



Assessing Local Needs
COVID-19 Pandemic
Nonprofit Survey
Report

March 31, 2020

Background

In March 2020, philanthropic foundations serving Sarasota, Manatee, Charlotte and DeSoto counties partnered to better understand the needs of nonprofit organizations during the onset of the COVID-19 pandemic.

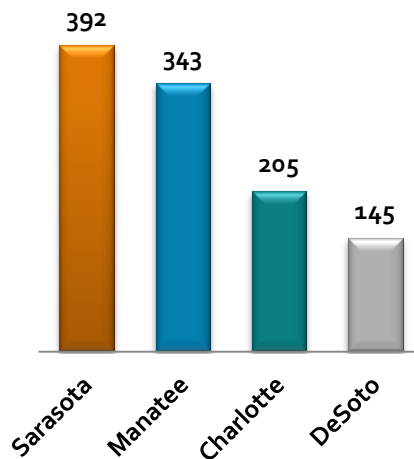
Community agencies were asked to complete an online survey and 485 people participated. One person per agency was asked to respond.

Respondents included a cross section of nonprofits representing nine different sectors. Participants reported which county(ies) they serve, with 71% indicating that they serve two or more local counties.

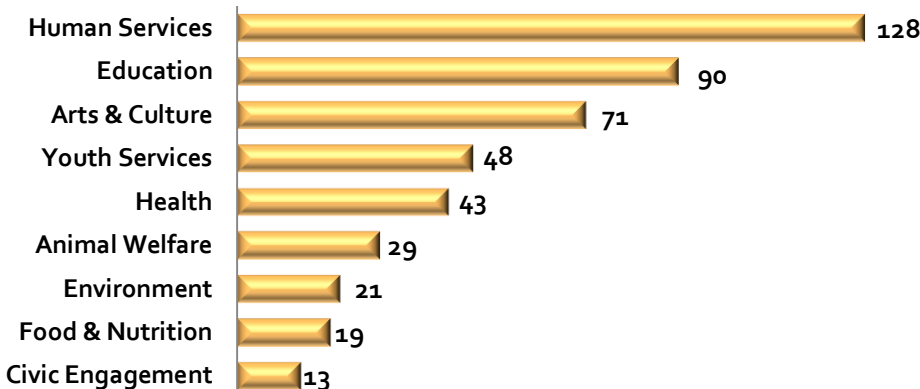
Also, 29% of respondents reported that they provide direct financial assistance to clients. These are primarily Human Services, Education and Youth Services entities.

Survey response demographics are as follows:

Respondents by County(ies) Served



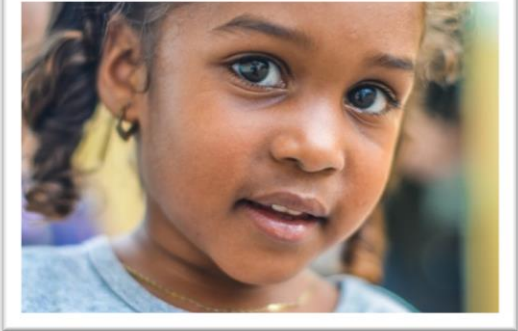
Respondents by Nonprofit Sector



Survey Process

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

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



Nonprofit agencies were sent a Survey Monkey link on March 19, just as the COVID-19 crisis began to unfold and social distancing guidelines went into effect. They were asked to complete the survey by March 30. Community Foundation of Sarasota County consultant Deborah Chapman then analyzed the data and produced this report.

Report Structure

Participants were asked 15 questions related to how the pandemic is impacting their organizations. The following sections summarize these responses and offer an overview of sector-specific needs.

"Thank you for creating this survey to give a voice to local nonprofits in need."

General Survey Themes

The nonprofit organizations expressed similar sentiments about the immediate and anticipated impacts of the current pandemic.

- ❖ **Financial Peril:** Many organizations are scrambling to stay in business with the majority out of operating income within three months.
- ❖ **Alternative Funding Sources:** Revenue-based entities are trying to identify alternative funding streams like virtual events and memberships.
- ❖ **Grant Expectations:** There are high hopes and expectations that foundations and/or government will provide funding support.
- ❖ **Giving Challenge:** The *Giving Challenge* was repeatedly cited as a critical resource.
- ❖ **Operations Impact:** More than two-thirds are unable to maintain normal operations.



- ❖ **Staffing Cuts:** Most already have reduced staff and expect to implement additional layoffs/ furloughs.
- ❖ **Technology Needs:** Hardware and tech support are needed for both the nonprofits and their clients to manage in the current virtual environment.
- ❖ **Vulnerable Populations:** Organizations are particularly worried about vulnerable populations during the crisis.
- ❖ **Donor Impact:** Agencies are very concerned about their donors and recognize they are financially suffering as well.
- ❖ **Shell Shock:** Some are still assessing the impact and have a sense of shock about the current situation.

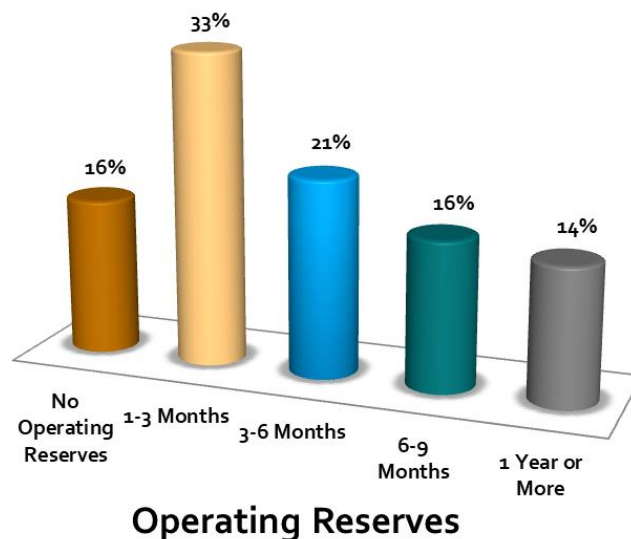
Operating Reserves

Almost half of the organizations report that they have three months or less in operating reserves, as indicated in the graph to the right. Participants also were asked if they are *able to continue normal operations*.

72% said NO

28% said YES

Some report they have already shut down operations. And 90% said they expect their regular operations to be impacted in the future.



"We have funds to last about 2 months. Shockingly difficult time for us all."

Financial Impact

Survey participants were asked how their respective organizations were impacted by the pandemic. Respondents could check all that apply to the prompts listed in the chart to the right. The most common responses relate to canceled events and revenue loses. A large number of nonprofits have canceled spring fundraisers, resulting in the loss of major revenue sources. Many anticipate decreases in monthly giving as well as a decline in membership dues.

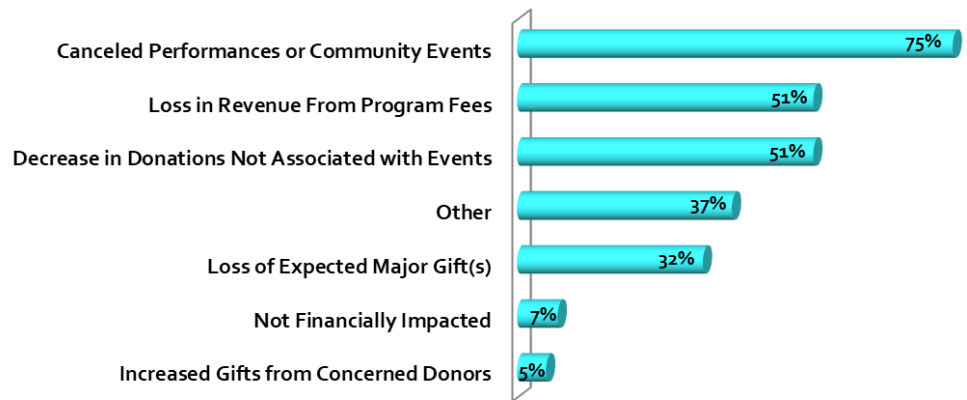


Agencies say they have already seen a significant decrease in donations of cash, food, and other items at a time when expenses are going up for emergency supplies, equipment, technology, transportation, etc.

Sectors like the Arts and Education are also looking at huge losses due to processing refunds. Several entities cited losses in the millions, and many worry about expected changes to the FY2021 state budget coupled with the loss of corporate donations and sponsorships.

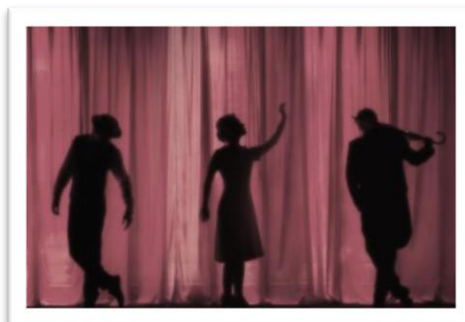
Some respondents were unsure if they will be reimbursed from the counties and are concerned about meeting grant requirements.

Impact of COVID-19



Funding Options

Many organizations are working to identify additional grants, including government funding, and some are accessing lines of credit or loans. A large number cited *The Giving Challenge* as a critical resource, and some have started *GoFundMe* pages.



Performance groups are exploring virtual events with livestreaming fees, and others are tapping endowments and emergency reserves. One agency has shifted to offer an online "un-gala" silent auction. Many hope the local foundations will be able to provide much-needed cash for their organizations during this crisis.

Donor Response

Organizations were asked what type of response they have received from donors regarding

urgent needs or canceled events. A common concern echoed is that donors are financially suffering too, whether through portfolio losses, business decline, job loss, etc. In terms of donor/patron responses to event cancellations, it is still early for many to assess, but the distribution ranges between donating, asking for credits, or expecting refunds. Some are not set up to process refunds and are trying to manage this.

NEED FOR VOLUNTEERS

62%

Do not have a current need for volunteers, though 21% are unsure at this point.

16%

Do have a need for volunteers in areas such as:

- ♦ Fundraising & Communications
- ♦ Technology Support
- ♦ Educational Tutors
- ♦ Delivery of Supplies & Food
- ♦ Animal Fostering

"Opportunities to attract major donors have diminished owing to poor revenue projections among businesses who wish to support us."

Current Needs

Survey participants were asked to list any needs they may not be able to meet in the near future as related to serving clients, staff, access to supplies, etc. The most frequent responses are listed below in order of prevalence (left to right). Operating income needs include wages, rent and utilities. Technology includes

computers, internet access and tech support for both staff and clients. Sanitizing supplies include disinfectants and cleaning products, as well as baby wipes which are in short supply. Medical supplies include personal protection equipment, vet supplies, insulin, etc.



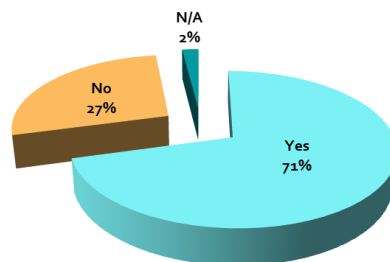
IT Infrastructure

Organizations were asked whether they have the IT infrastructure to support staff working from home when the job allows and whether they can connect with clients and families. Approximately a third of the respondents are unsure or do not have the IT infrastructure to connect with clients and staff. Many cited the critical need for, as one respondent put it, client “digital inclusion,” which includes computers, internet access, service-based apps, and digital training. Common staff needs are listed to the left.

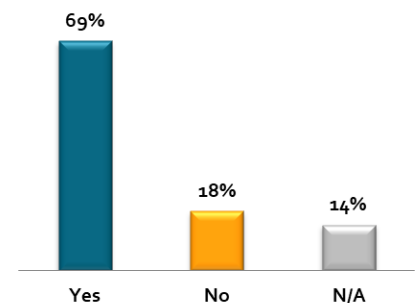
Examples of reported staff/organizational IT needs:

- Server Capacity
- Phone Systems
- Online Learning Platforms
- Virtual Client Contact Processes
- Secure Documentation Systems (e.g., HIPPA Compliance)

IT Infrastructure to Support Staff Working from Home



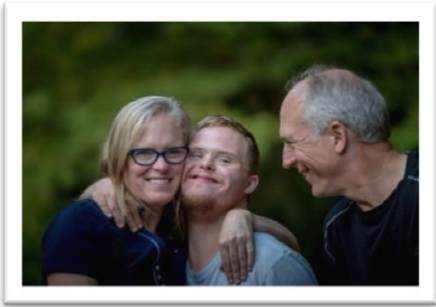
IT Infrastructure to Connect with Clients and Families



“We need Myfi (hot spots) and laptop computers for needy students that do not have internet access nor computer equipment at home.”

Staffing Changes

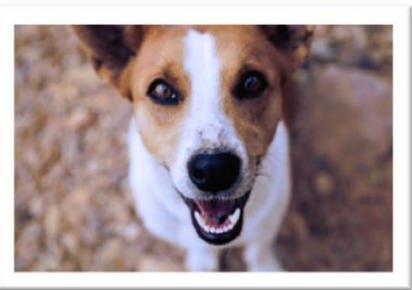
All of the organizations have experienced staffing impacts, with responses to question prompts captured in the chart to the right.



Many have already laid off staff, with one organization alone furloughing 92 people. Others feel that they may need to do the same in the near future.

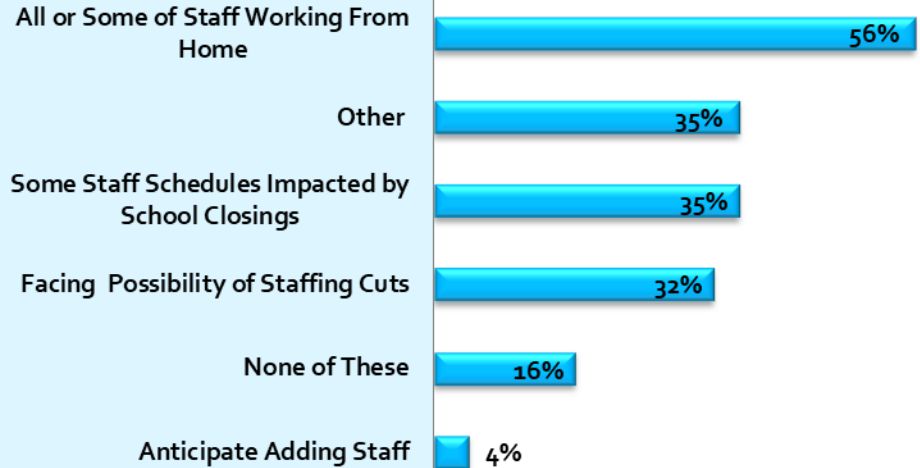
A third of the agencies said they will have to make staffing cuts and a third said they do not plan to pay staff during the crisis.

Many expressed concerns about losing key staff if they cannot retain them, and the potential long term impact on the organization.



Mental health and medical organizations reported an immediate need for additional staff and trained healthcare workers to manage the increased client load during the crisis. Some also conveyed apprehension for the mental health of employees as they navigate under these difficult circumstances.

Staffing Changes As a Result of COVID-19



The majority of the "Other" responses to the staffing question were from volunteer-based entities who do not consider workers to be staff. They expressed concerns about whether volunteers would return once the social distancing restrictions are lifted.

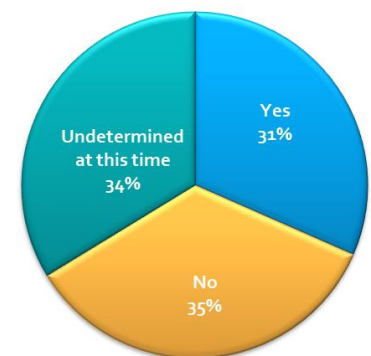
Some staff members are working overtime to provide essential client services. Facility-based agencies are particularly vulnerable since they face staffing problems if residents test positive and staff is exposed. Many Human Services agencies continue to see clients in person.

Nonprofit leaders are eliminating part-time positions and consultants first to manage costs, but some worry about the impact of losing support in areas like administration, facilities, marketing, social media, etc.

Respondents are worried about contract paid workers who have been particularly hit hard by the crisis.

Many nonprofits indicated that staffing cuts will depend on the gravity of the situation so they are in a holding pattern before determining next steps. Therefore, over a third of respondents answered "undetermined" to the question below.

Does Your Organization Plan to Pay Staff For Time Off Due to Cancellation of Work & Fewer Hours?



The general sentiment was one of shock at the rapid and devastating impact COVID-19 has had on their ability to operate and maintain payroll and staffing levels.

"The return of staffing will be slow, and some may never return. The elimination of positions, programs, and even locations is very possible."

Resources to Share

Participants were asked if they have resources to share with other nonprofits or the community.

While many are overwhelmed at the moment and unsure how they can help others, more than half offered support in the form of collaborative skills, item donations, and access to their volunteer base, as the chart below captures.

Also, several organizations are already sewing masks and working with partners to distribute a variety of donation items.

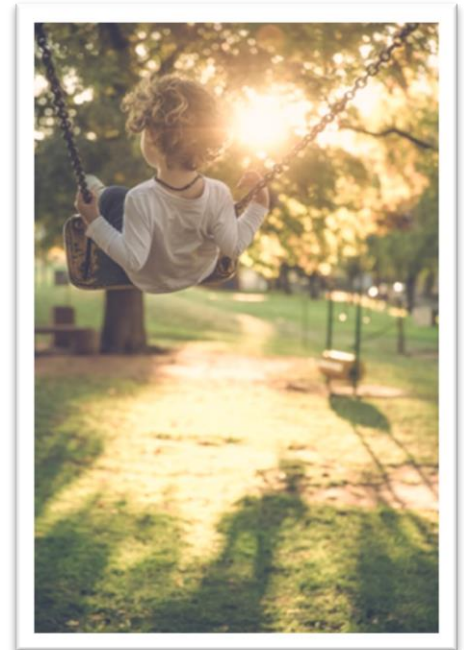


The general tone was one of great support and community focus, with respondents expressing a desire to offer help in any way they can.

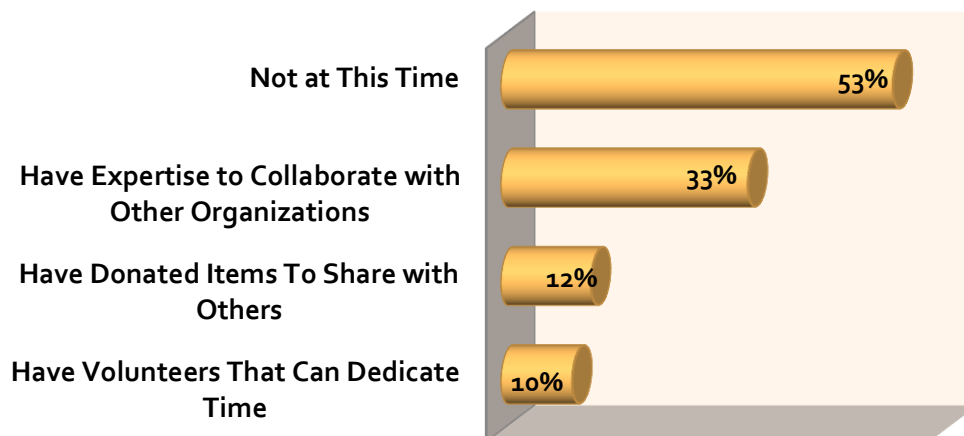
Examples of additional support offered by respondents are as follows:

- Human and Pet Food
- Facilities/ Meeting Rooms
- Sewed Surgical Masks
- Crisis Preparation
- Distribution Sites
- Fleet of Vehicles
- Grant Writing
- Clothing and Housewares
- Baby Equipment, Small Housewares
- Posting Audio and Video Files to Raise Morale
- Social Media or E-learning Services
- Housing for Artists
- Toys
- Managing Mental Health via Web and Social Media
- Trauma Informed Training
- Fundraising/ Special Events
- PSA and Emergency Broadcast Announcements
- Legal Matters Related to the Pandemic
- Virtual STEM Learning Livestream Media

- Skilled Construction Workers
- Staff for Fielding Calls
- Technology Experts
- Tutors



Do You Have Resources You Can Share with Other Nonprofits or the Community?



"We are happy to collaborate in any way with other non-profits as we all navigate this difficult time."

Other Feedback

Participants were given an opportunity at the end of the survey to offer any additional input they felt was important to share. While many reiterated their financial and staffing concerns, several other themes emerged as represented in the word cloud to the right and the sample of respondent quotes below:



Basic Needs: *"We need basic necessities to support individuals and families who are out of work during this pandemic."*

Cooperation: *"Thus far, we are seeing great cooperation from agencies willing to help each other and that is very encouraging."*

Fear: *"This crisis is far more profound than the 9/11 period and the lows of the great recession. In both of those traumatic periods, we were not required to suspend our core activities."*

Resilience: *"We realize it is an impossible time for everyone in the non-profit world. But hopefully, we will learn from this and be stronger in the end."
"I have every confidence that if we all work together, we can survive these very difficult times."*

Mounting Crisis: *"The societal crisis we now face will shortly become a human crisis of epic proportions as we add to the humanity in need of service, sadly, most of who took care of others for their career."*

Appreciation: *"We appreciate you asking and being proactive."
"I just want to say how grateful I am to live in a community that cares and wants to help. Acts of kindness and generosity really stand out."*

Philanthropy: *"It's wonderful to know that your foundations care so much."
"We are extremely concerned about the long term impact this may have on philanthropy in our local community."*

Long-Term: *"Many of our partners will not be able to meet the current need or the increased demand. Just as we see other businesses close, so too are our agencies."*

Vulnerable Populations: *"History has shown that there is an uptick in prejudice and bigotry during destabilizing events."
"Animals are already being dumped because the majority of municipal shelters have shut down intake."*

Innovation: *"Out of the challenge of the pandemic, we are creating innovative ways to connect with our audiences and serve students online."*

Loss: *"We recognize that our community will experience significant trauma as a result of this experience."*

Collaboration: *"We would greatly benefit from a cross-organizational conference call, video chat, or webinar on updates on resources, training on disaster relief protocols, or any general and open discussion with our peers."*

Community-Wide: *"A strong community-wide strategy is needed to get organizations like us back up to speed again as quickly as possible."*

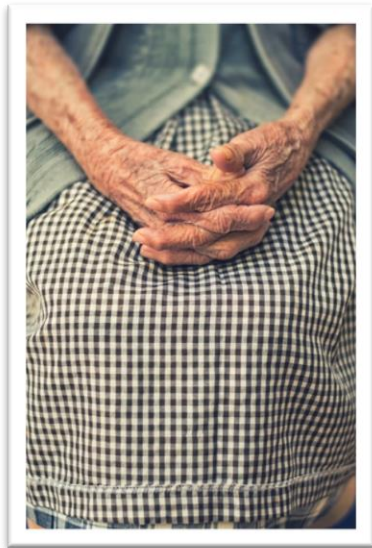
"The financial hardships of the COVID-19 emergency are impacting many of the people and businesses in our community. These same people and businesses have historically been the donor-focus of our previous fund-raising efforts."

Sector-Specific Analysis

Survey data were analyzed by each of the nine nonprofit sectors to identify notable differences and each group's specific needs. The following section offers an overview of key findings listed in order of the segments with the most respondents.

Human Services

A total of 128 Human Services agencies responded. These organizations serve children and individuals who are low income, as well as mentally ill, homeless LGBTQ+ and disabled populations. 46% of the organizations have three months or less in operating reserves given a large number rely on client fees to supplement funding.



These nonprofits still have a lot of direct, in-person contact with clients and, therefore, are in particular need of sanitizing and medical supplies, and are concerned about dwindling access to these items.



They expect their service demand to rise at a time when they cannot add staff, and anticipate a new set of clients coming from the middle class that will enter into crisis.

They want access to unrestricted funding to be agile in their operations, and several expressed the critical need for emergency client funds, such as through *Season of Sharing*.

They are deeply troubled by the toll of the pandemic in areas like domestic violence, child abuse, homelessness, mental health, and quality of healthcare, especially for the uninsured. Several also mentioned the need for childcare for first responders.

Education

90 nonprofits representing the Education sector completed the survey. More than 50% report they will run out of operation reserves in three months or less. This group is in urgent need of technology to pivot to virtual delivery platforms. This includes computers,

curriculum and virtual learning systems.

Many are exploring how to film and produce online classes, and some are trying to determine how to set up online payment systems. These nonprofits are further concerned about student access to technology, including internet service.

Many mentioned the need for scholarships and direct education funding for students.

Arts & Culture

A total of 71 Arts & Culture organizations responded to the survey representing the local arts-rich community of theater, dance, music, and other visual and performing arts, as well as the museums.

These organizations have been particularly hard hit, with many describing very dire situations due to high reliance on fees. Without such cash flow, many report a large



number of current layoffs, with 42% indicating that they face possible staffing cuts in the future. This is ten percentage points higher than the average of the full 485 responses. And 50% say they have three months or less in operating reserves.

Arts organizations overwhelmingly cited the need for emergency cash to maintain operations, make payroll, rent, etc., and more than half have seen a general decrease in donations. One respondent estimates losses of \$1 million.

This group also is very worried about the numerous freelance and contract workers in the industry and the financial losses they are experiencing as well.

With no income, many expect their organizations to shut down while others said they feel they will be a much different entity if they make it through this tumultuous time.

Some are exploring virtual events with livestreaming fees and online classes, and some are tapping endowment and other emergency reserves.

Many hope the local foundations will be able to provide much-needed cash for their organizations during this crisis. The general tone of the feedback was one of shock.

Youth Services

48 survey respondents described themselves as Youth Services providers. These include sports organizations, youth foundations, mentor programs, clubs, camps, etc. 44% of this group indicate that they have three months or less in operating reserves.

The Youth nonprofits are highly dependent on fundraisers for income and are uncertain of their future with events canceled or up in the air. Many say they cannot sustain operations without funding and some are currently depleting reserves to cover overhead.

They are also concerned about the families and small businesses that support them given they are also facing uncertain financial losses.

Those that offer scholarships for their services fear that they will not have the capacity to do so at the same levels as in the past.

These leaders are incredibly worried about the children they serve in terms of both their physical and emotional health. Many believe that the pandemic's impact on youth mental health will be profound. The social isolation alone is of great concern. They anticipate a high need for counseling services.



Several also play a role in homework assistance and education support, and fear that students will miss out on this valuable service.

Health

43 Health organizations completed the survey, 44% of which report they have three months or less of operating reserves. These nonprofits include mental health and addiction organizations, medical clinics, pregnancy centers, research foundations, support groups, etc.



Access to medical supplies is a huge issue. They need N95 masks, testing supplies, Personal Protection Equipment (PPE), sanitizing and disinfectant items, 'no touch' thermometers, medicine such as insulin, baby essentials, swabs, goggles, gloves, gowns, etc. which are all in low supply. They are alarmed about possible disruption of access to and distribution of client medications.

Some report that staffing may become a critical issue if a large scale outbreak occurs. Funding for technology is also a need with several requesting laptops and webcams to provide 100% telehealth services.

Animal Welfare

29 pet adoption and wildlife centers responded, with 45% reporting they have three months or less of operating reserves. As in the Health sector, these entities are in desperate need of medical and sanitizing supplies as well as food. They are concerned about the ability to properly care for animals without both these resources and staff.



They report that many people are offering to foster animals while working from home, but worry about what will happen when they go back to work.

Environment

A total of 21 Environmental agencies responded, representing parks, conservation organizations, marine research facilities and garden clubs. 38% said they have three months or less of operating reserves.

Those with staff are most worried about funding resources and maintaining operations. They fear that they will lose membership and donations, and that research projects will be postponed.

Several referenced their reliance on the *Giving Challenge* to boost revenues, though some were concerned about the timing since they feel their donor base, especially the middle class, will be hit hard by the crisis. They feel a rebound will be slow and may put a halt to their missions for a prolonged period of time.

Food & Nutrition

19 nonprofits representing community food banks participated in the survey. Of

these, 32% indicate that they have three months or less of operating reserves, the lowest rate of the nine nonprofit sectors.

These agencies expect a growing need for their services at a time when they are having trouble getting food due to hoarding. They report that, while volunteers are the heart of their operations, they are no longer able or willing to help. They fear that this lack of personnel, coupled with supply shortages, will seriously disrupt the food relief system. Many of the small distribution sites have already or expect to close.

They report that food donations have declined from major retailers which will increase food costs at a time when demand in the coming months is expected to be great.

Civic Engagement

13 nonprofits representing Civic Engagement entities, such as clubs and associations, participated in the survey. The majority are volunteer-based without operating expenses, though some are experiencing financial hardship with loss of memberships.

Their key message is one of apprehension regarding their ability to support the community through donations, scholarships and service offerings.



Rescue operations have been suspended and most adoption facilities are closed to the public or operating by appointment only. Because spay/neuter clinics have been forced to close, the number of outdoor kittens born into the community will increase yet facilities will not be able to intake the number they usually do.

These leaders recognize that, when families suffer, their pets do as well. They expect animal rescues and shelters will begin to see a rise in owner relinquishments soon. To diminish this, they recommend the establishment of a pet food bank.

Animals already are being surrendered given the majority of municipal shelters have shut down intake. Without transfers to partners, one estimate is that 1000+ animals will face possible euthanasia in the near term simply for lack of space.

This report was developed in partnership with the following foundations. Noted below are the early philanthropic responses of each foundation as of April 9, 2020. We will continually evaluate the needs of our communities. Due to the changing nature of this pandemic, we anticipate multiple phases and types of future responses over time.



- Supporting health and human services organizations serving people in Manatee County through the foundation’s Manatee County COVID-19 Community Response Fund.
- Advancing the continuation of an informed and engaged Bradenton in response and recovery through generous support from the Knight Foundation.
- Encouraging donors to help meet the emergency needs of individuals through Seasons of Sharing and to support charitable nonprofit organizations important to them.



- Meeting the emergency needs of individuals through Seasons of Sharing.
- Building capacity of nonprofit organizations via online giving day program known as the Giving Challenge.
- Providing grants on a rolling application cycle, and awarding sector-specific grants for healthcare, education, and animal services.



- Co-launched COVID-19 Response Initiative to fortify key health and safety organizations.
- Providing immediate relief to meet urgent needs of most vulnerable in community.
- Also building capacity of safety-net organizations to prepare for intermediate and long-term needs.



- Providing assistance to individuals affected by job or income loss through the foundation’s Hand Up Grant (HUG) program.
- Collaborating with county-wide efforts through COAD (Community Organizations Active in a Disaster).
- Meeting the emergency needs of individuals through Seasons of Sharing.



- Co-launched COVID-19 Response Initiative to fortify key health and human service organizations.
- Coordinating efforts to provide childcare, food assistance, and mental health services for families.
- Providing flexibility for current grantees by repurposing existing grant and sponsorship commitments.



- Meeting the emergency needs of individuals through Seasons of Sharing.
- Strengthening regional nonprofit organizations and donors through its contributions to the Giving Challenge.
- Supporting the creation of technology solutions for communities in the developing world through NetHope.



- Meeting the emergency needs of individuals through Seasons of Sharing.
- Expanding and increasing organizational capacity for emergency food needs.
- Helping organizations reinvent and reimagine service delivery through technology assistance grants.