2022

GREATER TORONTO NON-PROFIT COMMUNITY SPACE SURVEY RESULTS

Written collaboratively by members of the
Toronto Social Purpose Real Estate Reference Group

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Introduction

For decades, communities could take for granted that their local non-profit theatre group or sports league would be there for them and their children. Families could move into a community with the comfort of knowing their affordable after-school program was available or that there was an early years program operating out of the local church, a commercial storefront or community centre.

The economic realities that made those opportunities possible have been eroding for decades and have now reached a crisis point. Skyrocketing real estate prices and development in urban centres have made it very difficult for community groups to find stable, affordable, accessible and available space in cities. Demographic shifts in rural communities have led to the shuttering of numerous faith and community centres, due to demolition, loss, or deterioration, on which many community groups relied.

Often[1], organizations that do not own spaces are dependent on subsidized or discounted rent, or the provision of entirely free operational spaces (Faith & the Common Good et al, 2020). Market rate rent is mostly out of reach and non-profit funding is often restricted with only very limited resources for overhead expenses such as rent. The COVID-19 pandemic exacerbated the situation further, with many organizations experiencing losses in revenues but increases in demand for services, further hindering their abilities to pay rent and other operating costs.

For non-profits that own their spaces, despite their willingness and the expertise to grow and expand, the lack of affordability and funding hinders their ability to do so. In fact, non-profits often want to build spaces to house services, programs, and support needed by communities together in mixed-use developments, both to create community hubs and to be more economically efficient in development. However, market conditions over the last few decades have made it challenging if not impossible for non-profits to acquire and afford owning their own spaces, while organizations leasing space are faced with prohibitively high and increasing rental costs.

With rising real estate costs and real estate redevelopment pressures, limited access to funding and lack of access to land and affordable spaces, organizations that have been serving communities for decades and critical to social infrastructure are now being squeezed out, and as a result, our society risks losing its “community glue” - when community space is lost, it is not only a loss for the non-profit organizations that occupy them, but also the people these organizations employ, the communities they serve, and the cultural landscape of the neighbourhood.

1 It is estimated that ⅓ of Canada’s faith buildings could be in danger of closing

Non-profit organizations need stability and predictability to thrive. The lack of affordable community spaces has serious consequences for non-profits and the communities they serve. In order to understand the extent of the problem and what kind of space is needed, Toronto's SPRE Reference Group created the Greater Toronto Non-Profit Community Space Survey. Inspired by the Social Purpose Real Estate Collaborative of British Columbia's "Space for Community" survey, the objectives of the survey and this report are to further understand the current state of community space for organizations including barriers and challenges to accessing spaces, real estate management, and future space needs. The findings in this report are consistent with and further support the Ontario Nonprofit Network's report, **COVID-19: State of the sector one year after the onset of the COVID-19 pandemic,** which found that "Almost two-thirds of nonprofits reported an increase in demand for programs and services. At the same time, half reported pandemic-related losses in revenue" (ONN, 2021).

The intention of this survey is to serve as a high-level "pulse-check" on the state of community organization access to operating space in the region, informing future research and work on this area of study. In this report, community space refers to long-term spaces, owned or leased, used by mission-driven organizations to deliver their programs and services. Inquiries about this report can be directed to Alex Dow, Director, Community Initiatives & Partnerships, United Way Greater Toronto (adow@uwgt.org) or Alix Aylen, Program Lead, Infrastructure Institute (alix.aylen@mail.utoronto.ca).

Toronto Social Purpose Real Estate Reference Group,
September 2022

Sample

The survey was emailed to a master contact list of 1,865 contacts within the non-profit sector of the Greater Toronto Area, compiled by Findhelp | 211 Central and United Way Greater Toronto. The survey was also promoted through network mailing lists by members of the Toronto Social Purpose Real Estate Reference Group, including through the Toronto Non-profit Network and the Community Coordination Plan. The survey was distributed between December 2021 and March 2022. This report makes reference to the Greater Toronto Area which is interpreted primarily as covering Toronto, York, and Peel Region.

The survey had a total of 387 respondents, however due to the length of the survey and there being several optional questions, there was attrition for several of the questions asked. Findings reported in percentage (%) format should not be interpreted as a percentage out of 387, but as a percentage of the organizations who answered the question. The exact number is indicated as a fraction accompanying every percentage presented in this report.

The findings in this report refer to the total number of "unique" organizations that responded to each question. Duplicate responses (from multiple members of the same organization) were removed in processing the final data to ensure that the findings reflect the responses of the unique organizations that responded to each question.

This sample size represents only a fraction of the non-profit sector in the region, with over 14,000 non-profit organizations operating within the City of Toronto. The sample represented in this report was limited to the membership of the distribution lists indicated above. The intention of this report is to serve as a jumping off point for further research on the topic of Social Purpose Real Estate in the Greater Toronto Area.

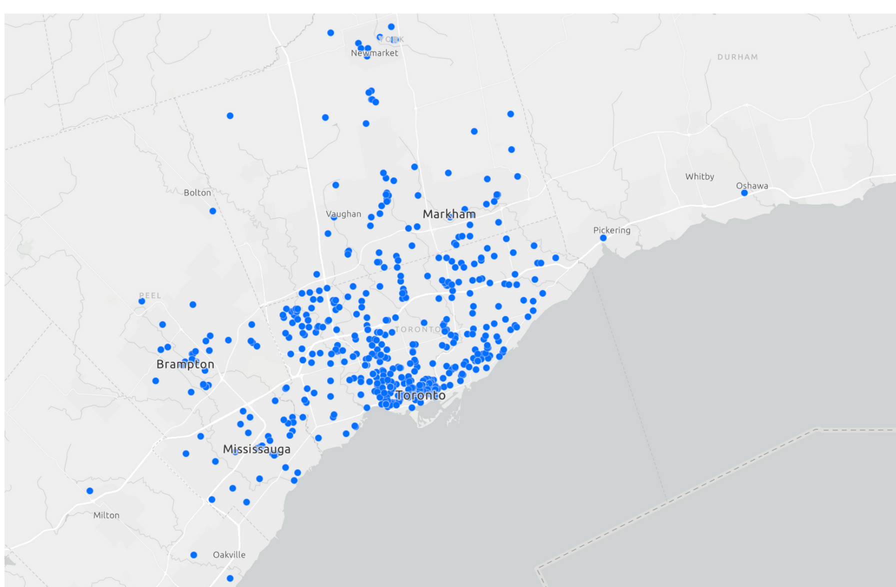

Figure 1 Map of all survey respondents

Additional Considerations

The survey was distributed during COVID-19 pandemic and the impacts of the Omicron variant may have impacted response rates (i.e. due to increased work loads, a reduction in staff members and staff turnover). Further surveys and other research methods may be required to better understand the impacts of the COVID-19 pandemic on non-profit space. The pandemic has also created a shifting landscape of space needs, with growing demand for services and increased fundraising pressures impacting community access to space and the growing needs of organizations.

Given that the survey was primarily distributed by contacts identified by United Way Greater Toronto and 211 Central, non-profit organizations providing social and community services are overrepresented as respondents in comparison to the wide breadth of non-profit organizations in the GTA. The largest category of organizations was identified as those providing Community Services (174) - of which 129 were based in Toronto.

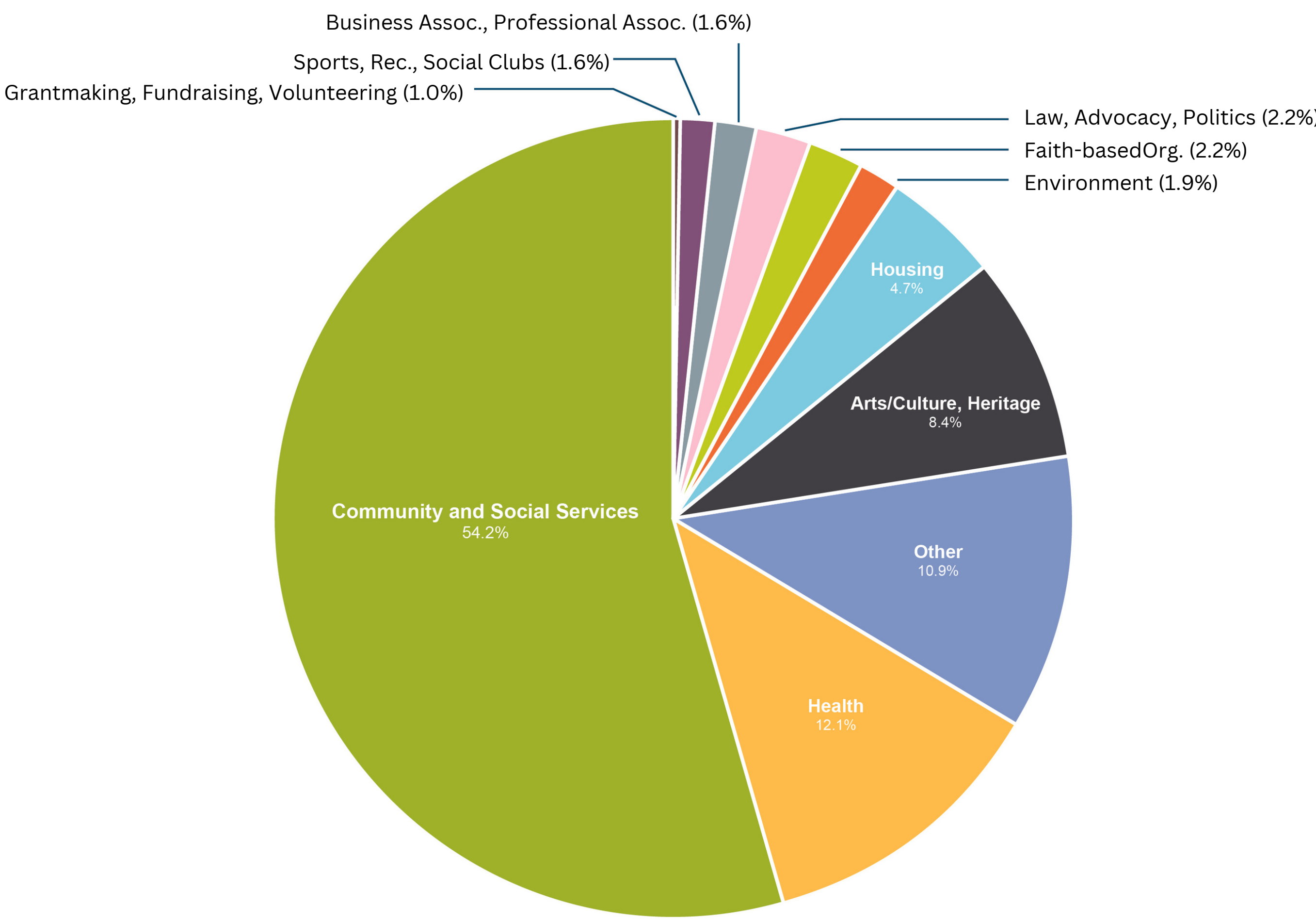

Figure 2 Types of Organizations Surveyed

As a result, the survey may not be as reflective of the needs of arts organizations, or others underrepresented in this report. Further research on the needs of arts organizations and faith-based organizations can be found in reports such as the following:

- Why Not Theatre Space Project Market Scan (Canadian Urban Institute, School of Cities, Why Not Theatre, 2021)

- No Space for Community The Value of Faith Buildings and the Effect of Their Loss in Ontario (Faith & the Common Good, Ontario Nonprofit Network, the Ontario Trillium Foundation, Cardus, the City of Toronto, The National Trust for Canada)

Findings

Key findings from this survey have been analyzed and grouped into the following categories as the key topics for consideration:

1. **Funding & affordability**
2. **Space needs**
3. **Ownership & leases**
4. **Impacts of the COVID-19 pandemic**
5. **Non-profit-led solutions**

1. Funding & affordability

When asked to “describe any challenges faced by your organization in securing and maintaining affordable and suitable space in more detail” as an open-ended question, nearly 60% of the organizations responding to this question indicated a lack of funding and affordable space as the primary factor. This is further supported by the responses to the question of "What challenges or barriers, if any, do you or your organization face in securing affordable, suitable, and secure space for your programs and services?" as the majority of organizations (188/291 or 64.6%) reported "Lack of affordable space" as a "High Impact Barrier".

In considering the financial capacity of organizations responding to this survey, 49.2% (145/295) of all organizations reported annual operating budgets under $1,000,000 and 50.8% (150/295) reported operating budgets over $1,000,000 (with 25% (74/295) reporting operating budgets of $0-$249,000). The majority of organizations that responded to this survey (154/222 or 69.3%) reported spending less than 30% of their annual budgets on rent with the second highest category reported being organizations currently spending 30-50% of annual expenses/operating costs on rent or a lease (32/222 or 14.4%).

Of those surveyed, 10.6% (30/282) of organizations reported being at risk of closing a location. The most commonly reported reason for organizations being at-risk of closing a location was an inability to pay rent due to a decline in revenue (12/30 or 40.0%), followed by “Other” reasons (10/30 or 33.3%), Inability to pay rent due to recent or forthcoming rental increases (6/30 or 20.0%) and disruptions due to the COVID-19 pandemic (6/30 or 20.0%). (Note: organizations could select more than one reason for this question).

The “Other” reasons submitted included:

- On a precarious lease with a church
- Not enough funds to get a space

- Municipality may ask for space to be returned
- Current property will be redeveloped
- Funds required for significant repairs
- Loss of funding
- Current space is no longer suitable

As further insight into the conditions necessary for organizations to operate 71.7% of organizations (226/315) responding to this survey reported that their ability to operate is dependent on access to **at least one** form of subsidy, discount or access to free space (note: some organizations identified need for more than one condition, illustrated in the bar chart below).

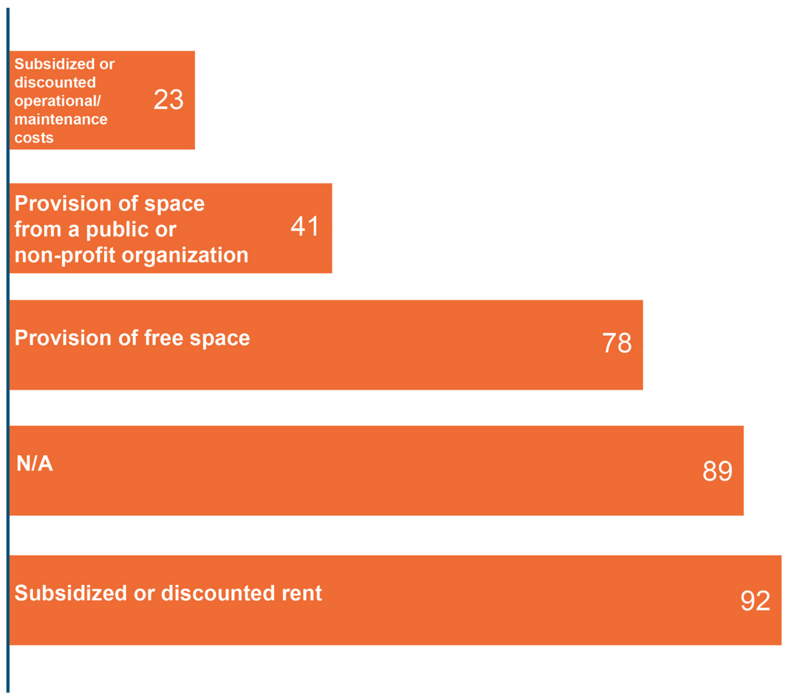

Figure 3 Are any of the following conditions necessary for you to operate your non-profit organization? Check all that apply.

This need for support is further strengthened when considered in combination with the other findings in this section, specifically that access to sustainable and consistent funding was identified as a significant challenge in the open-ended questions. Within these open-ended responses was specific and frequent mention of the lack of access to multi-year, flexible funding for rent or space acquisition (Questions 38-39), which is consistent with the other findings in this section.

More than half of the organizations in the sample (133/218 or 61.0%) reported experiencing rent increases in the last 2 years, with 24.8% (54/218) of organizations reporting increases over 10% and 36.2% (79/218) below 10%. Given that many respondents are currently struggling to secure funding for rent and space acquisition the prevalence of rent increases with organization renting space indicates an unsustainable trend in regards to the financial capacity of non-profit organizations to rent space on a long-term basis.

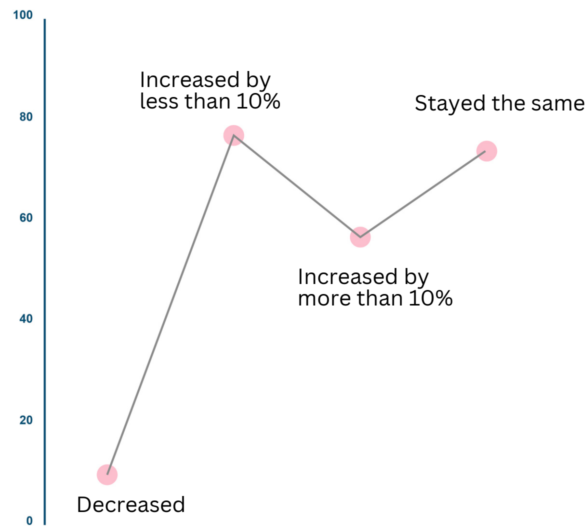

Figure 4 "In the last two years, the amount we have paid for rent has..."

The majority of organizations (191/225 or 84.9%) indicated that it was either "likely" or "very likely" that they would be able to continue operating in their current space 12 months from when they completed the survey (between December 2021-March 2022). Conversely, 34 organizations surveyed (34/225 or 15.1%) indicated it was either "unlikely" or "very unlikely" that they would be able to continue operating in their current space, 30 of which were from the Toronto+ category (operating space in Toronto + one additional region) of respondents.

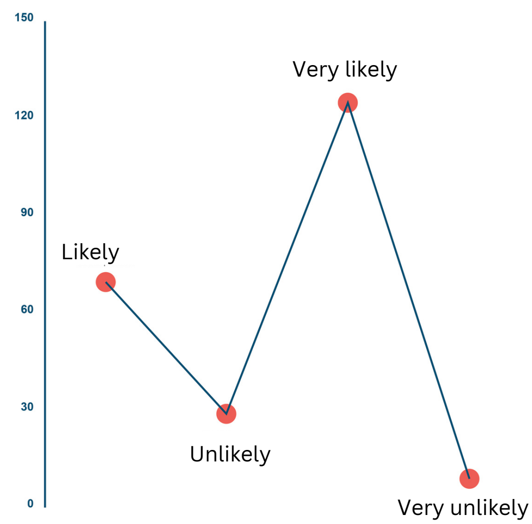

Figure 5 How likely is it that you will be able to operate in your current space 12 months from now?

Of these 34 organizations, 12 indicated that their rent has “stayed the same”, 10 indicated that their rent has increased by over 10%, 10 indicated that rent has increased by less than 10% and one reported a decrease in their rent (with one non-response). Of these organizations, 23.5% (8/34) reported an operating budget of $0 - $249,999, with 82.3% (28/34) indicating operating budgets under $1 million. Based on these findings, rent increases and relatively low operating budgets appear to be common factors contributing to the unlikeliness of their ability to operate in the same space 12 months from the time of the survey.

2. Space needs

Another theme that emerged in the findings of this survey is the lack of access to spaces that meet the needs of the organizations surveyed. The majority of organizations surveyed (179/300 or 59.7%) indicated that their current space is **not** currently meeting the needs of their organization. This rate (50-60%) is consistent across most of the ownership models reflected in this sample for organizations that own their spaces, those owning and renting spaces as well as organizations renting space.

The greatest discrepancy is found for organizations responding to this question that do not currently own or rent their space, with 81.2% (39/48) of those using borrowed or donated space indicating that their current spaces do **not** meet their needs. The primary reason for the lack of satisfaction with their current spaces is reported that they are either too small to meet the service demand of community members and too small to grow and further develop programs. With an increasing population and vulnerabilities in neighbourhoods across the GTA, the existing deficiencies in program spaces, as presented through this report, indicate that this trend will increase over time without sufficient intervention and support for organizations seeking to improve and expand their program spaces based on existing and anticipated program needs.

Additional ways in which current spaces are <u>**not**</u> meeting the needs of the organizations surveyed include:

- A lack of meeting space for staff
- Spaces may be appropriate for office use or program delivery but not both
- A lack of sufficient storage space
- Spaces are not purpose-built for the organization's operations
- Commercial kitchen space is needed to serve the community
- Require additional space in satellite locations
- Restrictions on use of space and lack of agency to use space as needed by the organization (i.e. reduced operating hours, space-sharing, inability to run multiple programs at once)
- Spaces are not accessible
- A lack of privacy for children's programs and service delivery
- Insufficient parking and inaccessible by public transit

3. Ownership & leases

Respondents represented a variety of access models, with 11.4% of organizations owning property (37/322), 15.5% (50/322) not owning or renting, 17.1% (55/322) renting and owning, and 55.9% (180/322) renting only. Of note is that the majority (19/37 or 51.0%) of the organizations that own their properties indicated ownership of longer than 25 years and 62.1% (23/37) of those that own have operating budgets over $1 million. The benefit of building ownership is further demonstrated within the findings of this survey with many of these respondents also expressing that they have considered leveraging the properties that they own as a real estate asset to expand the work of their organization.

Of the respondents reliant on leased space for their operations (both those renting and those renting & owning), a significant majority (186/214 or 86.9%) indicated their lease agreement was a standard lease rather than a license or other agreement, with 23.1% (43/186) of respondents also indicating that their current lease agreement did not include renewal terms (with 9/43 or 20.9% on month-to-month leases with no renewal terms).

4. Impacts of the COVID-19 pandemic

The survey included questions regarding the impact of the COVID-19 pandemic on the operating conditions of the organizations surveyed, which may have been further impacted by the survey distribution coinciding with the spread of the Omicron variant in Ontario. With the onset of the COVID-19 pandemic, 67.9% (199/293) of the organizations surveyed indicated an increase in demand for services (with 47.8% or 140/293 of organizations reporting that demand has “significantly” increased).

This is consistent with the Ontario Nonprofit Network’s report on the State of the sector one year after the onset of the COVID-19 pandemic which found that “Almost two-thirds of nonprofits reported an increase in demand for programs and services. At the same time, half reported pandemic-related losses in revenue” (ONN, 2021).

Further research is required to observe the long-term impacts of COVID-19, with 52.7% (143/271) of organizations indicating that they don’t yet know what the permanent impact of the COVID-19 pandemic might have on the space needs of the organization. Additional potential impacts of the pandemic on access to space requiring further research include the impact on revenue generation and fundraising capacity for space costs.

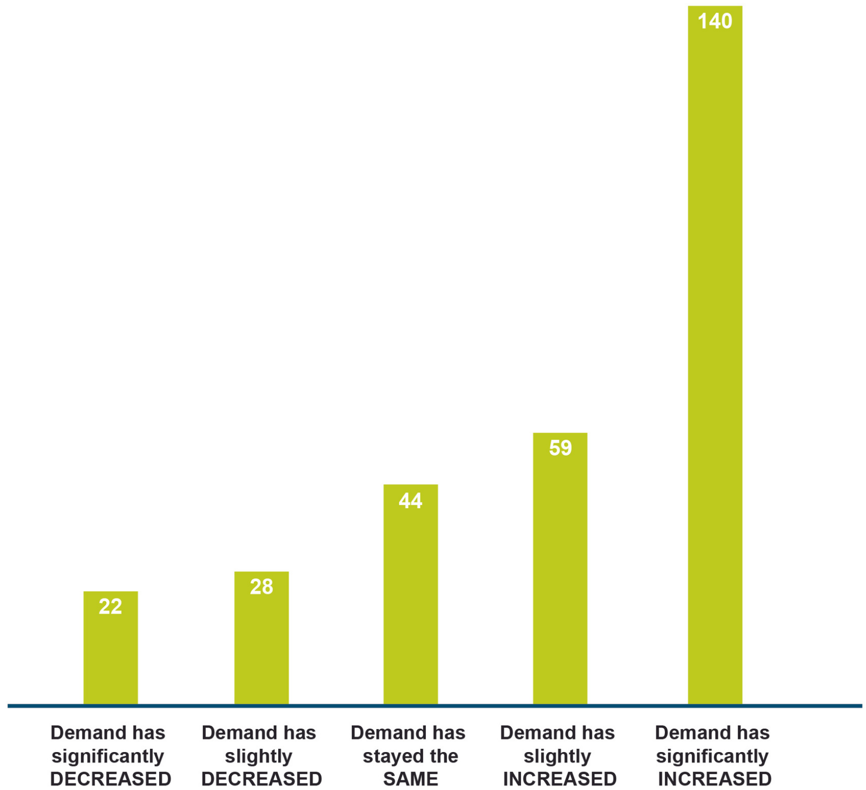

Figure 6 Has demand for your services changed as a result of the COVID-19 pandemic?

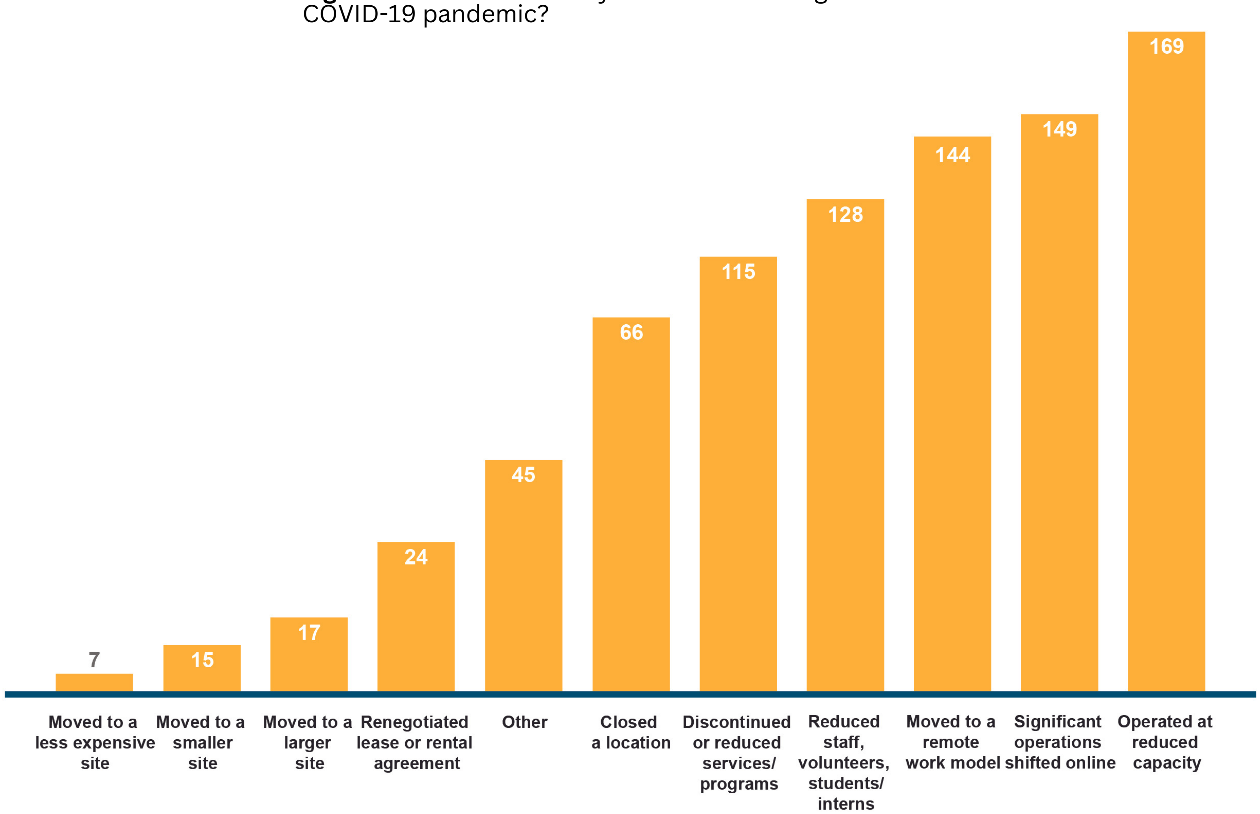

Figure 7 As a result of the COVID-19 pandemic, what temporary changes has your organization made in regards to your space?

5. Non-profit-led solutions

The survey's responses include some positive implications for non-profit sector-led responses to these challenges including space-sharing and the development of social purpose real estate. On space sharing, 44.1% of organizations (114/258) indicated they were willing or are already engaging in a space-sharing arrangement with another non-profit organization, and 69.5% of organizations (185/266) indicated they were "somewhat likely" (57/266 or 21.4%), "likely" (52/266 or 19.5%) or "very likely" (76/266 or 28.5%) to consider space-sharing in the future.

On the development of new properties and social purpose real estate, 59.7% (55/92) of respondents who reported owning property (considering both the "own" and "own & rent" categories of respondents) indicated they have considered leveraging it as an asset to further their operations. Further, of these organizations, 31.1% (14/45) indicated knowledge or confidence in pursuing capital improvements, redevelopment, or acquisition as a Low Impact Barrier, and 28.9% (13/45) respondents indicated that it was not a significant barrier to them.

Recommendations

Our survey shows that non-profits need but cannot access affordable, long-term, and appropriate spaces (looking at both rental and ownership models), and those with access to space have expressed concerns regarding their abilities to maintain access to these assets. Even for those non-profits that own their own space and have the knowledge and confidence to pursue capital improvement, redevelopment, or acquisition, there is simply a lack of affordable and suitable properties available.

In order to tackle the issue of affordability, suitability and stability, we need to leverage existing assets and creative solutions across government and community organizations to make more space available for non-profits to own and create opportunities for affordable, long-term leases. Addressing the community space issue means non-profits can continue to do what they do best: serve communities, bring people together and drive inclusive local economic development.

Based on the findings of this survey, the following recommendations should be further explored and considered:

1. **Promote inter-governmental cooperation that breaks down silos within and across government and other public institutions** to support the creation of more social purpose real estate opportunities:

    - **Review current restrictions on financing for non-profit housing to enable mixed use development** that includes community space for services, childcare, arts and recreation as well as affordable housing
    - **Create opportunities for affordable non-profit owned or leased space as part of major public infrastructure projects** leveraging relevant programs and projects (example: Transit-Oriented Communities) to ensure that communities have access to services and community programs
    - **Collaborate to identify vacant, under-utilized spaces** for not-for-profit and other community uses (including initiatives aimed at underused office space) such as affordable space for non-profits
    - **Work with school boards and other public institutions to strengthen the reach of existing programs that make public lands available** to non-profits for co-location, leasing and ownership opportunities, such as Community Use of Schools and the Community Space Tenancy Program
    - **Consult with local non-profits to determine best uses for existing and newly available government and public institution spaces**

2. Governments, funders and philanthropic organizations, private sector lenders and non-profits can partner together to create an eco-system that supports opportunities for non-profit ownership of space:

- **Explore options for public, philanthropic and private investment i**ncluding but not limited to, delivery organizations such as community land trusts, as well as the financial tools and funding programs and instruments that enable projects across various stages (development, redevelopment, acquisition and renovation)
- **Consider the creation of a province-wide loan guarantee system** that leverages local knowledge of community needs and engages trusted actors with supports such as pooled funds across funders
- **Promote opportunities for community hubs and shared spaces** through loans and grants to non-profits acting as landlords or leads/intermediaries for other non-profits
- **Support the inclusion of indigenous and black-led organizations** in the design and delivery of funding programs and other enabling activities
- **Increase affordable space availability** for non-profits with the below-market rent tenancies
- **Develop new mechanisms to support existing non-profit-led solutions** such as community land trusts

3. Non-profits and non-profit networks can contribute to these solutions through:

- **Leveraging their assets for broader use** including affordable housing through partnerships and re-development
- **Working together to identify opportunities** for shared space and community hubs
- **Developing an inventory of non-profit space needs** and opportunities to promote shared space and service collaboration
- **Identify promising practices and programs** within and beyond the Greater Toronto area
- **Enabling non-profit sector partnerships** that bridge the assets/resources of higher capacity organizations with lower capacity organizations

What's Next?

This report provides initial insight into the nature of non-profit access to operating space in the Greater Toronto Area in 2022. Given the findings presented in this report it follows that any growth and work to support the stability of the non-profit sector must be accompanied by the growth of supportive real estate and tenancy arrangements (in the form of subsidies or consistent multi-year funding for space acquisition and operating costs), especially in a context of rising rents in the region. The findings of this report provide insight into the urgency of the current situation for many organizations with their current demand, with the concerning implication that any increase in demand could not be supported with existing support and resources.

The Social Purpose Real Estate Reference Group presents this report and the recommendations above to both shed light on the context in which non-profit organizations are currently operating in the Greater Toronto Area, as well as to put forward recommendations for what comes next, and how the public, private and non-profit sectors can respond to the findings of this report.

In addition to the recommendations presented here, this report represents an initial study on the topic of access to space for non-profit organizations operating across the Greater Toronto Area, and seeks to lay the foundation for additional opportunities to further this research. Members of this group propose the following additional areas of study to on this topic to deepen the analysis presented here:

- Focusing on organizations that have been displaced or shut down that may not have received notice of this survey - who is not represented in this report, and how can they be engaged?;

- Understanding the geographic nature of vulnerability to displacement.
- Further analysis on how space needs correlate with organizational maturity and size (e.g. What are the space needs specific to grassroots organizations?)
- Further insight into the barriers that exist for organizations with an interest in building ownership opportunities;
- Surveying organizations that currently own their spaces regarding the resources required to further develop their assets;
- Further engagement and understanding of the interests and needs of diverse organizations by organization type (grassroots, emerging, established) and identity (Indigenous-led, Black-led, and organizations led and/or serving East Asian, South Asian, Latin American, and 2SLGBTQ+ populations)
- Further research to understand long-term impacts of the COVID-19 impact on space needs (e.g. hybrid / remote work impacts --- how is this changing their space needs and their willingness / desire to share space?).

References

Faith & the Common Good, Ontario Nonprofit Network, the Ontario Trillium Foundation Cardus, the City of Toronto, The National Trust for Canada. **No Space for Community. The Value of Faith Buildings and the Effect of Their Loss** (2020)

Ontario Nonprofit Network (ONN). **COVID-19: State of the Ontario Nonprofit Sector One Year Later** (2021)

Appendix

Survey Questions

1. What is the name of your organization?

2. What is your role within your organization?

3. Please provide your e-mail address.

4. Do you provide consent to be contacted via e-mail to have the results of this survey shared back with you and for future initiatives related to community space?

5. Does your non-profit organization provide services or programs that are INTENTIONALLY DESIGNED for specific populations (e.g. a specific racial, cultural, or equity deserving group) or a specific client group (e.g. entrepreneurs, youth, artists)?

6. Please identify the specific population(s) and client group(s) your organization intentionally serves. Select all that apply.
    - Black (examples: African, African Canadian, Afro-Caribbean, Afro-Latin)
    - East Asian (examples: Chinese, Japanese, Korean)
    - Indigenous: First Nations status, non-status, Inuit, and/or Métis
    - Latin or South American (examples: Brazilian, Colombian, Cuban, Mexican, Peruvian)
    - South Asian or Indo-Caribbean (examples: Indian, Tibetan, Indo-Guyanese, Indo-Trinidadian, Pakistani, Sri Lankan)
    - White (examples: English, Greek, Italian, Portuguese, Russian, Slovakian)
    - Women
    - 2SLGBTQ+
    - Landed Immigrant/Newcomer
    - Temporary Foreign Workers
    - Refugee Claimants
    - International Students
    - Undocumented/Non-Status Migrants
    - Non-Permanent Seniors (e.g. Super Visas)
    - Persons with a disability
    - Persons with a specific/chronic health need
    - People experiencing homelessness
    - Veterans
    - Entrepreneurs
    - Francophone

- Youth
- Children
- Artists
- Other (please specify)

7. How would you characterize the primary services your non-profit organization provides?
    - Arts, culture, heritage, and tourism;
    - Business associations, professional associations, and unions;
    - Community and Social Services; Environment;
    - Faith-based organizations;
    - Grantmaking, fundraising, and volunteering;
    - Health (e.g. Community Health Centres, mental heath, care homes);
    - Housing;
    - Law, advocacy, politics, public policy, research;
    - Sport, recreation, and other social clubs;
    - Other (please specify))

8. Where is your organization located?

9. How many different locations does your organization operate from?

10. (OPTIONAL) Provide the postal code for each location that you operate from.

11. (OPTIONAL) Provide an estimate of your annual operating budget.
    - $0 - $249,999
    - $250,000 - $499,999
    - $500,000-$999.999
    - $1,000,000 - $2,999,999
    - $3,000,000 - $4,999,999
    - $5,000,000 - $6,999,999
    - $7,000,000 - $9,999,999
    - Greater than $10,000,000

12. Are any of the following conditions necessary for you to operate your non-profit organization?
    - Provision of free space
    - Provision of space from a public or non-profit organization
    - Subsidized or discounted operational/maintenance costs
    - Subsidized or discounted rent
    - N/A

13. Is proximity to the people you serve important to your operations?

- Yes
- No

14. Does your non-profit organization own or rent/lease property?

- Rents property
- Owns property
- Owns & rents property
- Does not own or rent property (e.g. uses co-working space or work from home)

15. How long have you owned this property?

16. Approximately what percentage of your annual expenses/operating costs go toward your mortgage?

- Between 30% & 50%
- I don't know
- Less than 30%
- More than 50%
- Our organization does not have a mortgage

17. Approximately what percentage of your annual expenses/operating costs go toward building expenditures including property tax?

- Less than 10%
- Between 10-19%
- Between 20-29%
- Between 30-49%
- More than 50%
- I don't know

18. Have you considered leveraging your owned property to expand your organization in some way (i.e. remortgaging and subsequently acquiring more real estate, re-developing an existing site, etc.)?

- Yes
- No

19. In addition to owning one or more properties, do you rent/lease a property?

- Yes
- No

20. Which of the following best describes the type of rental or lease agreement you have? If you have more than one type of agreement, please pick your primary type of agreement.

- Lease agreement
- License agreement
- No written agreement

21. Is your property subject to any of the following conditions that negatively impact your operation? Check all that apply.

- Hours of operation - space not available in evenings
- Hours of operation - space not available on weekends
- Occupancy level of the space (may be due to COVID-19)
- Sound/noise restrictions
- Restrictions on certain uses or activities (please describe below)
- Restrictions on certain users of the space (please describe below)
- Other (please specify)

22. What is the REMAINING duration on your current lease or rental agreement?

- 0-6 months
- 1-3 years
- 3-5 years
- 5+ years
- 7-12 months
- Other

23. Does your current lease include renewal terms?

24. Approximately what percentage of your annual expenses/operating costs goes towards your RENT or LEASE?

- Less than 30%
- More than 50%
- More than 75%

25. Please complete the following sentence. "In the last two years, the amount we have paid for rent has...."

- Decreased
- Increased by less than 10%
- Increased by more than 10%
- Stayed the same

26. How likely is it that you will be able to continue operating in your current space 12 months from now?

- Likely
- Very likely
- Unlikely
- Very unlikely

27. What is the approximate square footage of your primary location?

- Less than 2,000 square feet
- Larger than 30,000 square feet
- 5,0000-9,999 square feet
- 20,000-29,000 square feet
- 2,000-4,999
- 10,000-19,999

28. What type of spaces and facilities are currently needed to run your operations? Check all that apply.

- Meeting space
- Multi-purpose space
- Office Space
- Outdoor Space
- Community or Commercial Kitchen
- Clinical or Treatment Rooms
- Recreation Space (indoor or outdoor)
- Housing (e.g. subsidized rental units, shelter)
- Parking
- Warehouse Space
- Proximity to public transit
- Other (please specify)

29. Does your organization's current space meet the needs of your organization?

30. (Optional) Please briefly describe the ways in which your organization's current space DOES NOT meet your organization's needs.

31. (Optional) Please briefly describe the ways in which your organization's current space DOES meet your organization's needs.

32. Are the operations at your primary location able to run while adhering to COVID-19 health guidelines (i.e. physical distancing measures, occupancy measures, screening station)?

- No
- Yes
- Yes but with slight reductions to service delivery and number of people served
- Yes but with significant reductions to service delivery and number of people served

33. Were you able to operate remotely when you were not able to operate in-person?

34. Has demand for your services changed as a result of the COVID-19 pandemic?

- Demand has slightly DECREASED
- Demand has significantly DECREASED
- Demand has slightly INCREASED
- Demand has significantly INCREASED
- Demand has stayed the SAME

35. As a result of the COVID-19 pandemic, what TEMPORARY changes has your organization made in regards to your space? Check all that apply.

- Closed a location
- Moved to a smaller site
- Moved to a larger site
- Operated at reduced capacity
- Moved to a less expensive site
- Reduced staff, volunteers, students/interns
- Discontinued or reduced services/programs
- Renegotiated lease or rental agreement
- Significant operations shifted online
- Moved to a remote work model
- Other (please specify)

36. As a result of the COVID-19 pandemic, what PERMANENT changes has your organization made in regards to your space? Check all that apply.

- Closed a location
- Moved to a smaller site
- Moved to a larger site
- Operated at reduced capacity
- Moved to a less expensive site
- Reduced staff, volunteers, students/interns

- Discontinued or reduced services/programs
- Renegotiated lease or rental agreement
- Significant operations shifted online
- Moved to a remote work model
- Other (please specify)

37. As a result of the COVID-19 pandemic, what PERMANENT changes has your organization made in regards to your space? Check all that apply.

- Closed a location
- Moved to a smaller site
- Moved to a larger site
- Operated at reduced capacity
- Moved to a less expensive site
- Reduced staff, volunteers, students/interns
- Discontinued or reduced services/programs
- Renegotiated lease or rental agreement
- Significant operations shifted online
- Too soon to tell
- Moved to a remote work model
- Other (please specify)

38. What challenges or barriers, if any, do you or your organization face in securing affordable, suitable, and secure space for your programs and services? Rank each barrier. (Low Impact Barrier, Moderate Impact Barrier, High Impact Barrier)

- Lack of affordable space
- Lack of suitable space - repair/maintenance needs
- Lack of suitable space - repair/maintenance needs
- Lack of suitable space for organization's needs
- Lack of long term security of tenure
- Zoning or building cost restrictions
- Lack of knowledge/confidence in how to negotiate lease or rental agreements
- Lack of knowledge/confidence in how to proceed with development
- Lack of money or funding for renovations, redevelopment acquisition or operations
- Lack of knowledge/confidence to take on capital improvements, redevelopment or acquisition

39. Please describe any challenges faced by your organization in securing and maintaining affordable and suitable space in more detail.

40. Is your organization planning to move, or at-risk of closing a location in the near future?

- No
- Yes we are planning to MOVE a location
- Yes we are at-risk of CLOSING a location
- Yes we are planning to MOVE one location and are at-risk of CLOSING another location

41. When is your organization planning to close, or at-risk of closing a location?

- Within 6 months
- Within one to two years
- Within three to five years

42. Is the location you are planning to close, or the location that is at-risk of closing, your primary location?

- Yes
- No

43. What are the reasons why you are planning to close, or at-risk of closing a location? Check all that apply.

- Inability to pay rent due a decline in revenue
- Inability to pay rent due to recent or forthcoming rental increases
- Property owner is deciding to sell property
- Low demand for services
- Property owner is not renewing our lease
- Disruptions related to the COVID-19 pandemic
- Other (please specify)

44. (OPTIONAL) Please provide the postal code(s) of the location(s) that you are planning to close, or locations that are at-risk of closing.

45. In addition to planning to close a location, or having a location that is at-risk of closing, is your organization planning to move a location?

46. When is your organization planning to move a location?

- Within 6 months
- Within one year
- Within one to two years
- Within three to five years

47. What are some of the reasons why your organization is planning to move within the next 5 years?

- Building is being developed and/or demolished
- Building is closing/being sold
- Costs (rent, operational, travel, etc) are too expensive
- Other

48. Is the location you are planning to move your primary location?

49. Some non-profit organizations share surplus space within their locations to other non-profit organizations, either by way of a sub-lease or other arrangement. Are you willing and able to share your space with another organization?

- No, we cannot share space due to restrictions or our rental or lease agreement
- No, we cannot share space due to the nature of our work
- Yes, we are willing and able to share space and HAVE additional surplus space
- Yes, but we prefer not to share space
- Yes, we currently share our space but HAVE NO ADDITIONAL surplus space

50. What is the likelihood that within the next 1-3 years, your organization would consider sharing space or co-locating with another organization?

- Likely
- Very likely
- Unlikely
- Very unlikely

51. (OPTIONAL) What concerns do you have, if any, about sharing space or co-locating with another organization?

52. Would you be interested in joining a "community space registry" where you would provide information about your organization's space needs and potentially have access to available community spaces from other non-profit organizations, including the opportunity to collaborate on space related initiatives?

- Need more information to decide
- I don't know
- No
- Yes

53. What information would be helpful for you to decide your interest in a community space registry?

Toronto Social Purpose Real Estate Reference Group

2022