



# Status of West Marin Nonprofits: Survey Results 2024

Co-design and analysis by J. Solomon Consulting, LLC  
November 1, 2024







# Content

About the Survey	3
Methodology	4
Response Rate	5
Respondent Profile	6
Topics of Focus for 2024	18
1. Financials	19
2. Fundraising	31
3. Planning, Monitoring, & Evaluation	39
4. Collaboration	48
5. Diversity, Equity, Inclusion, Justice, & Belonging (DEIJB)	56
6. Emergency Response	62
Acknowledgements	65

# About the West Marin Nonprofit Survey

---

## **Initial impetus (2020):**

- Understand how West Marin nonprofits were faring during the pandemic

## **Ongoing purpose:**

- Provide information to West Marin nonprofits on how they are collectively faring
- Help funders and policymakers provide nonprofits with the best possible support
- Identify organizational trends
- Address distinct topics in alternating years (e.g., programs/services in odd years, financials in even years)

## **Surveys to Date:**

- Summer 2020
- May/June 2021
- May/June 2022
- May/June 2023
- **July/August 2024**

# 2024 Survey Methodology

---

**Administration dates:** Pilot in July 2024; full deployment in August 2024

**Data collection:** Alchemer online platform

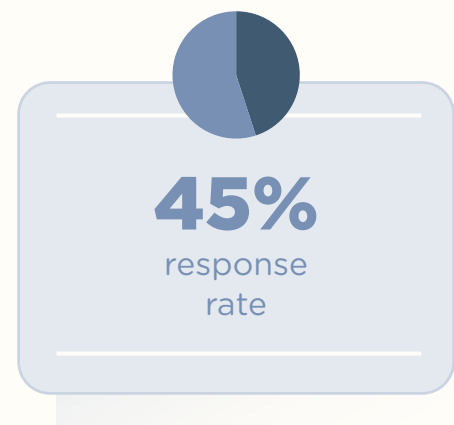
**Instrument:**

- 30 main questions (combination of multiple choice, numeric fill-in, narrative short answer)
- Adapted/updated items from previous West Marin Nonprofit Surveys
- Added new questions
- DEIJ questions drew on [Equity Organizational Self-Assessment](#) (Michigan State University, 2018) and [Diversity, Equity, and Inclusion Spectrum Tool](#) (Meyer Memorial Trust, 2018)
- Topics of focus: Financials; Fundraising; Planning, monitoring, and evaluation; Collaboration; DEIJB; Emergency response

**Analyses:** Descriptive statistics and thematic analysis



# Survey Response Rate, 2024



The number of organizations responding to the survey has been relatively consistent over the past 4 of 5 years (2020: 50, 2021: 37; 2022: 32; 2023: 38, 2024: 38).

\* Both legally constituted organizations and fiscally sponsored groups are referred to as “organizations” in this report.

\*\* Three additional organizations submitted a partial survey.

# Respondent Profile



## OVERVIEW OF

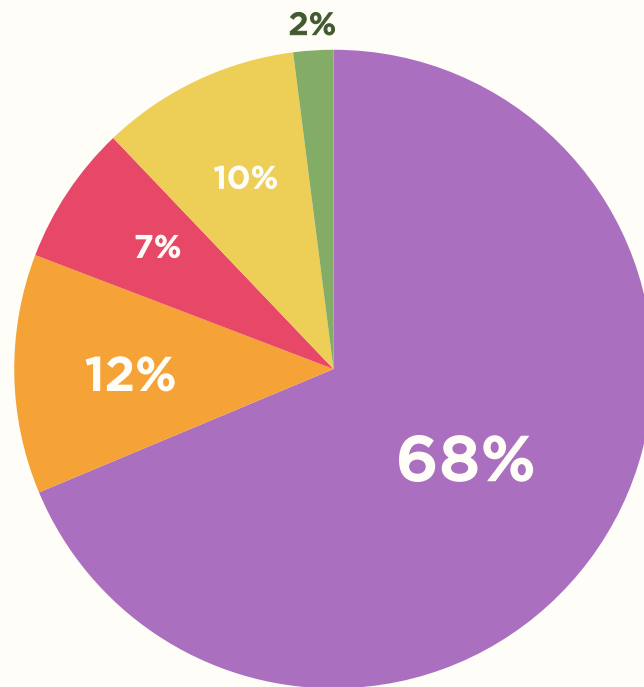
# Respondent Profile

- Over three quarters of 2024 respondents (78%) reported 501(c)(3) status.
- All West Marin regions are being served by at least two thirds of respondents.
- No respondent reported the following as either their primary or secondary issue area: nutrition education, sustainable food production, economic opportunities, worker rights and wellbeing, transportation, and Internet access.
- Some traditionally marginalized populations are a primary focus of multiple organizations, while others are not.
  - Latinx families, low-income families, and seniors/older adults are each a primary focus of 20%-24% of respondents.
  - Other BIPOC families/BIPOC people in general, people with disabilities, immigrants/refugees, people experiencing homelessness, LGBTQI+, and veterans are each a primary focus of no respondents or just one respondent.



# Years Operating

- Over two thirds of responding organizations had been operating for over 20 years.
- One organization just began operating in 2024.



(n=41; percentages do not sum to exactly 100% due to rounding)

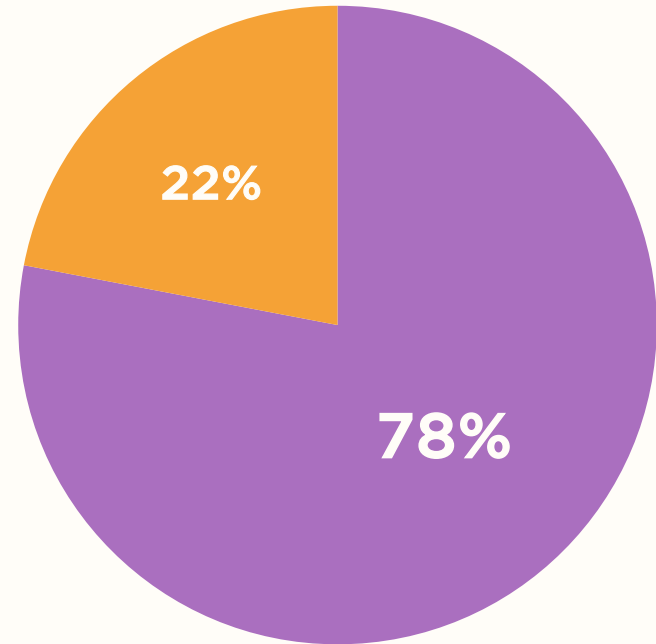


# Incorporation Status

- Over three quarters of 2024 respondents (78%) had 501(c)(3) status.
- The proportion of 501(c)(3) respondents has declined slightly over the past 2 years (90% in 2022, 82% in 2023).

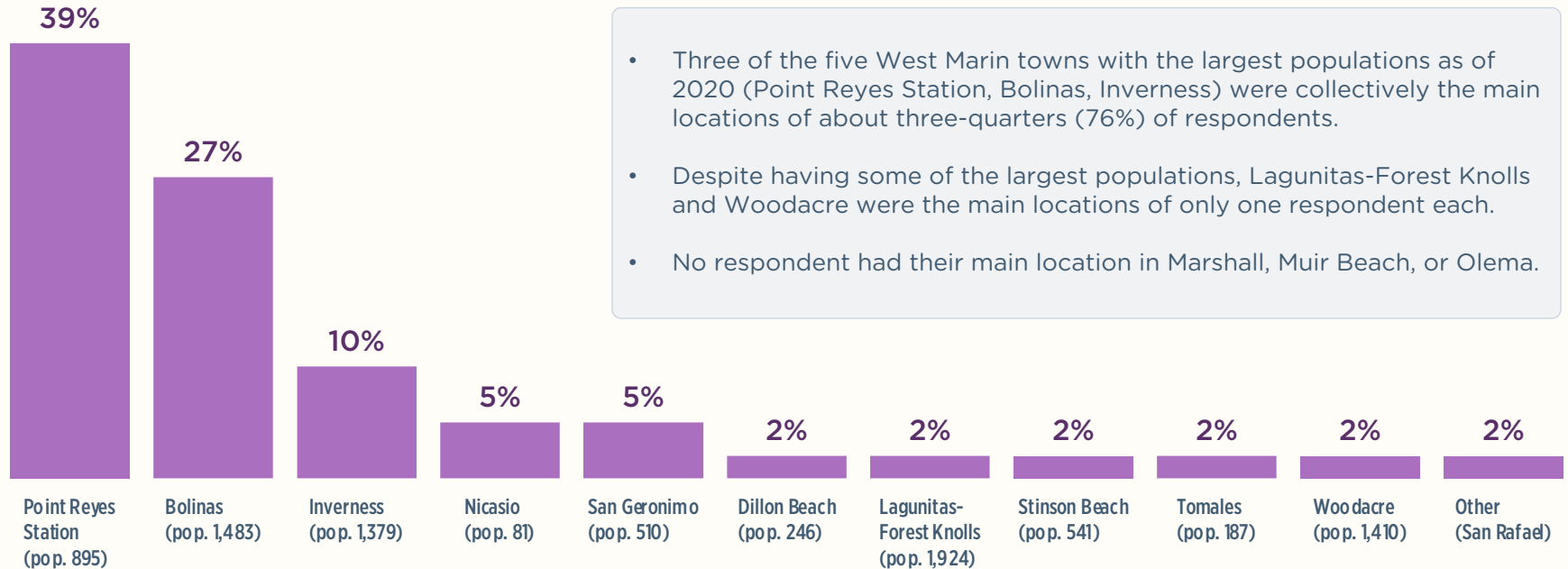
■ 501(c)(3)

■ Not incorporated (have fiscal sponsor)



(n=41)

# Main Location, by Town

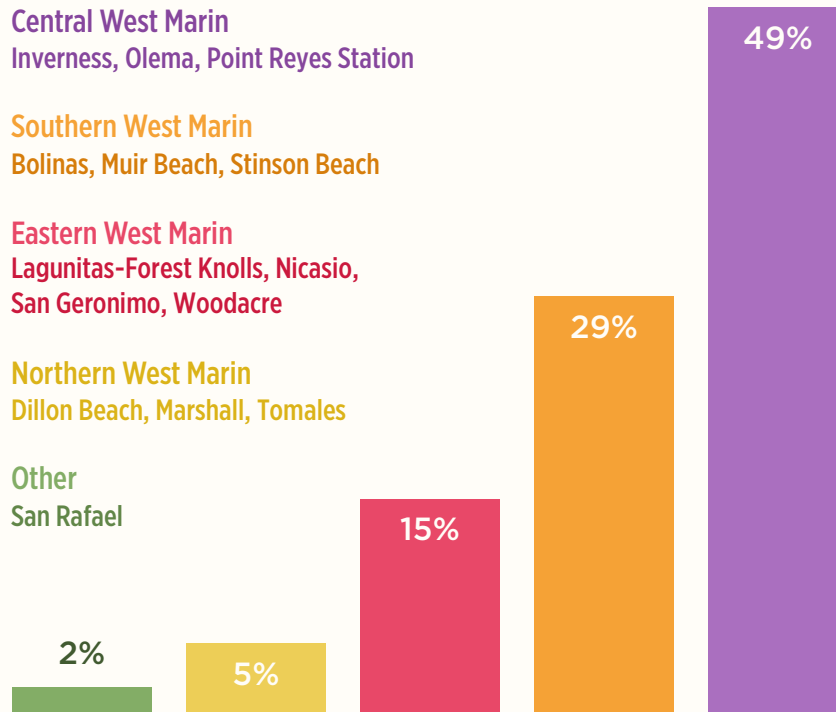


(n=41; percentages do not sum to exactly 100% due to rounding; population data from U.S. Census, 2020: <https://data.census.gov/table/DECENNIALDHC2020.P1>; the 1 respondent with a main location in Lagunitas-Forest Knolls was located in Forest Knolls)

# Main Location, by Region

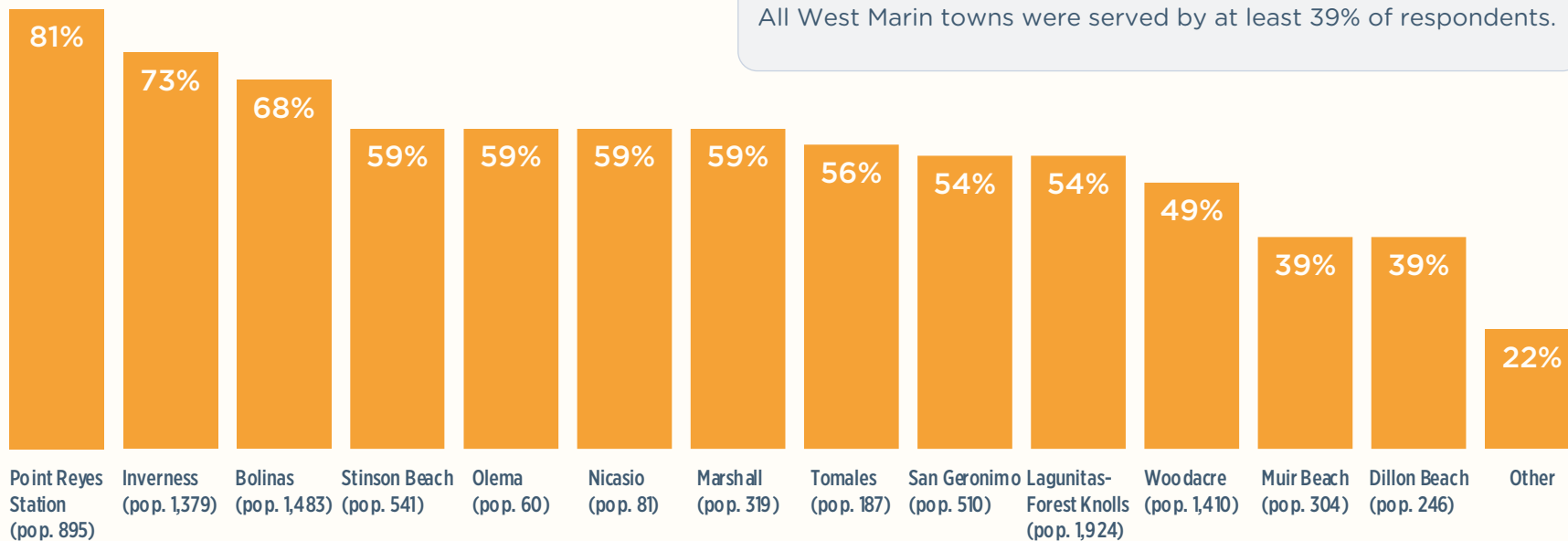
- Close to half of organizations (49%) have their main location in Central West Marin, which had two of the five most populous towns in the region as of 2020.
- 15% of organizations had their main location in Eastern West Marin, which had two of the five most populous towns in the region as of 2020.
- One organization was based outside West Marin (San Rafael).\*

\*This organization was included in the survey because it is in the process of opening an office in West Marin.



(n=41)

# Places Served, by Town



(n=41)

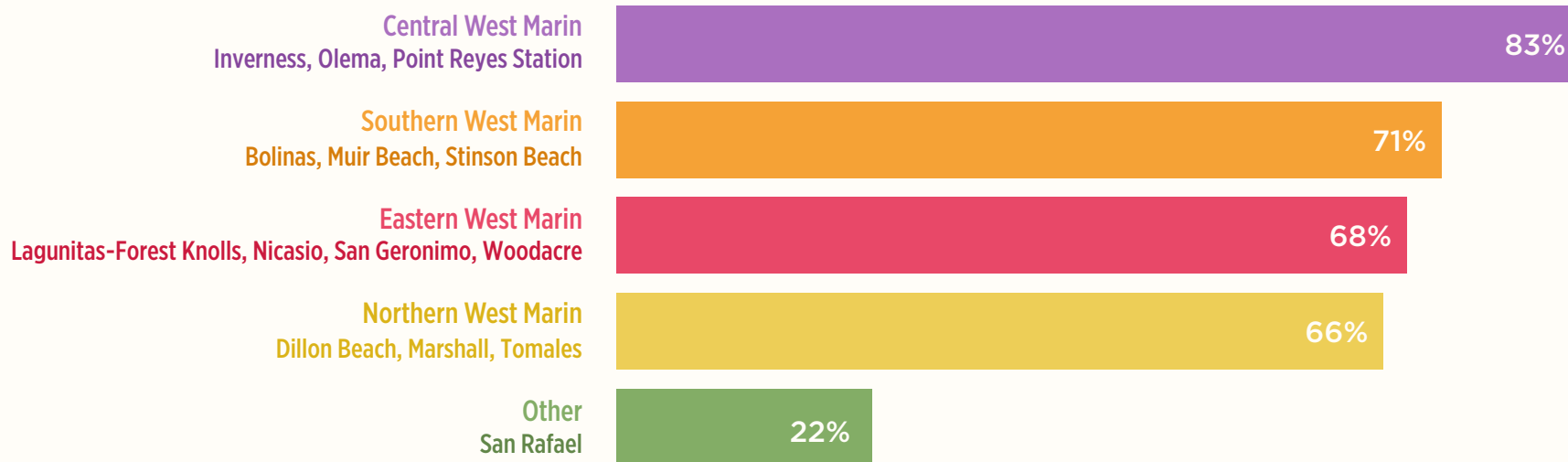


# Places Served, by Town (continued)

---

- Lagunitas-Forest Knolls, which had the largest population of West Marin towns in 2020 (1,924), was served by 54% of respondents.
- Although there are no organizations based in Marshall, Muir Beach, or Olema, each was served by 39% to 59% of respondents.
- 10% of respondents reported serving all West Marin towns.
- 22% reported serving 1-2 West Marin towns.
- 22% of respondents reported serving other places (e.g., neighboring counties, greater Bay Area, all of CA, etc.).

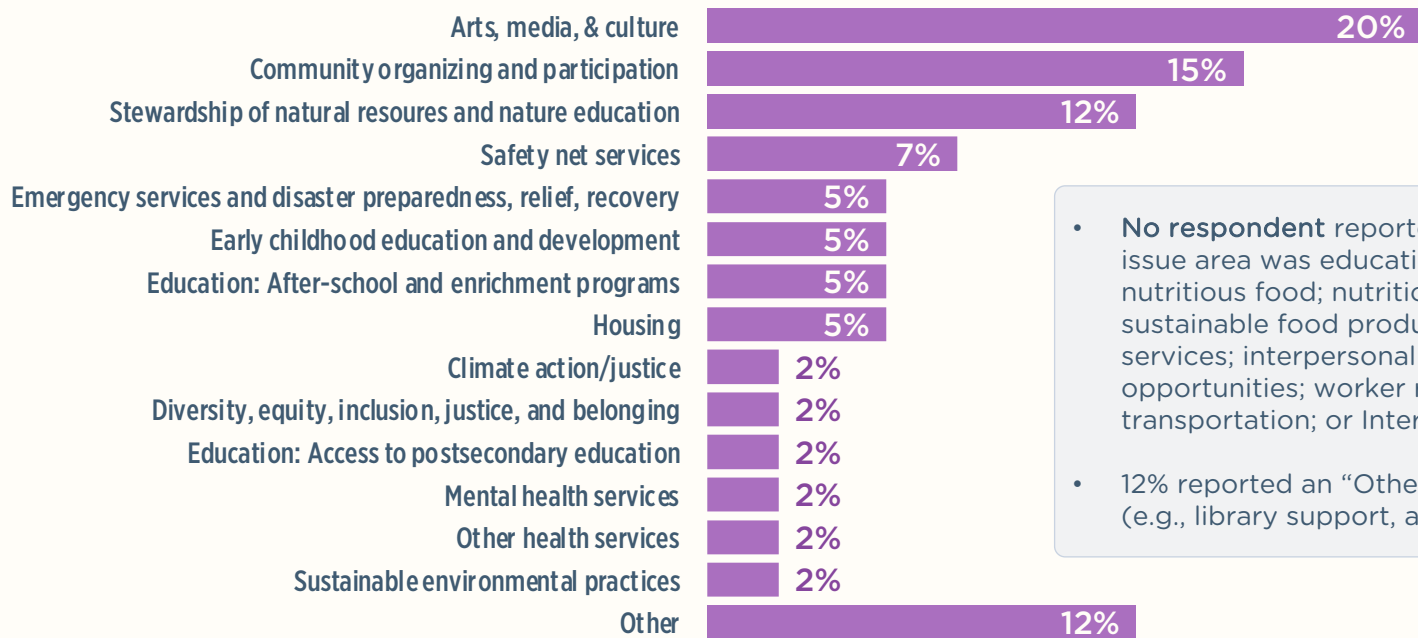
# Places Served by Region



All regions in West Marin were served by at least two thirds of respondents.

(n=41)

# Primary Issue Area



- **No respondent** reported that their primary issue area was education: K-12; access to nutritious food; nutrition education; sustainable food production; physical health services; interpersonal violence; economic opportunities; worker rights and wellbeing; transportation; or Internet access.
- 12% reported an “Other” primary issue area (e.g., library support, animal rescue, etc.).

(n=41; percentages do not sum to exactly 100% due to rounding)

# Secondary Issue Area

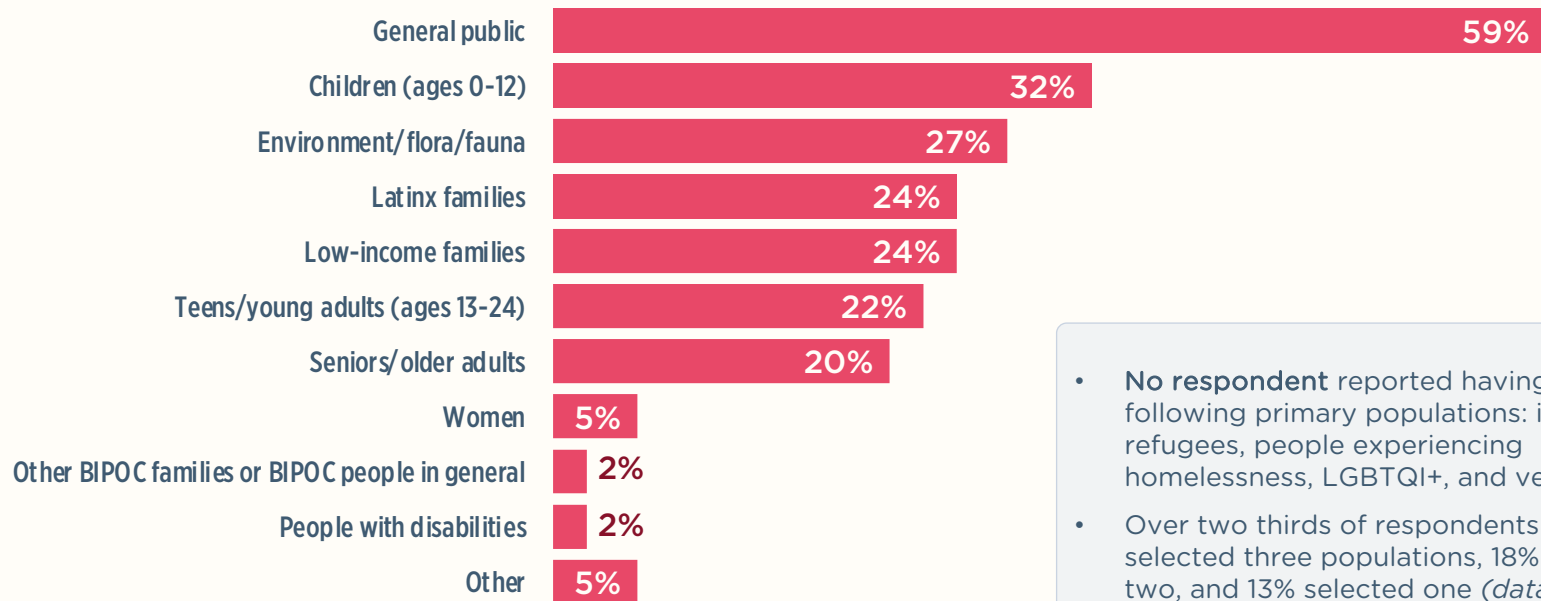


- Most common secondary issue area reported was DEIJB (15%).
- **No respondent** reported that their secondary issue area was early childhood education and development, access to postsecondary education, nutrition education, sustainable food production, mental health services, safety net services, economic opportunities, worker rights and wellbeing, transportation, or Internet access.
- 10% reported an “Other” secondary issue area (e.g., improving public welfare, providing essential childcare, etc.).

(n=41; percentages do not sum to exactly 100% due to rounding)



# Primary Population(s) Benefitted



Respondents could select up to 3

(n=41)

- **No respondent** reported having the following primary populations: immigrants/refugees, people experiencing homelessness, LGBTQI+, and veterans.
- Over two thirds of respondents (69%) selected three populations, 18% selected two, and 13% selected one (*data not shown in graph*).

# Topics of Focus for 2024

- 1. Financials**
- 2. Fundraising**
- 3. Planning, Monitoring, & Evaluation**
- 4. Collaboration**
- 5. Diversity, Equity, Inclusion, Justice, & Belonging (DEIJB)**
- 6. Emergency Response**

# 1. Financials



## OVERVIEW OF

# Financials

---

- The majority of respondents (57%) had gross income under \$250K in calendar year 2023.
- The majority of respondents (54%) had net positive net income in the \$1 to <\$100K range in 2023.
- Overall, responding organizations were in a better place financially in 2022 than in 2023.
  - Median gross income **declined by 28%** from 2022 to 2023.
  - Median net income **declined 72%** from 2022 to 2023.
- 100% of respondents reported individual donors as an income stream in 2023, and 42% of respondents' gross income came from individual donors that year.







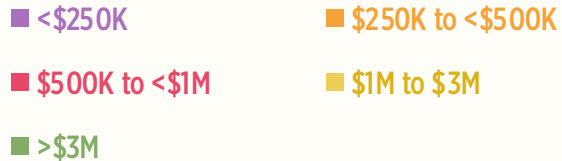
## OVERVIEW OF

# Financials (continued)

- Among organizations that provided data in 2022 and 2024 surveys (on calendar years 2021 and 2023, respectively):
  - Individual donors/gifts showed no or virtually no change with respect to the percentage of respondents reporting this funding stream and the percentage of income that the stream represented.
  - Marin County funding and earned income showed increases in the percentages of respondents reporting the stream and the percentage of income that the stream represented.
- In 2024, 76% of respondents reported currently having a reserve, 12% an endowment, and 7% a line of credit.
  - 17% have no source of financial protection.

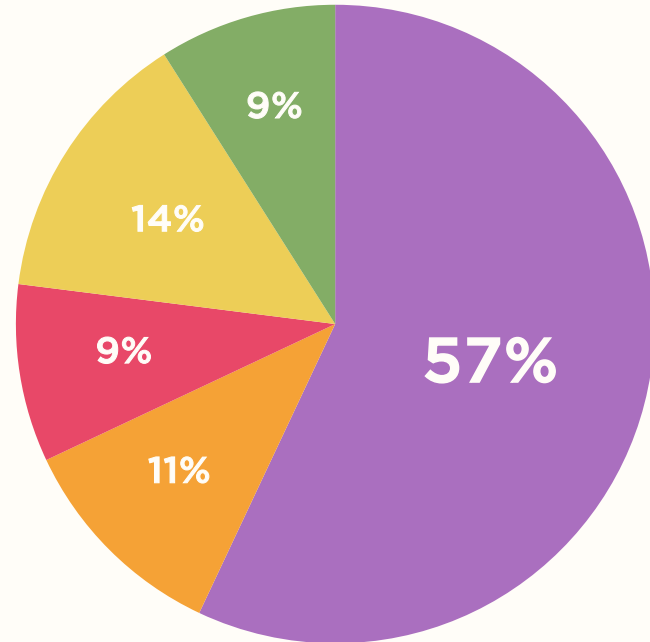
# Gross Income by Income Category

- The distribution of gross income, by income category, was very similar in calendar years 2022 and 2023.
- In both years, just over 50% of respondents had gross income under \$250K, and the remaining respondents were relatively evenly divided across higher income categories.



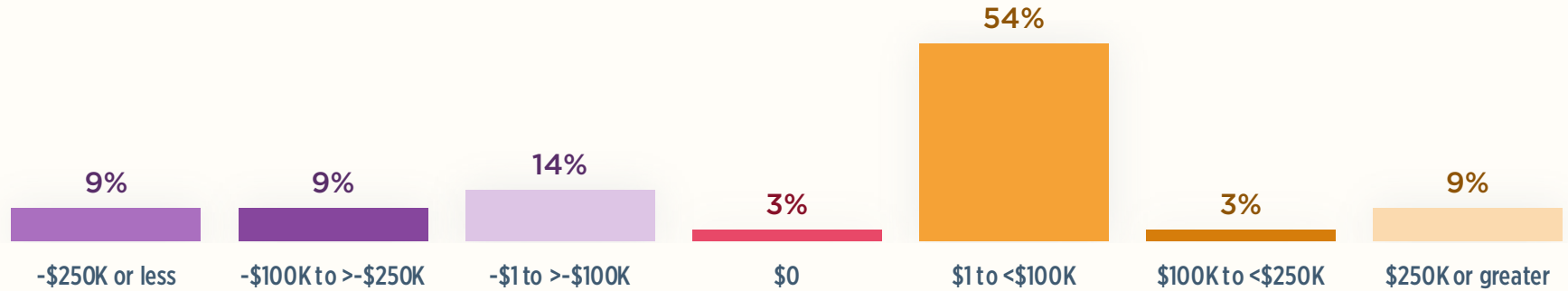
(n=35)

Calendar year 2023



# Net Income by Income Category

Calendar year 2023



(n=35; percentages do not sum to exactly 100% due to rounding)

- About two thirds of respondents (66%) had a positive net income in 2023.
  - Just over half had a net income of \$1 to <\$100K .
- A slightly larger proportion of respondents had positive net income in 2022 (72% of 32 respondents) vs. in 2023 (66% of 35 respondents).

# Net Income: Min, Max, Median

Calendar Year	(n)	Gross Income			Expenses			Net Income		
		Min	Max	Median	Min	Max	Median	Min	Max	Median
2023	35	\$5,042	\$8,853,996	\$125,646	\$2,000	\$11,819,000	\$136,068	-\$4,456,000	\$718,606	\$2,124
2022	32	\$0	\$10,735,000	\$174,194	\$0	\$7,821,565	\$171,874	-\$618,640	\$5,487,000	\$7,638

- Median **gross income** declined by **28%** from 2022 to 2023.
- Median **net income** declined **72%** from 2022 to 2023.

(Organizations that were not providing services in one or both years of focus, because they had not come into existence yet, were excluded from the analysis of the applicable year[s])

# Net Income Overall

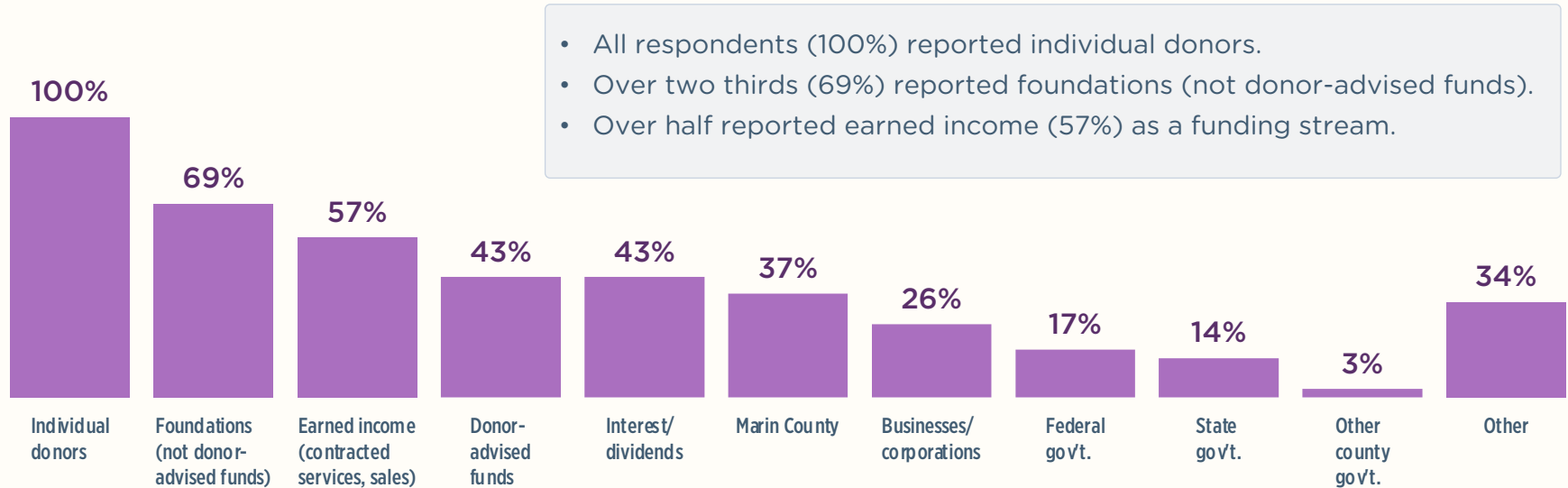
Calendar Year	(n)	Total Across Orgs.		
		Gross Income	Expenses	Net Income
2023	35	\$33,663,080	\$38,522,415	-\$4,859,335
2022	32	\$36,169,602	\$27,671,514	\$8,498,088

- As a whole, organizations reported doing worse financially in 2023 than in 2022.
- Some outliers affected the numbers, including one organization with a multimillion-dollar positive net income in 2022 and a multimillion-dollar negative net income in 2023, and several other organizations with negative or positive net income in 2022 or 2023 in the range of at least \$500K to over \$1.5M.

(Organizations that were not providing services in one or both years of focus, because they had not come into existence yet, were excluded from the analysis of the applicable year[s])

# Income Streams

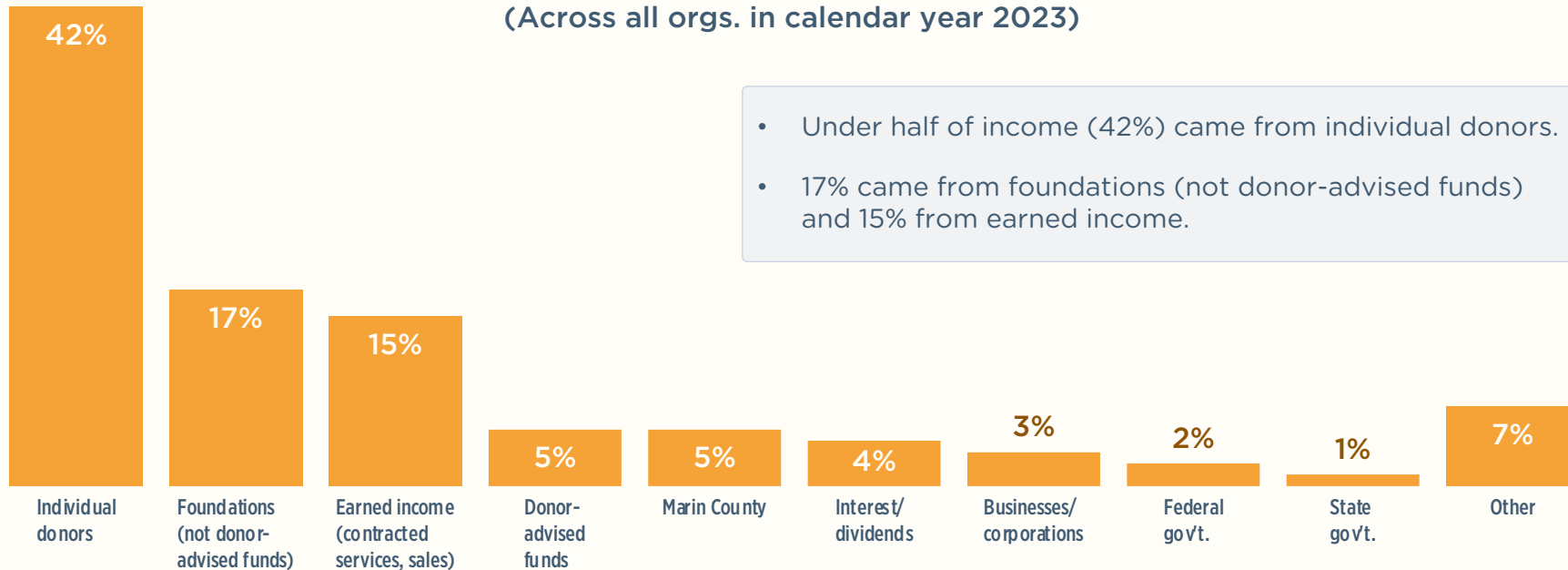
(% of orgs. that reported each income stream in calendar year 2023)



(n=35)

# Mean % of Income by Stream

(Across all orgs. in calendar year 2023)



(n=35; note that "Other county gov't." was 0.2%; percentages of the bars do not sum to exactly 100% due to rounding)



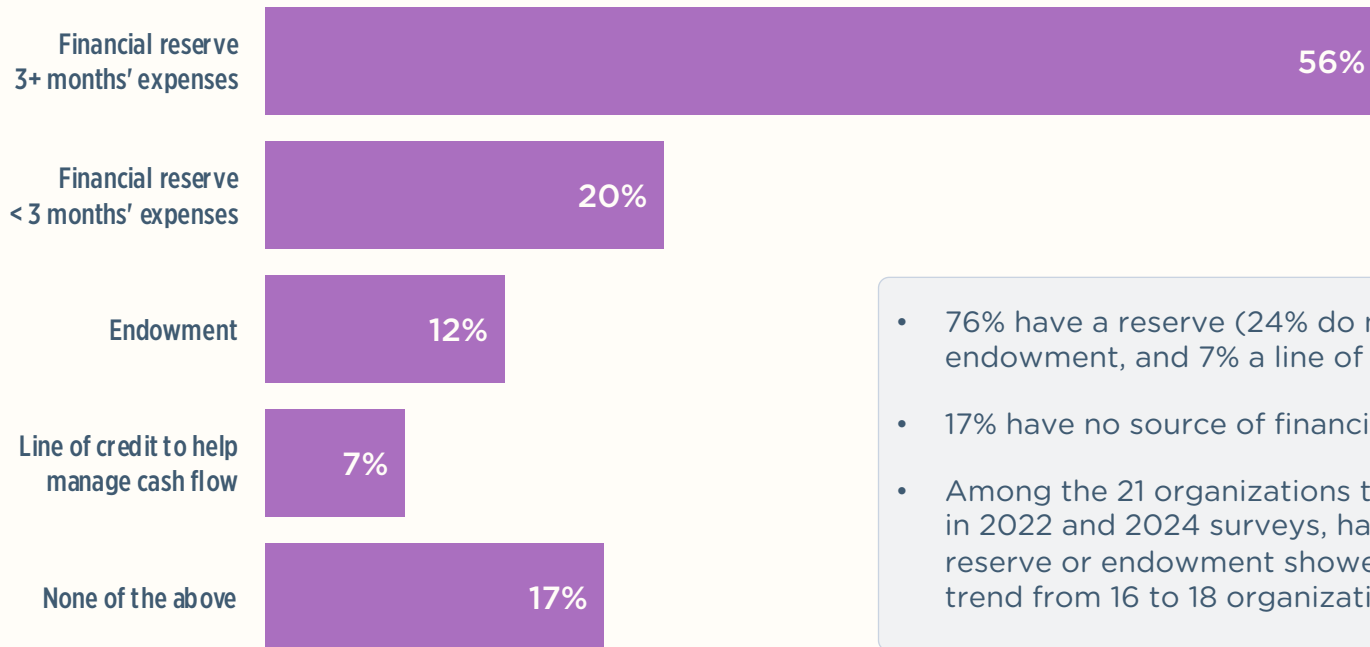
# Income Streams: Change Over Time

---

Among organizations that provided data in 2022 and 2024 surveys  
(on calendar years 2021 and 2023, respectively):

- Individual donors/gifts showed no or virtually no change with respect to the percentage of respondents reporting this funding stream and the percentage of income that the stream represented.
- Interest/dividend income, federal/state government income, and loans showed drops in the percentage of respondents reporting the stream and the percentage of income that the stream represented (a very small drop in percentage of income for loans).
- Marin County funding and earned income showed increases in the percentages of respondents reporting the stream and the percentage of income that the stream represented.

# Cash Flow Management

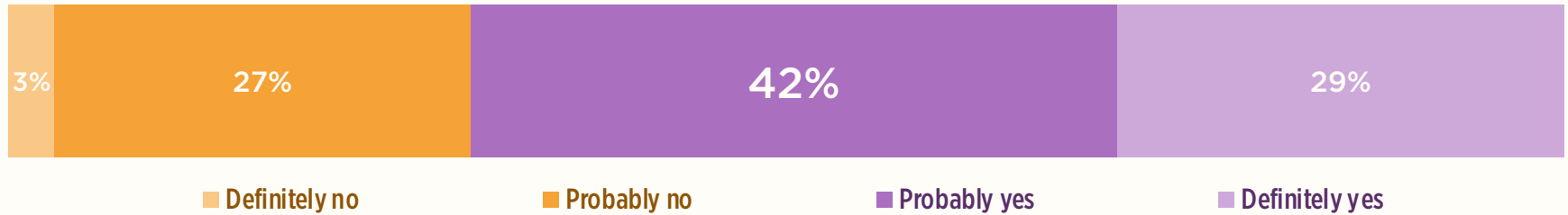


- 76% have a reserve (24% do not), 12% an endowment, and 7% a line of credit.
- 17% have no source of financial protection.
- Among the 21 organizations that provided data in 2022 and 2024 surveys, having a financial reserve or endowment showed a small upward trend from 16 to 18 organizations.

(n=41)

# Benefit from Financial Technical Assistance

(Whether would benefit)



71% reported potential benefit from TA.

(n=38; percentages in the bar do not sum to exactly 100% due to rounding)

## **2. Fundraising**

## OVERVIEW OF

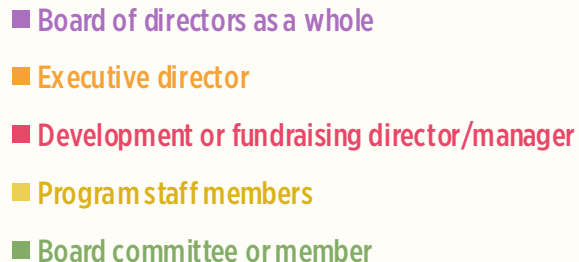
# Fundraising

- Most nonprofits do not have specialized staff or consultants to lead fundraising.
  - Only 13% have a development or fundraising director or manager.
  - For most organizations, fundraising responsibility falls on the executive director (33%) or board (33%).
  - No one reported that a contracted fundraiser (individual or company) had primary responsibility.
- The majority (73%) agreed that they have a clear fundraising strategy in place, and a similar proportion (70%) agreed that they regularly evaluate the effectiveness of their fundraising strategies.
- More than half (63%) agreed that they have made progress diversifying their funding sources, but only 10% strongly agreed.
- 60% agreed that they feel confident about being able to raise funds they need this year, with 35% strongly agreeing.



# Primary Fundraising Responsibility

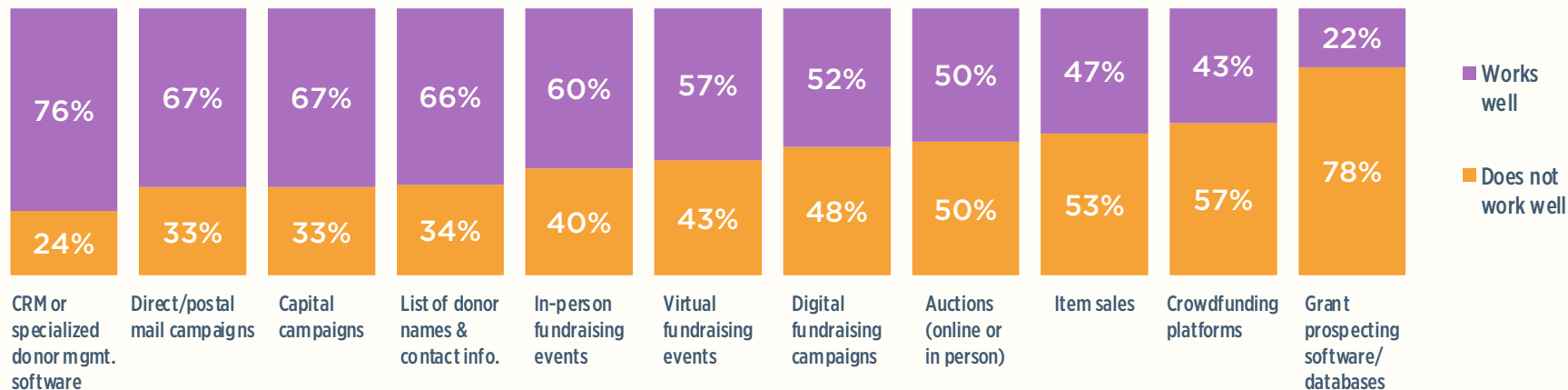
- Only 13% have a development or fundraising director or manager.
- For most organizations, the responsibility falls on the executive director (33%) or board (33%).



(n=40; percentages do not sum to exactly 100% due to rounding)

# Fundraising Tools & Strategies: Working Well or Not

(Among those that reported using the tool/strategy)

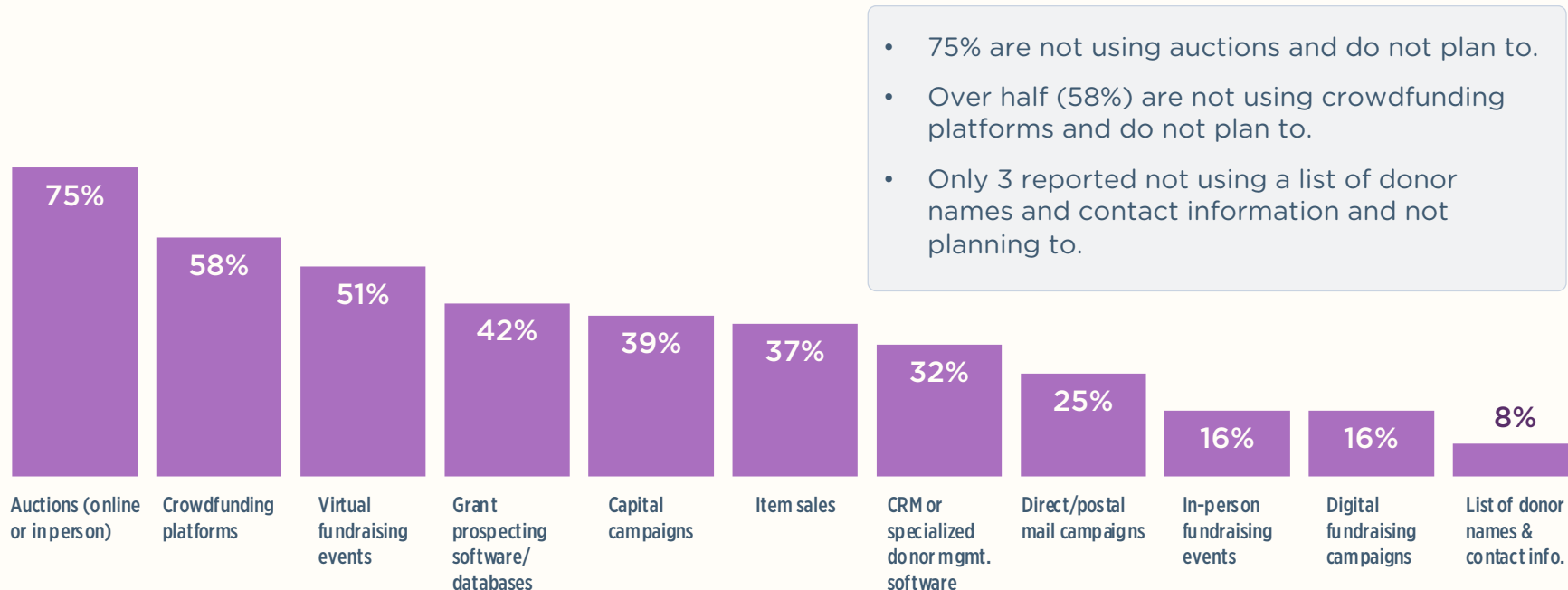


- 76% of the 21 organizations using customer relationship or donor management software reported it **worked well**.
- 78% of the 9 organizations using grant prospective software/databases reported it **did not work well**.

(n=6-32, depending on the number of respondents per item that reported using the tool/strategy)



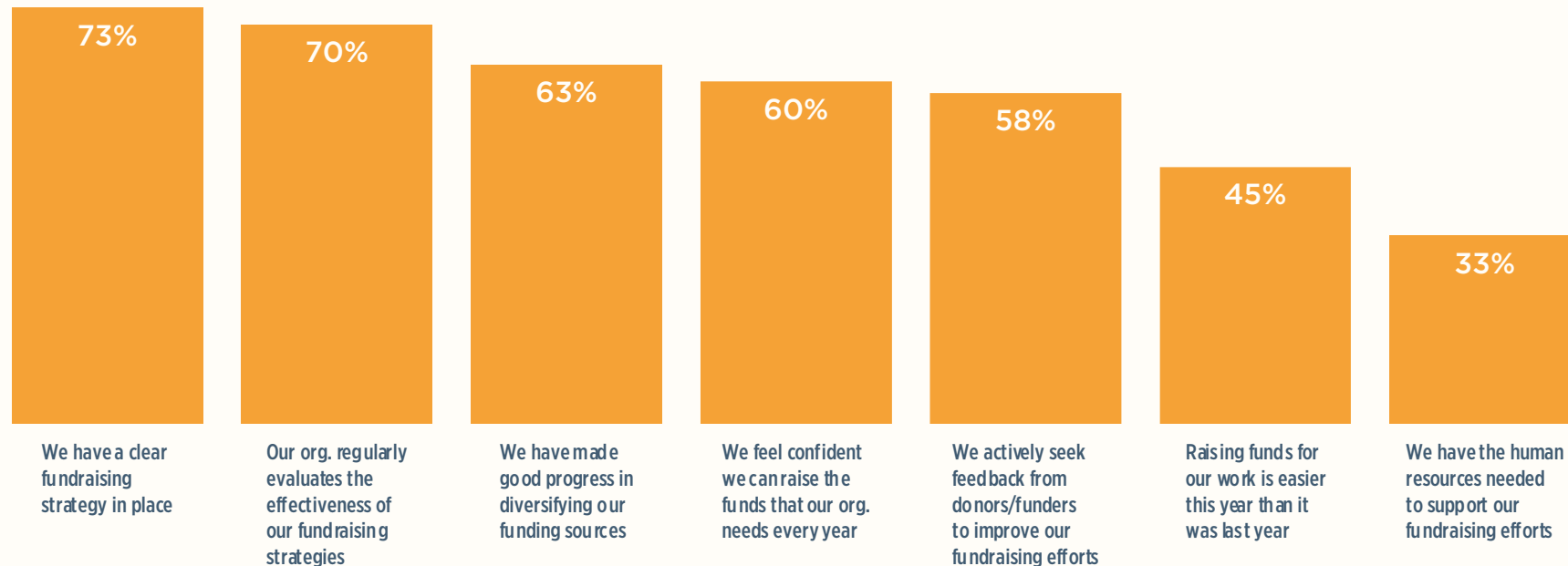
# Fundraising Tools & Strategies: Not Using or Planned



(n=35-40, depending on the item)

# Fundraising Capacity & Outlook

(% agreeing somewhat or strongly)



(n=40)

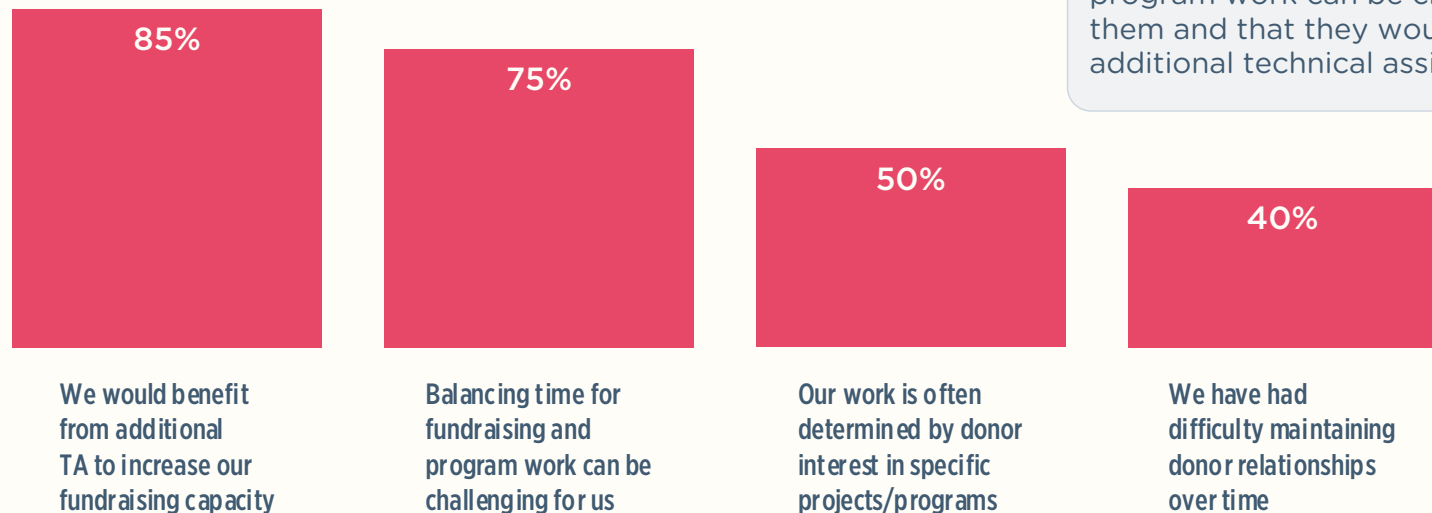
# Fundraising Capacity & Outlook

---

- The majority (73%) agreed that they have a clear fundraising strategy in place, and a similar proportion (70%) agreed that they regularly evaluate the effectiveness of their fundraising strategies.
- More than half (63%) agreed that they have made progress diversifying their funding sources, but only 10% strongly agreed.
- 60% agreed that they feel confident about being able to raise funds they need this year, with 35% strongly agreeing.
- Less than half of respondents agreed that raising funds for their work is easier this year than last year (45%), and only 10% strongly agreed.
- Only 33% agreed that they have the human resources needed to support their fundraising efforts, with only 8% strongly agreeing.

# Fundraising Challenges

(% agreeing somewhat or strongly)



A large majority of respondents agreed that balancing time for fundraising and program work can be challenging for them and that they would benefit from additional technical assistance.

(n=40)

## **4. Planning, Monitoring, & Evaluation**

## OVERVIEW OF

# Planning, Monitoring, & Evaluation

- West Marin nonprofits most frequently have current versions of financial documents, including an annual financial report, annual budget, and profit and loss statement—each 83%-85%—and a financial plan (51%).
- Tools for which organizations have made less progress are community needs assessment, organizational theory of change, HR strategy plan, and organizational theory of change — only 15%-22% have a current one and 20%-29% are developing one.



## OVERVIEW OF

# Planning, Monitoring, & Evaluation (continued)



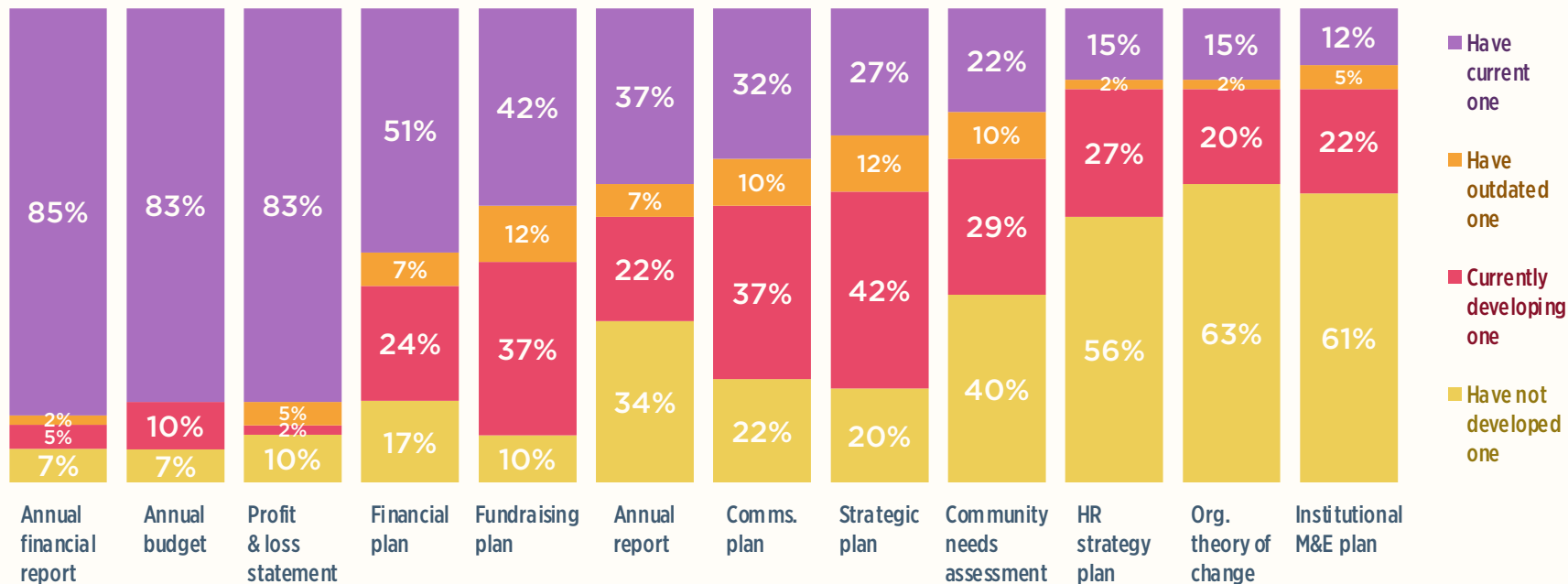
The vast majority of respondents (87%) consider M&E efforts to be integral to their work, but they often lack fundamental M&E tools or practices or desired alignment with funders.

- 76%\* somewhat or strongly agreed that M&E is a new concept for their organization.
- Only 12% have a current institutional monitoring and evaluation (M&E) plan; 22% are developing one.
- Just under half (47%) disagree that their staff have the knowledge and skills to conduct M&E successfully.
- The same percentage (47%) disagree that they regularly use M&E learnings to improve their work.
- Around three quarters want funders to have M&E requirements that are more realistic and that are better aligned with nonprofits' priorities.

\*Percentage is 77% on later slide due to subcategory rounding.



# Status of Planning Tools



(n=41; Percentages in each bar do not necessarily sum to exactly 100% due to rounding)

# Status of Planning Tools (continued)

---

## **In 2024:**

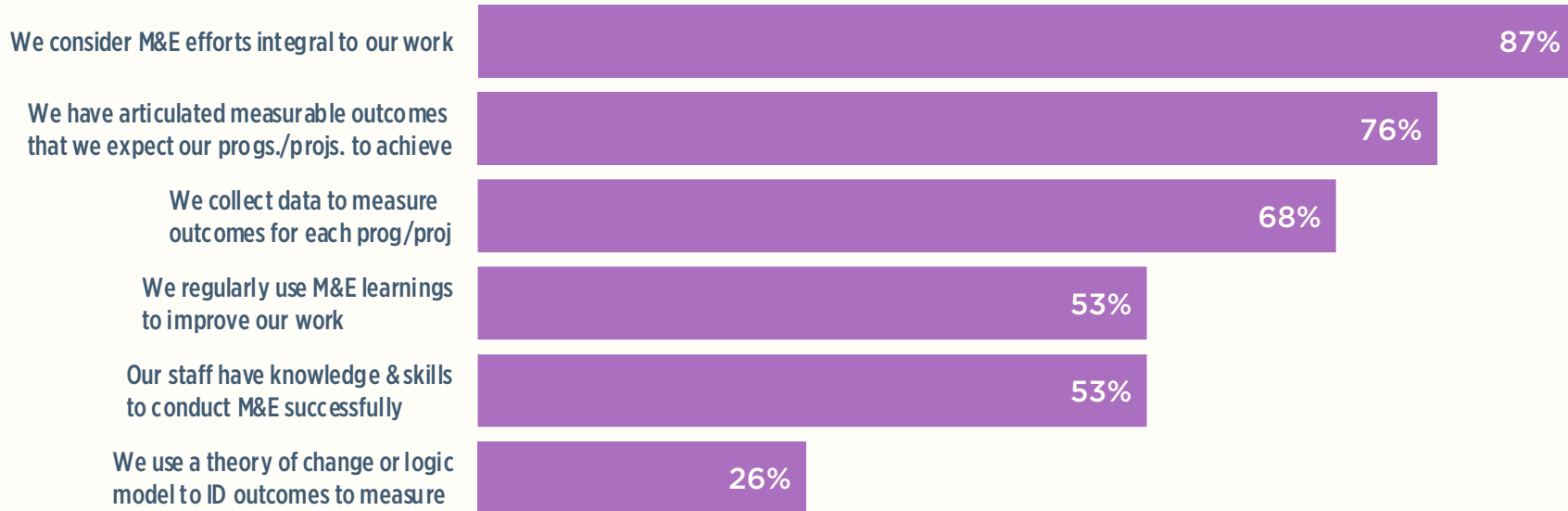
- West Marin nonprofits most frequently have current versions of financial documents, including an annual financial report, annual budget, and profit and loss statement—each 83%-85%— and a financial plan (51%).
- For fundraising and communications, 42% and 32%, respectively have current plans.
- The majority of organizations either have a current strategic plan (27%) or are developing one (42%).
- Tools for which there is less progress are community needs assessment, organizational theory of change, HR strategy plan, and organizational theory of change — only 15%-22% have a current one and 20%-29% are developing one.
- The least progress has been made on M&E institutional plans: only 12% have a current one and 22% are developing one.

## **Among those responding to both 2022 and 2024 surveys (n=21):**

- There was a notable increase in the percentage that had a “current annual report for the prior fiscal year” (2022 survey) vs. had a “current annual financial report” (2024 survey): 76% to 100%.
- **However**, it should be noted that the timing of survey completion during the year may have affected the response rate.

# M&E Culture & Practices

(% agreeing somewhat or strongly)



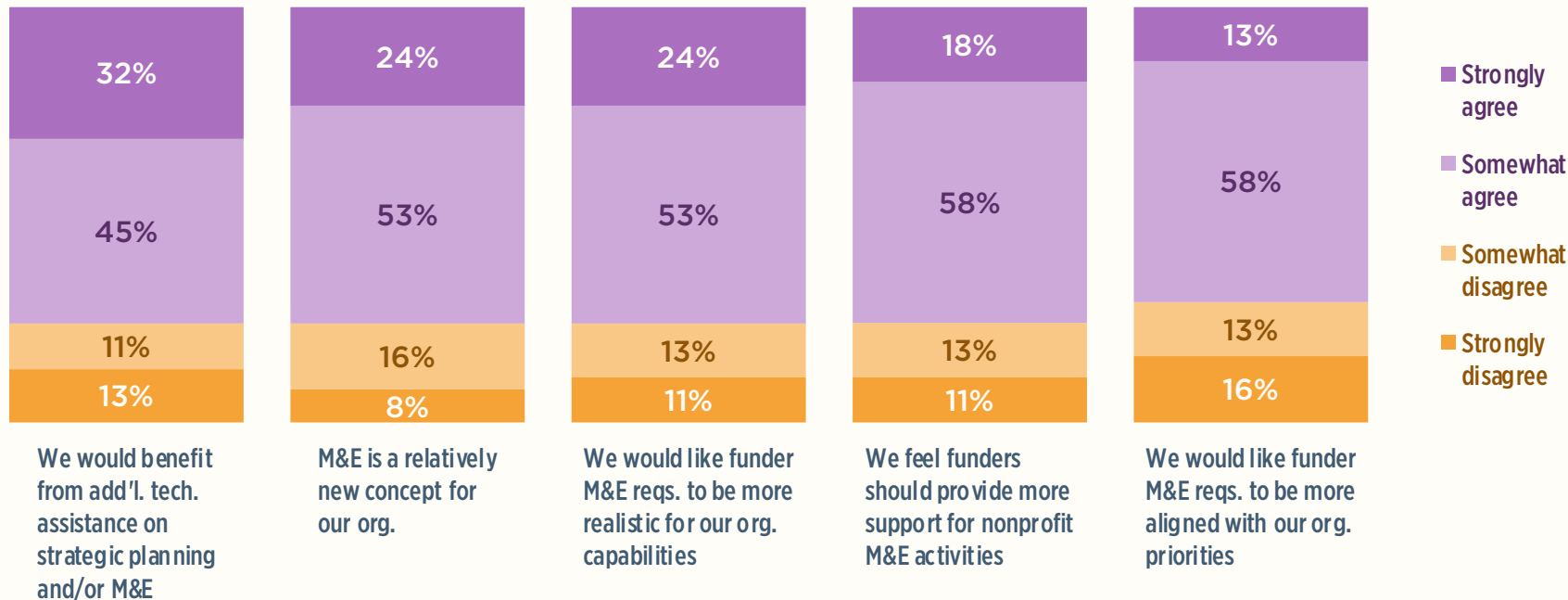
(n=38)

# M&E Culture & Practices (continued)

---

- The vast majority of respondents (87%) agreed that they consider M&E efforts to be integral to their work; however:
  - Just under half (47%) disagreed that they regularly use M&E learnings to improve their work.
  - The same percentage (47%) disagreed that their staff have the knowledge and skills to conduct M&E successfully.
    - Only two respondents *strongly agreed* that their staff have the knowledge and skills to conduct M&E successfully.
- Three quarters (76%) agreed that they have articulated measurable outcomes that they expect their programs or projects to achieve, and around two thirds (68%) agreed that they collect outcome data for each program/project; however:
  - A notably lower percentage (26%) agreed that they use a theory of change map, logic model, or similar tool to identify which outcomes to measure.

# M&E Needs & Challenges



(n=38; Percentages in each bar do not necessarily sum to exactly 100% due to rounding)

# M&E Needs & Challenges (continued)

---

Percentages of respondents agreeing (somewhat or strongly) that they had particular M&E-related needs and challenges were highly consistent across the items assessed; specifically, around three quarters (71%-76%\*) reported each of the following:

- M&E is a relatively new concept for their organization.
- They would like funders to:
  - Have M&E requirements that are more realistic for their organizational capabilities;
  - Better align these requirements with nonprofits' priorities; and
  - Provide more support for nonprofits' M&E activities.
- They would benefit from additional technical assistance on strategic planning and/or M&E.
  - For this item, 32% were in strong agreement.

\* Percentage is 77% on previous slide due to subcategory rounding.



## **4. Collaboration**

## OVERVIEW OF

# Collaboration

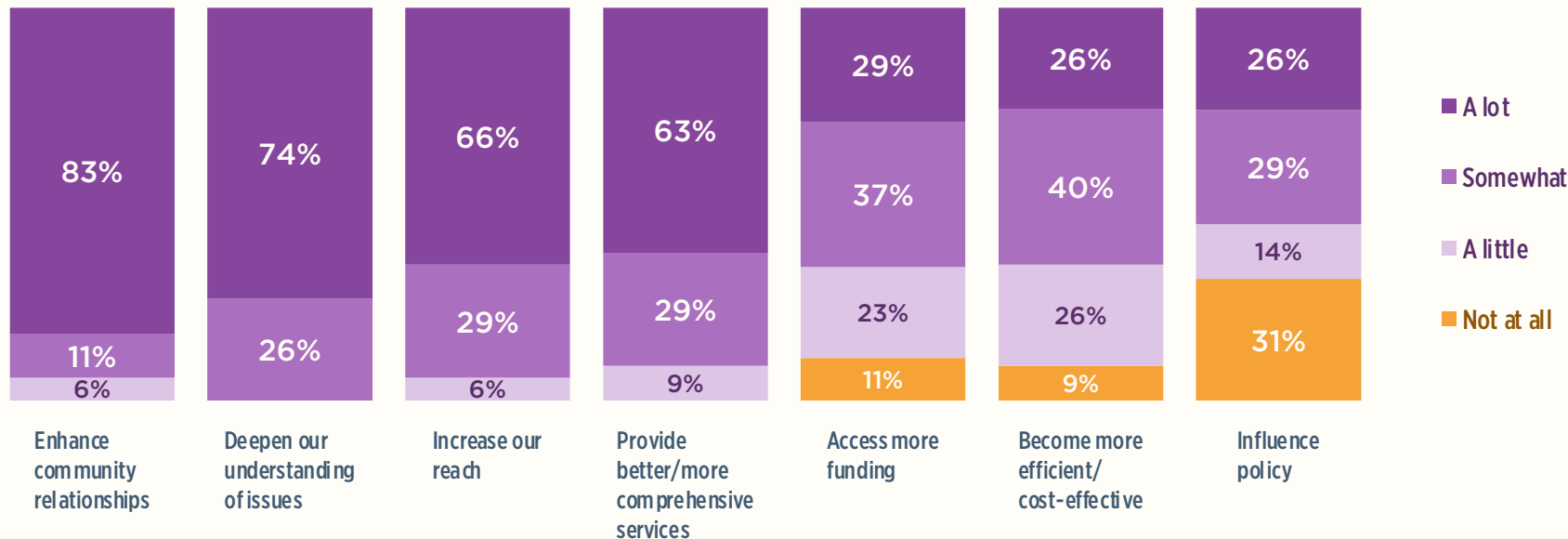
---

- The majority of organizations (58%) are optimistic about the value of collaboration, despite two thirds agreeing that applying for funding as a collaborative is difficult.
- For all potential benefits of collaboration examined, the majority of respondents (54%\*-100%) reported having benefitted “a lot” or “somewhat.”
  - Collaborations have benefitted respondents “a lot” in enhancing community relationships (83%), deepening their understanding of issues (74%), increasing reach (66%), and improving services (63%).
- Collaborations have benefitted respondents “a little” or “not at all” in accessing more funding (34%), becoming more efficient (34%\*), and influencing policy (46%\*).
- Large majorities of respondents agreed that they would like to learn more about how to collaborate effectively with other organizations (90%), would like funders to provide more support to foster collaboration (83%), and would benefit from additional technical assistance on how to collaborate more effectively (70%).

\* Graph on later slide shows slightly different percentage due to subcategory rounding.

# Benefits of Collaboration

(To date, collaborating with other orgs. has enabled us to...)



(n=35; Percentages in each bar do not necessarily sum to exactly 100% due to rounding)

# Benefits of Collaboration (continued)

- For all potential benefits of collaboration examined, the majority (54%-100%) reported having benefitted “a lot” or “somewhat.”
- Collaborations have benefitted organizations “a lot” for:
  - Enhancing community relationships (83% benefitted “a lot” );
  - Deepening their understanding of issues (74% benefitted “a lot”);
  - Increasing their reach (66% benefitted “a lot”); and
  - improving their services (63% benefitted “a lot”).
- A sizable minority reported having benefitted “a little” or “not at all” for:
  - Accessing more funding (34%);
  - Become more efficient (34%\*); and
  - Influencing policy (46%\*).
- Nearly a third of organizations (31%) reported that collaborating with other organizations had not benefitted their influencing policy at all.

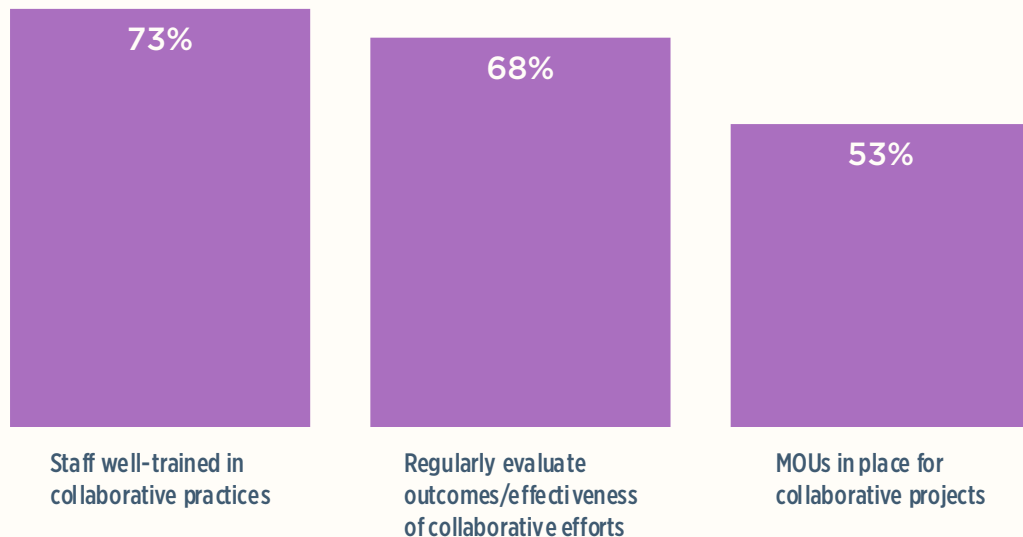


*“Since we are an artistically based informal organization, collaboration is tantamount to success. The collective creative endeavor/relationship model holds incomparable power, energy and infinite ability to manifest.”*

\*Percentage is slightly different on previous slide due to rounding.

# Collaboration Practices

(% agreeing somewhat or strongly)

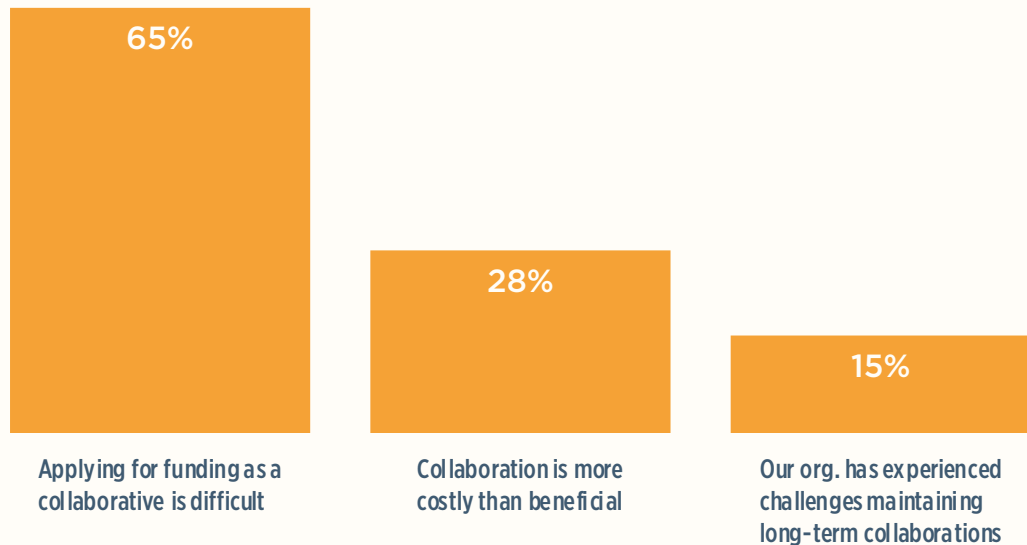


- Close to three quarters of respondents (73%) agreed that their staff were well-trained in collaborative practices.
- Around two thirds (68%) agreed that they regularly evaluate the outcomes and effectiveness of collaborative efforts.
- Beyond the 53% that agreed that they had agreements in place for collaborations, 30% reported that the question was not applicable (*data not shown in graph*).

(n=40)

# Collaboration Challenges

(% agreeing somewhat or strongly)

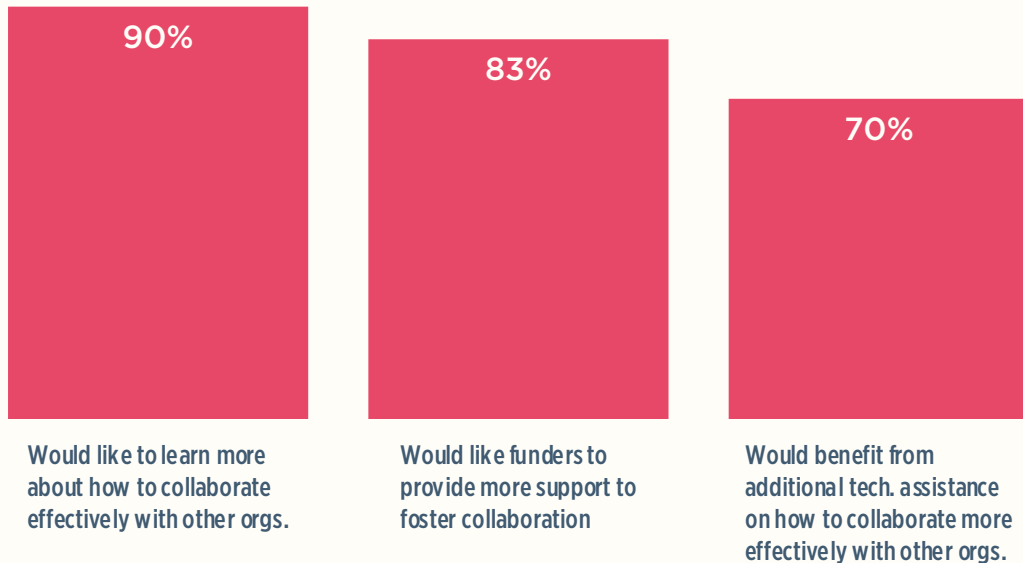


- Around two thirds of respondents (65%) agreed that applying for funding as a collaborative is difficult.
- However, the majority were optimistic about the value of collaboration: only 28% agreed that collaboration is more costly than beneficial, with 58% disagreeing and 15% reporting that the item was “not applicable” (*latter data not shown in graph*).\*
- Only 15% agreed that they have had challenges maintaining long-term collaborations.

(n=40; \*Percentages do not necessarily sum to exactly 100% due to rounding)

# Collaboration Support Needs

(% agreeing somewhat or strongly)



(n=40)

Large majorities of respondents (70%-90%) agreed that they:

- Would like funders to provide more support to foster collaboration;
- Would like to learn more about how to collaborate effectively; and
- Would benefit from additional technical assistance on how to collaborate more effectively.

# Collaboration: Qualitative Theme

---

Collaboration is a strong value, a core principle, or key to what the organization does (n=3-4).



*“Collaboration is a strong value of ours but... as a new organization we have not had much occasion to collaborate, yet.”*



## **5. Diversity, Equity, Inclusion, Justice, & Belonging (DEIJB)**

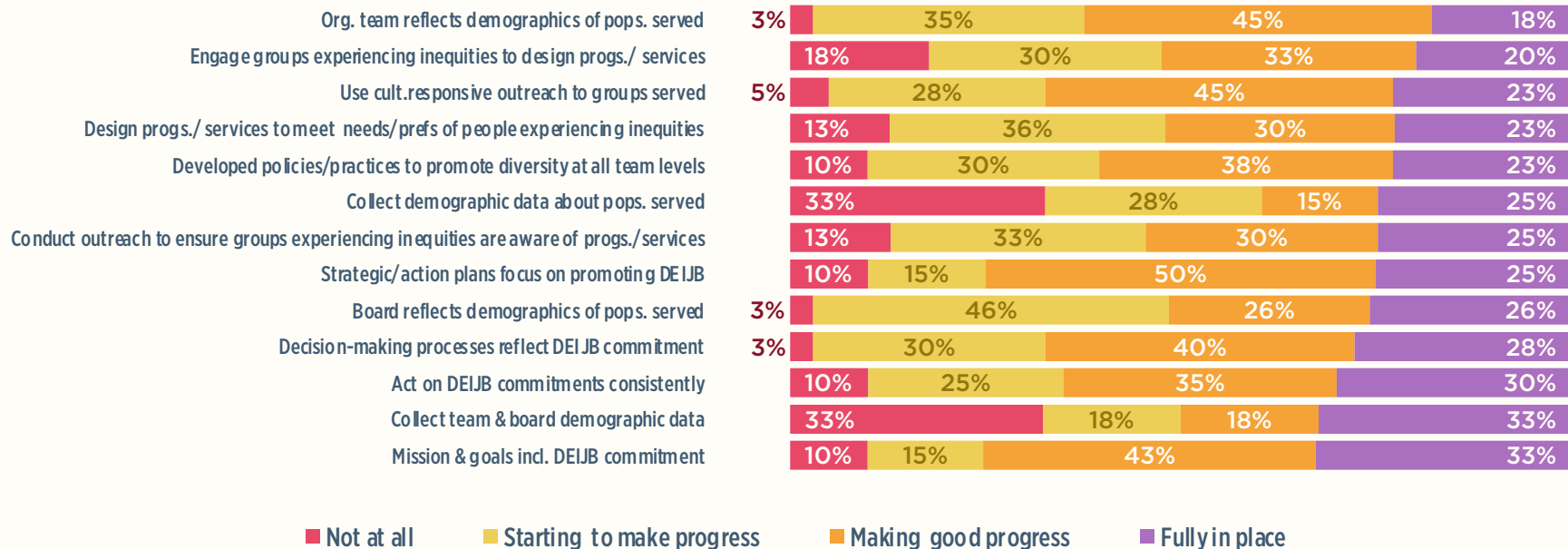
## OVERVIEW OF DEIJB

---

Overall, organizations continue to make progress in DEIJB. However, collection of demographic data has shown the least progress.

- In 2024, mission, goals, and objectives including a DEIJB commitment showed the most progress, with 33% reporting "fully in place" and 43% reporting "making good progress."
- Among nonprofits responding to both the 2023 and 2024 surveys, the percentages reporting practices "fully in place" approximately tripled or more for:
  - Strategic plans/action plans focus on promoting DEIJB (13% to 38%);
  - Engagement of members of groups experiencing inequities to design programs/services (8% to 29%);
  - Design of programs/services to meet needs/preferences of members of groups experiencing inequities (8% to 33%); and
  - Outreach to members of groups experiencing inequities (8% to 38%).
- In 2024, 33% reported not collecting demographic data on team and board, and the same percentage reported not collecting demographic data about populations served.

# Organizations' DEIJB Work



(n=40 for all items except board of directors reflecting demographics of pops. served, n=39; percentages in each bar do not necessarily sum to exactly 100% due to rounding)

# Organizations' DEIJB Work (continued)

---

## In 2024:

- The most progress was exhibited for **mission, goals, and objectives including a DEIJB commitment**, with 33% reporting fully in place and 43% reporting making good progress.
- Additional practices reported to be fully in place or making good progress by two thirds to three quarters of respondents:
  - Having strategic/work/action plans that focus on DEIJB (75%), decision-making processes reflecting DEIJB commitments (68%), use of culturally responsive outreach to groups served (68%), and acting on DEIJB commitments consistently (65%).
- 33% reported that they were not collecting demographic data about their team, board and populations served.

# Organizations' DEIJB Work (continued)

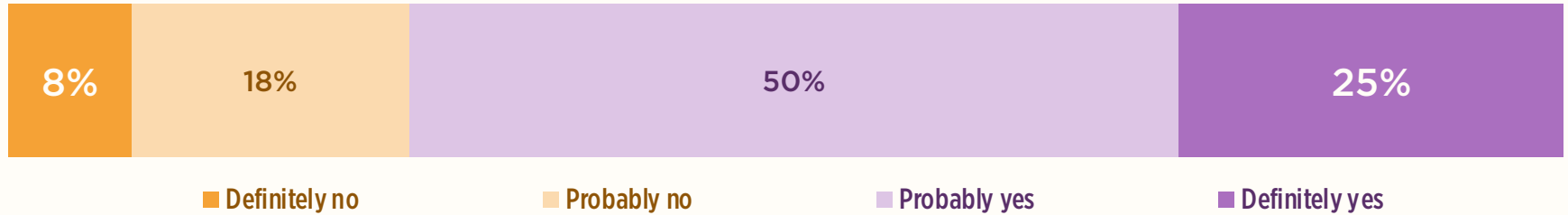
---

## **Among those responding to both 2023 and 2024 surveys (n=24):**

- For comparable items, the percentages that reported fully in place increased notably over time.
- In particular, the percentage reporting fully in place **at least tripled** for:
  - Strategic/work/action plans focus on promoting DEIJB (13% to 38%),
  - Engagement of members of groups experiencing inequities to design programs/services (8% to 29%),
  - Design of programs/services to meet needs/preferences of members of groups experiencing inequities (8% to 33%),
  - Outreach to members of groups experiencing inequities (8% to 38%).

# Benefit from DEIJB Technical Assistance

(Whether would benefit)



Three quarters reported potential benefit from TA.

(n=40; percentages in the bar do not sum to exactly 100% due to rounding)

## **6. Emergency Response**

## OVERVIEW OF

# Emergency Response

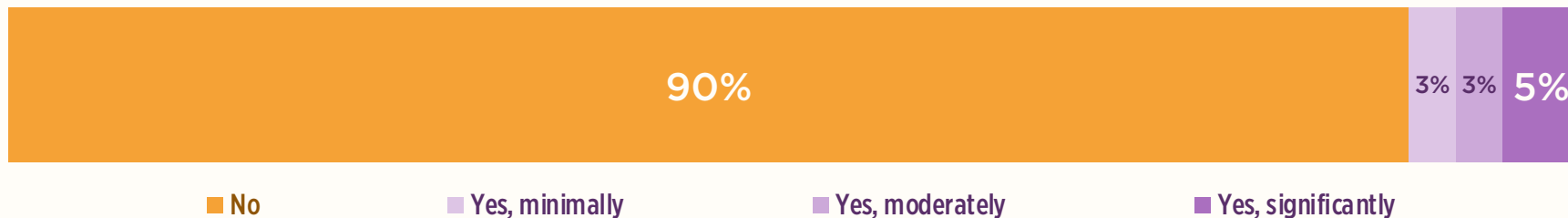
---

- The vast majority of respondents (90%) reported not shifting resources to emergencies in 2023.
- Among respondents that did shift resources, two did so for emergencies with their buildings, one did so for COVID and fire/smoke, and one did not report the reason.



# Emergency Resource Shift

(% of orgs. shifting resources in calendar year 2023 for emergencies)



- Two reported emergency issues with their building (e.g., water intrusion, pests); in response, one used restricted donor funds and postponed other projects, while the other canceled some activities.
- One reported responding to COVID and fire/smoke emergencies with personal protective gear, county protocols, a van for emergency exit, and making work/activities flexible/hybrid.
- One did not specify the emergency.

(n=38; percentages in the bar do not sum to exactly 100% due to rounding)

## **With thanks to:**

- West Marin's nonprofit organizations
- The Goodman Barinaga Fund
- Survey reviewers
- Eric Ryan, Mission Met