Status of West Marin Nonprofits 2022

Survey Results of West Marin Nonprofits
May / June 2022

Compiled by
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About the Survey
About the Survey

The purpose of the annual survey is to:
• Provide information to nonprofits serving West Marin on how they are collectively faring;
• Help funders and policymakers provide nonprofits with the best support and resources possible;
• Identify organizational trends over multiple years.

Surveys to Date
West Marin Fund conducted a survey in the summer of 2020 about the impact of COVID-19 on the West Marin nonprofit community. Fifty nonprofits participated.

The success of that survey spurred the idea of creating an annual survey of the status of West Marin nonprofits. A second survey was conducted in the spring of 2021 with 39 respondents.

A revised and enlarged third survey was conducted in May/June 2022.
About the Survey cont.

Dates of survey  May 3, 2022 – June 9, 2022

Participants  32 West Marin nonprofits responded (‘the nonprofits’)
78 nonprofits and fiscally sponsored groups invited
41% response rate
$150 honorarium given to each participating nonprofit

The Survey  43 questions
55% short answer; 45% multiple choice/ranking

Administered by  West Marin Fund

Results Compiled by  Mission Met, LLC.

Survey Questions  View
Key Findings
Key Findings

Financials
- As a whole, the nonprofits maintained financial stability through the pandemic.
- The net income of survey respondents grew by 23% in both 2020 and 2021.
- Emergency government funding was crucial to the survival of many nonprofits.
- 78% of respondents maintained their reserve or endowment with a median of six months.
- Over 50% of the nonprofits would like assistance with finding County of Marin funding opportunities.

Staff, Board, and Volunteers
- Staffing rates increased by 17% in 2021 compared to 2020.
- The rate of loss of volunteers due to Covid has slowed, but nonprofits were still losing volunteers in 2021.
- In total, just over $500,000 in salary equivalent was lost in 2021 due to the departing volunteers.
Key Findings cont.

Programs and Services

• COVID-19 had a mixed impact on programs and services in 2021.
• 48% of the nonprofits in 2021 expanded existing programs.
• 65% of the nonprofits canceled an event or program on a one-time basis.
• 30% of the nonprofits temporarily closed a facility.
• 66% of the nonprofits said it was either “very” or “extremely” important to strengthen program evaluation processes.

Diversity, Equity, Inclusion, and Justice (DEIJ)

Of the nonprofits:
• Over 84% allocated at least 5% of their staff time to DEIJ efforts in 2021, with a median of 10%.
• Limited organizational capacity, along with a need to better understand DEIJ issues, were the main barriers to effectively implementing DEIJ efforts.
Financials
74% of the organizations had revenue under $1M.

In comparison, 92% of nonprofits nationally have revenue under $1M. (See National Council of Nonprofits report.)
## Income & Expenses

Income and expenses increased from 2020 to 2021.

Net income was positive in 2020 and 2021.

<table>
<thead>
<tr>
<th></th>
<th>2020</th>
<th>2021</th>
<th>% Change from 2020-2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Income</td>
<td>$22,657,126</td>
<td>$25,656,825</td>
<td>13%</td>
</tr>
<tr>
<td>Expenses</td>
<td>$17,531,563</td>
<td>$19,808,995</td>
<td>13%</td>
</tr>
<tr>
<td>Net Income</td>
<td>$5,125,563</td>
<td>$5,847,830</td>
<td>14%</td>
</tr>
<tr>
<td>Net Income as a Percent of Income</td>
<td>23%</td>
<td>23%</td>
<td>0%</td>
</tr>
</tbody>
</table>

The data in the table provides comparative totals for the 23 organizations that completed the survey each of the last two years.
Individual Gifts and Foundation/Corporate comprise around \( \frac{3}{4} \) of the funding.

There was some variance in funding from year-to-year; need more year-over-year data to determine true trends.
In 2021, 47% of the nonprofits in the survey received state and/or federal emergency funding.

59% of the nonprofits received funding of $25,000 or less.

Emergency funding was critical for many nonprofits:

- The funding “allowed us to maintain operations.”
- “If we didn’t receive funding, we would have probably closed down.”
- It made “all the difference in the world.”
County of Marin Funding

11 (34%) of the 32 respondents received a total of $960,373 in County of Marin funding in 2021.

Regarding County of Marin funding, do you need assistance with the following?

- Finding Funding Opportunities: 54%
- Receiving Support During: 47%
- Measuring Progress Regarding Work Funded: 38%
- Completing Funding Applications and Reports on Funds Provided: 25%
## Financial Endowment/Reserve

<table>
<thead>
<tr>
<th></th>
<th>2020</th>
<th>2021</th>
<th>% Change from 2020-2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Have a Reserve or Endowment</td>
<td>18</td>
<td>18</td>
<td>0%</td>
</tr>
<tr>
<td>Median Months of Reserve</td>
<td>6</td>
<td>6</td>
<td>0%</td>
</tr>
</tbody>
</table>

The data above represents a comparison of the 23 nonprofits that completed both the 2021 and 2022 survey.
Staff, Board, & Volunteers
Changes in Staff, Board, & Volunteers

In total, just over $500,000 in salary equivalent was lost due to the departing volunteers in 2021 (an average of about $22,000 per nonprofit).

<table>
<thead>
<tr>
<th></th>
<th>2019-2020</th>
<th>2020-2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change in Number of Staff</td>
<td>0.0%</td>
<td>16.8%</td>
</tr>
<tr>
<td>Change in Volunteers</td>
<td>-31.2%</td>
<td>-8.0%</td>
</tr>
<tr>
<td>Change in Board Members</td>
<td>0.4%</td>
<td>3.3%</td>
</tr>
</tbody>
</table>

This information is a comparison of the 23 nonprofits that took both the 2021 and 2022 survey.
81% of the organizations represent only 24% of FTE staffing.

- Each bar represents one organization and its FTE staffing.
- Total FTE staffing of the nonprofits is 182.
- 6 nonprofits have no staffing.

*Staffing includes employees and contractors.
Programs & Services
Areas Served

The nonprofits serve a balanced cross-section of communities.

Northern
Dillon Beach, Marshall, Tomales

Southern
Bolinas, Muir Beach, Stinson Beach

Eastern
Forest Knolls, Lagunitas, Nicasio, San Geronimo, Woodacre

Central
Olema, Inverness, Seahaven, Point Reyes Station
Changes in Populations Served 2020-2021

The data indicates a shift towards incorporating a social justice and equity lens in populations served by the nonprofits.

Services increased significantly for BIPOC communities, immigrant residents, and families.
The nonprofits responded to a variety of emergencies in 2020 and 2021, including the COVID-19 pandemic, wildfires, air pollution, and drought.

This chart shows the number of nonprofits surveyed and their responses to local emergencies in 2020 and 2021.
Respondents gave greater importance to assessing the effectiveness of their program delivery. Two-thirds say that it is either “very” or “extremely” important to improve their program evaluation process.

### Program Results - Improvements

How important is it to your organization to improve your program evaluation process over the next year?

<table>
<thead>
<tr>
<th>Importance Level</th>
<th>Number of Orgs</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Important</td>
<td>3</td>
<td>9%</td>
</tr>
<tr>
<td>Somewhat Important</td>
<td>8</td>
<td>25%</td>
</tr>
<tr>
<td>Very Important</td>
<td>15</td>
<td>47%</td>
</tr>
<tr>
<td>Extremely Important</td>
<td>6</td>
<td>19%</td>
</tr>
</tbody>
</table>
Nonprofit Category

Number of Orgs Selecting a Category as a Primary or Secondary Focus Area

- Arts, Culture, and Humanities: 10
- Education: 10
- Environment: 6
- Community Improvement and Capacity Building: 5
- Human Services: 4
- Youth Development: 4
- Public Safety, Disaster Preparedness and Relief: 4
- Health Care: 3
- Public and Societal Benefit: 3
- Housing and Shelter: 1
- Philanthropy, Volunteerism, and Grantmaking Foundations: 1
- Unknown: 1
- Mutual, & Membership Benefit: 1
- Civil Rights, Social Action, and Advocacy: 1
- Food, Agriculture, and Nutrition: 1

Percent of Revenue Budgeted to Corresponding Category

- Arts, Culture, and Humanities: 7.9%
- Education: 16.8%
- Environment: 18.6%
- Community Improvement and Capacity Building: 1.8%
- Human Services: 22.7%
- Youth Development: 1.3%
- Public Safety, Disaster Preparedness and Relief: 4.8%
- Health Care: 5.7%
- Public and Societal Benefit: 4.8%
- Housing and Shelter: 8.5%
- Philanthropy, Volunteerism, and Grantmaking Foundations: 2.5%
- Unknown: 0.0%
- Mutual, & Membership Benefit: 0.0%
- Civil Rights, Social Action, and Advocacy: 1.6%
## Challenges Facing West Marin

Indicate how challenging each of the following will be to achieve for the communities of West Marin within the next ten years

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Difficulty Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access to affordable housing</td>
<td>3.9</td>
</tr>
<tr>
<td>Mitigating climate impacts</td>
<td>3.6</td>
</tr>
<tr>
<td>Availability of living wage employment opportunities</td>
<td>3.5</td>
</tr>
<tr>
<td>Preventing the spread of wildfire</td>
<td>3.4</td>
</tr>
<tr>
<td>Easily accessible public transportation networks</td>
<td>3.3</td>
</tr>
<tr>
<td>Overcoming barriers to diversity, equity, inclusion, and justice</td>
<td>3.2</td>
</tr>
<tr>
<td>Extensive provision of affordable mental health and wellness services</td>
<td>3.1</td>
</tr>
<tr>
<td>Widespread rapid response of disaster relief services</td>
<td>2.7</td>
</tr>
<tr>
<td>Provision of necessary pre-k through 12th grade educational resources</td>
<td>2.5</td>
</tr>
<tr>
<td>Ensuring food security for all</td>
<td>2.4</td>
</tr>
</tbody>
</table>
Diversity, Equity, Inclusion, & Justice
(DEIJ)
Stage of Development

Percentage of nonprofits and their “stage of development” for integrating DEIJ efforts into their organization.

- Programs & Services
- Communications & Outreach
- Staff and/or Board DEIJ Training

<table>
<thead>
<tr>
<th>Stage of Development</th>
<th>DEIJ Efforts</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Progress</td>
<td>66%</td>
</tr>
<tr>
<td>Being Planned</td>
<td>34%</td>
</tr>
<tr>
<td>Not Yet Started</td>
<td>28%</td>
</tr>
<tr>
<td>Not Applicable</td>
<td>19%</td>
</tr>
</tbody>
</table>
Organizational Resource Allocation

The top 2 orgs in each chart have missions that are specifically focused on DEIJ-related programs.
Organizational capacity and lack of understanding are the largest barriers to addressing DEIJ.

<table>
<thead>
<tr>
<th>Organizational capacity to address DEIJ</th>
<th>No Barrier</th>
<th>Small Barrier</th>
<th>Medium Barrier</th>
<th>Large Barrier</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>28%</td>
<td>16%</td>
<td>34%</td>
<td>22%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Support from leadership regarding DEIJ</th>
<th>No Barrier</th>
<th>Small Barrier</th>
<th>Medium Barrier</th>
<th>Large Barrier</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>84%</td>
<td>6%</td>
<td>6%</td>
<td>3%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Support from the community regarding DEIJ</th>
<th>No Barrier</th>
<th>Small Barrier</th>
<th>Medium Barrier</th>
<th>Large Barrier</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>78%</td>
<td>13%</td>
<td>9%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Understanding regarding DEIJ issues</th>
<th>No Barrier</th>
<th>Small Barrier</th>
<th>Medium Barrier</th>
<th>Large Barrier</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>53%</td>
<td>28%</td>
<td>19%</td>
<td></td>
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</table>
Next Year’s Survey
Next Year’s Survey

We have learned a lot in the three years of conducting the surveys.

For the next survey we will:

• Get greater clarity regarding the ultimate purpose and use of the survey data and refine the questions accordingly.
• Streamline the survey to make it easier to take.
• Explore other survey tools besides Survey Monkey.
• Improve the design and analysis so that year-over-year responses can be analyzed and compared more effectively.
• Provide an earlier start date and keep the survey open longer for greater participation.
• Decide whether to conduct the survey every year, or every other year.