# United Way of Central and Northeastern Connecticut
# Summary of Results of 2009 Non-profit Pulse Survey
# October 2009

The United Way of Central and Northeastern Connecticut (UWCNCT) recently completed its Sixth Annual Non-profit Pulse Survey of UWCNCT funded partner agencies and other non-profit organizations within its 40-town service area. This important longitudinal study relates broadly to health and human services and provides valuable insights into the current and expected conditions facing these service providers

A total of 358 surveys were sent electronically to the aforementioned groups described in mid-August 2009. All of the 99 usable surveys returned were completed and submitted online, yielding an overall response rate of 27.7%. This compares to 420 surveys e-mailed for the 2008 study which resulted in a response rate of 19.3%.

According to the Connecticut Attorney General, Public Charities Unit, there are 7,082 charities in the state. Of those, 1,922, or approximately one out of four, are located in UWCNCT's 40-town service area. The number of charities both in the state and in Greater Hartford is up from a year ago (6,873 and 1,856 respectively).

The 2009 sample size results in a margin of error (at the 95% level of confidence) of +/- 8.4% for the entire sample. Response rates for each segment appear to be positively correlated with the level of affinity that UWCNCT has with each group. Total responses and response rates for each group are summarized below.

- Funded partners: n=52, (52.5%)
- Other non-profits: n=47, (47.5%)
- Total: n=99, (27.7%)

## Brief Summary of Conclusions

Optimism appears to be returning to survey respondents, perhaps reflecting some modest signs that the recession has bottomed out. Not surprisingly, expectations for increased revenue continue to decline, suggesting that this might be a lagging indicator. Further, demand for services continues to increase but not to the extent indicated in 2008, while staffing is more likely to be reduced. The 2009 survey found that collaborations and partnerships are helping non-profits meet the rising needs of those they serve. The trend to consider merging with another non-profit organization continues to grow. Alarmingly, one out of three respondents report that their organization may cease operations in the next year. For those respondents reporting that they have begun to tap reserves, more than two out of three report having six months or less of operating expenses in reserve. The Federal Stimulus Package has not made a measurable difference for clients or non-profit organizations. In summary, while optimism is returning, or perhaps phrased another way, pessimism is abating, the challenge of meeting increased demand for service with fewer resources will not be ending any time soon.

## Summary of Responses to Survey Questions

Descriptive results are summarized below and include weighted total scores for both United Way funded and non-funded non-profits that responded to the survey.

## Annual Giving – Six-year trend

Individual Giving

| Individual Giving (Total) | 2004 | 2005 | 2006* | 2007 | 2008 | 2009 |
|---|---|---|---|---|---|---|
| Decrease | 42.5% | 23.5% | 18.7% | 6.9% | 29.4% | 48.6% |
| Stay the same | 25.9% | 37.9% | 64.7% | 44.2% | 36.6% | 30.2% |
| Increase | 31.4% | 38.5% | 16.6% | 48.9% | 34.1% | 21.1% |

- Nearly one out of two respondents report that revenue from individual contributions will decrease, up from 29.4% in 2007 and the highest "decrease" level ever recorded. In two years, this has increased eight fold from only 6.9% of respondents indicating that revenue from individuals would decrease to nearly half of those responding.
- The downward trend in reporting an increase in contributions from individuals begun last year continues (21.1% in 2009 versus 34.1% in 2008).
- 78.9% of the respondents report that revenue from individual contributions is 20% or less of the organization's revenue, compared to 72.7% in 2008.

* **Note:** Due to technical difficulty in the online survey tool for this question in 2006, we re-solicited the response to this question and received 30 responses versus 68 for the entire survey. The percentages shown are based on the actual number of responses received following re-solicitation.

***Comments:***

*Fewer donors and for the first time a decline in the average gift amount.*

*Down 15% overall.*

*(People) see the need and are responding – people are seeing themselves with less, friends and neighbors with less. People are giving out of their need not their reserves.*

*When government grants were cut for our food pantry the community responded to make up a portion of that loss.*

*We do not receive contributions from individuals.*

**Note:** *Giving USA*, the annual compilation of American giving published by Giving USA Foundation, reports that individual giving, the largest single source of donations (75% of all giving in 2008), decreased by 2.7% in 2007 (-6.3% when adjusted for inflation) compared to an increase of 2.7% in 2007 (-0.1% adjusted for inflation).

Foundations/Corporate Giving

| Fdn./Corporate Giving (Total) | 2004 | 2005 | 2006 * | 2007 | 2008 | 2009 |
|---|---|---|---|---|---|---|
| Decrease | 48.5% | 27.9% | 20.4% | 24.7% | 28.8% | 49.5% |
| Stay the same | 24.5% | 40.6% | 63.5% | 26.8% | 35.8% | 31.4% |
| Increase | 27.0% | 31.5% | 15.8% | 48.4% | 35.3% | 19.2% |

- In 2009 half of all respondents believe that giving from foundations and corporations will **decrease** (49.5%) compared to nearly one out of three who felt that way in 2008 (28.8%). The 2009 level of "decrease" is the highest ever recorded by this study.
- 80.9% of those surveyed report revenue from foundation and corporations to remain the same or **decrease**. This is in stark contrast to 2008 when 71.1% of all those surveyed report giving of this type to remain the same or to **increase** in the current fiscal year when compared to the prior fiscal year.
- In 2009, respondents were less likely to report an increase in revenue from foundations and corporations (19.2% compared to 35.3% in 2008). This continues a downward trend begun in 2007.
- 72.6% of respondents in 2009 indicate that their organization receives 10% or less of its revenue from foundations or corporations.

* **Note:** Due to technical difficulty in 2006 the online survey tool for this question in 2006, we re-solicited the response to this question and received 30 responses versus 68 for entire survey. Percentages are based on actual number of responses received in re-solicitation.

***Comments:***

*A lot of them have taken hits from the market and have a lot more demands on their resources.*

*Most are either the same or down.*

*These funders are not open to helping new charities. If they haven't funded you in the past, they are not interested now because their dollars are limited also.*

*This is a very small percentage of our total revenue, but we hope to improve this to the extent possible in the future.*

**Notes:** The annual *Giving USA* study of charitable contributions in America for 2008 found that grant-making by foundations increased by 3% (-0.8% adjusted for inflation) compared to an increase of 10.3% (7.3% adjusted for inflation) in 2007.

According to *Giving USA*, corporate giving decreased 4.5% (-8% adjusted for inflation) compared to an increase of 1.9% in 2007 (a decline of 0.9% adjusted for inflation) in 2007.

A separate study by the *Chronicle of Philanthropy* for 2008, found that the nation's largest companies increased their charitable contributions by 9% compared to an 8% increase in 2007. Of those companies that would predict giving in 2009, 72% said their giving would remain flat, 21% said giving would decline, and 7% said giving would increase.

Closer to home, the *Chronicle* reports that Aetna Inc. and United Technologies Corporation project that their giving will remain the same in 2009 when compared to 2008.

The Foundation Center in New York reported in their annual report *Foundation Growth and Giving Estimates: Current Outlook* (2009 Edition) that total giving by the nation's more than 75,000 grant-making foundations grew by an estimated 2.8% in 2008 (-1% adjusted for inflation). Looking ahead to 2009, The Foundation Center reported in *Foundations Address the Impact of the Economic Crisis* that nearly two-thirds of the responding foundations expect to reduce the number and/or the size of grants they award in 2009.

### Total Revenue

| Total Revenue (Total) | 2005 | 2006 | 2007 | 2008 | 2009 |
|---|---|---|---|---|---|
| Decrease | 34.9% | 52.7% | 20.2% | 28.6% | 55.1% |
| Stay the same | 16.3% | 15.0% | 8.0% | 28.2% | 12.7% |
| Increase | 40.2% | 32.1% | 67.0% | 42.9% | 30.0% |
| Not sure | 6.4% | .1% | 4.7% | 0% | 2.3% |

**Note:** This question was new to the longitudinal study in 2005.

- The study finds that in 2009, 55.1% of the respondents feel that revenue will decrease compared to 28.6% in 2008, the largest "decrease" level ever recorded for this metric.
- Respondents in 2009 were much less likely to believe that total revenue would remain flat.

### Overall Attitude

| Overall Attitude (Total) | 2004 | 2005 | 2006* | 2007 | 2008 | 2009 |
|---|---|---|---|---|---|---|
| Optimistic | 62.3% | 61.3% | 71.0% | 78.8% | 35.4% | 55.2% |
| Pessimistic | 37.7% | 38.7% | 28.9% | 21.2% | 64.6% | 44.8% |

- Pessimism appears to be abating with 55.2% of the respondents indicating that they are optimistic given current economic news and trends. Optimism appears to be returning to respondents in 2009 but not at the levels prior to 2008.
- For the first time in the history of this study, respondents in 2008 reported an overall pessimistic attitude given current economic news and trends.
- Comments did not support a shift to optimism but rather an abating/subsiding of pessimism.

***Comments:***

While there were some optimistic comments . . .

*I'm worried that I may be too optimistic but it's critical in this not time to be overtaken by pessimism.*

*I am optimistic about the ability to provide a better quality of service and securing grants to given financial aid.*

*I think we will survive but charitable giving is a must if we are to do so.*

*It's a cautious optimism for the current year with great uncertainty for 2010.*

*In relationship to the financial troubles other organizations are experiencing, I'm optimistic about our organization. However, I anticipate the next few years to be difficult.*

*Although we are in a financial recession and financial backing is more difficult to come by, our organization is encouraged because our financial backing has remained constant.*

*We are hoping that we have hit bottom and while recovery will be slow, we have downsized to meet the new realities.*

*We are down approximately $180,000 from last year. I have to be optimistic otherwise, I wouldn't get out of bed in the morning.*

There were more comments that were pessimistic . . .

*Non-profits are being asked to do more with considerable less while demands are spiraling.*

*Current economic climate has forced our organization to suspend operations.*

*Connecticut's economy usually mirrors what we read about in other states or nationally but one year later so I envision not one, but two increasingly difficult years ahead.*

*Even if the level of funding or support stays at last year level we fall behind.*

*Funding decreases and client needs increase.*

*I don't feel that we can get any lower, if we did it would be catastrophic.*

*Chronic underfunding from public sources combined with the economic recession and failure of the state to really deal with deficit is alarming.*

*This will be my first deficit in my 18 years.*

**Demand for Services**

| Demand for Services (Total) | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 |
|---|---|---|---|---|---|---|
| Decrease | 9.5% | 2.3% | 0% | 4.7% | .2% | 6.8% |
| Stay the same | 34.7% | 33.5% | 28.5% | 25.5% | 15.1% | 20.9% |
| Increase | 55.8% | 62.1% | 59.0% | 56.4% | 84.6% | 72.1% |
| Not sure/no response | n/a | 2.1% | 12.6% | 13.5% | 0% | 0.2% |

- 93% of respondents report that the demand for services remained flat or increased compared to 99.7% in the 2008 study.

***Comments:***

*Demand is way up for our services and grants and funding streams are more difficult to access.*

*In some areas, like foreclosure counseling, demand was up over 50%.*

*A failing economy is a catalyst for increased incidents of domestic violence.*

*Even though demand for our services has increased due to the current economic conditions in our state, our capacity to meet that need has not changed.*

*More people are in need of our assistance due to the growing population of seniors.*

*Unemployment has created a 40% increase in customer traffic.*

*We currently have a two year waiting list for families to enroll in our programs.*

*Unemployed family members need additional basic (emergency food, advocacy) and reemployment services.*

### Projection of Demand for Services or Programs

| Projected Demand for Services (Total) | 2005 | 2006 | 2007 | 2008 | 2009 |
|---|---|---|---|---|---|
| Decrease | 4.5% | 0% | 4.8% | .4% | 2.2% |
| Stay the same | 22.4% | 15.0% | 14.6% | 7.9% | 18.6% |
| Increase | 53.0% | 59.2% | 62.6% | 91.5% | 70.9% |
| Not sure/no response | 20.0% | 25.4% | 18.0% | .3% | 8.2% |

**Note:** This question is new to the longitudinal study in 2005.

- 89.5% of respondents project that demand for services will stay the same or increase compared to 99.4% in 2008.
- The projection that the demand for services will increase has moderated since 2008 (70.9% in 2009 versus 91.5% in 2008).

***Comments*** *(includes comments on shift in demand for one population):*

*Adult services will increase.*

*Children's mental health services.*

*More middle income families are expected to seek our services.*

*We expect the greatest increase in demand for our food programs.*

*Young adults seeking job training in Green Industries.*

*Unemployment has not yet peaked and more folks have given up and don't show up in the data. Also the percentage of people unemployed for more than six months increasing.*

*I expect an increase in demand for services from middle class victims of domestic violence.*

*Although the demand for our services has increased, our ability to meet or address this demand is questionable. For the first time in 25 years we had to impose a fee for our after school program.*

*We don't have the resources to expand into new areas, though we have indentified some significant gaps in services for our youth.*

*With so many cutbacks happening more people are contacting our agency for help.*

*We will try to expand current services and are looking for new fee for service programs we can offer.*

## New Services

- 46.5% of the respondents indicate that they will be adding new services compared to 56.4% who felt this way in 2008.
- New in the 2009 study, we asked respondents if in the last six months they had addressed rising client needs that are beyond their scope of service. Respondents most often cited either referring clients or partnering with other organizations that address those needs.
- Also new in 2009, we asked respondents if they had responded to rising client needs beyond existing scope of services which new services were now offered. Employment assistance was the most often-cited new service.

### *Comments regarding addressing rising client needs*

*Changed pantry hours to meet needs of working poor.*

*Developing strong network of complementary agencies.*

*We have begun working with another agency to provide services to children who are emotionally at risk.*

*Research on funding for certain needs, applying and looking for collaborations with other agencies.*

*We have served all clients and incurred a deficit for 2009.*

## Federal Stimulus Package *(new in 2009 survey)*

We asked survey respondents about the impact of the Federal Stimulus package on clients as well as their organization. 44.5% of the 2009 survey respondents do not anticipate that their clients will be better off because of the Federal Stimulus Package. Only 18.9% indicated that “yes” their clients would be better off.

60.9% of survey respondents said that they did not expect to receive funds from the Federal Stimulus Package. 19.3% indicated that they were actively pursuing funds for their organization.

### *Comments*

*CT is using too much stimulus money to subsidize state operations and it is not making its way into the economy as intended. (This comment voiced several times.)*

*This is very difficult to determine. It doesn’t appear to be making any real tangible difference that we can readily determine.*

*Provided some social welfare support (unemployment, food stamp) but with limited job creation and limited impact over first 12 months.*

*Not really a stimulus package.*

*We applied to support keeping one paid staff member at current levels, but were turned down.*

*Very small amount of stimulus package money will be available to us if at all.*

*We are concerned about the sustainability of the services we are able to support with stimulus money.*

*Not much faith in government to deliver efficiently.*

However, some have been successful . . .

*We have pursued and been successful in obtaining funding through the regional HPRP stimulus funds and we are pursuing other avenues as well that fall under the Federal Stimulus Package.*

*We pursued and were successful.*

*Already receiving stimulus formula funds and pursuing competitive grants.*

*We have a new program funded by federal stimulus money.*

## Staffing levels

| Paid Staffing Levels (Total) | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 |
|---|---|---|---|---|---|---|
| Reduced | 24.7% | 26.0% | 15.5% | 15.8% | 41.6% | 48.8% |
| Unchanged | 56.4% | 44.4% | 67.5% | 36.4% | 10.0% | 37.7% |
| Increased | 18.8% | 27.5% | 17.1% | 47.9% | 48.5% | 13.5% |
| No response | n/a | 2.1% | n/a | n/a | n/a | |

- In 2009, 48.8% of the respondents report reducing staffing levels compared to 41.6% reporting reduced staffing levels in 2008.
- 86.5% of the respondents indicate that staffing levels have remained flat or decreased compared to 51.6% reporting same in 2008.
- 82.8% of the respondents indicate that staff reduction was less than 25%.

## Allocation of Staff Time for Fundraising or Resource Development

- 44.3% of the 2009 respondents indicate that they made changes to the way their organization allocates staff time for fundraising or resource development compared to only 17.8% of respondents in 2008.
- Comments indicate that respondents are finding more creative ways to increase fundraising efforts.

### *Comments*

*All staff has taken an active role in fundraising.*

*Executive director and board and volunteers are doing more without extra staff.*

*Recently established fund raising committee of board members, staff and volunteers.*

*Everyone is doing some fundraising or community outreach.*

*We do not have the luxury of having anyone but the executive director do fundraising.*

*Staff is spending more time on resource development, we have added consultants to assist and we are asking board members to help.*

*Every warm body is involved with fundraising.*

## Non-Monetary Support

- 87.1% of the respondents indicate that the volunteer and in-kind support their organization received in the current fiscal year compared to the prior fiscal year remained flat or increased. In the prior year, 91.4% of the respondents reported non-monetary support remained flat or increased.
- In 2009, respondents were more likely to indicate that non-monetary support increased (42.6%) than in the prior year (36.2%).

***Comments:***

*About 85% of organization is delivered through volunteer support.*

*We now have a volunteer coordinator who works one day a week (volunteering).*

*People who have not been able to give cash have been very generous with in kind.*

*Recruiting volunteers remains a challenge because of workplace demands, i.e., long hours, combined with family responsibilities.*

*We have intentionally sought volunteers to do what staff used to do and are seeking in kind materials support for items for which we used to pay.*

*A lot of people out of work are volunteering – have one family of four who used volunteering as their vacation together this year.*

*More people have been offering volunteer assistance this year, which is wonderful.*

*Thank God for volunteers.*

**Note:** According to a recent study by Independent Sector, a Washington D.C.-based coalition of major charities and foundations, the average monetary value of time donated by volunteers was $20.25 per hour in 2008. Looking at the data by state, the monetary value of volunteers in Connecticut is $27.02 per hour, exceeded only by volunteers in New York whose value was worth $28.04 per hour.

## Reserve Funds

| Reserve Funds (Total) | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 |
|---|---|---|---|---|---|---|
| Depleted reserve funds | 10.9% | 7.3% | 0.4% | 0.5% | 6.7% | 6.4% |
| Not tapped – no plans | 22.7% | 28.5% | 28.3% | 47.4% | 21.9% | 21.4% |
| Not tapped – may need to | 12.7% | 10.4% | 14.4% | 6.6% | 20.6% | 15.1% |
| Have begun to tap | 25.5% | 23.1% | 14.9% | 10.5% | 15.1% | 31.9% |
| Unable to tap | 4.1% | 2.7% | 12.7% | 0.3% | 0.2% | 0.2 |
| No reserve fund | 26.4% | 21.4% | 29.2% | 34.7% | 35.4% | 25.0% |

- 31.9% of 2009 respondents indicate that they have begun to tap their reserves compared to 15.1% in 2008.
- The percentage of respondents reporting that they have depleted their reserves has decreased reversing a three-year trend of increasing percentage reporting such.
- 6.4% of respondents in 2009 report depleting reserve funds to cover expenses, consistent with 6.7% in 2008
- For those respondents who have begun to tap reserves, 68.1% report having six months or less of operating expenses in reserves.
- New in 2009, we asked survey respondents how many months of expenses they have in reserves. 54.8% report having three months or more of expenses in reserves.

***Comments:***

*Our reserve currently covers deficits and will do so for the anticipated 2009 deficit. We cannot count on remaining funds to support another year's deficit.*

*Delay in state budget approval has meant delay in receiving state grant funds, we are tapping into reserves and have secured a revolving line of credit to manage cash flow.*

*We need to establish a reserve, but we do not have access to unrestricted funds.*

## Impact of Public Sector Budget

| Changes in public sector funding affect non-profit | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 |
|---|---|---|---|---|---|---|
| Yes, it will | 21.2% | 49.1% | 4.3% | 58.4% | 37.6% | 68.3% |
| No, it will not | 71.0% | 20.1% | 36.5% | 25.0% | 14.4% | 10.4% |
| Not sure yet | 7.8% | 19.6% | 48.2% | 16.7% | 48.0% | 21.3% |
| Did not respond | n/a | 9.1% | 11.0% | n/a | n/a | n/a |

- Two out of three respondents in 2009 indicate that changes in this year's public sector budgets (federal, state and/or local) would affect their organization compared to 37.6% in 2008.
- 56.8% of those surveyed indicated that they receive more than half of their funding from public grants or contracts compared to 43.9% in 2007.

***Comments:***

*Public funding is flat thus a de facto cut tied to COLA indexes.*

*State budget cuts to DMHAS, DCF, DSS will impact our budget.*

*The majority of our funding is from the public sector so we are directly affected by changes to public sector budgets.*

## Merger Considerations

| Considered merging in last 12 months | 2005 | 2006 | 2007 | 2008 | 2009 |
|---|---|---|---|---|---|
| Yes | 15.2% | 14.3% | 14.9% | 20.6% | 25.3% |
| No | 78.3% | 85.7% | 85.1% | 79.4% | 74.7% |
| No response | 6.6% | n/a | n/a | n/a | n/a |

**Note:** Question new in 2005.

- One out of four respondents (25.3%) considered merging with another organization in the past twelve months compared to one out of five in 2008. The trend toward considering merging continues to rise.
- New in 2009 survey respondents were asked how concerned they were that their organization may cease operations next year. 68.5% indicate that they are not concerned at all. Conversely, one out of three indicates that they are concerned or very concerned that their organization may cease operations next year.

***Comments:***

*I think for social services, this is a good idea, it also cuts down on duplication of services. In the arts, that's not as realistic given the diversity of programming.*

*We have formed partnerships for various services but not mergers.*

*We do not wish to merge but are very open to acquisition.*

*I don't think a merger would result in significant cost savings, however it may strengthen smaller organizations.*

*It needs to happen and could be incentivized by United Ways and by foundations.*

*Non-profit mergers are a necessity to reduce overhead and put more dollars out for the customer.*

*Important option to consider, but must have clear and realistic objectives and think through not only fiscal and programs goals, but organizational cultural fit.*

## Description of Organizations Submitting Completed Surveys:

### How would you categorize your primary area of service?

- Areas of service most often cited are as follows:

| | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 |
|---|---|---|---|---|---|---|
| Arts | 19.4% | 13.0% | 25.4% | 4.9% | 0.5% | 6.1% |
| Education | 14.2% | 13.5% | 13.9% | 14.2% | 7.1% | 10.3% |
| Children/youth | 12.1% | 17.7% | 15.5% | 33.4% | 8.4% | 27.4% |
| Health | 17.4% | 12.1% | 0.9% | 9.8% | 14.2% | 4.6% |
| Human services | 18.8% | 23.3% | 30.1% | 26.9% | 28.7% | 32.7% |
| Job training | 5.9% | 2.5% | 0.1% | 0.1% | 0.3% | 4.2% |
| Other | 5.2% | 13.6% | 14.2% | 10.4% | 34.1% | 14.6% |

- One out of three respondents categorized their primary area of service as "human services."

**How many full time staff does your organization have?**

- 88.2% of respondents reported less than 50 employees (98.3% reporting such a number in 2008).

**What is your organization's annual operating budget?**

- 90.4% of those surveyed report budgets of less than \$5 million compared to 91.8% of all those surveyed in 2008.
- 60.7% of all those surveyed report budgets of less than \$1 million, compared to 62.6% in 2008.

**What are your organization's total assets?**

- 91.0% of those who responded to this question indicate total assets of less than \$5 million compared to 98.4% in 2008.
- 69.3% of respondents indicate total assets of less than \$1 million consistent with last year (71.1%).

**What percent of your annual operating budget is for salary and benefits?**

- 49.7% of those surveyed spend more than 50% of their annual operating budget for salary and benefits compared to 57.1% and 67.9% in the 2008 and 2007 respectively.

## Conclusions

- The overall attitude given the current economic environment appears to be less pessimistic and slightly more optimistic in the 2009 study than a year ago. In 2008 and for the first time since the commencement of this annual survey, nearly two out of three respondents reported an overall pessimistic attitude given current economic trends. The reversal of the 2005-07 trend toward optimistic was fairly dramatic in 2008 given that only one out of five respondents in 2007 reported a pessimistic attitude.
- Respondents in 2009 are much more likely to believe that giving from individuals, corporations and foundations, while a relatively small percentage of their overall revenue, will decrease in the current fiscal year as compared to a year ago.
- The same is true for total revenue – it is expected to decrease from the prior fiscal year.
- We did see a slight moderation in the current and projected demand for services. While still at least 90% of those responding were experiencing or expected to see an increase in the need for their services, this is down from nearly a 100% level in 2008.
- Fewer respondents report instituting new services in 2009, probably due to decreased expectations for increased funding.
- Survey respondents indicate that they are collaborating with other non-profits to address rising client needs beyond their scope of service. If they did add services to respond to rising client need, it was done most often with employment assistance.
- Respondents were more likely in 2009 to reduce paid staffing levels, a reflection of reduced revenue to support service.
- Compared to 2008, respondents were more likely to have made adjustments to staff time allocated to fundraising. Comments indicate a variety of creative ways to use volunteer and staff time to raise resources.
- Non-monetary support continues to increase based on survey response over the past four years.
- The percentage of respondents indicating that they have begun to tap reserves doubled in 2009 – 31.9% in 2009 compared to 15.1% in 2008. For those who have begun to tap reserves, more than two out of three report having six months or less of expenses in reserves.
- One out of three respondents indicates that they are concerned or very concerned that their organization may cease operations next year.
- The trend toward considering merging with another non-profit in the past twelve months continues to rise – one out of four in 2009 from one out of five in 2008.
- Two out of three respondents indicate that they will be affected by changes in this year’s public sector budget, up from a little more than one out of three in 2008.
- Only one out of five felt that those they served would be better off as a result of the Federal Stimulus Package and nearly two out of three said that they did not to expect to receive any funds from the package.

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