are important to the ‘public good’.

- Questions Arising:*** 1) Has the move to “contract” funding and the associated adoption of new accountability mechanisms compromised nonprofit organizations’ independence?

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<sup>2</sup> *Social capital* is closely related to civic participation and voluntary activity. The role of nonprofits in contributing to ‘social capital’ has come to be viewed as especially important. Social capital, as Robert Putnam notes, “refers to features of social organization such as networks, norms, and social trust that facilitate coordination and cooperation for mutual benefit” (1995: 67). For its part: “Social cohesion may be defined as involving building shared values and communities of interpretation, reducing disparities in wealth and income, and generally enabling people to have a sense that they are engaged in a common enterprise, facing shared challenges, and that they are members of the same community” (Maxwell as quoted in Policy Research Committee 1996: 44). It is according to Judith Maxwell “... the capacity to reconcile differences and discern common interests” (as quoted in Public Policy Forum 1998: 31).

- 2) Does the new funding relationship between governments and nonprofits contribute to, or hinder, effective service delivery?
- 3) Is the nonprofit sector experiencing a state of crisis? If so what can be done to relieve this situation? And finally,
- 4) What role does the nonprofit sector have in promoting a vibrant democratic civic society and how can that role be best sustained?

## 2) **Setting the Context**

### *i) Social Service Oriented Nonprofits are Operating in a Significantly Changed Environment*

#### *a) Changing Social and Economic Landscape*

The following trends are important for understanding the increased stresses placed on the nonprofit sector (enhanced demands placed on the sector because of intensified social problems). These include:

- expanding societal needs and social problems associated with globalization and the politics of competitiveness (significant social and economic dislocation have resulted).
- growth of income polarization (Canadian Council on Social Development 2003), high and entrenched levels of poverty and homelessness (Evans 1998) and youth exclusion (Marquardt 1998; Shields, et. al. 2006).
- for recent immigrants, despite higher education and skill levels, there has been a growing distance between their labour market earnings — a 25% earnings deficit (Statistics Canada 2003) — compared to both native-born earners and older cohorts of immigrants (problems of economic integration).
- growing evidence of the racialization of poverty of in the larger cities, especially Toronto (Ornstein 2000; Galabuzi 2001, United Way of Greater Toronto & Canadian Council on Social Development 2002; Shields 2003), and the expansion of poverty among other vulnerable populations like single mothers (Burke and Shields 2000).

b) *Shifting Public Policy and Administrative Frameworks*

In addition, changes in public policy and public administration have negatively impacted the nonprofit sector, including:

- there has been a fundamental restructuring of social services provision (changing public policies and administrative practices) among Governments and other societal institutions.
- the general trend has been to shift responsibility downwards with the municipalities experiencing the most negative impacts among Government bodies (increased responsibilities without adequate tax base) — the ‘Cities Agenda’ only partially addresses this problem. The recent Canada-Ontario Immigration Agreement is a major funding development which should provide an advantage to the settlement sector in Ontario.
- following from the call from David Osborne and Ted Gaebler, *Reinventing Government* (1992), for Government to “steer rather than row”, there has been a strong shift to contract out service delivery to nonprofits and in some cases for-profit organizations — associated with *New Public Management* practices. The question arises as to the capacity of the voluntary sector to taken on such an expanded role. It has also brought to the fore the issue of accountability and the nonprofit sector.

c) *The Question of Nonprofit Accountability*

In its most basic form “[a]ccountability is an obligation to explain how a responsibility for an assigned task has been carried out”(Canada West Foundation 1999b: 8). The issue for the nonprofit sector is the greatly expanded scope of responsibilities and a shift in focus as to who it is most accountable to.

Much of the attempt to restructure the welfare state has been justified on the grounds of enhancing efficiency and accountability — what Janice Gross Stein has come to call the “cult of efficiency” (Stein 2001). The responsibility for social welfare has been one shared between the state, the private sector actors, and nonprofit organizations, but in the modern period with the state taking a leading role (a mixed social economy). The contemporary effort to *reinvent the welfare state* is about recasting this configuration of state-society sharing responsibilities for social welfare. In particular, the goal has been to download many responsibilities onto the family and the nonprofit sector with the contention that this will relieve state fiscal burdens and increase efficiencies (Burke 2000: 179-181). In fact, a major component of the neoliberal policy project was to have voluntary sector activities replace a good deal of what government did under the old welfare state.

The issue of accountability has been pushed to the fore as the nonprofit sector undergoes this process of structural adjustment. As more responsibility has come to be loaded on to the Third Sector nonprofits have come under “greater pressure to improve its organizational performance” (Light 2000: v). As Paul C. Light observes:

“Its funders, be they governments, charitable foundations, or individual givers, have never seemed so insistent about economy and results, while its clients, be they communities or individuals, have never been more demanding about efficiency and responsiveness. *How* the nonprofit sector does its work is becoming almost as important to funders and clients as *what* the sector actually delivers by way of goods and services” (2000: v).

In spite of decades of rapid growth and strong overall public respect for nonprofit organizations an impression remains that the sector is not as efficient as its private and government sector cousins — an idea often promoted by governments themselves.

The lean and mean philosophes which so dominated private and public sector management thinking in the 1980s and 90s have come to penetrate deeply into the nonprofit sector (Light 2000: 1,13). It is little wonder, consequently, that charitable organizations so often centre their fundraising messages around the organizational efficiency of their operations as much as they emphasize the philanthropic benefits (‘their public good’). In the words of Paul Rutherford: “The big charities employed a particular vocabulary of aid to explain their activities. They talked what is colloquially known as the ‘language of business,’ promising efficiency and economy: ‘Doing good fast and cheap’ would be an appropriate slogan” (2000: 117-118). This is a kind of a “Harvard Business School bang-for-the-buck mentality that fails to take into account the subjective, unquantifiable nature of much philanthropic[/nonprofit] work” (Dowie 2001: xv). And yet many organizations in the NGO world have felt compelled to speak in such terms, perhaps unwittingly assisting in the cultural transformation of the sectors value system.

A key policy informant put forward a compelling perspective in this regard.

“... I always found the notion of voluntary sector ‘inefficiency’ curious. Often, in justification of some new, particularly destructive initiative, I would be told that voluntary organizations were inefficient because they did not use the latest management theories in their operations, or did not have a ‘bottom line’ mentality. This despite the obvious facts that voluntary organizations consistently deliver more outputs per dollar of input than either business or government, and consistently seem able to motivate workers to astonishing levels of effort for low compensation. If only business and government could learn to be equally ‘inefficient’”.

Julie White, former Executive Director of Ontario's Trillium Foundation offers a compelling perspective on why we should be cautious about attempts to hold nonprofits accountable to the same measure of success that applies to the business sector. As she observed:

“And all this has created significant pressure on the sector for ‘deliverables’; you know, “what are the numbers?”, “what are you able to achieve?” And although I think there are some good benefits in applying business standards to charitable organizations, charities do not have quarterly earnings. Their impact is often long term and harder to define and part of the challenge for us, in the sector, is trying to find effective ways of measuring things. And there is a danger in rushing too quickly to superficial indicators that we think are going to measure our success.”

“... Canada doesn't do very well in terms of bringing its various sectors together to learn from each other, and although it is true that the nonprofit sector has much to learn from business, it is also true that the business sector has a great deal to learn from the nonprofit sector, particularly about meeting the needs of conflicting stakeholders, managing and measuring long term impact, and dealing with uncertainty. To say nothing about doing more with less” (1996: 4, 8).

There is a certain misconception that has been embraced by government and other funders that administrative accountability is one and the same as public accountability — in fact, administrative accountability has replaced to a significant degree public accountability. This is a problematic trend for organizations that are engaged with the public on an ongoing basis, especially community-based organizations.

‘Administrative accountability’ is able reporting on whether funds received are spent according to the conditions laid out regarding obtaining the funding. By contrast, “public accountability” is about the responsibility of state funders to provide the amount of money needed for essential services and to report this information clearly to the public. Hence, this form of accountability is concerned centrally with public policy.

Another complicating factor is fact that the accountability of the voluntary sector operates at a number of levels. For example, there is a responsibility which nonprofits owe “to their beneficiaries or clients, members, volunteers, staff, partners and affiliates, donors and funders, and governments, as well as to the general public or specific publics. But, they are accountable in different ways to these different constituencies” (Panel on Accountability and Governance in the Voluntary Sector 1998: 8). Sometimes these

various levels of accountability can rest uneasily together. For example, government demands for “efficiency and economy of service” may conflict with client desires for “quality service”. Such tensions are not easily resolvable and makeup part of the *small-p politics* which nonprofit bodies are often engaged. The concern is that accountability to the state has increasingly come to trump nonprofit accountability to the community.

While these issues are fundamentally political and even moral or ethical in their nature — in terms of our notions of democracy and public accountability — they have enormous practical impacts for the NGO sector. The new accountability mechanisms not only limit autonomy; they are also very costly. The senior researcher for the Voluntary Sector Initiative has estimated that the cost of the “new accountability regime” for nonprofit service providers may be as high as 20% of the value of their awarded contracts — a figure rarely acknowledged in the award itself. In the light of these findings Susan Phillips has called for a far more elastic accountability system (Phillips 2002). In a similar vein, a survey of Ontario nonprofit directors have forcefully argued that newly imposed government evaluation requirements have had the unintended effect of actually reducing the ability of agencies to service clients because of the considerable amount of organizational resources they consume in their execution (Reed and Howe 2000: 31). In terms of governance the new contractual terms for service delivery can become “administrative mechanisms to maintain state control over third parties. ... While this issue may appear to be purely administrative, in reality it is political because our frameworks for evaluation are directly linked to our visions of accountability in a democratic society” (Omidvar and Richmond 2003: 8; also see: Evans and Shields 2002).

Further confusion and greater practical problems flow from the current habit of various funders to confound ‘accountability’ with ‘evaluation’. While it is both possible and desirable for a particular agency to provide a reasonable level of **accountability** for publicly-funded service provision; it is simply impossible, at the agency level, to provide true **evaluation** of the long-term outcomes of their services. “Evaluation” is fundamentally about whether a program or program orientation is working; it short it is concerned with assessing whether a program is producing desired results.

The very methodology of such evaluations requires resources and expertise devoted to an examination of macro factors such as changing labour market conditions and population demographics. The confounding of notions of ‘accountability’ and ‘evaluation’ places an impossible burden on NGO’s, and institutionalises the funders’ abandonment of responsibility for providing the necessary resources to evaluate the long-term outcomes of publicly-funded social services (Chambon and Richmond 2001; and Howarth 1998); perhaps in governments’ attempts to escape their policy consequences. After all, nonprofit organizations have been very responsive to accountability concerns.

It is essential that this discussion not be interpreted as a refusal of the NGO sector to be accountable for their use of public funds.

While the full range of practical implications that flow from this perspective are beyond the scope of this paper, some essential elements must be noted:

- Funders must assume responsibility for providing NGO service organizations with the necessary resources to implement appropriate systems of accountability and to track the kind of short- and medium-term service outcomes that contribute to more global evaluation.
- Funders must also assume their responsibility for providing the necessary resources and coordination (e.g. with academics and evaluation experts) to provide more global evaluation of service outcomes.
- NGO's involved in service delivery require a single, agency-specific system of evaluation and accountability that corresponds to the agency mission as well as the administrative resources of the agency and the accountability requirements of multiple funders; they cannot continue to assume the burden of providing multiple and changing reporting systems to multiple funders.
- Funders and agencies alike require training in scientific and resource-efficient methods of accountability and evaluation; the desire to "count and evaluate everything" which has developed along with wide-spread computerization must be combated; systems of sampling and the use of qualitative methods must be validated and promoted.
- Ethical issues remain fundamental to professional delivery of social services; the funders' legitimate concerns for accountability cannot be confounded with an intrusion on the principle of client confidentiality.

Finally, the questions of accountability and evaluation systems are ultimately political and as such must be subject to public debate, rather than negotiated privately and separately between individual agencies and the funders of particular programs. Within this debate there are a number of issues of terminology that currently provide more confusion than clarity with respect to basic issues of public policy. We have already noted the ambiguity of various notions of "accountability", as well as the confusion of "accountability" with "evaluation", but other forms of labelling with ambiguous meanings also require examination.

Consider for example the use of the term "voluntary". For the NGO sector it refers to the community basis of their support and their governance, while for funders it often appears to denote a sector that can be pressured to continually do "more with less". In part, this goal is achieved by harnessing the energies of volunteers, including the unpaid overtime labour of employed NGO staff. Importantly, one of the most significant contributors of volunteering is done by paid NGO staff themselves, often in their efforts to preserve the quality of human contact that has been eroded by imposed 'efficiency' measures.

Similarly the terminology of “professionalisation” for the NGO sector refers to the raising of the level of service quality and related compensation, while for funders it appears all too often to imply conformity with externally-imposed obligations at lower costs. Consider as well the increased tendency for governments and funders to itemize services as standard ‘unit of service’ (Reed and Howe 2000: 29-30), irrespective of the acute needs associated with, for example, gendered or racialised status of clients. Finally, reflect on the current redefinition of community agencies as “service providing organizations” or SPO’s, rather than NGO’s with a mission that includes community education, civic engagement, and advocacy. Within the nonprofit sector, promoted by the contract funding system, there is a growing imbalance between the ‘contracted service function’ of NGOs and the NGO role of providing ‘voice for the voiceless’ — advocacy.

### 3) *The Contracting Regime and the New Governance*

#### a) *Overview*

The drive towards alternative service delivery (ASD) arrangements increasingly calls upon third sector actors to enter into ‘partnerships’ with the state. These arrangements are overwhelmingly focussed upon production of services. Advocacy through intermediary nonprofit organizations, under the rules of this new funding regime, has been actively discouraged (Laforest 2001: 8). Hence, other important roles served by the third sector, such as research and advocacy, are marginalized.

Clearly, the drive to download responsibilities for social welfare by governments to the third sector has strained the capacity of the sector to handle new demands to its outer limits — the capacity issue is important here.

#### b) *Restructuring Nonprofit Sector Funding*

It is important to note that about 60% of all funds from nonprofit organizations come from government sources, with provincial governments being the most important single source (Eakin 2001: ii; Canada West Foundation 1999b: 2). In Ontario social service nonprofit organizations received some 89% of their funding in the 1990s from one of the three levels of government (Eakin 2001: 5).<sup>3</sup> Only some 15% of nonprofit financial resources are derived from private giving (individual and corporate) (Eakin 2001: ii). The remaining 25% is raised by other means but largely through fees for services.

Governments have not only cut back on their levels of funding (the Canada-Ontario Immigration Agreement opens up a rare case of an increase of available funds for

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<sup>3</sup> It is important to note that while we have a global sense of the funding of nonprofits with charitable status our knowledge of the other components of the sector are lacking, also our knowledge is sketchy about funding patterns at the sub-sector level.

settlement) but, and arguably more importantly, they have changed the nature of funds they provide to the nonprofit sector. In short there has been a displacement of core/base funding for “contract funding”. Contract funding involves “the purchase of defined services with specified outputs and closely controlled funding, usually accompanied by increased accountability requirements with little or no flexibility in program delivery or funding” (Eakin 2001: i). Additionally there is often the requirement for nonprofit organizations to come up with “matching contribution funding” from other sources (Eakin 2001: i).

Contact funding was perfected in New Zealand and Britain (under Thatcher) in the 1980s and is guided by a neoliberal political philosophy and New Public Management administrative practices. With contract funding there has been a deliberate built-in underfunding of nonprofit organizations. The theory guiding this approach is “that underfunding would allow the public to choose which services to support with their donations. ... ‘Contact funding’ for defined services enable governments to specify outputs and closely control spending. This type of funding has tremendous appeal; it was seen as bringing the rigours of business to the perceived ‘inefficiencies’ of service provision among voluntary sector organizations” (Eakin 2001: 2).

In terms of funding short falls, it is estimated that current contract funding arrangements with nonprofit organizations, after all real costs are factored in, “is from 7%-15% short of actual costs” (Eakin 2002: 8). In order to make up for these funding deficiencies nonprofits have made up the difference by strict restraints around staffing and cuts to infrastructure investments. The result is the ‘hollowing out of the foundations’ of nonprofit organizations. Consequently, the NGO sector has been placed under considerable and increasing stress.

#### **4) *Growing Sources of Stress***

One of the greatest sources of stress for the nonprofit sector is the result of both increased workloads and the changing nature of their work. The norm is increased demand, without an increase in staff to match — generally, agencies are doing more for less (Reed and Howe 2000: 21-22).

A study of the job quality in the nonprofit sector reveals that workers in the sector are on average considerably older, more likely to be employed in contingent jobs, better educated, enjoy fewer fringe benefits, bear heavier workloads, and managerial, professional and technical/trades earn \$2 to \$4 per hour less than those in the for-profit-sector (McMullen and Schellenberg 2003). In this regard the Canadian Policy Research Networks have come to the following disturbing conclusion: “Government off-loading has meant increasing demands on the sector. But, resources may not be adequate for the new responsibilities. Workload problems, stress, work/life conflict, job insecurity, lower pay and benefits and a high level of dissatisfaction are all warning signals” (2003: 2). There appears to be a growing polarization between public/para-public versus nonprofit sector wage and benefit compensation to the detriment of third sector employees. For

professional staff compensation also appears to be significantly higher in the private sector compared to the nonprofit sector as well.

The provision of publicly provided social services through the mixed social economy in Canada has long been made possible through “the sacrifices of exploited staff”. With the movement toward intensified alternative service delivery of social provision through the nonprofit sector this tendency has been amplified. And while it is the case that “helping people is a reward in itself, it does not compensate for low wages and lack of benefits” (Canada West Foundation 2000: 6). Given this situation the problem of retention of quality staff in the sector will become increasingly significant and difficult in the future.

The structure of workload has changed as well; some of the factors that have influenced the new world of nonprofit work are: an environment of increased competition, need to work in multi-partner projects, increased accountability reporting, fewer committed and flexible volunteers, clients with more complex problems, and the need to be computerized (Reed and Howe 2000: 21-22). This has made work in the sector more difficult.

In the Reed and Howe’s (2000:27-28) Ontario study, most of the respondent organizations were either restructuring, amalgamating, or downsizing (or saw these as imminent). Moreover, the study found that resource reductions were *NOT* the major concern of the organizations surveyed, rather it was the manner that funds are now provided to voluntary organizations; i.e., contract funding (Reed and Howe 2000: 45-48). Smaller nonprofit organizations have also experienced difficulties because of the growing challenge of finding community space due to increased user fees and reduced access to schools in provinces like Ontario.

##### 5) *Concluding Observations: Implications for Democratic Governance*

There has emerged a ‘democratic deficit’ as community-based organizations are restructured in ways that compromise their independence and diminished their ability to advocate on the behalf of their communities (de-funding of the advocacy function, and the characterization of such activities as the work of ‘special interests’).

The way that funding restructuring has taken place under the influence of neoliberalism has not only served to drive the sector into a state of stress, if not crisis, but also extend the little fingers of the state deep into the operations of nonprofit organizations through project-based contract funding and new accountability mechanisms. This has intensified the work load of already heavily stretched organizations and compromised their autonomy, and worked against a vibrant independent civil society and threatens publicly supported services that are vital to the public good (Evans and Shields 2002; Evans, Richmond and Shields 2005).

Attempts to move third sector organizations toward a market (to function more like businesses) rather than a community-based model of operation represents a profound transformation. The observations of Robert Ware are significant in this regard:

Communities are the place for public moral activity, while markets are the place for private economic activity. Communities, at their best, foster recognition, care and co-operation. Markets foster anonymity, independence and competition. Communities are considered the place for openness, security and trust. Markets are the place for secrecy, insecurity and distrust .... Communities look for dignity and equality. Markets look for fitness and success. ... The problem is that our society is awash with markets but in need of substantive community with public values (Ware 1999: 307).

### ***What Can be Done?***

It is essential to understand clearly what the core nature of the problem is and some factors that may help to point to a way forward. This may best be summarized in the following points, namely that:

- 1) the state's relationship with NGOs have been deliberately restructured through the new contracting regime that has imposed an accountability framework that is both burdensome and controlling of NGO functions.
- 2) the primary issue is not the amount of state money directed towards NGOs but the kind of money — above all the sector needs 'good money' and needs to unit around advocating for this.
- 3) in the current policy climate there is considerable resistance to tax increases. At the same time there has been strategic public social investments. However, hospitals and educational institutions have captured most of these dollars. In this policy context it is unlikely that significant new dollars will flow to the nonprofit sector. This reality reinforces the importance of the quality of the dollars received rather than the amount of dollars. Once again in this regard the Canada-Ontario Immigration Agreement offers a strategic advantage.
- 4) there does exist examples of 'best practices' flowing out of initiatives such as the Voluntary Sector Initiative (VSI) that can be pointed to. However, there are few champions of fair funding practices among the bureaucrats that administer programs at the program level. Eakin identified in her study that only 3 of 17 surveyed projects has having 'good' funding

practices<sup>4</sup> — some of the worst offenders are big federal funders like HRSDC, CIC, and Status of Women. What is desperately needed is NGO funding reform champions in the ranks of the bureaucracy at the program level.

- 5) in Toronto a funders forum has been set up led by the charitable foundations to spearhead discussions between public and private NGO funders around the issue of progressive funding reforms.

It is within this context that a comprehensive strategy must be developed by the nonprofit sector in Canada to guide future relationships with government and society for the betterment of the public good.

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<sup>4</sup> See: Lynn Eakin. 2005. *The Policy and Practice Gap: Federal Government Practices Regarding Administrative Costs When Funding Voluntary Sector Organizations* (Ottawa: Voluntary Sector Forum).

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