



HOW IS YOUR NONPROFIT DOING?

**Survey Results of Fifty West Marin Nonprofits
Regarding the Impact of the Covid-19 Pandemic**

Compiled by **MISSION**
— **MET**

Outcomes and Agenda

TWO PRIMARY OUTCOMES

1. An increased understanding of the impact that Covid-19 has had on West Marin nonprofits
2. Ideas regarding next steps you can take

AGENDA

- Introductions
- Eric will present a set of slides summarizing the survey results and recommendations
- Q & A
- Hold questions until the end although you can capture questions in the chat box as we go along; Sarah Hobson will facilitate the questions

Topics

1. **Overview of Survey**
2. **Key Findings**
3. **Overview of Survey Participants**
4. **Covid's Impact on:**
 - a. **Staff and Volunteers**
 - b. **Financials**
 - c. **Programs**
5. **Summary of Short-answer Responses**
6. **Recommendations**

Overview of Survey

DATES OF SURVEY

August 10, 2020 -- August 27, 2020

PARTICIPANTS

50 West Marin nonprofits

Note: More than 100 nonprofits organizations and groups with fiscal sponsorship serve West Marin. Of these, 65+ are *located* in West Marin.

THE SURVEY

22 separate questions in seven sections; a mix of multiple choice and short answer; conducted online with SurveyMonkey

ADMINISTERED BY

West Marin Fund

RESULTS COMPILED BY

Mission Met, LLC.

SURVEY QUESTIONS

[Link](#)

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Key Findings

- **PROGRAMS:** Over 50% of West Marin nonprofits say that Covid has negatively impacted their effectiveness and impact.
- **WORKFORCE:** The total workforce (staff and volunteers) of West Marin nonprofits dropped 33% during the first half of 2020.
- **PPP:** Funding from the Paycheck Protection Program was acquired by 54% of the qualifying nonprofits, helping to defer Covid's impact.
- **SMALLEST NONPROFITS:** West Marin's smallest nonprofits are being disproportionately impacted by Covid compared to larger nonprofits.
- **BIGGEST CHALLENGES:** The two biggest challenges that the nonprofits are facing in response to Covid are adapting programs and raising funds.

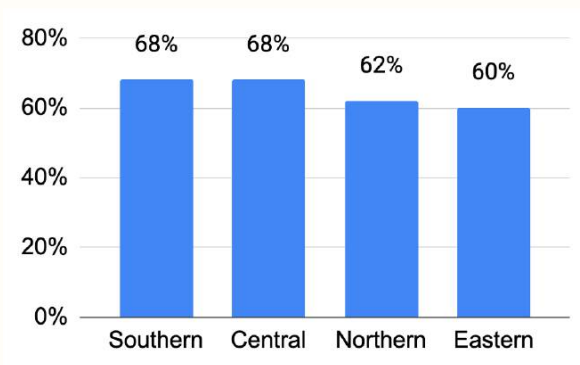
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Locations & Areas Served

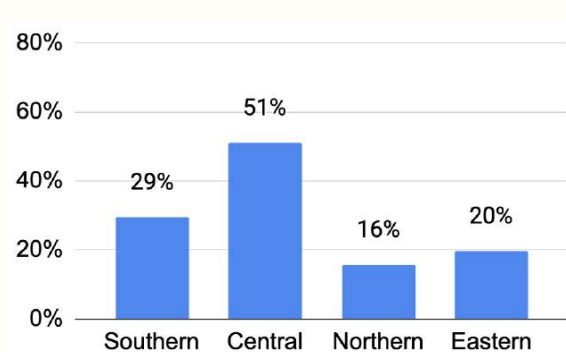
Survey respondents are located across West Marin and serve a balanced cross-section of communities.

West Marin Regions Served



Southern = Bolinas, Muir Beach, Stinson Beach
Northern = Dillon Beach, Marshall, Tomales

Location of Organization By Region



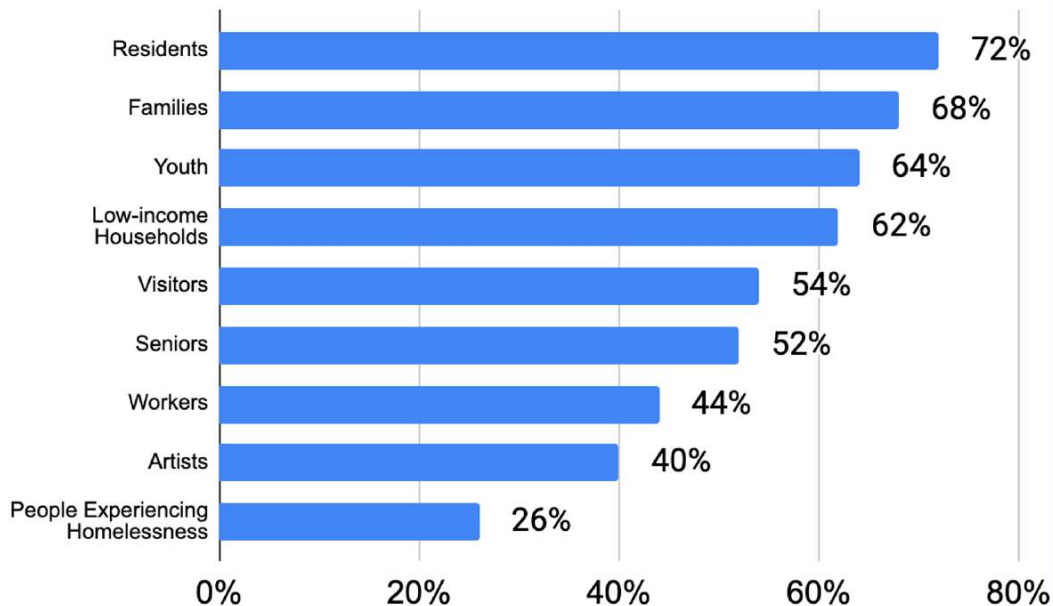
Central = Olema, Inverness, Point Reyes Station
Eastern = Forest Knolls, Lagunitas, Nicasio, San Geronimo, Woodacre

Notes: 1. The percentages in the charts exceed 100% because survey respondents were allowed to choose multiple locations in their answers.
2. Five of the fifty survey respondents are fiscally sponsored organizations.)

Population Served

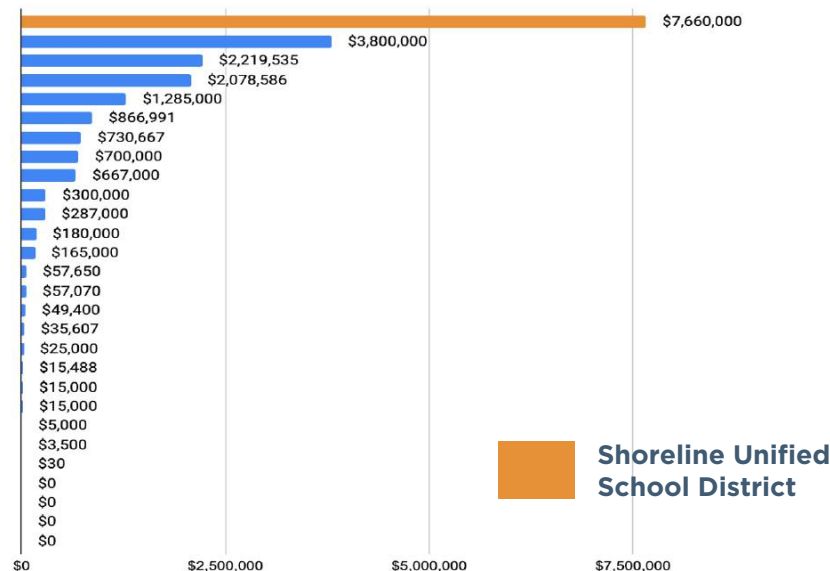
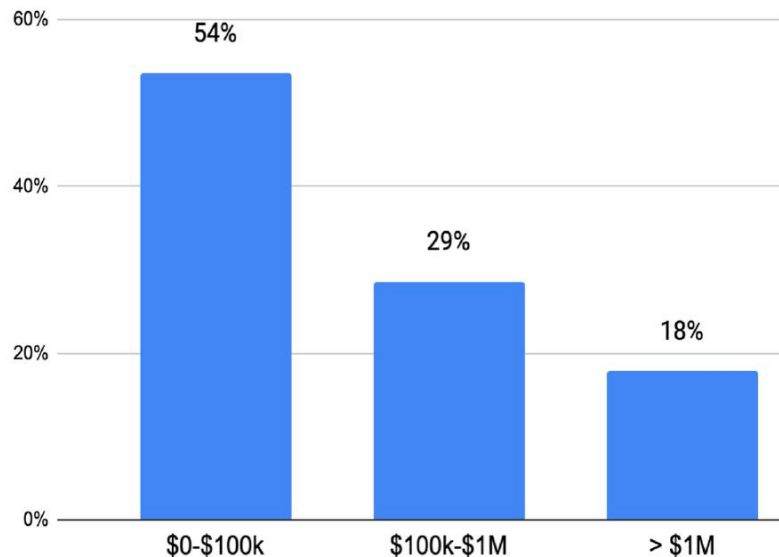
West Marin nonprofits serve a variety of populations.

Note that the percentages at right total greater than 100% because survey responders could select multiple populations served.



Size of Nonprofits – Financially

28 of the 50 respondents provided a projected six-month expense budget for July 1, 2020 - December 31, 2020.



Number of Full- and Part-time Staff by Organization on January 1, 2020



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Key Quotes

IMPACT ON STAFFING

“We have minimized staff hours as far as we can while still maintaining our ability to conduct essential organizational work...”

VOLUNTEERS

“Volunteerism was the most impacted. The majority of our volunteers were 60+ and our delivery model under the pandemic just did not work. Staff members were redirected into roles that volunteers were in.”

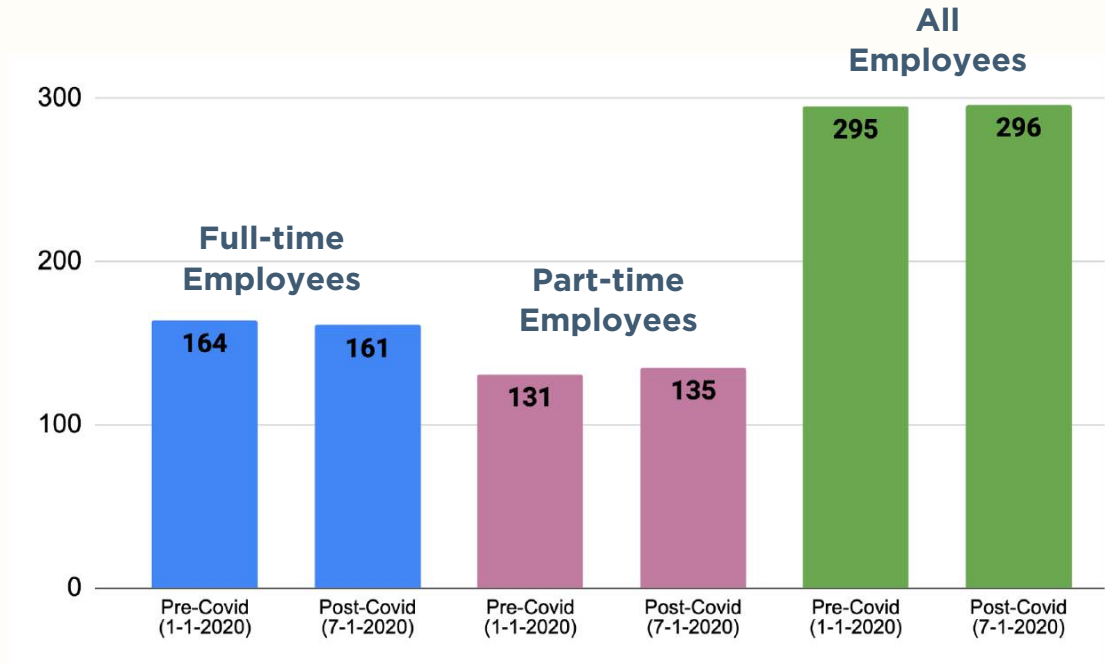
Impact on Staffing

- 78% of the nonprofits surveyed (39 of 50) have employees (full-time and/or part-time). Of those nonprofits, 28% (11 of 39) laid off or furloughed staff.
- This roughly compares with 24% of California nonprofits and 18% of nonprofits in a national survey.
- As shown on the following three slides, the smallest nonprofits were significantly more impacted by staffing loss than larger nonprofits.

Staffing: Nonprofits >10 Employees

11 of the 50 nonprofits that responded to the survey had 10 or greater employees (full- and part-time combined.)

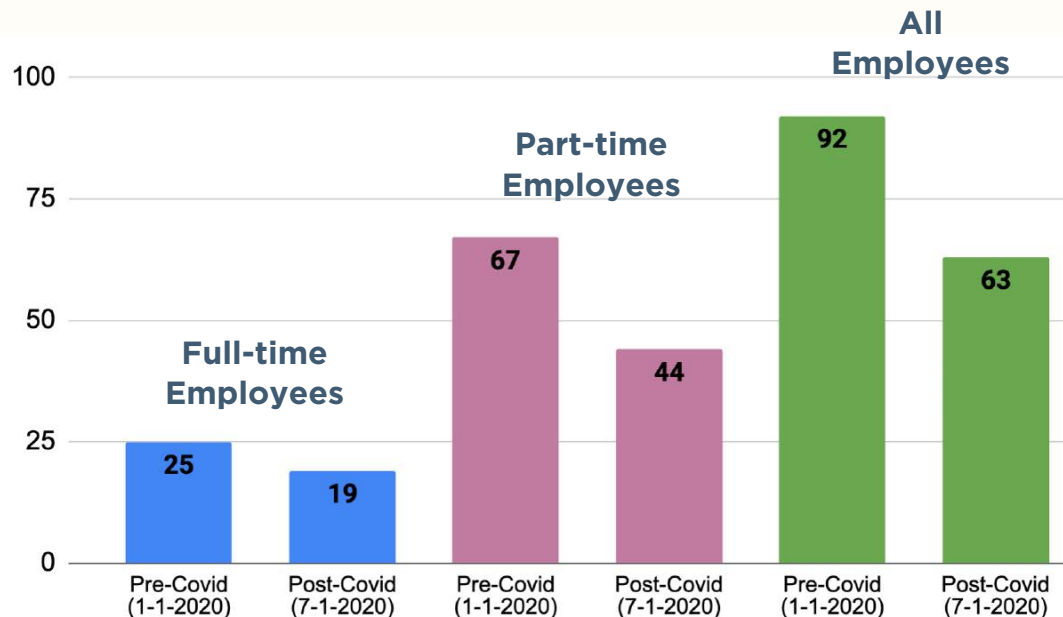
The initial impact of Covid on their staffing levels was negligible.



Staffing: nonprofits <10 Employees

The initial impact of Covid on the staffing levels of nonprofits with less than ten employees was significant.

(39 of the 50 nonprofits that responded to the survey had less than ten employees (full and part-time combined).)

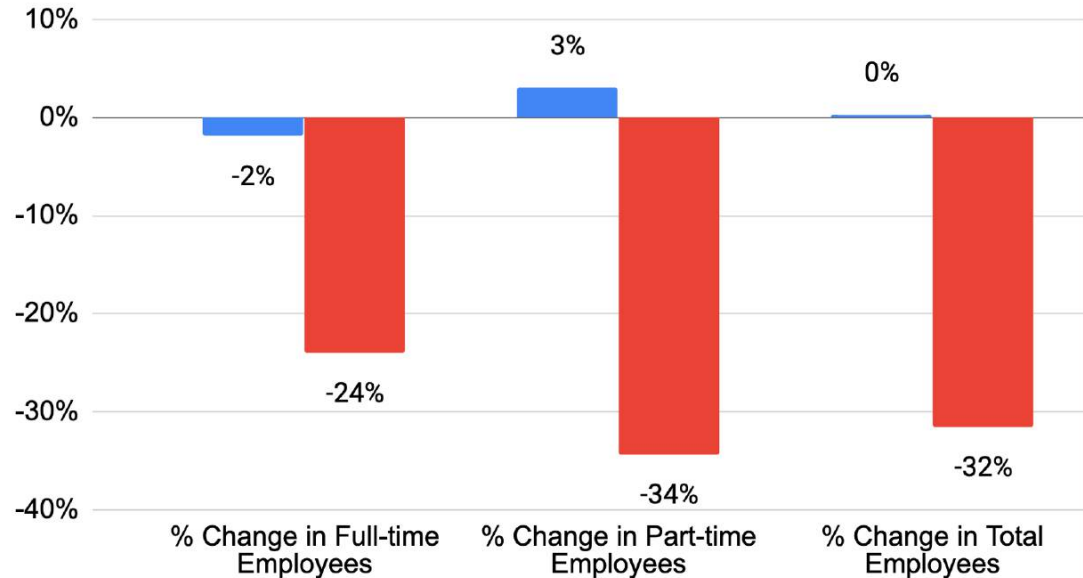


Staffing: Comparative Impact

Between January and July, the smallest nonprofits experienced significantly more employee loss, percentage-wise, than larger nonprofits.

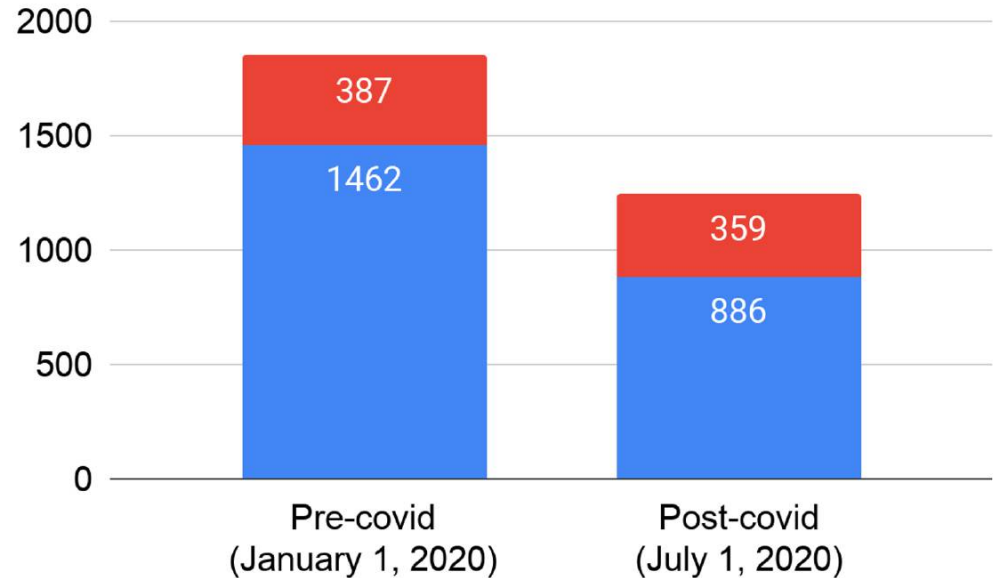
■ ≥ 10 Employees

■ < 10 Employees



Overall Workforce Impact

The combined workforce of volunteers and staff dropped by 33% in the first four months of the pandemic.



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PPP

“The PPP loan allows us to be financially stable this fiscal year but we are concerned about our income next fiscal year, making fundraising one of the biggest challenges over the next 6 months.”

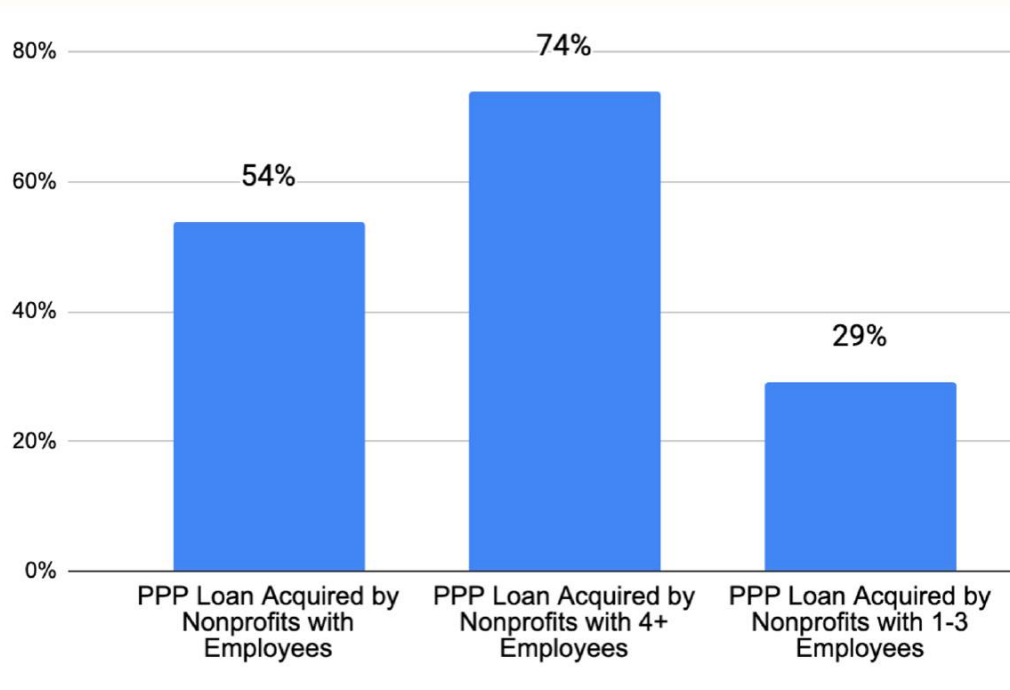
INCOME AND EXPENSES

“Our income dropped to nearly \$0 overnight when we closed in mid-March. We immediately reduced our expenditures by 50%, but we still have a facility to take care of and contractual obligations, etc.”

Impact from PPP

The federal government's Paycheck Protection program provided funding to 54% (21 of 39) of the survey responders with employees.

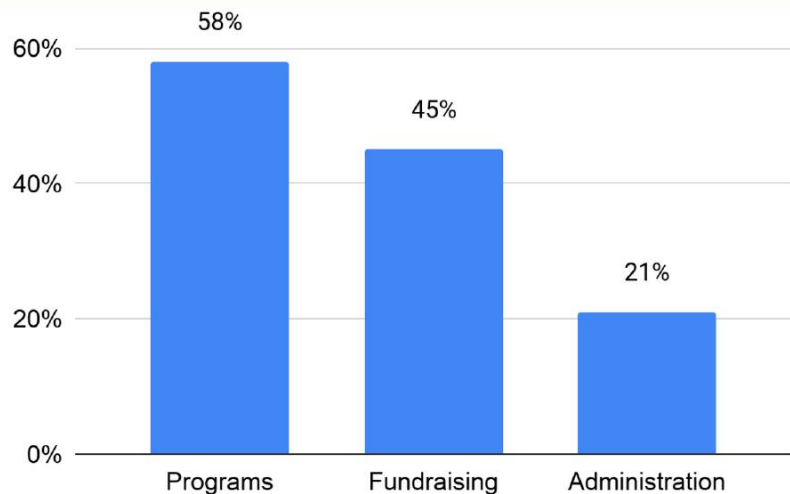
Nonprofits with 4+ employees were about 2.5X more likely to acquire PPP funding than nonprofits with 1-3 employees.



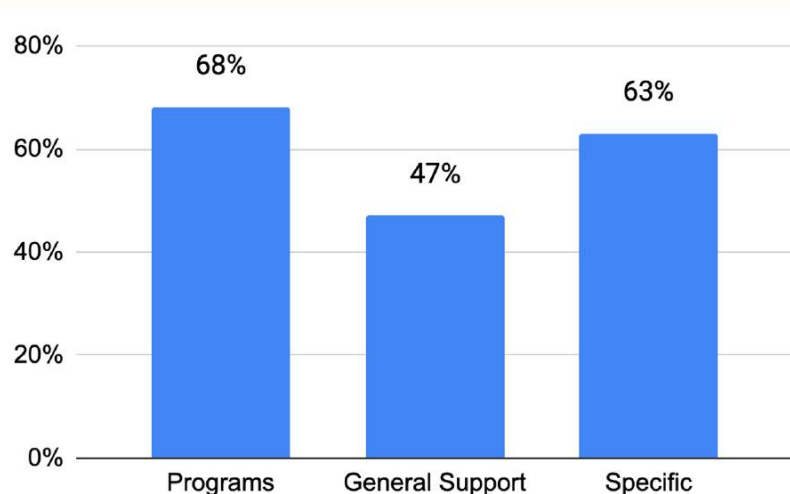
Impact on Expenses & Revenue

Between April and June, many West Marin nonprofits reduced their expenses while experiencing cuts in income.

Percent of west marin nonprofits that cut expenses in these categories



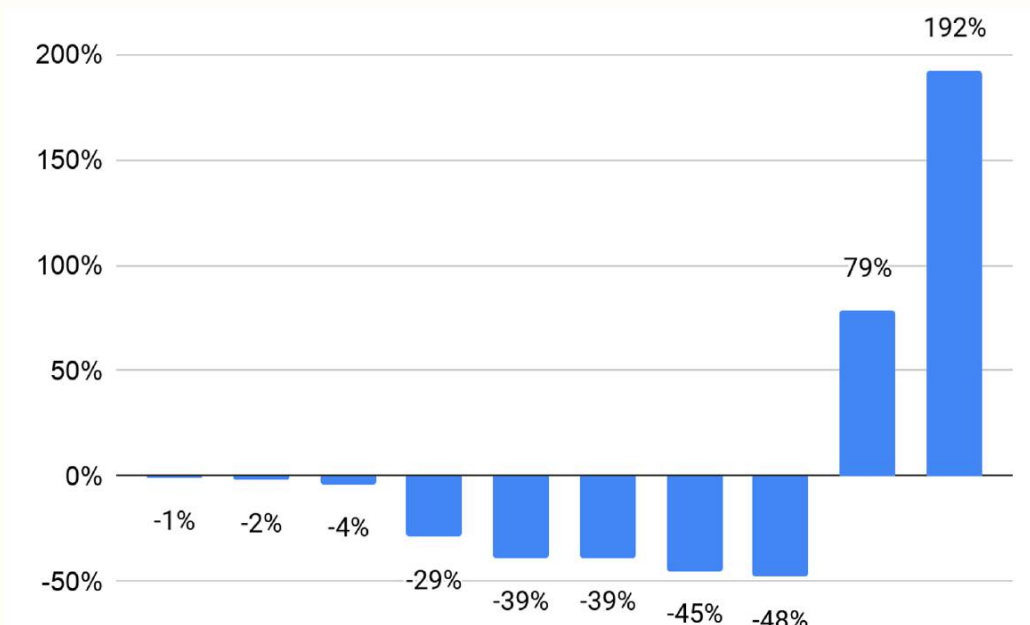
Percent of west marin nonprofits that had cuts to income in these categories



Impact on Actual vs. Budgeted Income

Only 20% (10 of 50) of the survey respondents provided budgeted vs. actual financial information. The data at right shows that 8 of those 10 organizations had a decrease in their actual income vs. their budgeted income.

This data reflects what is going on with nonprofits across the country. Most are losing income while a small minority are getting extra funds to address Covid and social injustices.



Topics

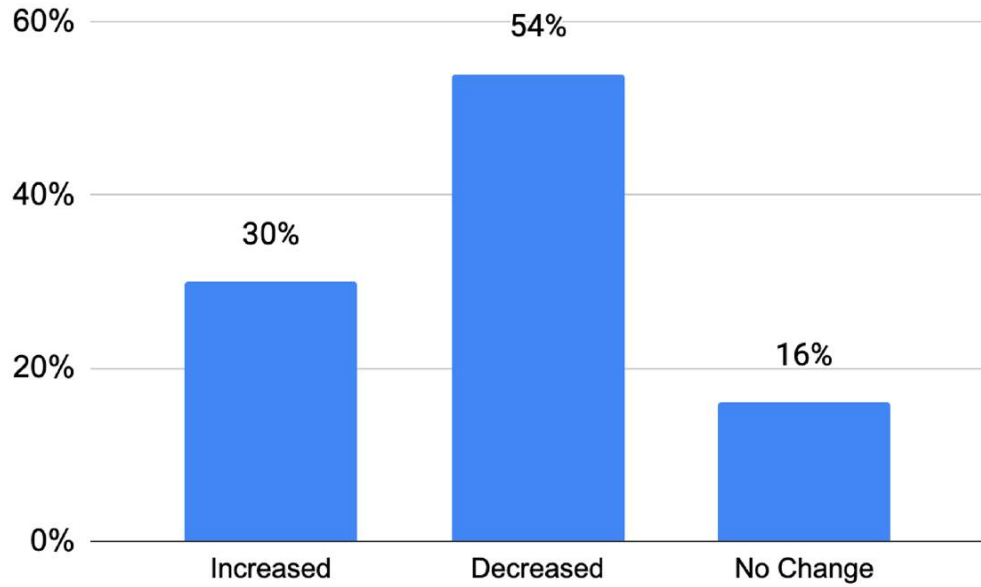
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Key quotes

- **IMPACT:** “We are all learning new ways to operate that will be silver linings in years to come but the day to day toll on our residents, especially our most vulnerable residents is intense.”
- **IMPACT:** “Our community, like many across the nation, is split into those who are doing well because they can work from home and those who are not, either because they are working risky essential jobs or they have lost their job and are struggling to pay rent and buy food.”
- **GOING ONLINE:** “Our facilities are closed. All has gone online via Zoom. Those who don’t have/can’t use/dislike technology are not able to be served in the majority of our programs.”

Change in Effectiveness of the Nonprofits Due to Impact of Covid-19

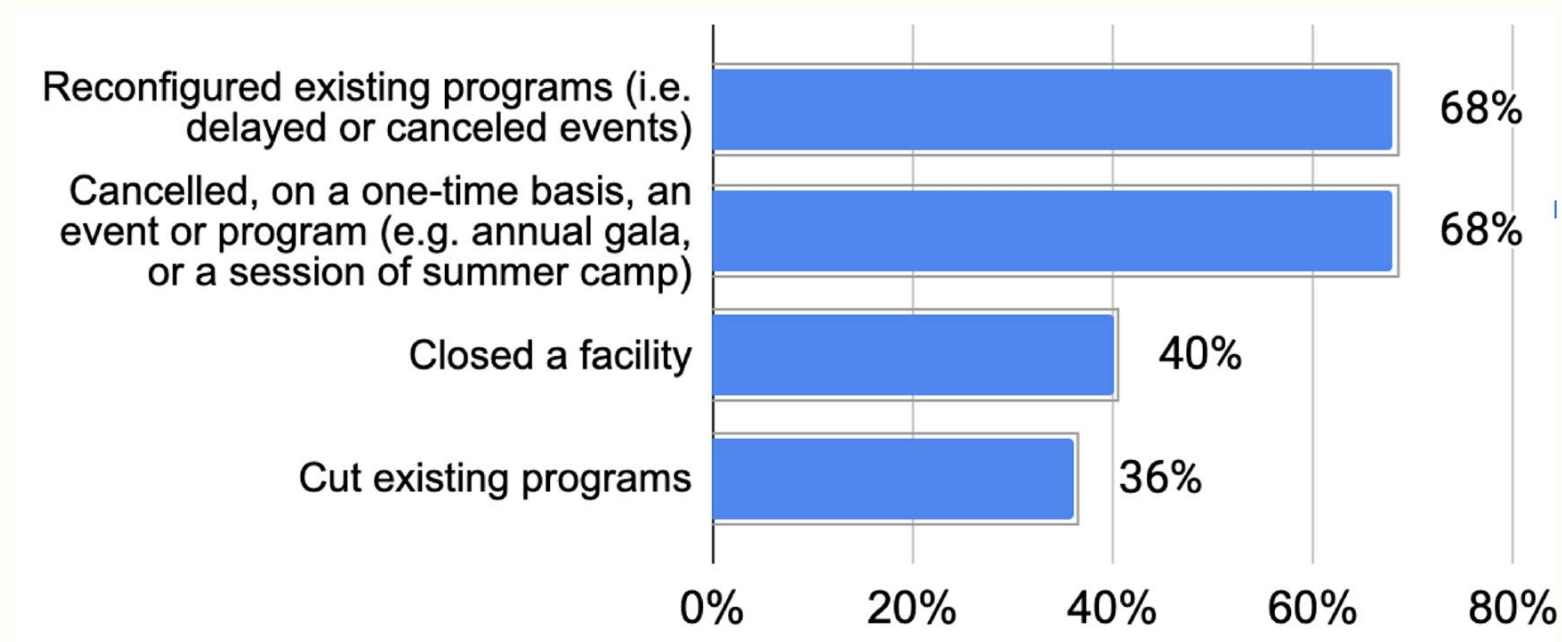
Over 50% of West Marin nonprofits reported a decrease in their effectiveness and impact between April-July.



Impact on programs

- As a result of Covid, 94% of the survey respondents either:
 - Cut a program
 - Canceled a program or event
 - Reconfigured a program or event
- This is similar to [a national survey](#) that indicated that 91% of nonprofits had to curtail or adapt their programs.

Actions taken due to Covid-19



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Short-answer questions

- What do you see as the biggest challenges and/or opportunities for your organization and staff in the next 4-6 months?
- What do you see as the biggest challenges and/or opportunities for the communities and populations your organization serves in the next 4-6 months?
- What resources and support do you anticipate your organization will need in the next six months? Where possible, please identify whether you anticipate accessing resources from A) the County B) private foundations/individual donors and C) West Marin Fund.

Summary of responses

Word cloud summary of three short-answer questions regarding challenges and/or opportunities



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Recommendations

Review this information

FOR NONPROFITS

Meet with your team and discuss this information. Determine if there are any insights that you can use in your planning.

FOR FUNDERS AND GOVERNMENT

Use this information to help guide your funding and support priorities.

FOR WEST MARIN FUND

Conduct survey again in February:

- Include the in-kind financial impact of volunteers
- Create more specificity for the financial questions
- If possible, align questions with state or national surveys

Consider working with the nonprofit [Marin Economic Forum](#) to help guide the next survey questions



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