
PANDEMIC RECOVERY ONE YEAR LATER



Nonprofit Survey Report
Sarasota, Manatee, Charlotte, & DeSoto Counties
March 2021

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EXECUTIVE SUMMARY

Year of Change

- 64% of organizations changed their delivery models this year.
- Just under half now offer new programs or services.
- 44% have modified their methods of evaluating outcomes.
- Many forged new partnerships that they are eager to continue.
- They expressed pride in their ability to pivot and adapt in this crisis.
- Changes brought opportunities to connect with clients or audiences in new ways and throughout expanded geographies.

Financial Pressures

- 1/3 of nonprofits have operating budgets below pre-COVID levels.
- Just under half plan to tap reserves in 2021.
- 70% of the job losses came from large organizations with operating budgets of \$500,000 or more.
- 75% received CARES Act funding primarily for operating expenses.
- The most common new or expanded financial resources they tapped this year were new individual donors and grants.
- They are looking for alternative streams of revenue and creative strategies given so many rely on event-based fundraising.

Technology Challenges

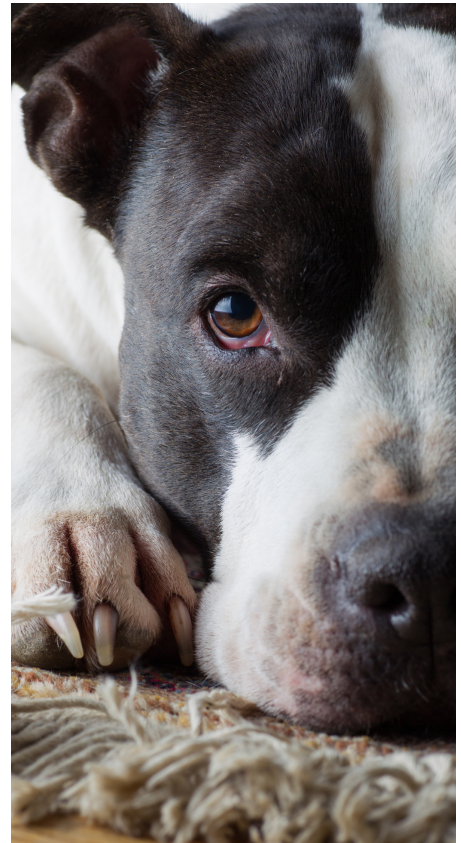
- The strong need for more technological support dominated many of their responses across multiple question items.
- The primary capital need is technological devices.
- Nonprofits lack devices, equipment, robust platforms, staff training, internet access, software, tech infrastructure, IT support, etc.
- They also report a high need for client internet access and devices.

Leadership Insights

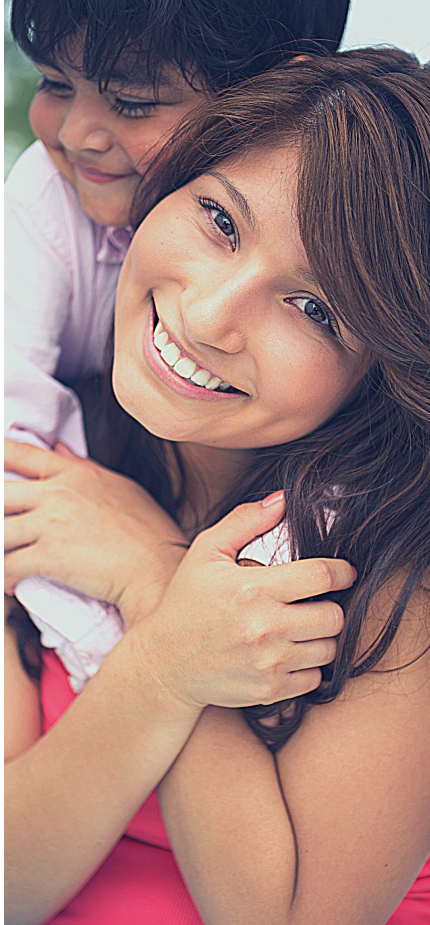
- Nonprofit boards have provided strategic guidance and financial contributions during the crisis.
- Demographics indicate the majority of leaders in the nonprofit industry are white women aged 50 and above.

Equity Concerns

- Diversity, equity, and inclusion comments were a common theme throughout many of the survey responses.
- Leaders are concerned about equitable access to resources such as technology, housing, healthcare, mental health supports, etc. for marginalized communities.



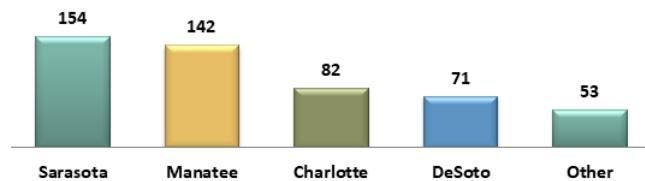
BACKGROUND



In March 2021, exactly one year after the onset of the COVID-19 crisis, philanthropic foundations serving Sarasota, Manatee, Charlotte, and DeSoto counties reached out to local nonprofit organizations with a follow-up survey to learn how they are faring during the pandemic recovery process.

There were 187 respondents to the online questionnaire, representing a cross section of agencies from nine different nonprofit sectors. 77% of the participants reported that their agencies serve two or more local counties.

Respondents by County(ies) Served

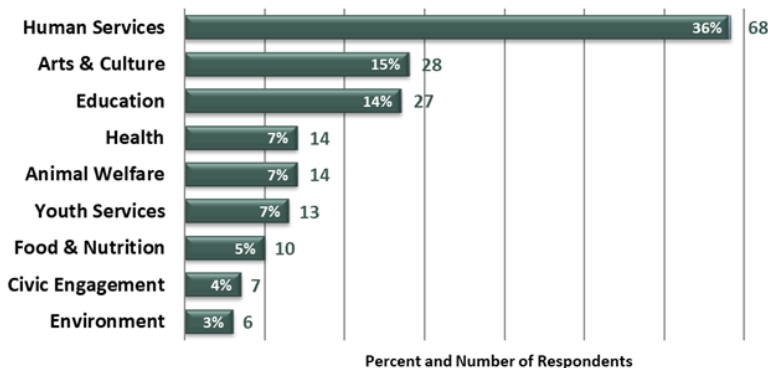


The survey questions were developed collaboratively by the following seven foundations:

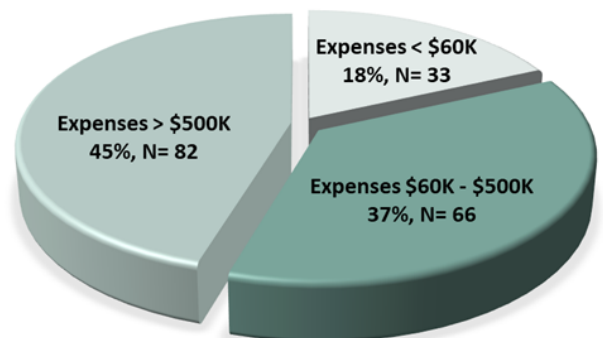
- Charles & Margery Barancik Foundation
- Charlotte Community Foundation
- Community Foundation of Sarasota County
- Gulf Coast Community Foundation
- Manatee Community Foundation
- The Patterson Foundation
- William C. & Marie Selby Foundation

Participants were asked a total of 32 questions related to how the pandemic has impacted their organizations. Not all respondents answered each question. The report is organized with cumulative summaries first, and sector highlights at the end. Organizational demographics by sector and operating budget are as follows:

Respondents by Nonprofit Sector



Respondents by Organization's Pre-COVID Operating Budget

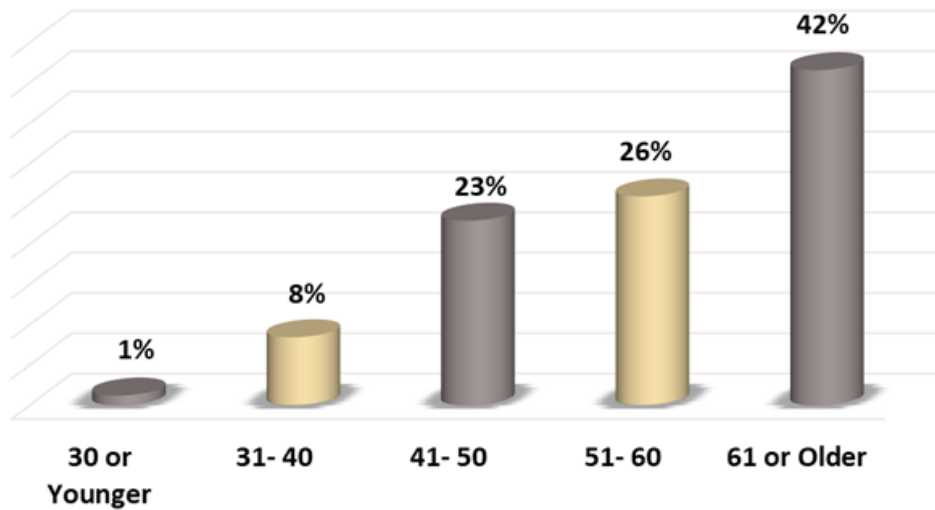


Percent and Number of Respondents

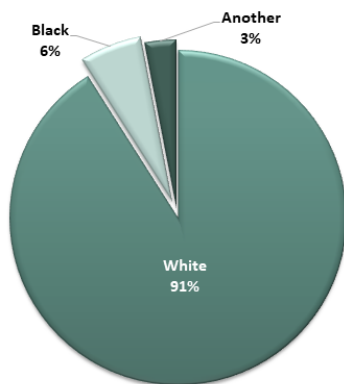
RESPONDENT DEMOGRAPHICS

Survey participants were asked if they would share information about their personal demographics related to age, ethnicity, race and gender identity. 90+% of the respondents answered the questions. Data show that 68% of these nonprofit leaders are white women age 51 or older, with 98% reporting they are not of Hispanic, Latine or Spanish origin. The Arts & Culture sector has the most diversity in terms of age and gender. The Youth Services sector reported the highest racial diversity.

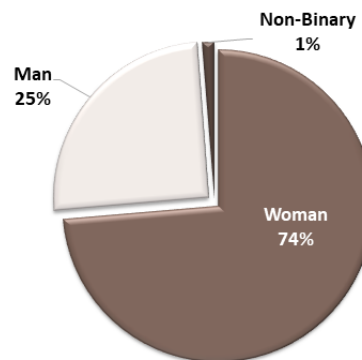
Respondents By Age



Respondents By Race



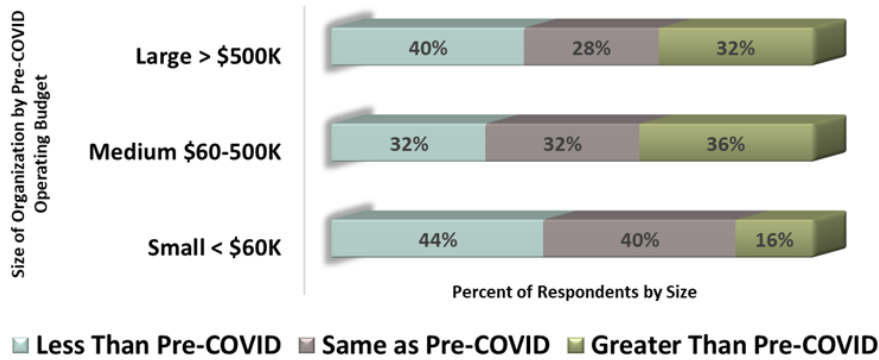
Respondents By Gender Identity



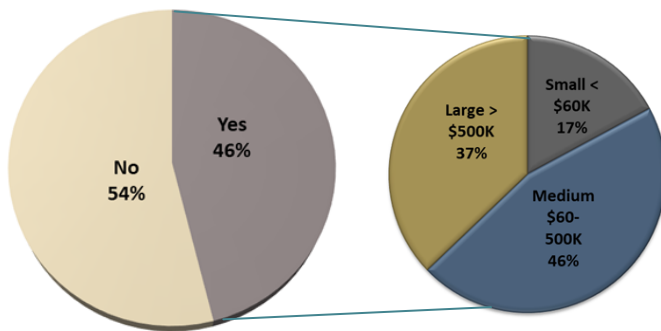
FINANCIAL STATUS

Nonprofit organizations (NPO's) were asked several questions about the financial impact of COVID-19. Data were analyzed based on pre-pandemic operating budget size, as depicted in the graph below. Approximately 1/3 of all agencies have budgets below pre-COVID levels. Smaller organizations were least likely to have increased their budgets over the last year.

How Has Your Operating Budget Changed?

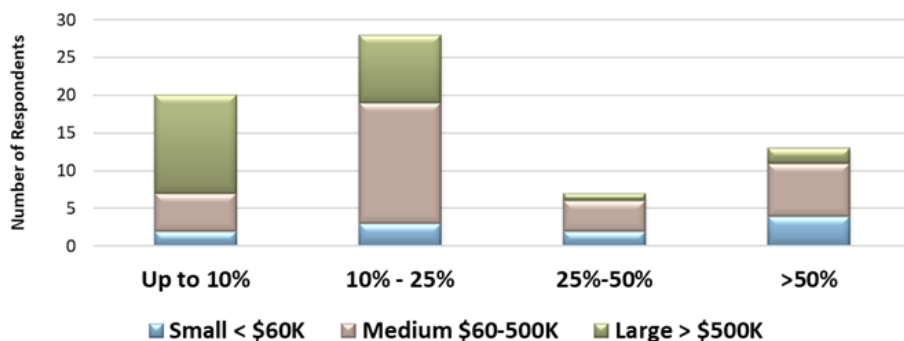


Percent of Nonprofits Planning to Use Operating Reserves in 2021



For those who plan to use reserves, smaller organizations with budgets below \$60,000 plan to tap a larger percentage than larger NPO's.

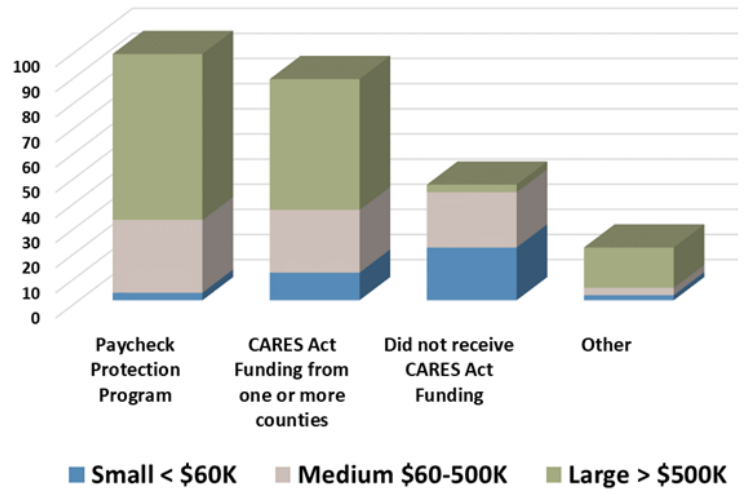
Percentage of Operating Costs To Be Funded Through Reserves in 2021



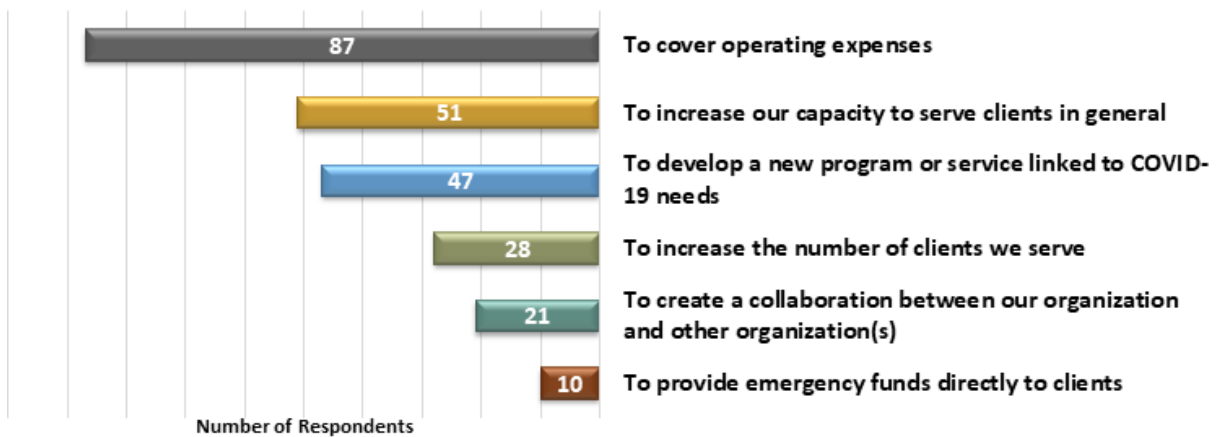
FINANCIAL STATUS (CONTINUED)

75% of the NPO's received some type of CARES Act or other funding. The larger organizations with budgets above \$500,000 were most likely to have received funds; the smaller ones were least likely. Examples of "Other" funding sources include foundation and corporate grants, Department of Children and Families, Small Business Association's Economic Injury Disaster Loans (EIDL), Governor's Emergency Education Relief (GEER), Elementary and Secondary School Emergency Relief (ESSER), Florida Department of Economic Opportunity, Florida Humanities Cares Grant, HUD, etc. The two most frequently cited uses for the CARES Act dollars were to cover operating expenses and to increase capacity to serve clients.

Number of Nonprofits Who Received CARES Act Funding by Organizational Size



If Your Organization Received CARES Act Funding, What Was It Used For?

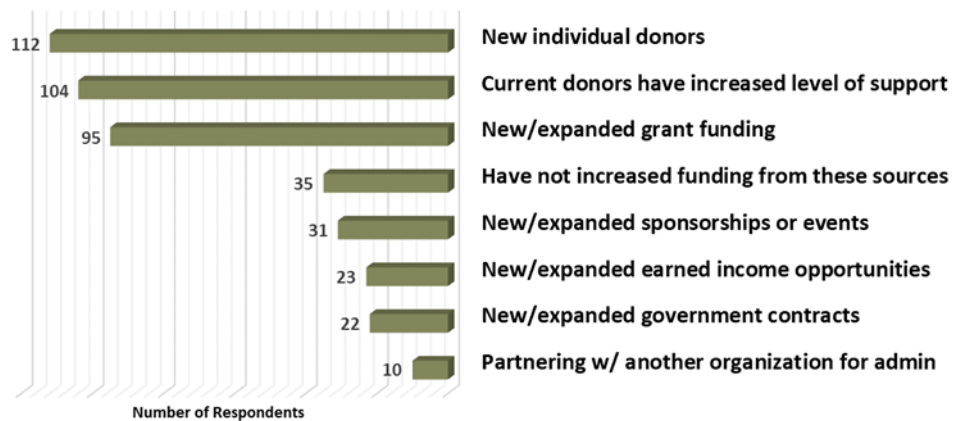


FINANCIAL STATUS (CONTINUED)



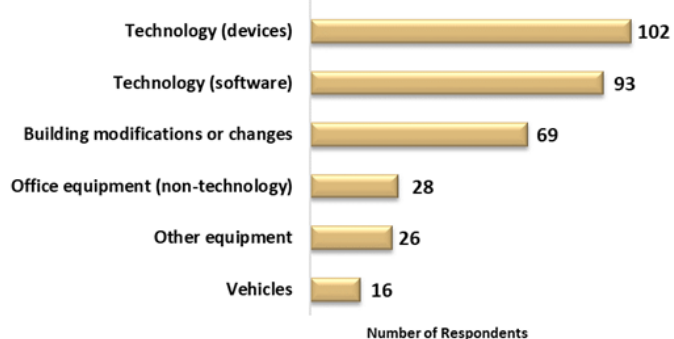
The survey also asked about which new or expanded resources have supported the organization's operations during the pandemic. Respondents could check all that apply. New individual donors, as well as current donors who increased their level of support, were the resources cited most frequently. Small and medium-sized NPO's relied more on new donors, while larger entities were more inclined to increase current donor support. Results by nonprofit sector are summarized in the Sector Highlights section of the report, beginning on page 12.

What NEW or EXPANDED Resources Have Supported Your Operations?



The last financial question addressed the NPO's capital needs. Technology devices and software were identified as the main priorities, followed by building modifications or changes. Needs by sector are reported in the upcoming section. In terms of differences by organizational size, technology needs were uniform across all nonprofits, however, the facility needs skewed towards larger organizations. The most common answers to "other" were personal protective equipment (PPE) and medical supplies.

What NEW or EXPANDED Capital Needs Does Your Organization Currently Have?

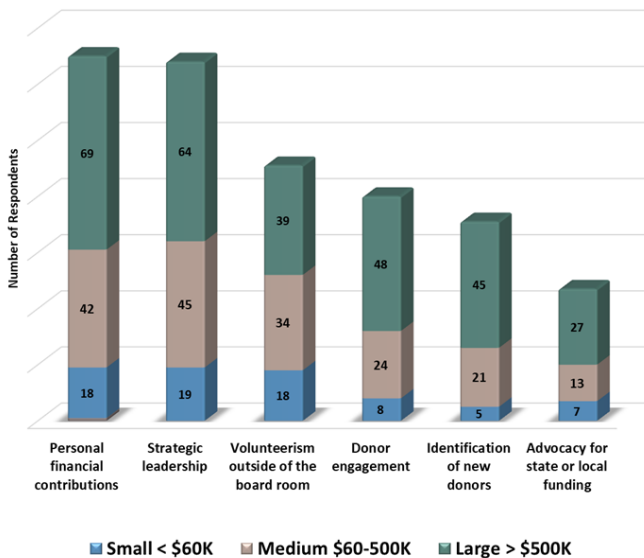


BUSINESS MODEL

Almost two-thirds of the respondents indicated that they have changed the way they deliver their programs and services. And over a third said they have had to cut some of their offerings this past year. 86% of the nonprofit leaders report that they are NOT operating at pre-COVID levels.

The nonprofits were asked how their board members have supported them during the pandemic. The most frequent ways were through personal financial contributions and strategic leadership, as summarized below. Distributions by budget size were mostly uniform, however, smaller NPO's were least likely to have board support through door engagement and the identification of new donors.

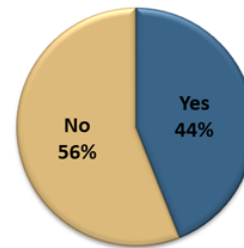
How Has the Leadership of Your Board Supported Your Organization During COVID-19?



- 63%** Said they offer the same programs, but their delivery has changed.
- 43%** Now offer new programs or services.
- 39%** Have had to cut some programs and services
- 14%** Offer programs at pre-COVID levels.

Survey participants were asked whether their method of evaluating the impact and/or outcomes of their programs had changed. The majority said that they had NOT changed. The distribution of these responses were nearly identical when comparing data by budget size. Only the sectors of Civic Engagement, Youth Services, and Environment had a majority of their NPO's reporting they HAD changed their evaluation methodology. Common themes with this question centered on the use of online systems to capture results.

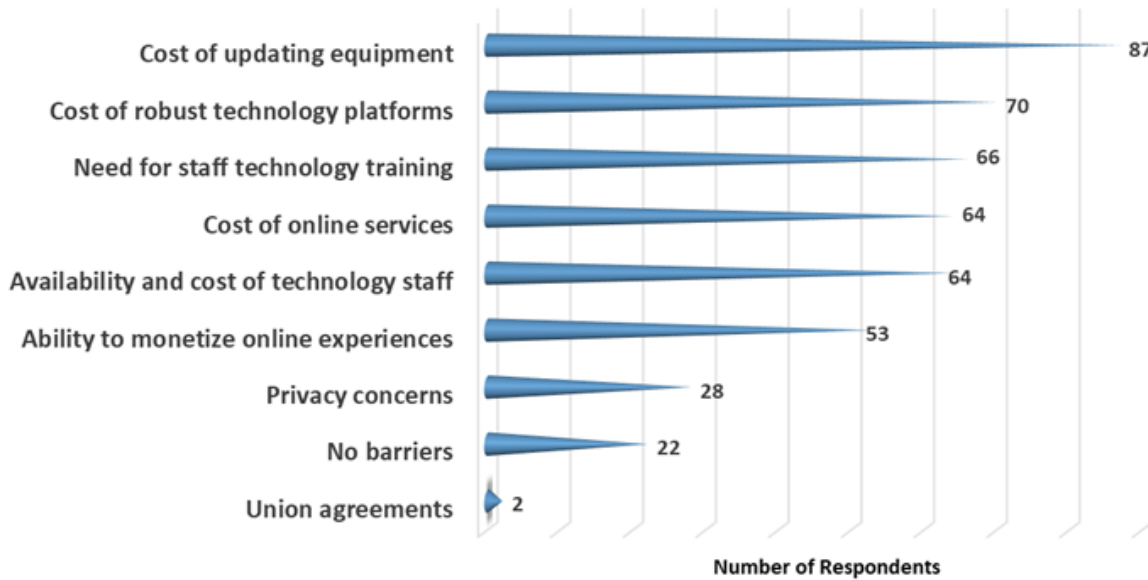
Has your organization's method of evaluating your programs changed?



TECHNOLOGY

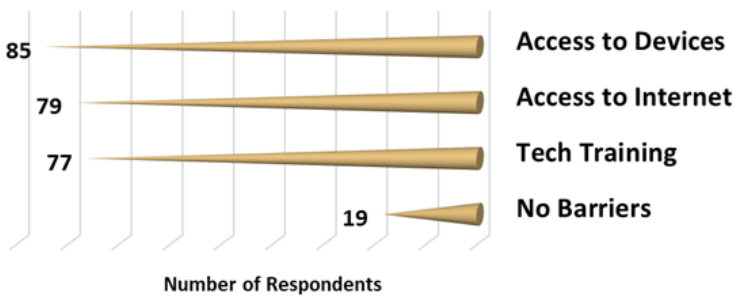
Below are the types of technology barriers that are persisting for the nonprofits, with the cost of updating equipment and robust technology platforms the most frequently cited gaps. The number one barrier for both medium and large NPO's is the equipment cost, while smaller organizations identified online services as their main barrier. Participants could check all that apply on these technology questions.

Types of Technology Barriers that Persist for Nonprofits



Types of Technology Barriers that Persist for Clients

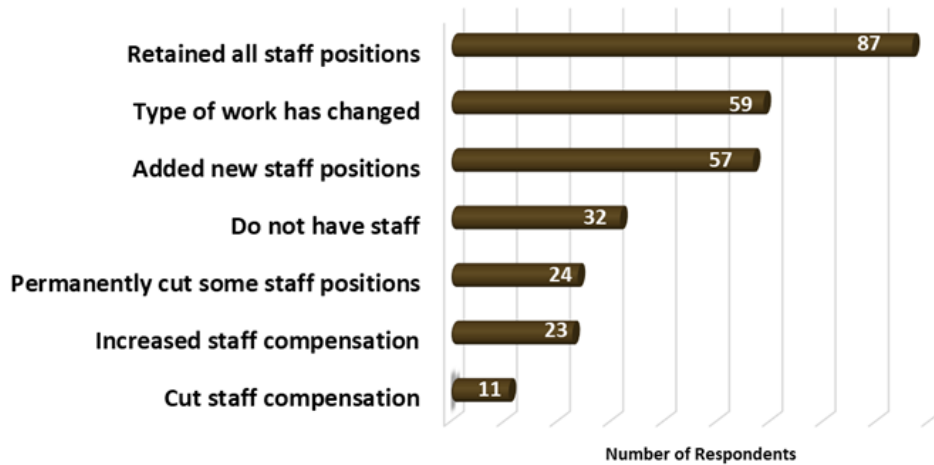
Some NPO's also reported ongoing technology challenges for their clients, with access to devices and the internet the most significant issues. The Sector Highlights section further identifies these technology needs by each type of nonprofit.



STAFFING

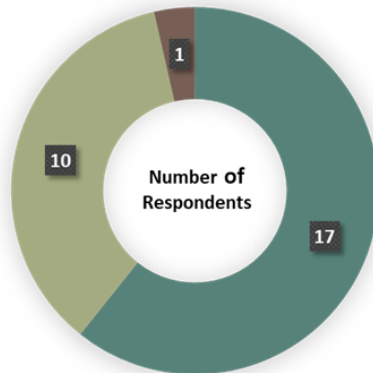
The leaders were asked to share information about the pandemic's impact on their staffing. They could check all that apply on this multiple choice question. 18% of the respondents said they do not have paid staff. Only 15% (or 28) of the NPO's reported staff cuts, ranging from 1 to 100 positions. The response counts for all staffing questions are summarized below.

How is Today's Staffing Different From Your Staffing at the Beginning of COVID-19?



Percentage of Staff Positions Cut

- *Less than 25% of our staff positions were cut.*
- *25%-50% of our staff positions were cut.*
- *More than 50% of our staff positions were cut.*



A total of 28 of the nonprofits reported staffing cuts which, for most, represented less than 25% of their total staff.

The Arts & Culture sector had the largest proportion of job losses, with 21% of these NPO's cutting staff during the last year.

70% of the job losses came from large organizations with operating budgets of \$500,000 or more. A total of 214.5 full-time equivalent (FTE) jobs were reported eliminated, 100 of which came from a single nonprofit in the Health sector.



VACCINES

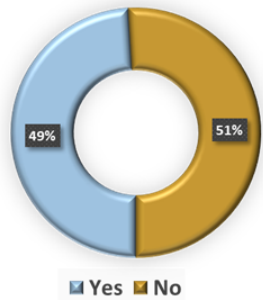
Respondents were asked about whether staff and/or clients had expressed hesitancy to receive the COVID-19 vaccine. Approximately half responded 'Yes.' The larger organizations, with budgets of \$500,000 or more, had a higher percentage of reported hesitancy than the small and medium-sized nonprofits.

The sectors with the **LOWEST** reported staff and/or client vaccine hesitancy are: Arts & Culture, Civic Engagement, and Animal Welfare.

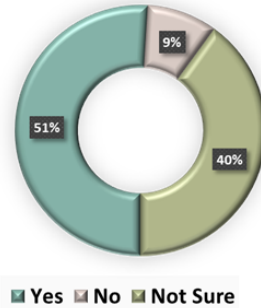
The sectors with the **HIGHEST** reported staff and/or client vaccine hesitancy are Health, Youth Services and Human Services.



Have Any of Your staff and/or Clients Expressed Hesitancy to Receive the COVID-19 Vaccine When Available?



Would Your Organization Be Open to Share Messaging Supporting an Increase in Vaccine Willingness?



Just over half of the NPO's would be open to sharing messaging to increase vaccine willingness, while 40% were not sure. and 9% said 'No.' This response distribution was consistent across all organizational size categories, however, differences were seen by sector. Health had the highest percentage of those open to sharing vaccine messaging with 79%, while Youth Services had the lowest at 38%.



NEEDS & OPPORTUNITIES

The leaders were asked to share one area they feel their organization has **excelled** in during COVID-19. The word cloud to the right captures the most common themes, which focused on their ability to adapt to a changing environment.

Key opportunities they believe might arise from the pandemic are as follows, listed in order of response category prevalence:



Virtual Delivery Platforms



Enhanced Partnerships



Increased Demand for Services



Expanded Client & Audience Reach



The most frequently mentioned **community needs** that the participants feel are NOT currently being met include vaccines, affordable housing, mental health supports, and equitable access to services such as housing, healthcare, technology, etc. Many people referenced diversity, equity, and inclusion in these comments. The four most pressing **organizational needs** are summarized in the diagram below, listed in order of response prevalence.

Top 4 Organizational Needs with Examples








1.	Operating Funds	<i>Unrestricted Funding</i>	<i>Capacity Building</i>	<i>Cash Flow Stabilization</i>	<i>Government, Private, Public \$</i>	<i>Low Interest Loan or Credit Line</i>
2.	Technology	<i>Devices & Software</i>	<i>Internet Access</i>	<i>Tech Infrastructure</i>	<i>Technical Knowledge & Training</i>	<i>Analytics Expert; IT Support</i>
3.	Human Capital	<i>More Staff to Serve More People</i>	<i>Trained & Qualified Staff</i>	<i>Technology Specialists</i>	<i>More Volunteers</i>	<i>Re-engagement of Volunteers</i>
4.	Facility Support	<i>Building or Office Space</i>	<i>Facility Improvements</i>	<i>New Facility or Venues</i>	<i>Building Materials</i>	<i>Facility Maintenance</i>

SECTOR HIGHLIGHTS: ANIMAL WELFARE



-  14 Animal Welfare organizations completed the survey, with operating budgets evenly distributed between the small, medium, and large sizes.
-  64% of these NPO's report that their operating budget is the SAME as their pre-COVID levels, and more than half plan to tap operating reserves in 2021.
-  None of the organizations cut staff this past year, and a third operate on a fully volunteer basis.
-  The key technology barrier for Animal Welfare organizations is the cost of online services. Client technology barriers are not a reported issue for this sector.

"Many grants we normally apply for have informed us that they are directing their funds towards human services."

-  50% received some form of CARES Act funding, primarily to cover operating expenses.
-  The new or expanded resource that has supported their operations the most is new individual donors.
-  The major capital need identified by these NPO's is software.
-  The primary ways their boards have supported them are through strategic leadership and personal financial contributions.
-  Animal Welfare organizations were most likely to have cut programs.
-  Their most immediate needs are funding followed by facility supports.
-  Opportunities they see as emerging relate to partnerships and collaborations.

SECTOR HIGHLIGHTS: ARTS & CULTURE



A total of 28 Arts & Culture organizations completed the survey, the majority of which have large operating budgets of \$500,000 or more.



68% of these NPO's report that their operating budget is LESS than pre-COVID levels, though only half plan to tap operating reserves this year.



21% of the organizations cut staff this year, the largest proportion of job losses of any sector. The range was from 1 to 6 staffers, with a total of 19 positions reported lost.



The key technology barrier for Arts & Culture organizations is the ability to monetize online experiences, as well as the cost of updating equipment.

"We have tremendous potential for the future as the services we provide are needed now more than ever!"



71% received some form of CARES Act funding, primarily to cover operating expenses.



The new or expanded resource that has supported their operations the most has been current donors who have increased their levels of support.



The major capital needs of these NPO's are technology devices and software.



The primary ways their boards have supported them are through strategic leadership and personal financial contributions.



Art & Culture organizations were most likely to have cut programs.



Their most immediate needs are funding followed by technology.



Opportunities they see as emerging relate to virtual platforms for performances and classes.

SECTOR HIGHLIGHTS: CIVIC ENGAGEMENT



7 Civic Engagement organizations completed the survey. The majority of these are small with operating budgets of \$60,000 or less.



Staffing responses were quite varied with some being all volunteer-based, and some adding or eliminating staff. A total of 2 jobs were reported lost during the past year.



Most of these NPO's report that their operating budget is LESS than their pre-COVID levels, with three NPO's planning to tap operating reserves in 2021.



The key technology barriers for Civic Engagement organizations are the cost of updating equipment and the cost of robust technology platforms. Technology training is the main need of clients.

"The 'flying the plane while building it' attitude was possible because our organizational culture is: Everything we do is an experiment!"



Less than half received some form of CARES Act funding, primarily to cover operating expenses and to develop a new program or service linked to COVID-19 needs.



The primary ways their boards have supported them are through strategic leadership and personal financial contributions.



The new or expanded resources that have supported their operations the most are new individual donors and current donors who increased their levels of support.



Civic Engagement organizations were most likely to offer the same programs with changed delivery.



The major capital needs of these NPO's are technology devices and software.




Their most immediate needs are those related to technology.





Opportunities they see as emerging relate to enhanced partnerships and virtual delivery platforms.


SECTOR HIGHLIGHTS: EDUCATION




 A total of 27 Education organizations completed the survey, the majority of which are medium to large-sized with operating budgets of \$60,000 or more.


 In terms of changes to their budgets, these NPO's were evenly distributed across the responses of less, the same and greater, with 57% planning to tap their reserves in 2021.

 A third of the organizations added staff this year and only two cut positions. A total of 7 jobs were reported lost during the past year.


 The key technology barrier for Education organizations is the cost of robust technology platforms. Access to devices is the main technology need of clients.


"This year has demonstrated the importance of diversifying our revenue streams and not being dependent on one major event a year."


 75% received some form of CARES Act funding, primarily to cover operating expenses and to develop a new program or service linked to COVID-19 needs.


 The new or expanded resource that has supported their operations the most has been grant funding.

 The major capital needs of these NPO's are technology devices and software.

 The primary ways their boards have supported them are through strategic leadership and personal financial contributions.

 Education NPO's were most likely to offer the same programs, but with delivery changes.

 Their most immediate needs are funding followed by technology supports for both themselves and their clients.

 Opportunities they see as emerging relate to virtual platforms for remote learning.

SECTOR HIGHLIGHTS: ENVIRONMENT



6 Environment organizations completed the survey, with the majority in the categories of medium or large operating budgets.



Most of these NPO's report that their operating budget is LESS than pre-COVID levels, with three planning to tap operating reserves in 2021.



Staffing responses were quite varied with some adding staff, some eliminating staff, some cutting compensation. A total of 6 jobs were reported lost during the past year.



The key technology barrier for Environment organizations is the cost of robust technology platforms. Technology training and access to devices were mentioned as needs of clients.

"We were determined to be here for people who needed a sense of peace and the ability to walk and breathe freely."



Two thirds received some form of CARES Act funding, with varying uses such as for operating expenses, to create new programs and to develop partnerships.



The new or expanded resources that have supported their operations the most are new individual donors and current donors who increased their levels of support.



The major capital need of these NPO's is technology devices.



The primary way their boards have supported them is through volunteerism outside of the board room.



Environment organizations were most likely to have cut some programs and services.



Their most immediate needs are funding and technology support.



Opportunities they see as emerging relate to virtual delivery platforms.

SECTOR HIGHLIGHTS: FOOD & NUTRITION



- 🍴🍴 10 Food & Nutrition organizations completed the survey. The majority are mid-sized with expenses in the \$60,000 - \$500,000 range.
- 🍴🍴 Most of these NPO's report that their current operating budget is GREATER than pre-COVID levels, therefore, the majority are not planning to tap operating reserves in 2021.
- 🍴🍴 None of the organizations cut staff this past year, and 40% have no paid staff. No jobs were reported lost during the past year.
- 🍴🍴 The key technology barriers for Food & Nutrition organizations are the need for staff technology training, the cost of online services, and the cost of updating equipment. Access to devices and the internet are the main needs of clients.

"We hope to continue to reach more people who desperately require our services."

- 🍴🍴 All reported receiving some form of CARES Act funding, primarily to increase their capacity to serve clients.
- 🍴🍴 The new or expanded resources that have supported their operations the most are new individual donors, current donors who increased their levels of support, and new or expanded grant funding.
- 🍴🍴 The major capital need of these NPO's is building modifications.
- 🍴🍴 The primary way their boards have supported them is through volunteerism outside of the board room.
- 🍴🍴 Food & Nutrition organizations were most likely to offer the same programs, but with delivery changes.
- 🍴🍴 Their most immediate needs are funding and facility support.
- 🍴🍴 Opportunities they see as emerging relate to expanded client reach.

SECTOR HIGHLIGHTS: HEALTH



14 Health organizations completed the survey, with the majority in the category of medium to large operating budgets.



50% of these NPO's report that their current operating budget is **GREATER** than pre-COVID levels, with a quarter indicating less and a quarter reporting the same. Half are planning to tap operating reserves in 2021.



Two of the organizations cut staff, with one eliminating 100 jobs and the other had 2 staff cuts. Almost half **INCREASED** staffing.



Technology barriers were evenly distributed across the choices of online services, staff technology training, robust technology platforms, and equipment. Access to devices is the main need of clients.

"Investment in building capacity amongst smaller CBO and interested individuals would have great future return and enhance sustainability of needed interventions to continue to level the playing field and achieve social justice and equity across all spheres of social determinants of health."



71% received some form of CARES Act funding, primarily to cover operating expenses.



The new or expanded resources that have supported their operations the most have been new individual donors, and new or expanded grant funding.



The major capital needs of these NPO's are technology devices and software.



The primary ways their boards have supported them are through strategic leadership and personal financial contributions.



Health organizations were most likely to offer the same programs, but with delivery changes.




Their most immediate needs are funding and facility support.





Opportunities they see as emerging relate to expanded client reach.


SECTOR HIGHLIGHTS: HUMAN SERVICES




 68 Human Services organizations completed the survey, with just under half in the large budget category, over a third medium-sized, and 15% small.


 41% of these NPO's report that their current operating budget is **GREATER** than pre-COVID levels, with 27% indicating it is less and 32% the same. A third are planning to tap operating reserves in 2021.

 43% of the organizations **INCREASED** staff, while 10 eliminated jobs, ranging from 1 to 31 positions. A total of 76.5 FTE jobs were reported lost during the past year.


 The key technology barrier for Human Services organizations is the cost of updating equipment. Access to internet and devices are the main technology needs of clients.


"We continuously adopted new policies and adapted our service delivery methods to ensure clients did not experience a hiccup in our services with everything else they were facing."


 79% received some form of CARES Act funding, primarily to cover operating expenses or to increase capacity to serve clients in general.


 The new or expanded resources that have supported their operations the most have been new individual donors, and new or expanded grant funding.

 The major capital needs of these NPO's are technology devices and software.

 The primary way their boards have supported them is through personal financial contributions.

 These NPO's were most likely to offer the same programs, but with delivery changes.

 Their most immediate needs are funding and technology support.

 Opportunities they see as emerging are enhanced partnerships and increased demand for their services.

SECTOR HIGHLIGHTS: YOUTH SERVICES



A total of 13 Youth Services organizations completed the survey, evenly distributed across the three operating budget sizes.



Only 2 of the organizations cut staff, with a total of 2 jobs reported lost during the past year.



The larger organizations are more likely to have current budgets that are greater than pre-COVID levels. And the smaller organizations tend to have budgets below pre-COVID levels, with 50% planning to tap their reserves in 2021.



The key technology barrier for Youth Services organizations is the cost of updating equipment. Clients need access to devices and internet, and technology training.

"We are working hard to meet the needs of young children and their families, many who have experienced significant hardships."



Half of the organizations received some form of CARES Act funding. The primary use was to cover operating expenses.



The primary ways their boards have supported them are through strategic leadership and personal financial contributions.



The new or expanded resource that has supported their operations the most has been grant funding.



Youth Services organizations were most likely to now offer new programs or services.



The major capital needs of these NPO's are technology devices and software.



Their most immediate needs are funding for staff and programming, followed by technology supports.



Opportunities they see as emerging relate to expanded client reach.

Community Foundation of Sarasota County consultant Deborah Chapman analyzed the data and produced this report. The survey tool was developed by Manatee Community Foundation with the following foundations who partnered on this project:

