

2021 Organizational & Community Needs Assessment

Presented in partnership with:



The online survey was a collaborative effort of the Community Foundation of the Eastern Shore, The Campbell Foundation, and the United Way of the Lower Eastern Shore.

The questionnaire was sent via email (link) to 297 nonprofit and community organizations located in Dorchester, Somerset, Wicomico, and Worcester Counties.

The 33-question survey was designed to determine the Lower Shore's greatest community needs and the highest priorities for funding, as well as identify possible gaps in services.

Additionally, the survey was designed to assess the impact of the COVID-19 pandemic on our local nonprofit and community organizations, and the level of organizational readiness for Diversity, Equity, and Inclusion (DEI) programming.

The survey was anonymous – unless respondents chose to identify themselves. The Campbell Foundation provided \$1,500 as incentives, which was split between three \$500 prizes. Only 501(c)3 organizations that had offices in any of the 4 counties qualified for the incentives, and recipients were chosen at random.

The survey took on average 13 minutes to complete. Data was collected from February 22 to March 16, 2021. The response rate to the survey was 42%, which was significantly higher than our 35% goal.

The missions of the organizations that responded covered a wide variety of community needs from animal welfare to workforce development. The top 5 focus areas addressed by respondents were: 1) Education (54%); Vulnerable Populations (53%); Health physical/behavioral (36%); Food/hunger (28%); Arts and Culture (28%).

SURVEY HIGHLIGHTS

ORGANIZATIONAL NEEDS

The open-ended comments on the organizational challenges question show that the need for **face-to-face interactions** (staff, clients, elected officials, peer organizations, community members) is seen as the biggest challenge for most organizations.

The 3 training opportunities that are reported as most beneficial would be:

- 1) Development/Fundraising
- 2) Board Development
- 3) DEI

- More organizations will **prioritize operating funding** over programmatic funding (47% vs. 37%)
- **Over 40% of organizations are looking at increasing collaboration with peer organization for collective impact.** Many others say that they would consider sharing staff and spaces, and back-office operations.
- **7 organizations are considering merging** with another nonprofit and **1 will likely dissolve its operations.**

“Our biggest challenge is that we have not been able to offer some of the prior programs affecting our most vulnerable populations, such as kids living in isolation.”

- Survey Respondent

COMMUNITY NEEDS

We asked organizations to let us know what they perceived to be our 4 most pressing community needs - no matter what their organizational missions were. While responses were quite varied, the top 4 were listed as:

- 1) **Affordable housing/homelessness (56%)**
- 2) **Behavioral health (41%)**
- 3) **Care for vulnerable populations (38%)**
- 4) **Connectivity (35%).**

Community Challenge:

“Poverty compounded with limited decent paying jobs with the barriers of limited transportation, expensive childcare, and “just enough support that keeps families in a cycle of providing daily without being able to move beyond basic survival.”

- Survey Respondent

DORCHESTER:

Respondents reported a **“solid supply of affordable housing”** as the most unmet need.

SOMERSET:

Respondents reported **“meaningful work and broadly shared economic security,”** and a **“solid supply of affordable housing”** as the most unmet needs.

WICOMICO:

Respondents reported a **“solid supply of affordable housing,” “providing for vulnerable populations,”** and **“offering meaningful work and broadly shared economic security”** as the most unmet needs.

WORCESTER:

Respondents reported a **“solid supply of affordable housing,” “offering meaningful work and broadly shared economic security,”** and **“providing for vulnerable populations”** as the most unmet needs.

FUNDRAISING

- **Event fundraising and fees for service** have decreased dramatically as a result of COVID. *(aligns with national trends)*
- Comments to the income revenue question indicated **admissions and memberships are down dramatically.**
- Close to 40% of respondents say that their most significant organizational challenge right now is **“revenue generation/fundraising.”**
- Comments to “the most significant challenge” question included the **fear of the lingering effects of COVID on the economy and funds becoming less available.**
- A comment to “the most significant challenge” question included the fear **that small nonprofits will not survive much longer** despite more funding coming their way.

Re: Sources of Funding:

“Government funding was not affected SO FAR, but we expect that it will be.”

- Survey Respondent

OPERATIONS

- **43% of respondents received PPP loans.** (below the 50% listed in the MD Survey)
- 49% of respondents said their cash flow has not changed as a result of COVID and 51% said that it was down. **PPP helped organizations through an infusion of cash.**
- **While 50% of respondents reduced staffing, 28% of respondents added positions** (comparable with national results)
- **5 organizations (or 4.5%) reported that a staff or contractor died of COVID-19** (higher percentage than Maryland peers though the MD survey was conducted earlier in the pandemic).
- **The role of volunteers has been critical to our organizations.** 24% of respondents said that services are down due to a shortfall in volunteers. However, 32% of organizations said that they still have the same number of key volunteers or added volunteers.
- A comment to a volunteer question indicated that organizational activities increased because of virtual meetings. We can **expect virtual meetings to continue post COVID** as they have been a way to keep volunteers engaged.
- Organizations said that they **needed more volunteers on their boards (67%) and for service delivery (64%).**
- Organizations report **an increase in demand for low income and ALICE residents due to the pandemic.**

“Most of our volunteers are older and fall into the vulnerable portion of the population.

- Survey Respondent

“We initially required staff to be vaccinated but due to staffing shortages and employee pushback, we are now “strongly encouraging” employees to get vaccinated.”

“Staff are not allowed to work with clients without vaccine.”

- Survey Respondent

Challenge for 2021

“Adapting to a new normal that can switch in a matter of weeks all while clients and staff have been trying to live, survive, and meet required program deliverables under constant pressure, stress, and trauma of a global pandemic, national strife, and local/family economic and health upheavals.”

- Survey Respondent

- A comment to “the most significant challenge” question addressed the **need to access public buildings** to keep operations going.
- COVID vaccination was cited in various comments as both a need/priority and a challenge.
- A comment to the county specific questions addressed the fact that some county government leaders tend to be “reactive” when crises occur and should try and work hand in hand with nonprofits.

DIVERSITY/INCLUSION/EQUITY

- While 65% of organizations said that they have people of color in staff leadership positions, the comments show that many included board members in their answer.
- While 40% of organizations said that their board compositions align with the racial composition of the people/community they serve, **44% said that less than 10% of their board members are people of color.** (*aligns with national findings*).
- **46% of organizations reported “actively implementing action steps towards racial equity and other aspects of diversity, equity, and inclusion.”**
- **53% of organizations reported having developed or are in the process of developing written DEI policies.**
- The comments indicated a **level of confusion re: terms like “diversity” and “people of color.”**
- When asked to describe the “vulnerable populations” nonprofits are working with, the answers included **all groups that are culturally, economically, medically, socially, and racially underserved or under resourced.**
- A comment indicated that in 2020, there were more killings of unarmed Black men, women, and children than in any other year.
- Another comment indicated that Wicomico County is second to Baltimore in rates of incarcerated per capita and that “re-entry citizen” services would prevent this population from ending up homeless.

II. TRENDS/NEEDS IDENTIFIED ON NATIONAL SURVEYS:

In order to put this needs assessment within a broader context, we reviewed similar surveys that had a national scope, as well as a Maryland survey that was done early in the pandemic. Whenever possible, in addition to presenting our results, we compared our data to that of our national peers.

Sources: CCS Fundraising 2021, National Philanthropic Trust: March 27, 2021, Nonprofit Leadership Center: November 2020, 2021 State of the Nonprofit Sector, BKD: October 2020

FUNDRAISING:

- The pandemic has had mixed impact in development/fundraising. **Almost as many respondents saw an increase in fundraising than those that reported a decline.**
- Nonprofits are finding success with major gift fundraising. **The overwhelming majority of respondents find virtual solicitations as successful if not more than in-person solicitations.**
- Over a third of nonprofits have **emphasized “unrestricted funding”** as a result of COVID.

- Survey respondents saw some **increases in gift planning activity** amid the pandemic, both in the number of gifts and the amounts of the gifts.
- Nonprofits that are not providing relief efforts are likely to experience a significant drop in revenue.
- Fees for services and programs have decreased for the majority of respondents.
- **Arts/culture/humanities experienced the greatest income decreases of all focus areas; the greatest increases have been for health and human services.**

DIVERSITY EQUITY INCLUSION:

- **Over half of nonprofits changed some aspects of their operations in response to society's focus on social justice and equity**
- Less than 20% of respondents say their board of directors reflects strong diversity across race, gender, experiences, expertise, and other related factors. **55% say they have some diversity but have more work to do, while 26% say they do not have a diverse board.**
- Leaders say the most significant barrier to building a diverse board is identifying and recruiting people of color who are passionate about the mission.

OPERATIONS:

- Over two third of respondents said they were either planning to offer remote work options or considering it for their development staff.
- **77% of U.S.-based nonprofits only have up to 12 months in reserves. Of those, approximately 25 percent have less than six months of operating expenses in reserve, and 10 percent have less than 30 days.**
- More than half of respondents said that in 2021 they will either be able to keep their current staffing model in place or will require additional services from agencies or partners six months from now. Only 23% of respondents said they will need to lay off or furlough staff.
- When asked "What types of additional assistance would be most helpful to your organization?", organizations overwhelmingly suggested additional assistance in the form of forgivable loans.

III. TRENDS/NEEDS IDENTIFIED ON MARYLAND NONPROFIT SURVEY (SUMMER 2020)

FUNDRAISING:

- All sources of revenue are seeing downward pressure, and Fee for Service revenue was the most impacted of all revenue streams with 24% indicating down by more than 50%.

DIVERSITY EQUITY INCLUSION:

- **BIPOC-led organizations were more likely to be in the human services and health fields.** Black, Indigenous, and People of Color are under-represented in the leadership of organizations in the arts, culture, and humanities as well as organizations focused on environment and animals.

- **Black, Latino and Asian people are under-represented and White people are over-represented in nonprofit executive director positions.** Native Americans had a stronger showing, with twice the state's representative number serving as nonprofit executive directors.

OPERATIONS

- Half of the respondents received the Paycheck Protection Program loan.
- 10% of organizations furloughed staff, 12% saw layoffs, and 19% reduced staff hours.

For any questions, please contact:

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