

*Bayer Center for
Nonprofit Management*

The Economy & Your Organization: *Nonprofit Management Survey Findings*

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Bayer Center for Nonprofit Management

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I. Executive Summary

In the fall of 2008, the Bayer Center for Nonprofit Management at Robert Morris University (BCNM) launched a longitudinal survey to assess the current and anticipated impact of the economic recession on nonprofit organizations in Southwestern Pennsylvania. The survey was designed to begin a benchmarking process that would monitor sector trends and summarize key findings in a report format. The survey was redistributed in the spring of 2009, and a follow-up public presentation was held to discuss the report's results and key findings in May of 2009.

Thanks to the generous support and the interest of the Richard King Mellon Foundation in these findings, the Bayer Center has been able to continue our efforts to measure how our region's nonprofits are faring – merely surviving or happily thriving? – in these trying times. This most recent iteration of the survey was distributed in the summer of 2010.

The survey focuses on organizational capacity and management issues. It was conceived as a complement to other research being conducted, including the work of the Forbes Funds that examined the impact of the economy on demand and delivery of program services.

Survey participation has grown steadily. The fall 2008 survey was completed by 72 respondents and the spring 2009 survey was completed by 96 respondents. The most recent survey had 131 respondents, representing a 36 percent increase since 2009 (and an 82 percent increase since 2008!). As we indicated in our last report, this growth in responses might be viewed in its own right as an indicator of the economic impact and concern among those asked to participate.

The responding sample is diverse. Nonprofits from eleven identified subsectors answered the survey, with budget sizes ranging from less than \$100,000 to more than \$10,000,000.

In keeping with past survey formats, survey questions were grouped into four topic areas: finances, fundraising, operations and demographics. Additionally, several open-ended questions were included in the most recent version to allow for less directed responses, as well as several questions soliciting feedback on Bayer Center programs and services.

The following report summarizes the 2010 survey results. The report contains both longitudinal data that compare the 2010 survey with the 2008 and 2009 results and additional information gleaned from new questions. The appendix includes detailed analysis of each survey question, complete with summary findings, charts and data tables that present respondents' answers on a budget and mission-level.

We hope this report serves as a catalyst for continuing discussion and seeking of solutions to the economic challenges many of us face. The Bayer Center welcomes your thoughts on how best to disseminate this information and use the data to continue to strengthen our regional nonprofit community.

II. Key Findings

In this third instance of BCNM's survey, "The Economy & Your Organization," we find a regional nonprofit sector that has weathered an intense storm only to find itself eyeing an overcast sky and wondering if a new front is moving in or if the sun is about to come bursting through. Interestingly enough, the opinions seem to be evenly divided on this point.

FUTURE PROSPECTS AND SIZE DIFFERENCES

Among our survey respondents, 44 percent believe that their financial situation will be better one year from now, and 46 percent think it will be the same or worse. There is a similar even split when respondents compare today to the recent past. 28 percent feel their situation is better than one year ago, and 30 percent see it as worse. With such divergent opinions, it is difficult to definitively identify major trends. Individual organizational situations seem to be as varied as the sector – differing widely by size, mission, and even from one organization to another.

Overall, smaller organizations seem to have found some degree of stasis – having been forced by limited resources and enabled by the nimbleness of small size to react earlier to the situation, while larger nonprofits display some degree of lag and are now projecting more volatility than the smaller groups. For example, while only 24 percent of organizations with budgets of less than \$100,000 indicate that their financial situations are worse today than one year ago, this number increases fairly steadily with size and peaks at 44 percent of groups over \$10 million who feel that things have gotten worse. At the same time, these largest organizations also report the strongest feeling that things have gotten better (also 44 percent). Looking ahead, however, nonprofits over \$10 million are the least optimistic, with only 22 percent projecting that their financial situation will be better a year from now.

Budget projections reflect similar volatility. **While only 20 percent of all respondents expect their budgets to decrease next year, the largest organizations have the highest response both when it comes to anticipated budget increases (67 percent) and budget decreases (33 percent).**

CASH AND CREDIT

The largest nonprofits also are the least worried about cash flow, with only 22 percent expecting cash flow challenges, and **more than 75 percent of them reporting operating reserves of at least four months.** Interestingly, 50 percent of human service organizations report more than six months of operating reserves.

Some very positive news is that, after starting at 67 percent in 2008 and rising to 80 percent in 2009, **the total percentage of organizations expecting cash flow challenges has dropped to a three-year low of 55 percent.** Community development, environmental, and health-related respondents appear to be especially challenged in this area with at least 80 percent expecting to struggle with cash.

Use of lines of credit has decreased slightly, from 51 percent in 2008 to 44 percent in 2010. **Of significant concern is the fact that 24 percent of organizations with lines of credit have no committed source of funds to repay the debt. This is a highly risky financial strategy and should be avoided, because it represents a potential threat to the survival of the organization.** Of related concern is the percentage of organizations with fully borrowed lines of credit – progressing from 0 percent in 2008 to 7 percent in 2009 and 12 percent in the current survey. Finally regarding lines of credit, two-thirds of organizations report that no Board approval is required for using the lines. The preceding information about repayment and full borrowing suggests that this may be a short-sighted practice. **At the very least, a Board policy should be in place defining how and when the line may be used, and what authorizations are required.**

FUNDING

Respondents indicate no significant loosening of corporate, foundation or government purse strings. 85 percent felt that corporations had tightened their giving in 2008, and this figure remains at 82 percent in 2010. Similarly, foundation tightening was reported by 83 percent in 2008 and 81 percent in 2010, while reports of government tightening increased from 63 percent to 81 percent over the same period. **The notable exception is individual giving which was reported as tighter by 77 percent of respondents in 2008 and only 58 percent most recently.** At the Bayer Center, we believe this is a testament to the inherent generosity of Americans and that it reinforces our long-standing commitment to promoting and teaching professional and strategic approaches to individual donor relations.

When asked if funding has improved since the stock market rebounded, 10 percent indicated improvement in government funding, 18 percent in corporate, 31 percent in foundation, and 40 percent in individual giving. Improvements in foundation funding were felt primarily among community development, environmental, higher ed, and human services organizations, and **improvements in government funding were felt almost exclusively by organizations with budgets in excess of \$5 million.** Improvements in individual giving were felt in the middle, with the largest (budgets over \$10 million) and smallest (budgets under \$100,000) organizations reporting little loosening in individual giving.

Fundraising campaigns seem ready to come bouncing back. While 20 percent of organizations report having delayed fundraising efforts because of the recession, fully two-thirds of these intend to launch campaigns. **Of these, nearly 80 percent are projected to begin before the end of 2010. If this comes to pass, it will create a highly competitive environment within a still struggling economy that may severely compromise the prospects for success of one or more campaigns.**

When it comes to honoring commitments, 25 percent of respondents report that they have had pledged or contracted payments delayed or cancelled. This represents a steady increase from 19 percent in 2008 and 23 percent in 2009. **This type of uncertainty makes the aggressive approach to the use of debt that was discussed earlier even more problematic.**

Another positive note is a growing acceptance of unrestricted funding. While only 4 percent of respondents indicated more government willingness to provide unrestricted funds, 17 percent said that businesses are more open to this type of funding, 34 percent for foundations, and 58 for individuals.

OPERATIONAL CHANGES

Cost-cutting continues to grow. 54 percent of organizations reported implementing cost-cutting measures in 2008, and this number has increased steadily to 75 percent in 2009 and 82 percent in the current survey. Among these, 41 percent report redesigning staff roles, 25 percent report a hiring freeze, 12 percent have utilized staff furloughs, and 10 percent instituted pay reductions. **Given the direct impact of these measures on the need for staff to do more with less, it is not surprising that fatigue and burn-out appear repeatedly as key organizational threats in the survey's open-ended questions.**

Where staff reductions occurred, the departments most affected in all organizations up to \$5 million in budget size were program. In larger organizations, management felt more cuts. This is reflected in the dual findings that **21 percent of all responding organizations eliminated one or more programs, but 17 percent of these largest organizations report adding 3 or more programs.**

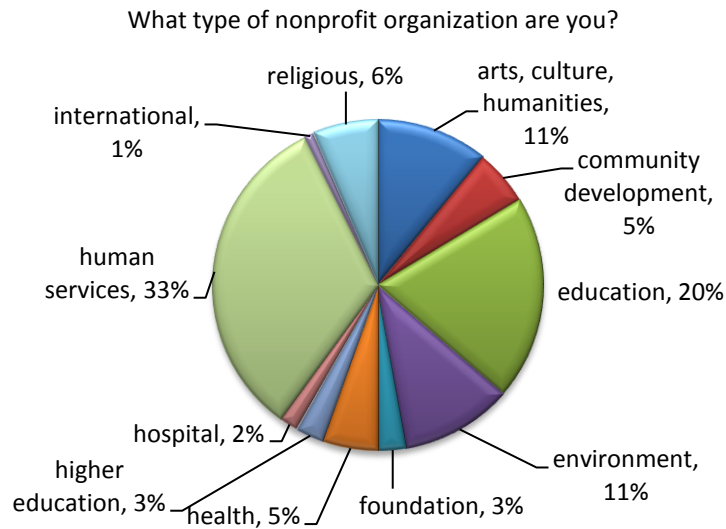
SOME FINAL THOUGHTS

One in five survey respondents (19 percent) indicates that the current state of their organization has not been affected by the recession, and 41 percent report varying degrees of impact but believe they are stable. This is good news. What is troubling, however, is that 31 percent have felt some impact and are unsure about their status, and 9 percent were hit hard and are unsure. In other words, **four out of ten respondents – 40 percent – are unsure about the current state of their organization because of the economic climate.**

On the positive side, in unity lies strength. Cutting programs, reducing costs, and demanding more of staff are not the only solutions that our resilient sector has found for current economic pressures. **Working together is gaining more and more traction. 42 percent of survey respondents reported some form of collaboration or merger consideration, with 34 percent collaborating on programs, 15 percent collaborating administratively, and 7 percent looking at merger possibilities.**

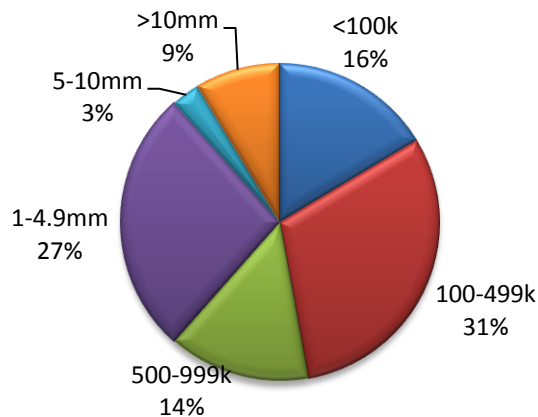
As you read through the following materials, remember that you are not alone. You will undoubtedly find your own organization reflected in many of the answers. We encourage you to think creatively. What do you do better than anyone else? Where does another organization have more expertise than your own? How can you combine your resources to strengthen your own nonprofit and, more importantly, fulfill your mission even more effectively? Maintain your identity, continue to do what you do best, but remain open in your search for constructive partnerships that enhance the powerful sector in which you work so hard to make our community a better place for all.

III. Survey Participants



For the 2010 survey, human services organizations led the way with 33 percent of the total respondents (n=110). Education was the next highest at 20 percent, followed by arts, culture and humanities and environment at 11 percent. **Collectively, human services, education, the arts and environment represent 75 percent of survey respondents.** This is an increase from the 2009 survey when these four missions collectively represented 66 percent of survey respondents (community development played a larger role in 2009). Subsector categorization was self selected by the respondents.

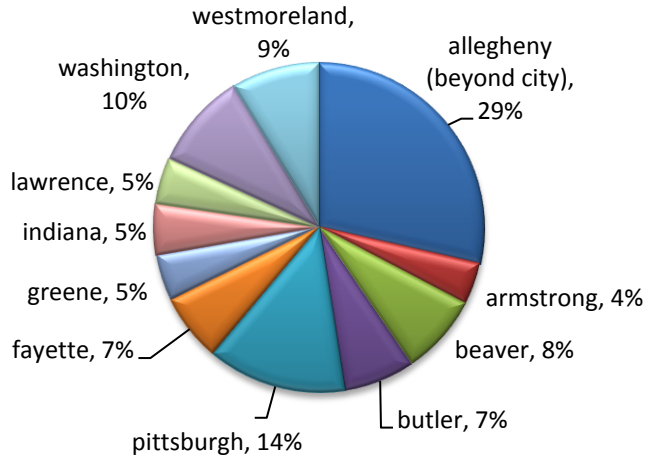
What is your organization's approximate annual budget?



Although survey budget sizes varied, **the majority of respondents, or 62 percent, worked for a nonprofit with an annual budget of less than \$1 million.** Nearly 90 percent of the respondents (n=104) were employed by an organization with a budget of less than \$5 million. The two most common budget sizes were of organizations with operating budgets from \$100,000 to \$499,999 (31%) and \$1,000,000 to

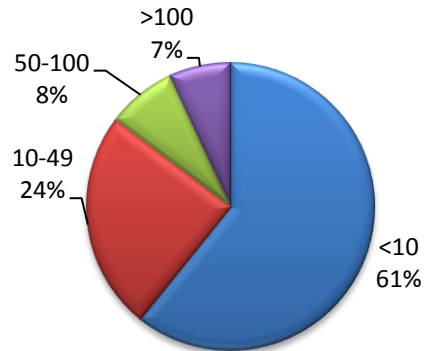
\$4,999,999 (27%). This is in-line with the 2009 survey results when these two budget ranges combined to represent 53 percent (versus 58 percent in the current survey) of the total respondents.

Which area(s) does your organization primarily serve?

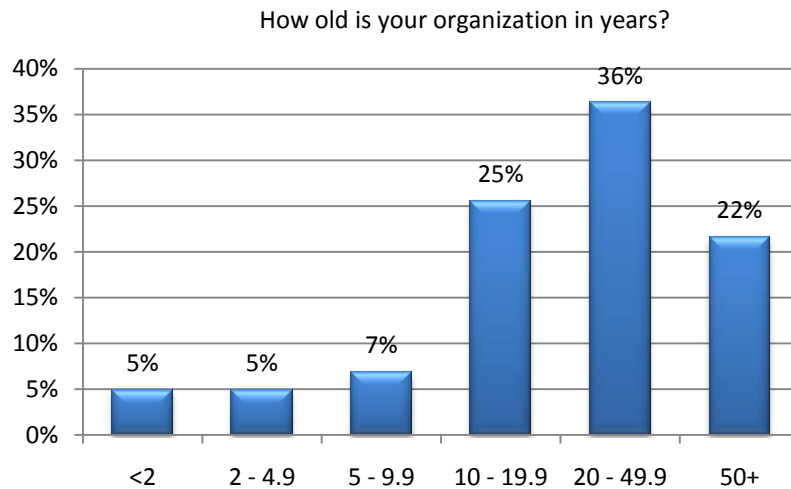


Over 40 percent of the total respondents serve the City of Pittsburgh and the surrounding Allegheny County region. Of the remaining, approximately 40 percent of respondents operate organizations in Washington, Westmoreland, Beaver, Butler and/or Fayette County.

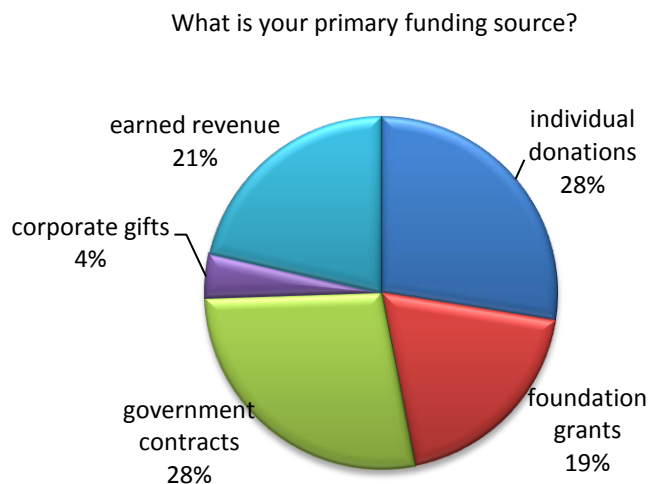
How many full-time employees does your organization have on staff?



The majority of survey respondents, or 61 percent, are employed at a nonprofit with a full-time staff of fewer than ten employees. Collectively, **85 percent of respondents work at a nonprofit with fewer than 50 full-time employees.**

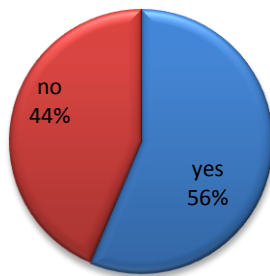


The overwhelming majority of survey participants work at an established organization. Over 8 out of 10 respondents, or 83 percent, work at a nonprofit that has been in existence for 10 years or more, with nearly 60 percent of respondents employed at an organization that has been in existence for two decades or more. Perhaps most interesting is that there are more survey respondents who work at nonprofits that are 50 years old or more (22 percent) than at a nonprofit that has been in business for less than a decade (17 percent).



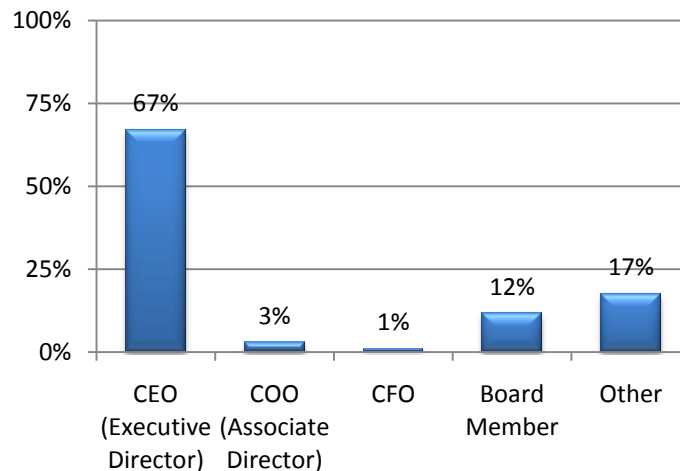
Survey respondents are evenly distributed across primary funding sources, with the exception of corporate philanthropy. Another way of interpreting the above chart is that contributions and grants comprise 51 percent of respondents' primary funding sources, with earned income sources (including government contracts) the remaining 49 percent. Accordingly, **the respondents of the 2010 survey are evenly split on whether their primary funding source is philanthropy or earned income.**

Does your organization provide critical services to people in need?



Over half the respondents answered “Yes” that their organization provides critical services to people in need. However after cross-examining these answers by mission type, we are skeptical that all respondents properly understood the question or answered it correctly. (For example, seven out of nine arts, culture and humanities organizations answered “Yes” to the above.)

What is your current position?



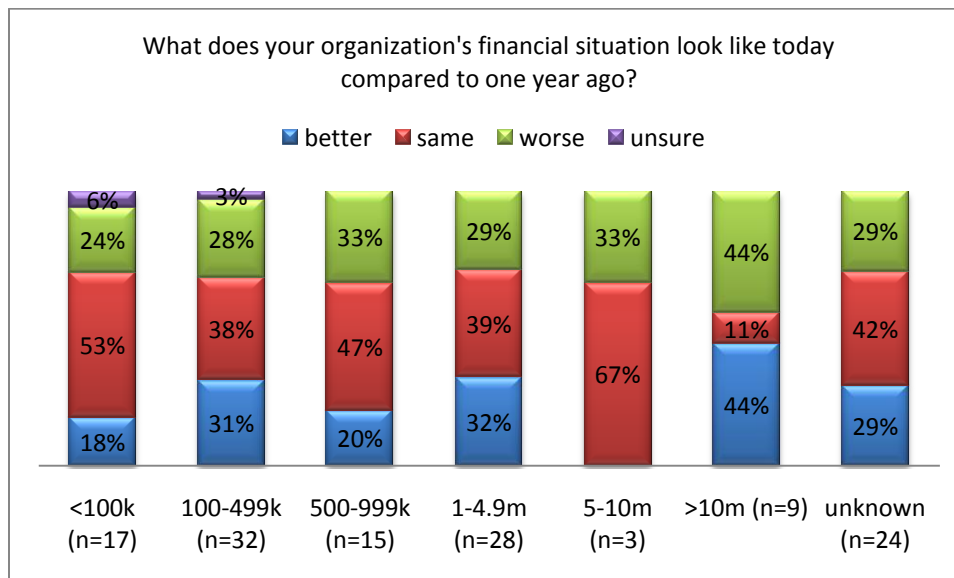
The majority of survey respondents are organizational leaders. Over four out of five respondents are C-level executives or board members, two-thirds of the respondents identified themselves as the CEO. **Therefore, the reader can be confident that the survey results to follow were derived from answers provided by actual organizational leaders who are best positioned to evaluate how the economy has impacted their organizations.**

IV. Finances

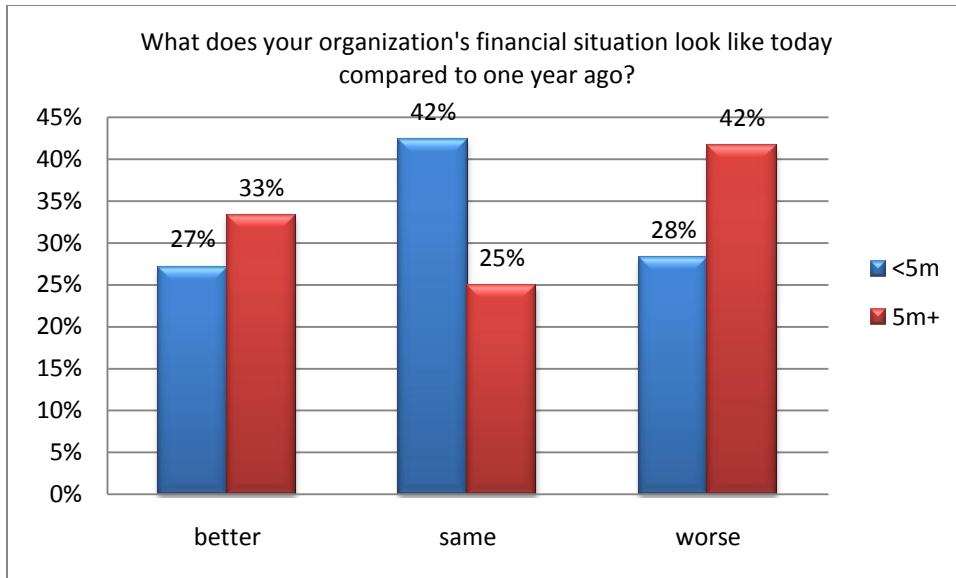
1. What does your organization's financial situation look like today compared to one year ago?



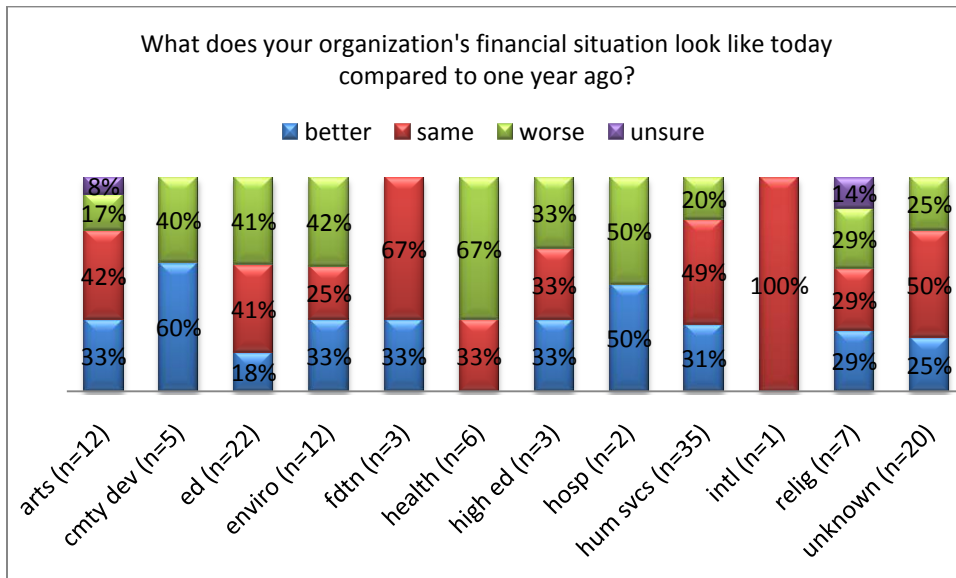
Compared to one year ago, two out of five respondents replied that their financial situation looked the same today as it did one year ago. Of the remaining 60 percent, respondents were nearly split as to whether their present financial situation was worse or better than it was one year ago.



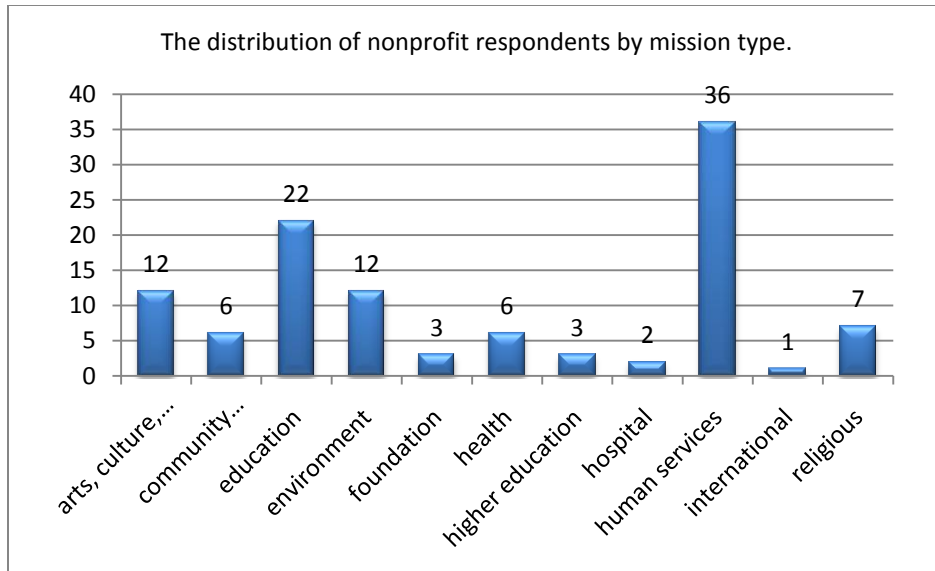
Not surprisingly, only 18 percent of respondents associated with a nonprofit that has an operating budget of less than \$100,000 responded that their present financial situation is “Better” than a year ago. On the other hand, 77 percent of respondents associated with a similar size nonprofit stated that their present financial situation is the “Same” or “Worse” compared to one year ago. Note that six percent of respondents associated with organizations of similar size were “Unsure” as to how their present financial situation compares to that of a year ago.



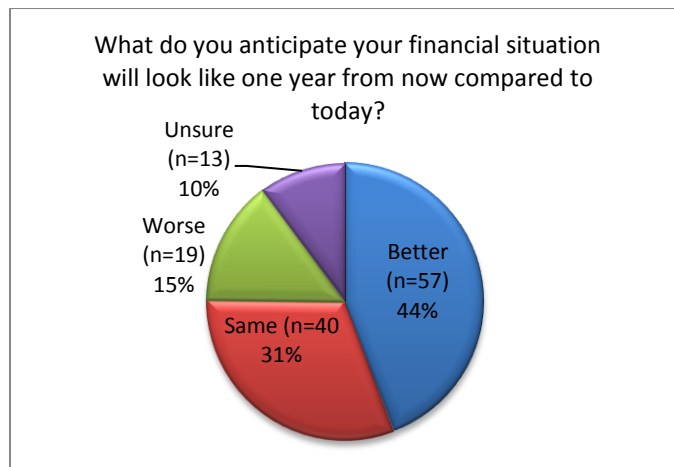
For larger organizations, or those with operating budgets of \$5,000,000 or more, we saw a higher concentration of respondents who answered that their financial situation is “Worse” today (42 percent) than one year ago. Conversely, for most small to medium sized nonprofits, 42 percent of respondents answered that their financial situation today is the same versus one year ago.



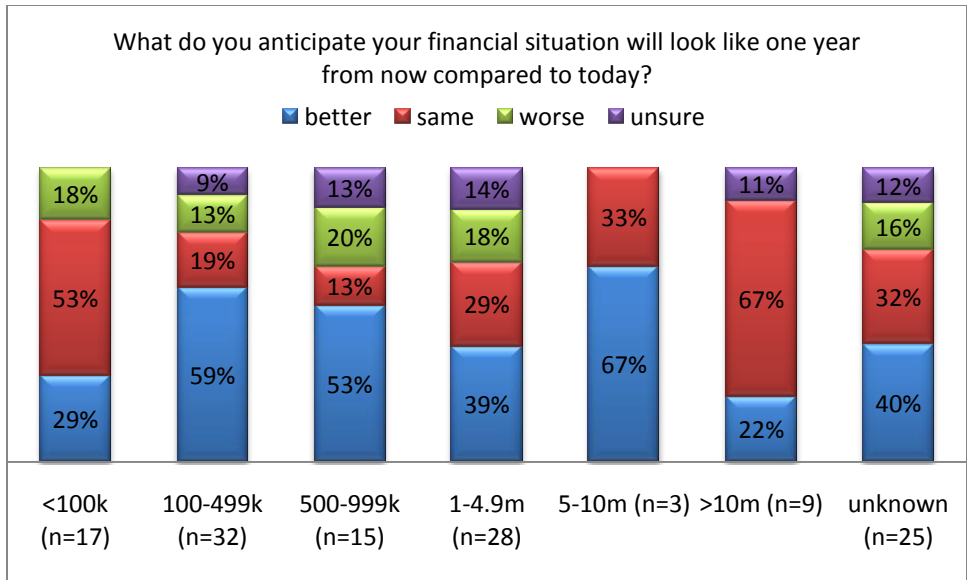
Analyzing the responses to question one on a mission basis, we see that hospitals and community development organizations had the highest percentages of “Better” responses. Similarly, those two missions, along with health, environment and education, all reported high concentrations of 40 percent or more of “Worse” answers than other mission types. It should be noted, however, that for this and future mission-based charts, some of the sample sizes are quite small:



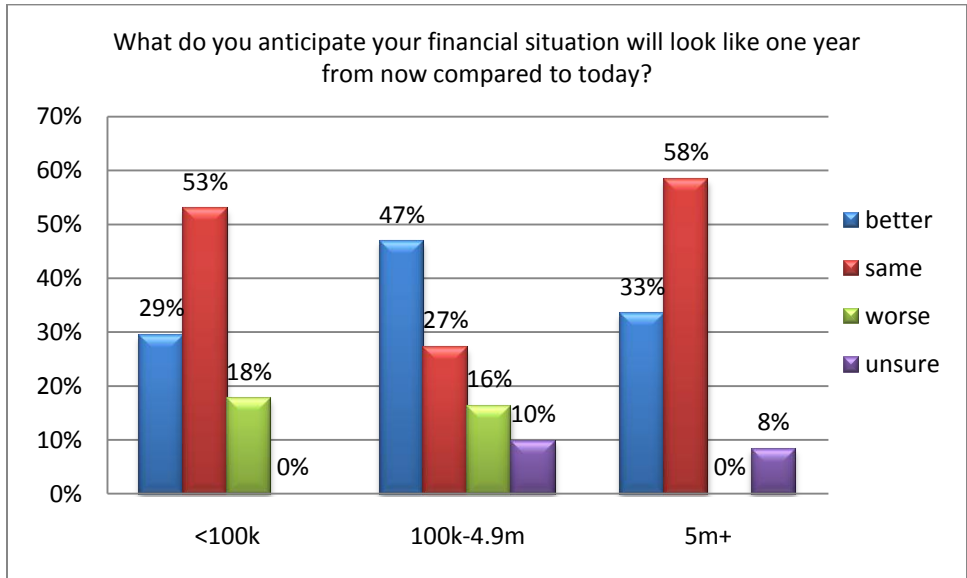
2. What do you anticipate your financial situation will look like one year from now compared to today?



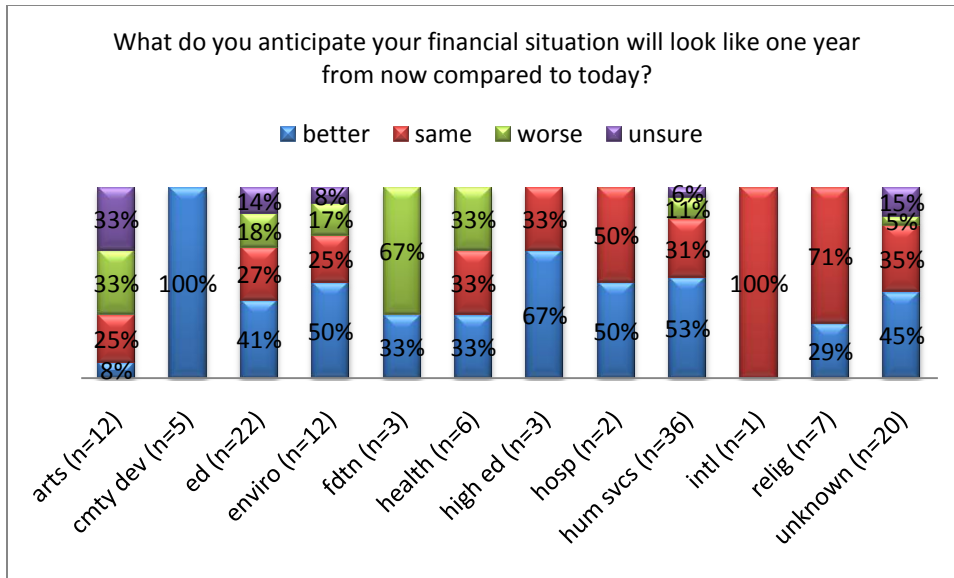
While nearly two out of five respondents answered that their financial situation was the “Same” today as it was one year ago, slightly more than two out of five respondents, or 44 percent, believe that their nonprofit’s financial situation will be “Better” a year from now.



When organizational size is factored in, approximately ten to 20 percent of respondents at small to medium sized nonprofits believe their financial situation one year from now will be “Worse.” Respondents of larger nonprofits largely believe their financial situation will be the “Same” to slightly “Better” a year from now, with no respondents answering “Worse.”

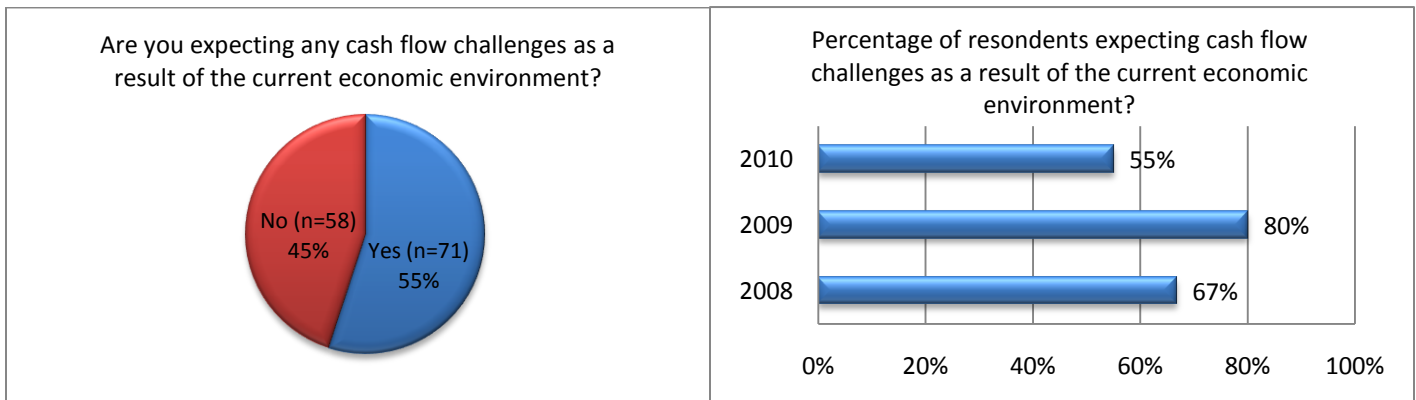


Of note, respondents who work at small to medium sized organizations in excess of \$100,000 but less than \$5,000,000 appear to be the most optimistic about their financial situation a year from now. At the same time, however, this group also expresses the greatest uncertainty with 26 percent expecting to be in “worse” shape or feeling “unsure” about the future.

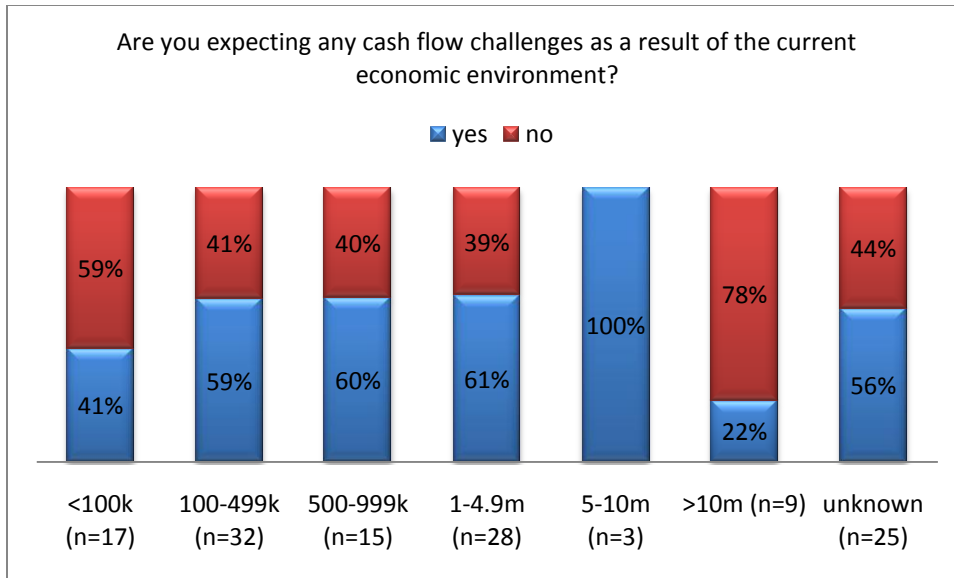


The mission types that answered “Better” 50 percent or more consist of community development, higher education, human services, hospitals, and environmental organizations. The mission types that had the highest concentrations of “Worse” answers were foundations, arts, culture and humanities, and health organizations.

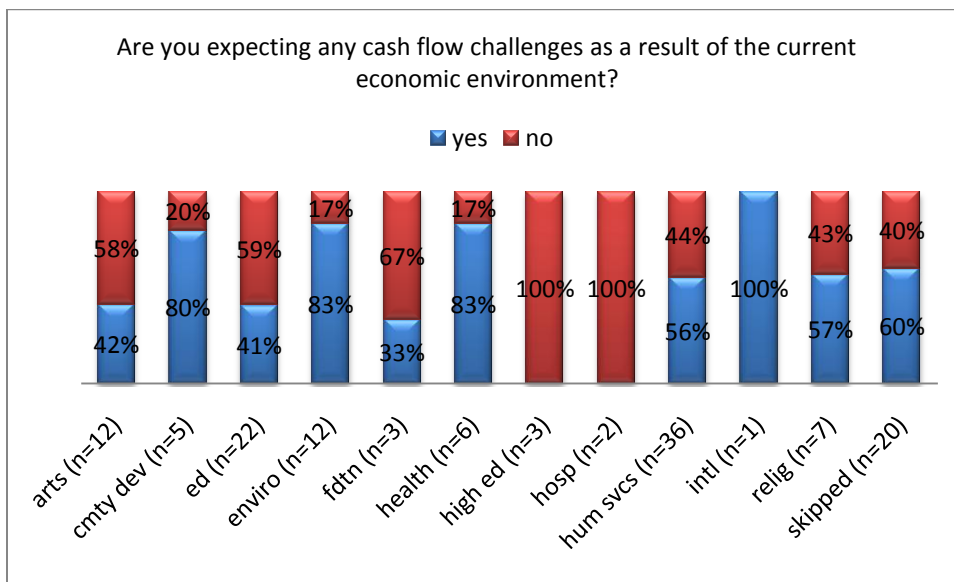
3. Are you expecting any cash flow challenges as a result of the current economic environment?



The majority of respondents, or 55 percent, are expecting cash flow challenges. While still significant, this result is much lower than the previous two surveys administered in 2008 (67 percent) and 2009 (80 percent).

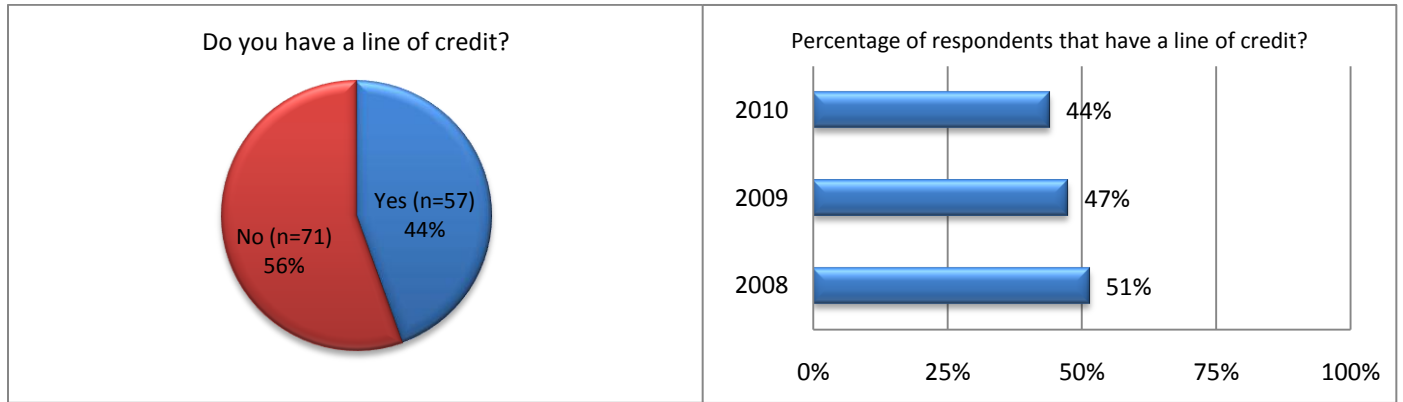


Most of the respondents that are expecting cash flow challenges work at small to medium size organizations. Very large organizations, or those with an operating budget in excess of \$10,000,000, are less concerned with cash flow challenges.

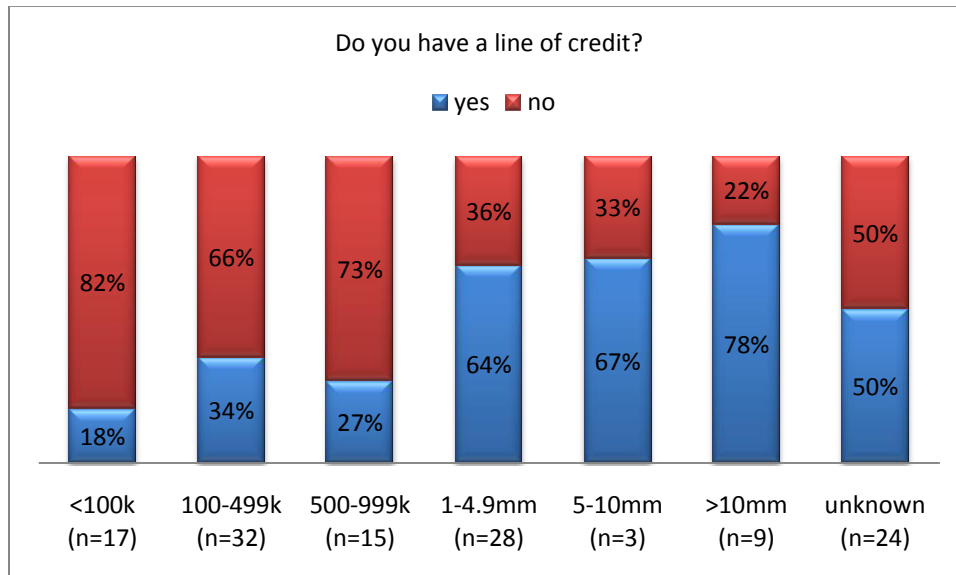


A number of mission types displayed high concentrations of “Yes” answers when asked if they expect any cash flow challenges. For example, international (there is only one international organization in the 2010 survey), environment, health, community development, religious and human services organizations all had concentrations of 50 percent or more of affirmative responses. Conversely, two-thirds or more of higher education, hospitals and foundations do not expect cash flow difficulties.

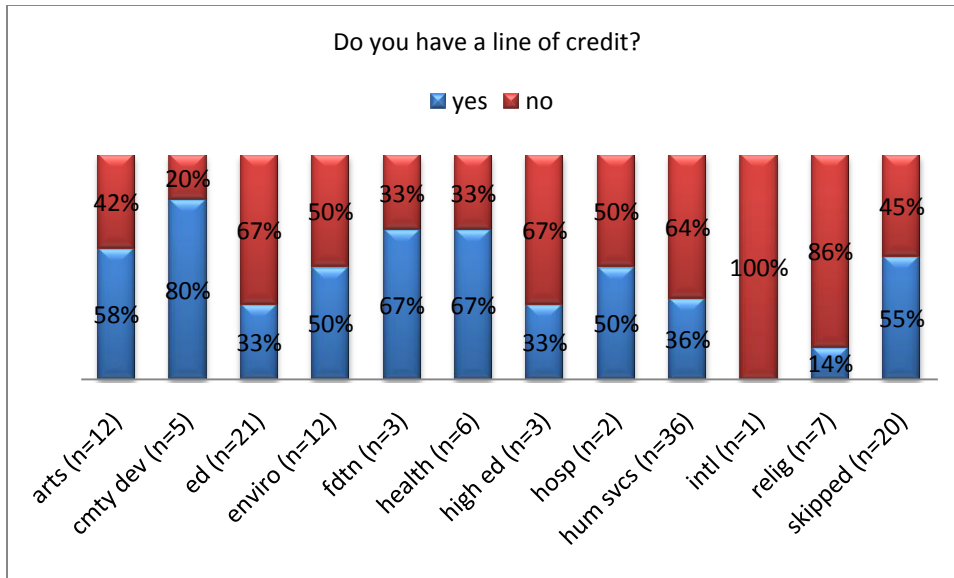
4. Do you have a line of credit?



Nearly half of the respondents reported that their organization does have a line of credit. This is in-line with previous survey results of 47 percent in 2009 and 51 percent in 2008.



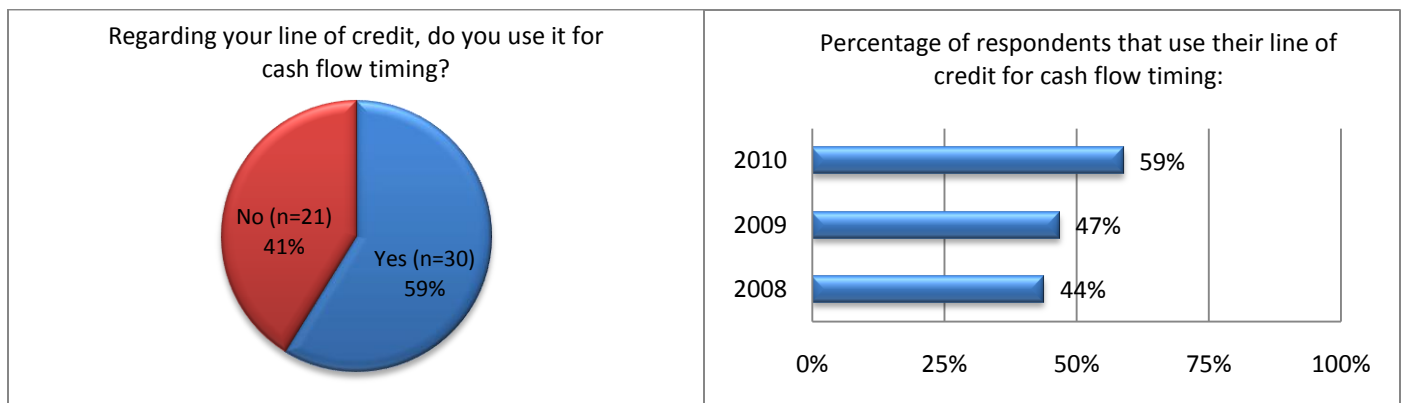
The preponderance of organizations with operating budgets in excess of \$1,000,000 have a line of credit, while the overwhelming majority of smaller organizations do not.



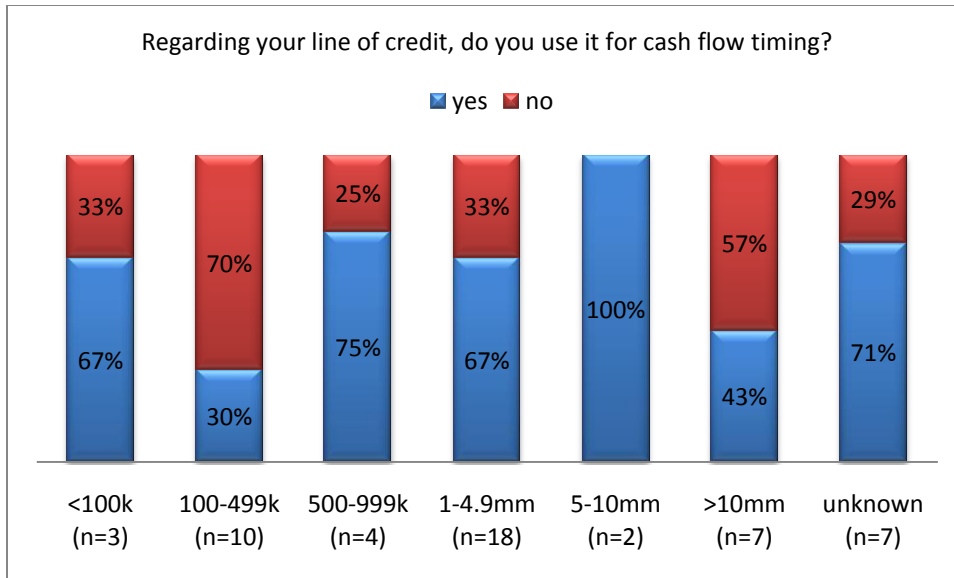
There appears to be little correlation between mission type and whether or not a nonprofit has a line of credit. Of the twelve missions listed in the chart above, eight of the mission types had 50 percent or higher concentrations of lines of credit.

Next, we asked a series of follow up questions to the respondents that answered “Yes,” their organization has a line of credit. Our objective in asking these more detailed line of credit questions is to better understand how respondents, and by implication their organizations, think about usage and repayment of debt and the strategic and governance implications involved.

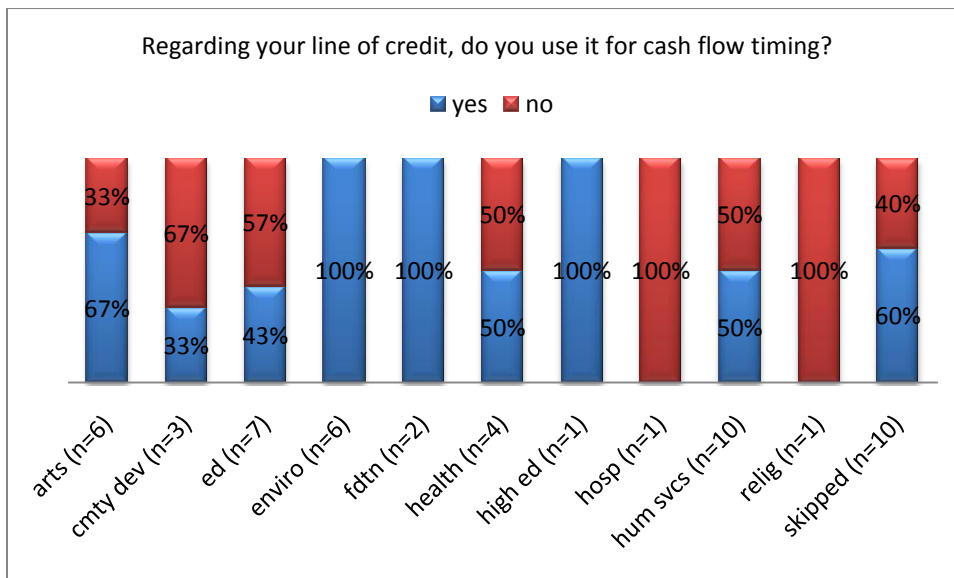
A. *Regarding your line of credit, do you use it for cash flow timing?*



When asked if their organization uses their line of credit for cash flow timing purposes (or working capital needs), nearly three out of five respondents answered “Yes.” This is a marked increase from 2008 and 2009.

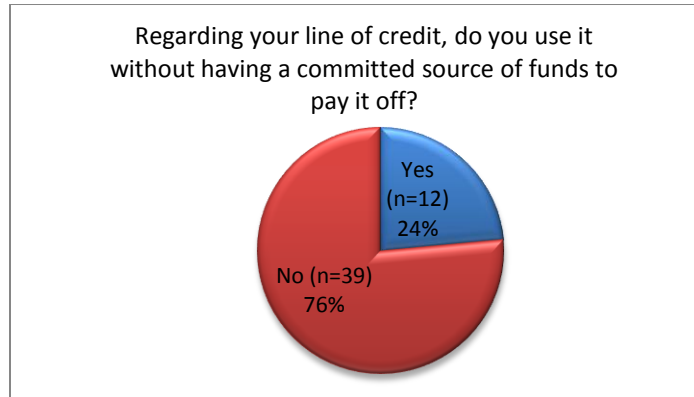


From the chart above, we see that budget size does not appear to be a determining factor for how an organization uses its line of credit.

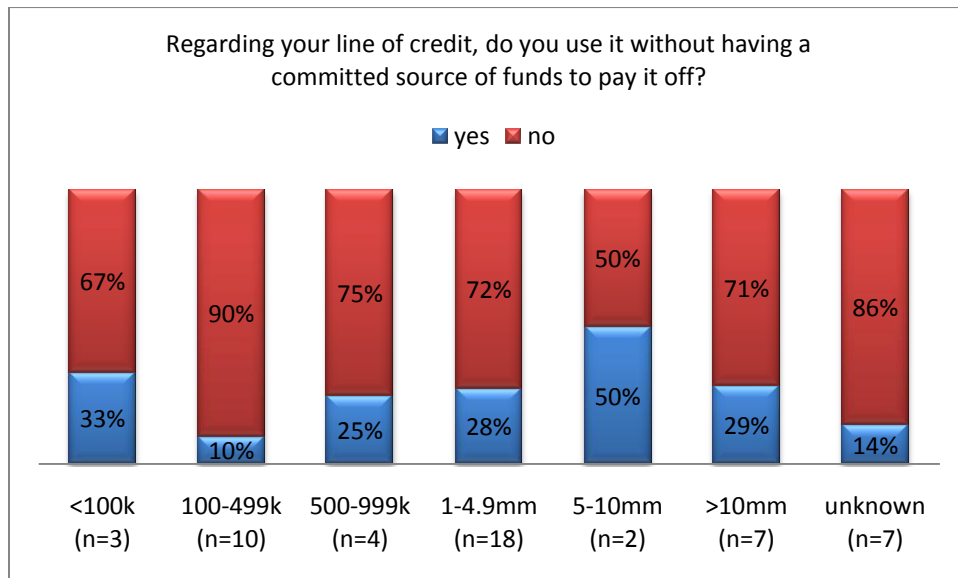


On the other hand, it appears that mission is related to how an organization uses its line of credit. For example, arts organizations often use their lines to subsidize working capital expenses until they can recoup the expenses through ticket sales. Many environmental groups that undertake capital projects are typically reimbursed by government sources in arrears and may need to use their line until they are reimbursed. Similarly, health and human services organizations often will use their lines of credit for payroll and other working capital expenses while they are waiting for reimbursements.

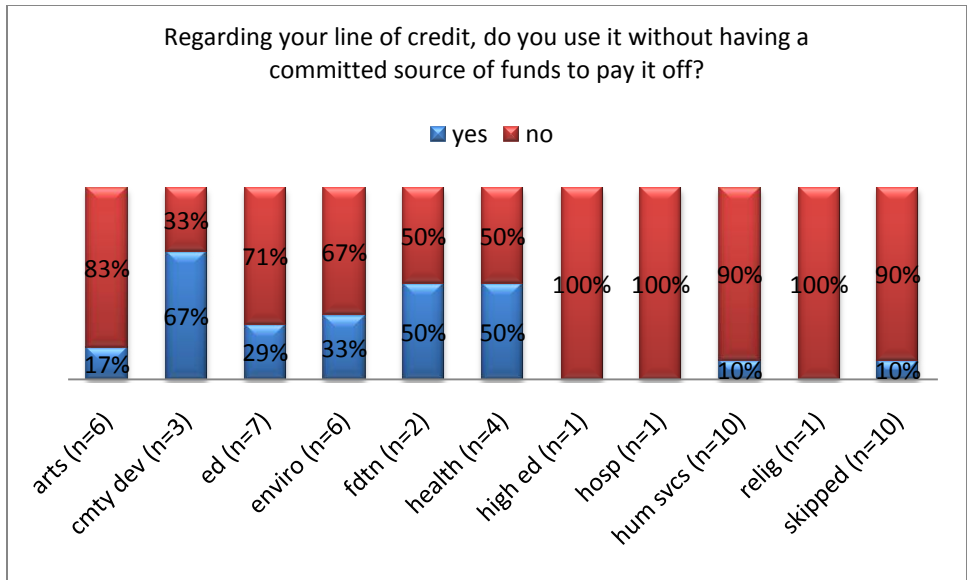
B. Regarding your line of credit, do you use it without having a committed source of funds to pay it off?



The good news is that slightly more than 75 percent of respondents' organizations with lines of credit do not use their lines without having a committed source of funds to pay it off.

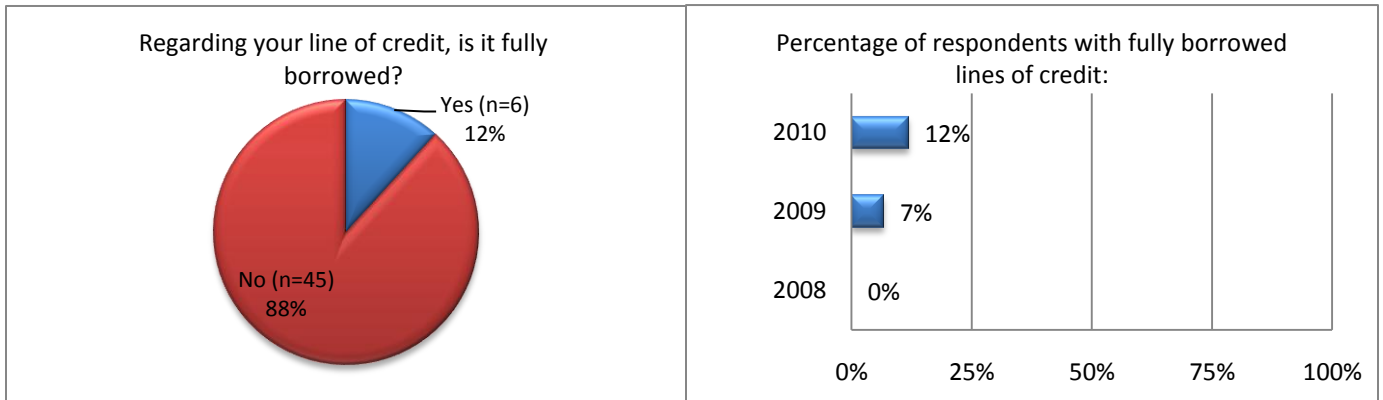


With regard to organizational size, we find that small to medium sized organizations, or those with operating budgets between \$100,000 and \$1,000,000, tend to be more conservative with respect to deficit financing. Very small organizations, or those with operating budgets of less than \$100,000, may be more aggressive with their deficit financing, and use their line of credit without having a committed source to pay it off simply because it may be the last resort. What is more troubling is that nearly one out of three organizations with an operating budget in excess of \$1,000,000 uses its line without knowing how it is going to pay it off.

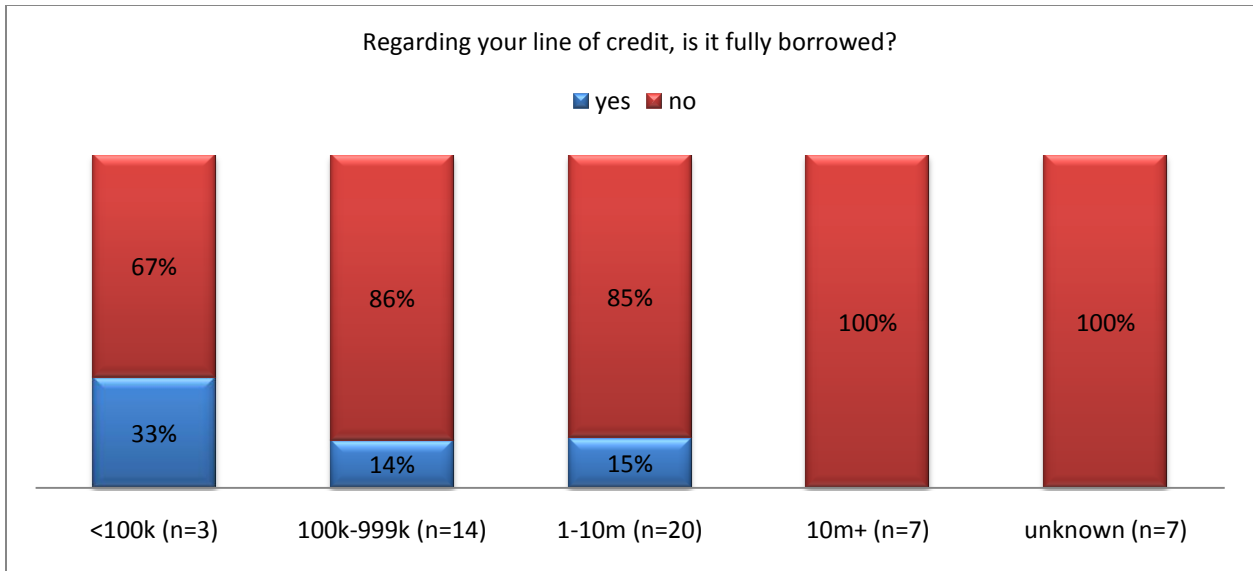


Community development, foundations and health organizations led the way with the highest concentration of “Yes” responses when asked the above question. However, because the sample size of respondents who have a line of credit is small, it is difficult to determine how meaningful the above data is when analyzed across the mission types.

C. Regarding your line of credit, is it fully borrowed?

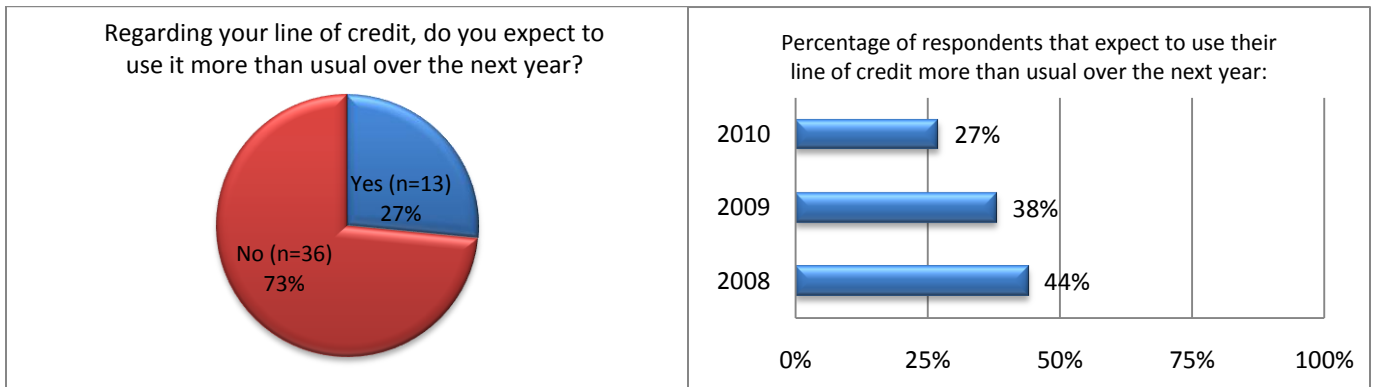


More than one out of ten respondents answered that their organization has fully borrowed its line of credit. This is nearly double the percentage of organizations that responded “Yes” in 2009.

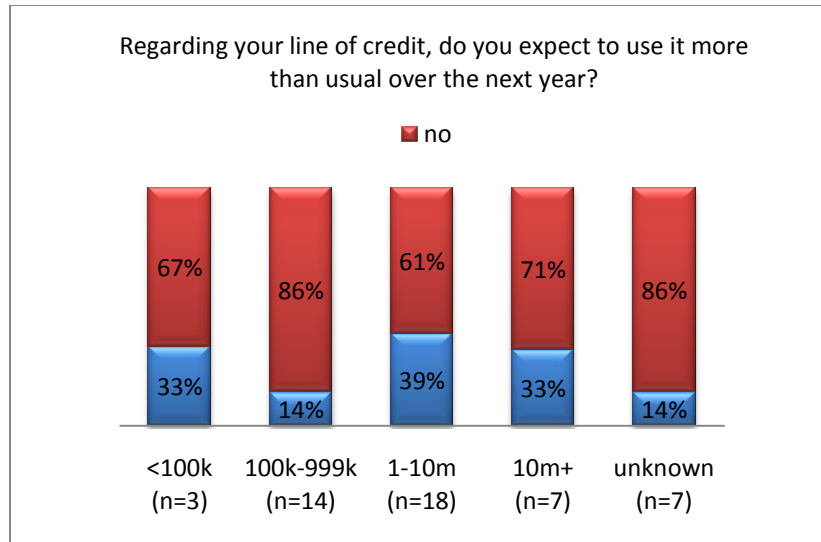


Very small organizations had the highest concentration of fully borrowed responses at 33 percent, yet also had the smallest sample size (n=3). For small to medium sized organizations, or those between \$100,000 and \$1,000,000, only 14 percent had fully borrowed lines (n=14). Similarly, 15 percent of medium to larger organizations (n=20) reported that they had fully borrowed their line of credit. For the largest organizations, not one had fully used their line.

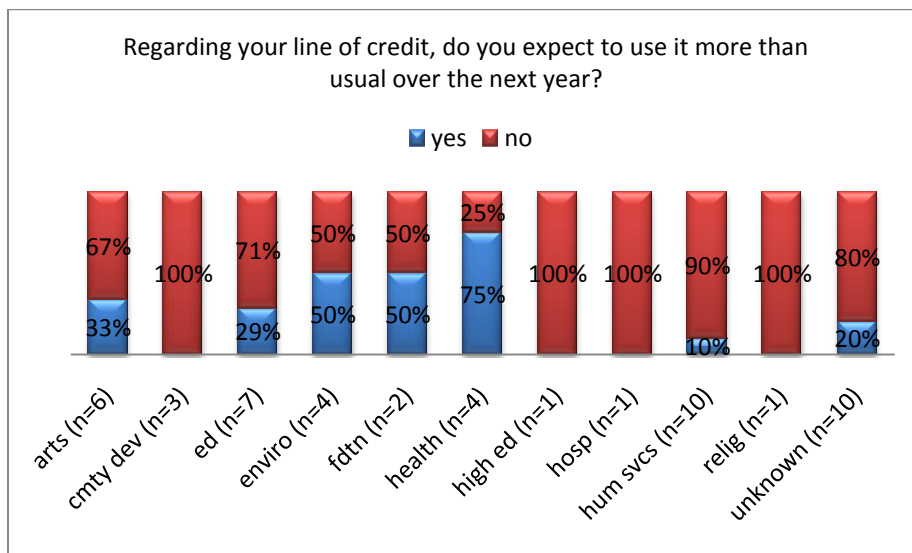
D. Regarding your line of credit, do you expect to use it more than usual over the next year?



Over one-quarter of respondents said that they expect their organization to use its line of credit more than usual over the next year. This is a sharp decrease from the results of the last two surveys when approximately 40 percent of respondents expected to use their line of credit more than usual that year.

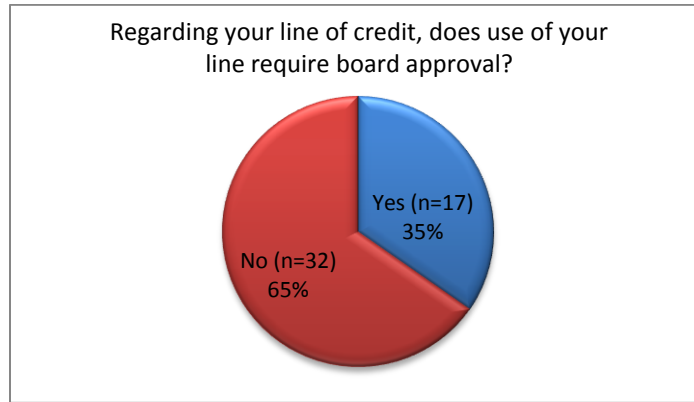


The bulk of the “Yes” responses were from medium to large sized nonprofits, or organizations with operating budgets of \$1,000,000. This is consistent with earlier findings that indicate a lag in financial pressure or volatility consistent with budget size.

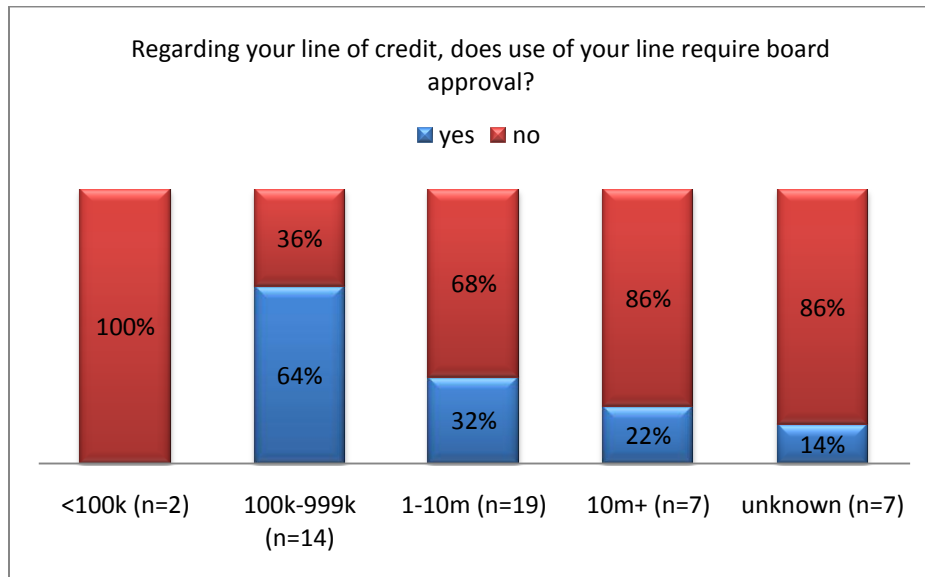


Health, followed by foundations and environmental organizations expect to use their lines of credit more than usual over the next year relative to other mission types.

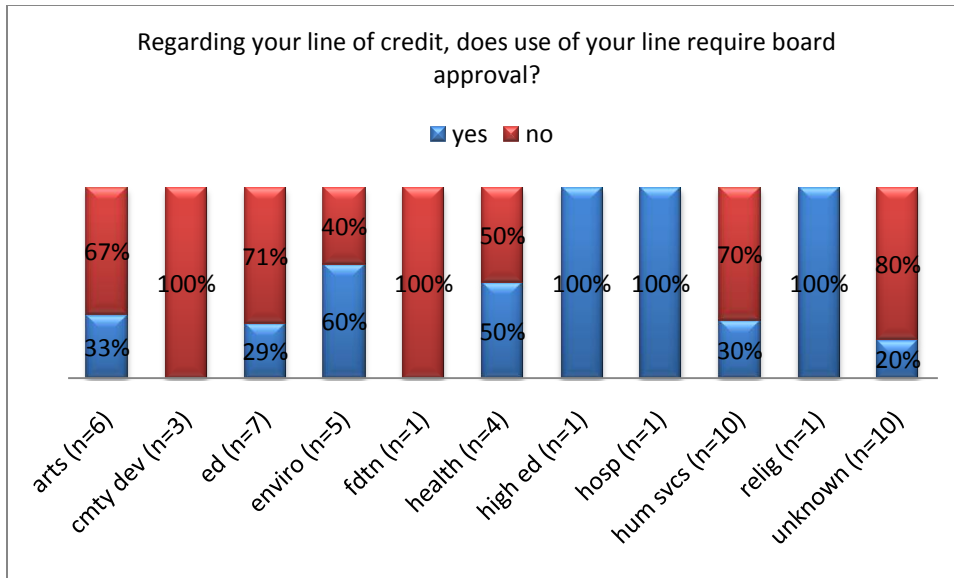
E. Regarding your line of credit, does use of your line require board approval?



Approximately two-thirds of respondents answered, “No,” that their organization does not need board authorization to use their line of credit. In a period where nonprofits, and their boards, are facing greater regulatory scrutiny from legislators and the community this is an enlightening discovery. In all cases, organizations with lines of credit should have a board-approved policy that defines how, when, and with what approvals a line may be accessed.

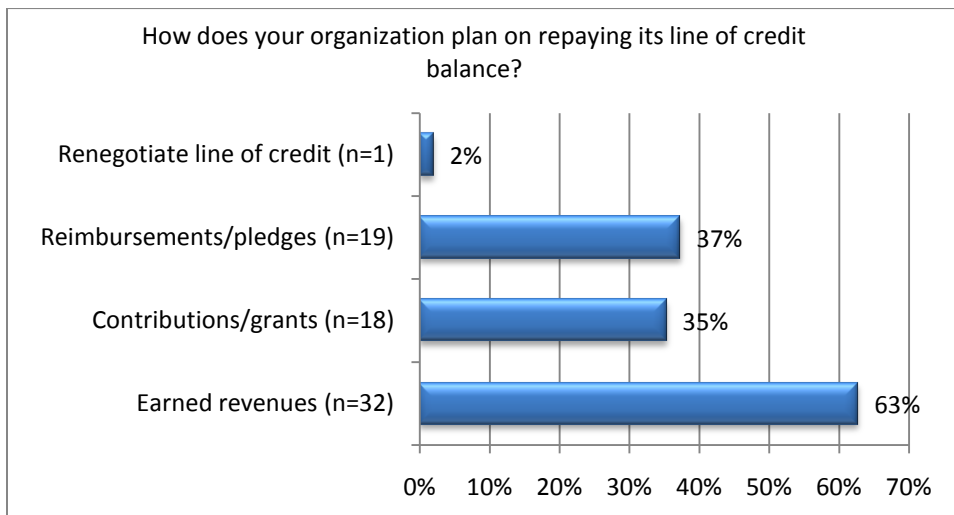


As the chart above demonstrates, only one budget size cohort – those with operating budgets between \$100,000 and \$1,000,000 – has a greater than 50 percent concentration of board approval needed. The rest of the nonprofits, from grassroots to the very largest, overwhelmingly do not require board approval when making decisions about using their lines of credit.

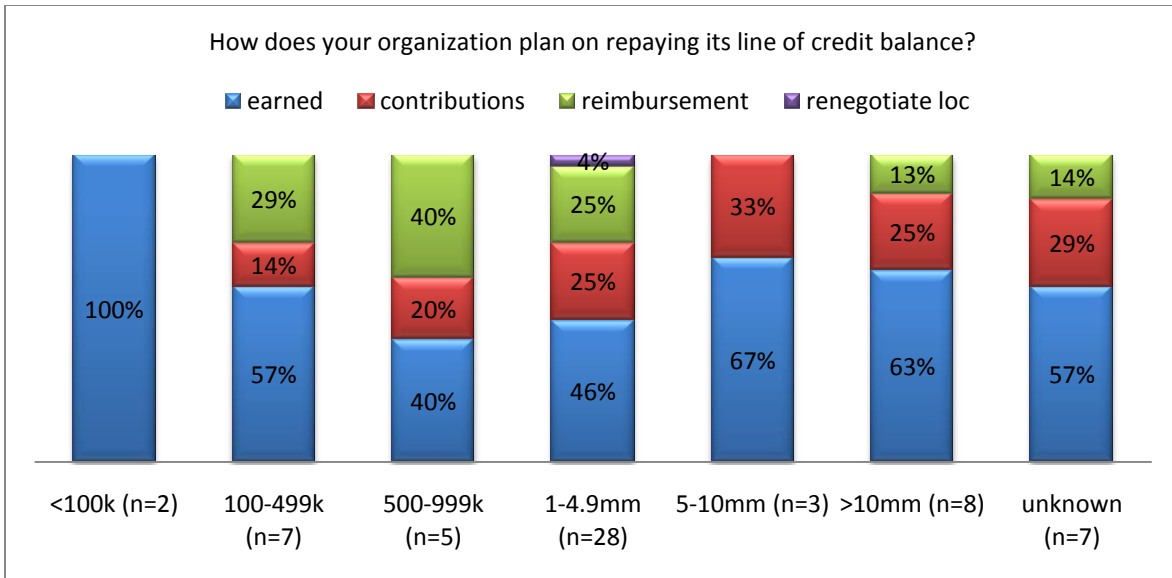


The mission types with the highest concentrations of non-board approval are community development, foundations (n=1), education and human services.

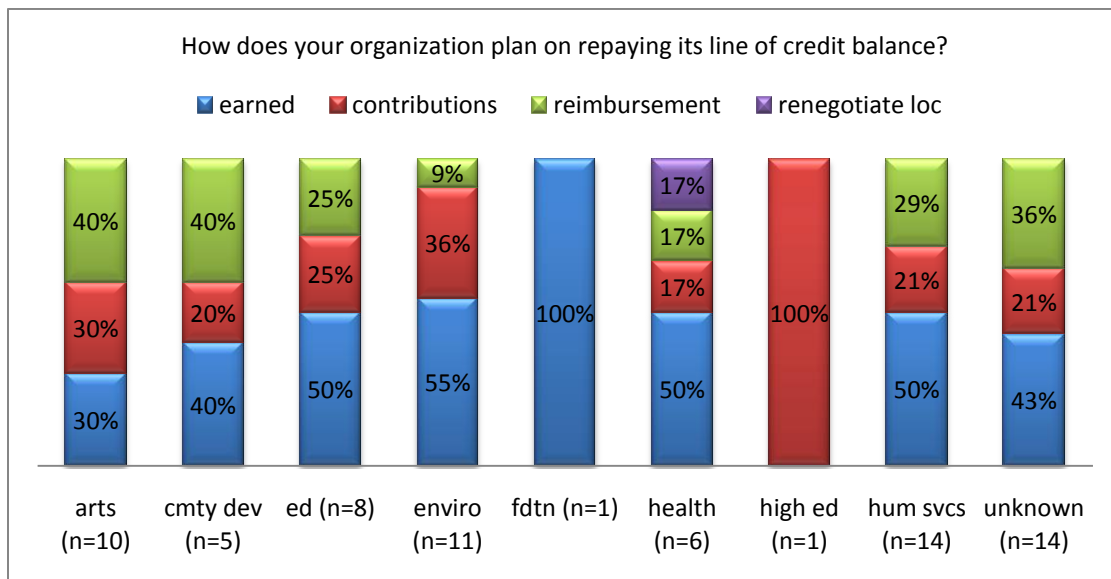
F. Regarding your line of credit, how does your organization plan on repaying its line of credit balance?



The majority of respondents answered that their organization plans on repaying its line of credit balance using earned revenues (63 percent), followed by reimbursement and pledges (37 percent), additional contributions and grants (35 percent), and renegotiating the line of credit terms with the lender (two percent). Reliance on contributions and grants may be an especially risky financial strategy.

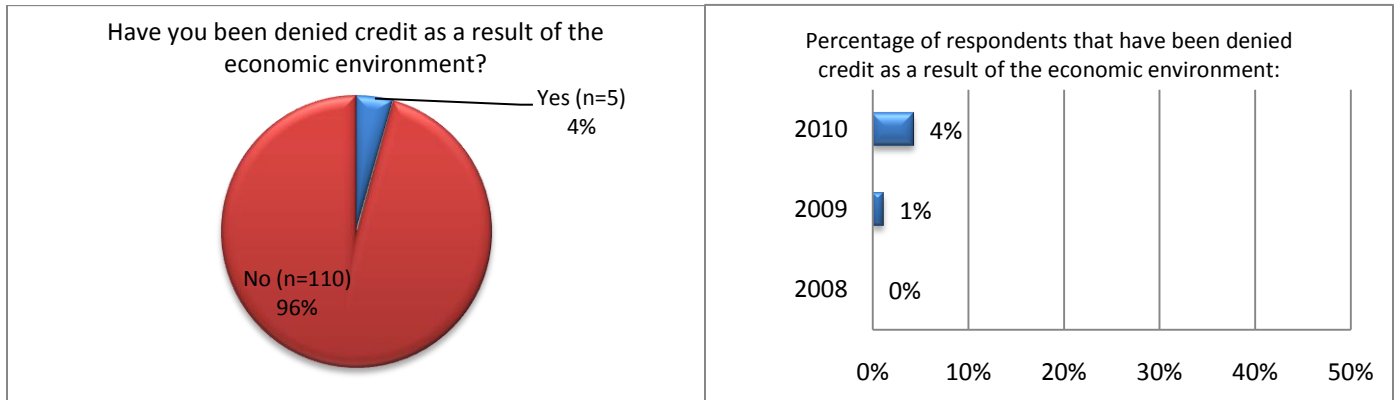


As organizations increase in budget size, so does the variety of their methods of repayment. We see that nearly all nonprofit respondents plan on using some portion of earned income to retire their credit balances. However, respondents of small to medium sized nonprofits tend to rely more heavily on reimbursements and pledges to retire their credit, whereas larger organizations rely more on additional contributions and grants. Considering the uncertainty of this strategy, it is presumably good that it skews more toward larger organizations given the assumption that their bigger size may give them more options should the contributions not meet targeted levels.



Regardless of mission, nearly all respondents plan on using some portion of their earned income to repay their line of credit balances. In terms of secondary sources, the arts, community development and human services tend to rely more heavily on reimbursements and pledges. Higher education (n=1), environmental, and education respondents indicate their organizations will rely more on additional contributions and grants as a secondary source of funds.

5. Have you been denied credit as a result of the economic environment?

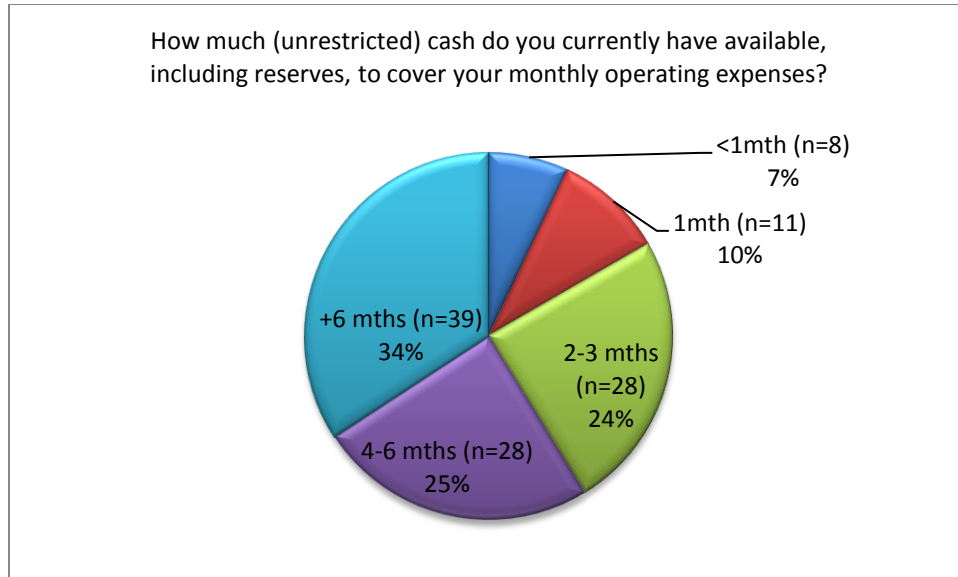


Four percent of respondents answered “Yes,” they were denied credit as a result of the economic environment. While this is a very large percentage increase from previous surveys, it still represents a small number of organizations.

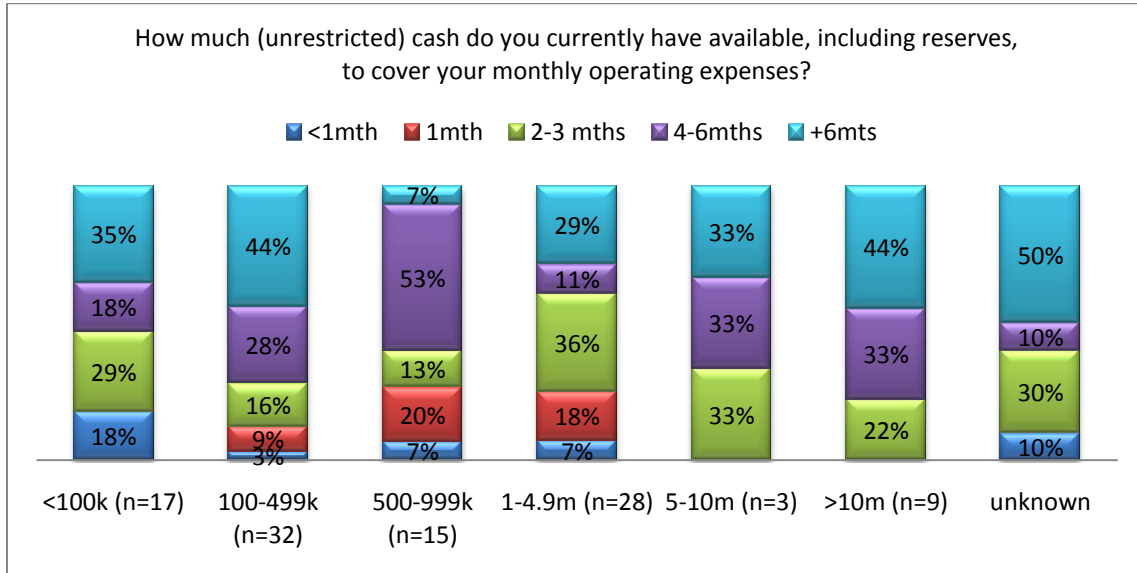
Most of the organizations that were denied credit were mid-size organizations. Of the five organizations that were denied credit, three had operating budgets between \$500,000 and \$1,000,000, and a fourth had an operating budget in the range of \$1,000,000 to \$5,000,000.

There was a dispersion of mission types that were refused credit. Among these types were arts, education, environment and human services organizations (one respondent did not identify mission).

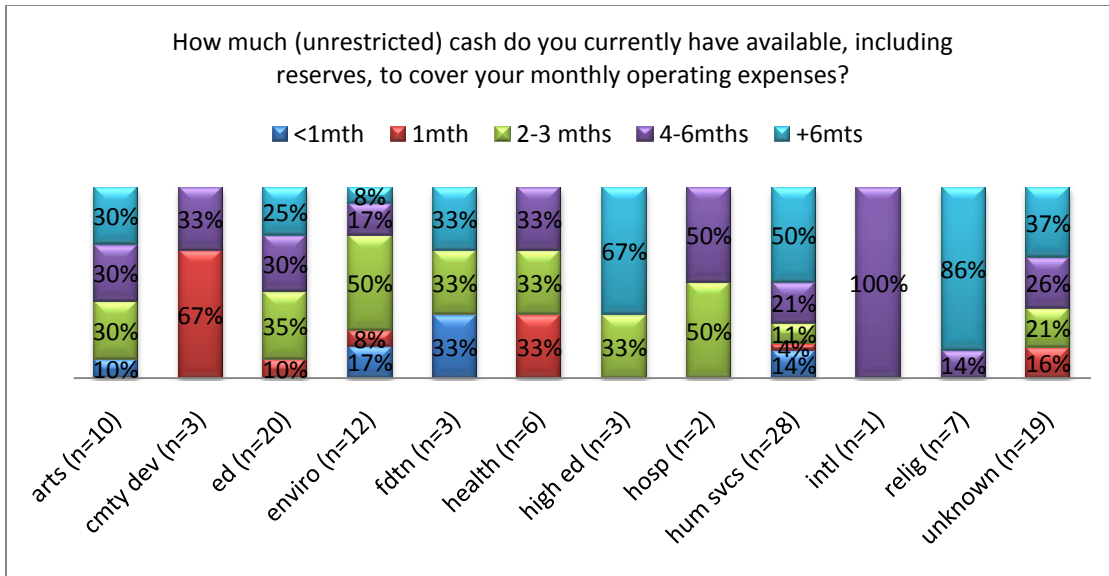
6. How much (unrestricted) cash do you currently have available, including reserves, to cover your monthly operating expenses?



The vast majority of respondents are moderate to healthy from a cash flow perspective. Nearly 83 percent of survey respondents have two or more months of cash reserves, and one out of three respondents has six months or more of unrestricted cash reserves.

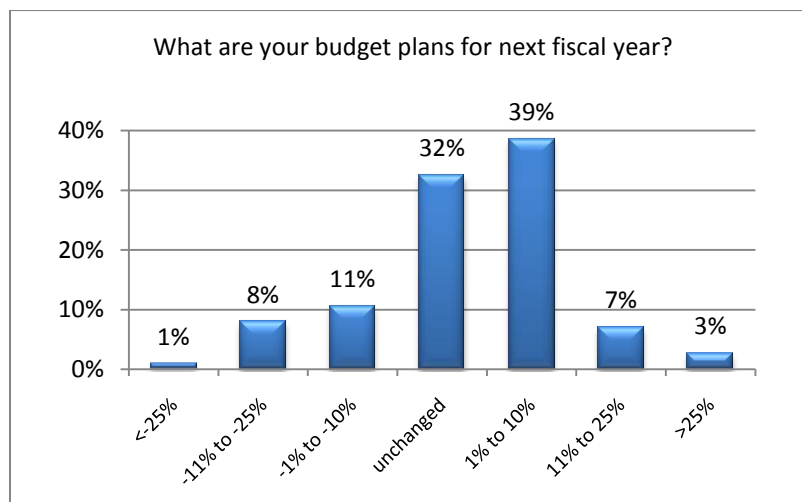


All operating budget cohorts displayed a 40 percent or higher concentration of four months or more of unrestricted cash reserves. Of concern, 18 percent of respondents who work at a nonprofit with an operating budget of less than \$100,000 reported that their organization has less than one month of operating reserves. Similarly, 12 to 27 percent of nonprofits with budgets from \$100,000 to \$5,000,000 have approximately 30 days of operating reserves or less. Among the largest nonprofits, reserve positions are quite strong.

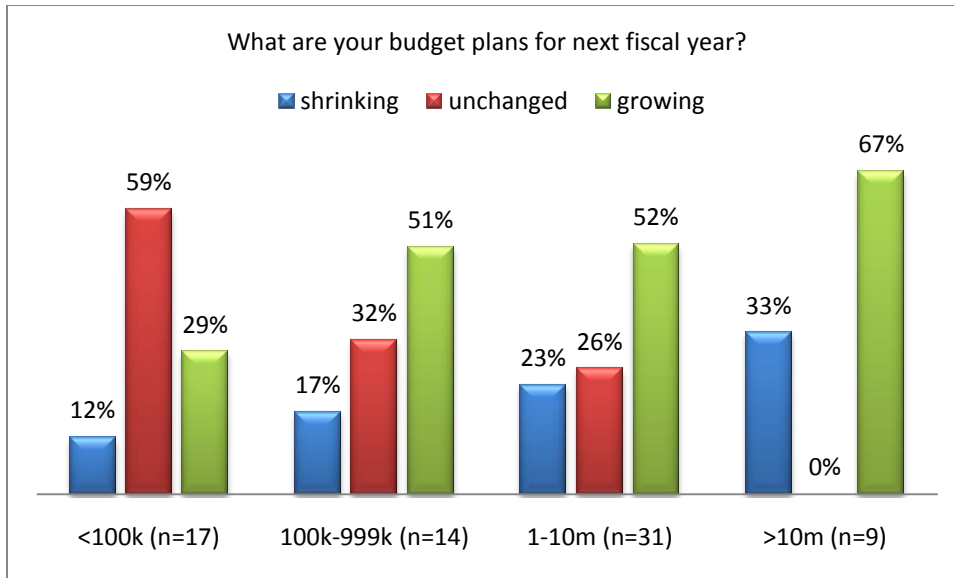


The missions that reported the most cash on hand were religious, human services, higher education and education organizations, among others. Conversely, the missions that reported to have less cash include community development, health, and environmental nonprofits.

7. What are your budget plans for next fiscal year?



Almost one-half of respondents (48 percent) answered that their organization plans on growing its budget for the 2010–2011 fiscal year, while approximately 20 percent anticipate shrinking their nonprofit’s budget.

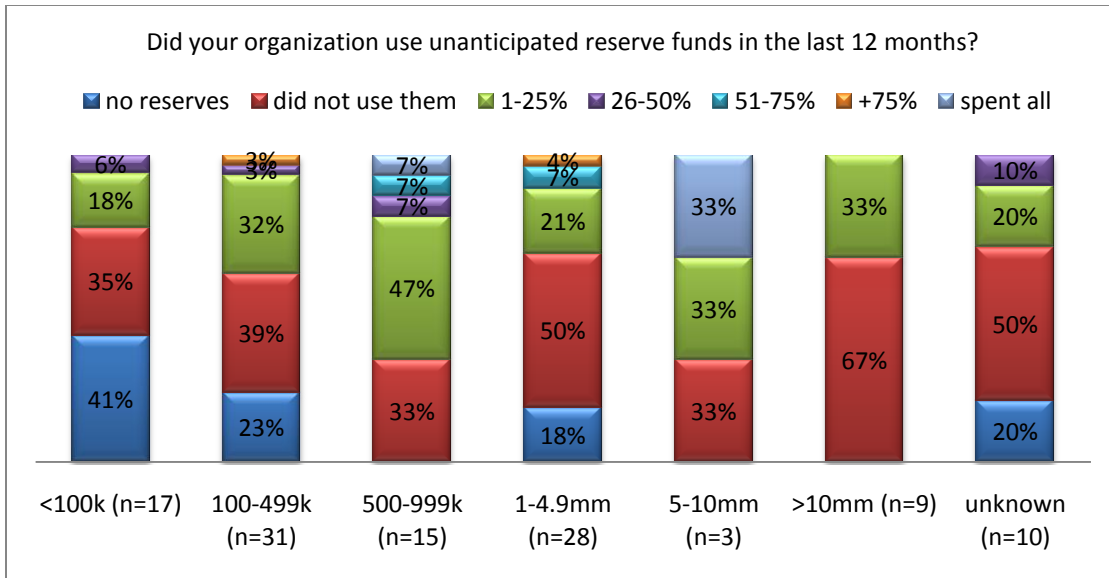


Budget growth seems to be a function of organizational size. Larger nonprofits are the most volatile with the largest percentages anticipating both growth and shrinkage. At the other extreme, the smallest organizations seem just to be trying to hold on.

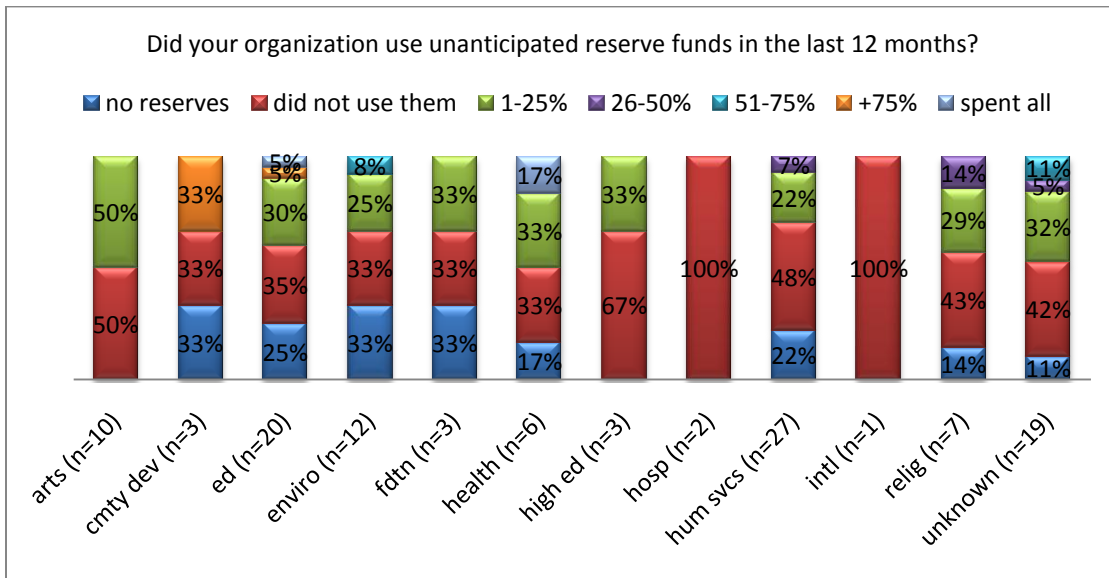
8. Did your organization use unanticipated reserve funds in the last 12 months?



Approximately two out of five (39 percent) respondents used unanticipated, or unbudgeted, reserve funds in the last 12 months, while approximately that same amount did not use unanticipated reserve funds at all. Of concern, one out of five respondents stated their nonprofit has no reserve funds. Encouraging, however, is the finding that only 11 percent used more than 25 percent of revenues and only one very small nonprofit depleted all resources.



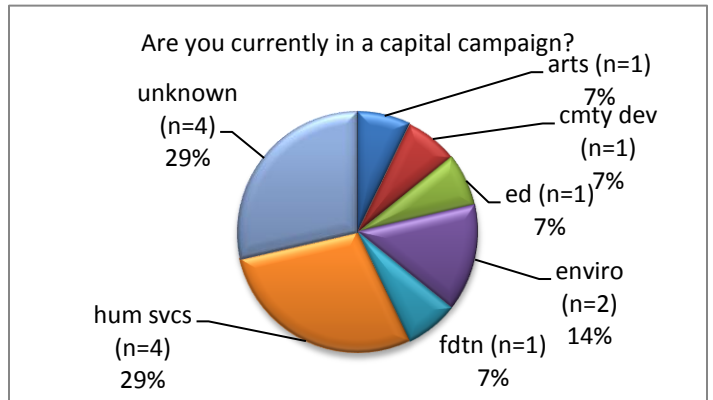
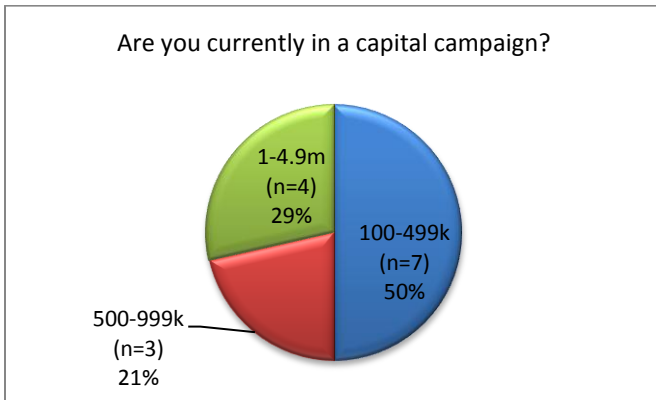
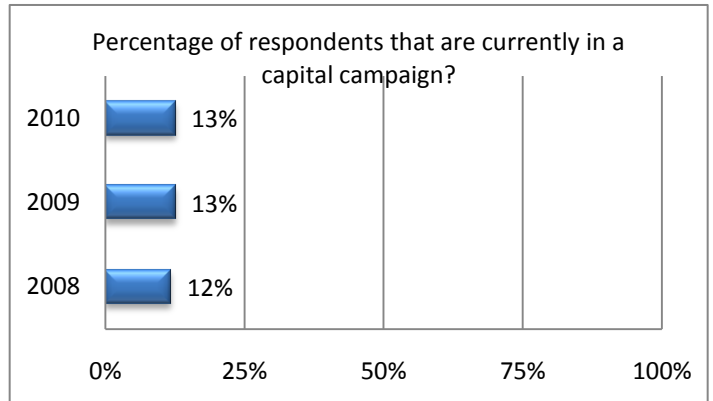
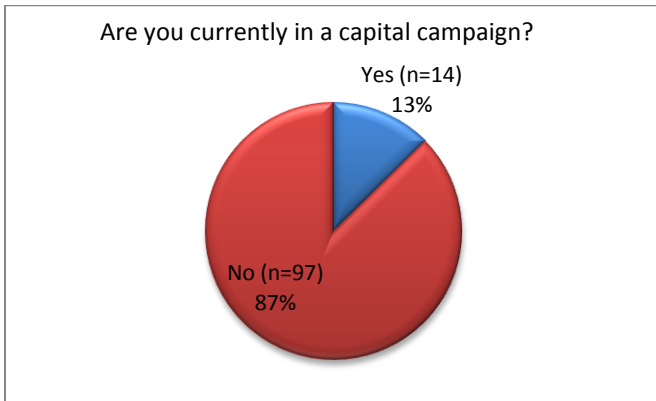
Not surprisingly, smaller organizations (less than \$500,000) used more unanticipated reserve funds over the last year than larger organizations. Consistent with the pressure on smaller nonprofits, nearly one-half of very small organizations (less than \$100,000) and one-quarter of small organizations (\$100,000 to \$499,999) have no reserve funds.



Nearly all mission types had at least a quarter of respondents who did dip into their reserve funds unexpectedly, with two education nonprofits spending 75 percent or more of their reserve funds and one health organization fully depleting its reserve funds. Notably, community development, education, environmental, foundations and human services all report more than 20 percent of organizations having no reserves.

V. Fundraising

1. Are you currently in a capital campaign?

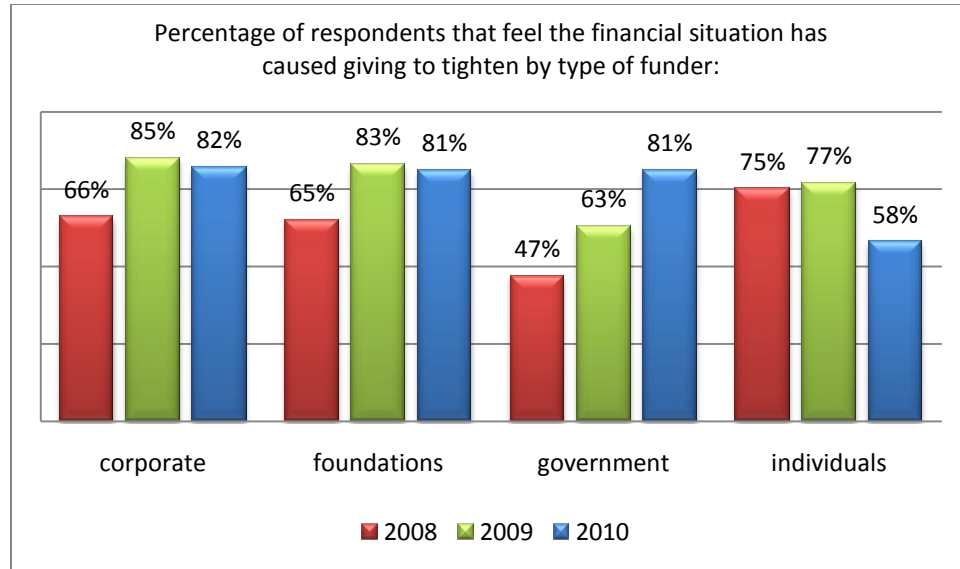


The great majority of respondents are not engaged in a capital campaign. This is precisely in-line with the 2008 and 2009 survey results of 13 percent, respectively.

All of the respondents engaged in a capital campaign work for small to medium sized nonprofits (budgets between \$100,000 and \$5,000,000) with half between \$100,000 and \$499,999 in budget size.

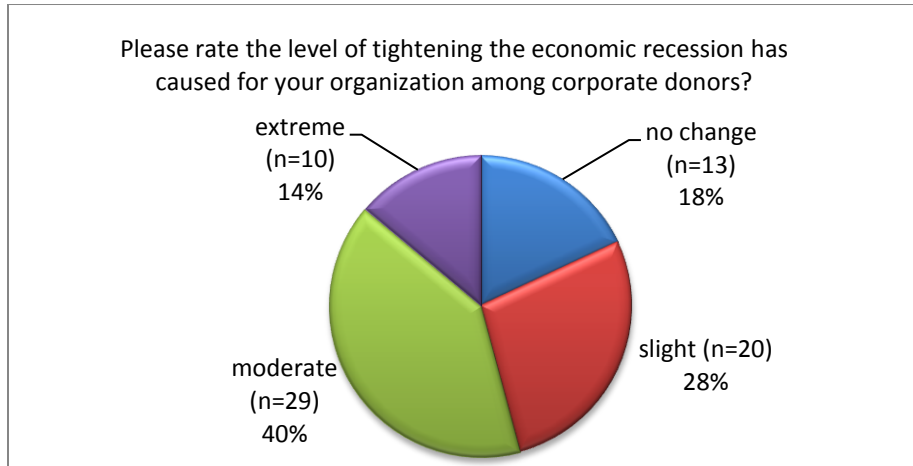
From a mission standpoint, human services had the greatest concentration of capital campaigns with four, followed by environmental organizations with two. Four respondents whose organizations are engaged in a capital campaign chose not to declare a mission type.

2. Please rate the level of tightening the economic recession has caused for your organization among corporations, foundations, government and individual funders?

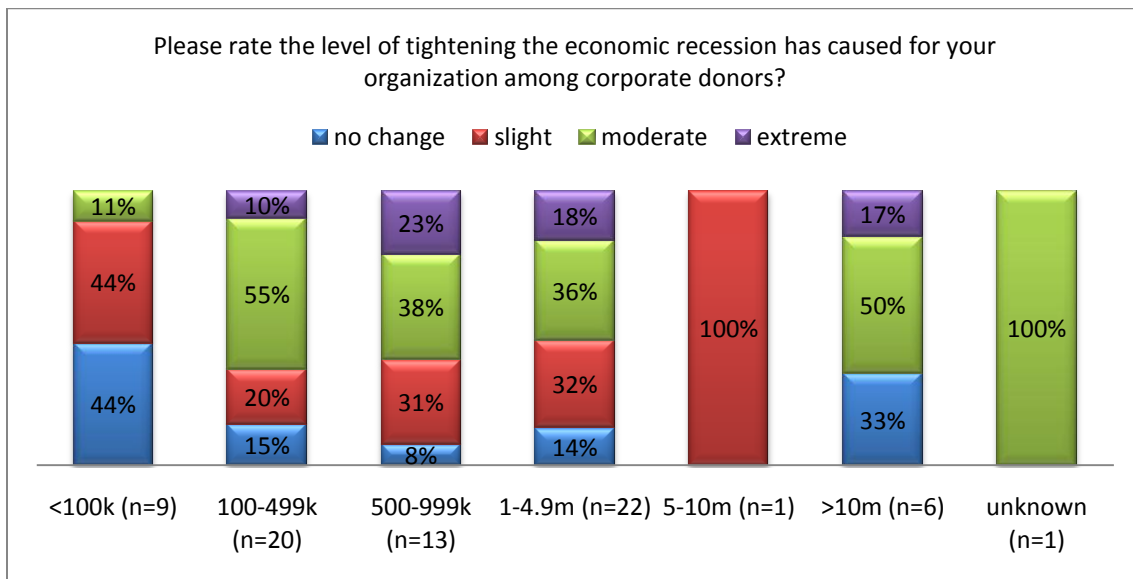


More than 80 percent of all respondents believe the financial situation has caused a tightening in giving from corporations, foundations and government sources in the 2010 survey. This is the first time since the Bayer Center began asking this question in the 2008 survey that three funding sources have exceeded 80 percent of affirmative responses in one year. Despite the significant rebound in the stock market, it is the perception among respondents that this has not yet been reflected in the giving practices of foundations. Individual giving is of particular interest. Although unemployment remains high and consumer confidence low, there is a marked improvement over the past two years in the perception of willingness of individuals to contribute. This is notable both as a reflection of the cultural generosity of our society and as a reinforcement of the call Southwestern Pennsylvania nonprofits made to step up their individual giving programs.

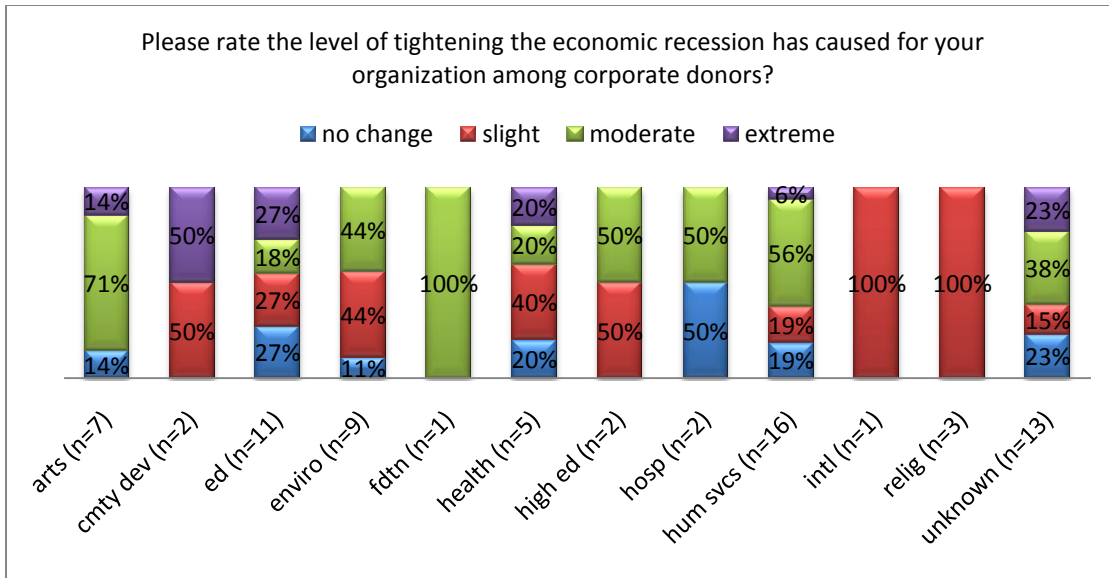
A. Please rate the level of tightening the economic recession has caused for your organization among corporate donors?



Of the respondents who do receive corporate funding (32 respondents do not), 82 percent said their nonprofit experienced a tightening in giving from corporate donors. Of that 82 percent who experienced tightening in giving, 54 percent characterized the tightening as “moderate” or “extreme.”

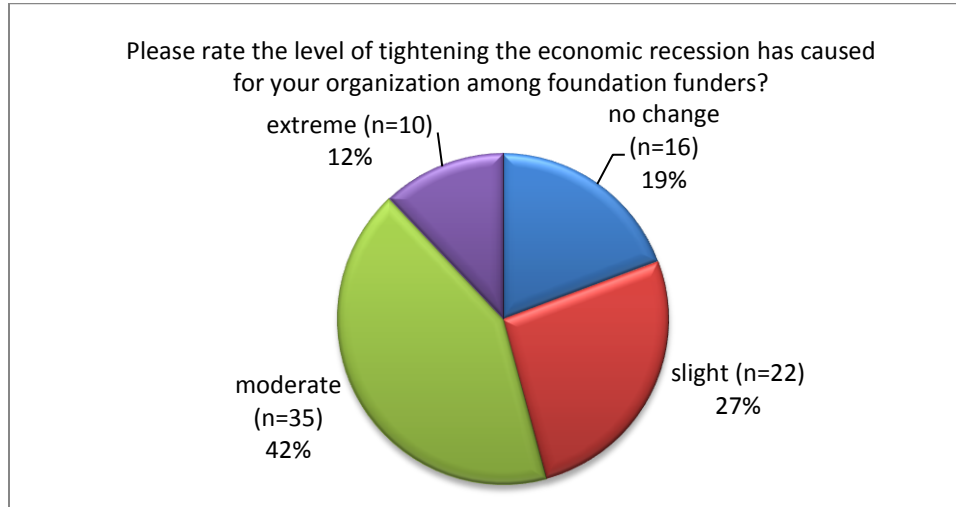


The overwhelming majority (88 percent) of very small organizations, or those with budgets of less than \$100,000, characterized corporate donor support tightening as “slight” or unchanged. Larger organizations reported a greater amount of corporate tightening, with the highest level of reported moderate or extreme tightening among organizations with budgets in excess of \$10,000,000. One interpretation may be that corporate donors were able to continue making small grants in the order of a few hundred or thousand dollars to very small grassroots organizations, while larger nonprofits felt the brunt of the corporate sector’s “belt tightening.”

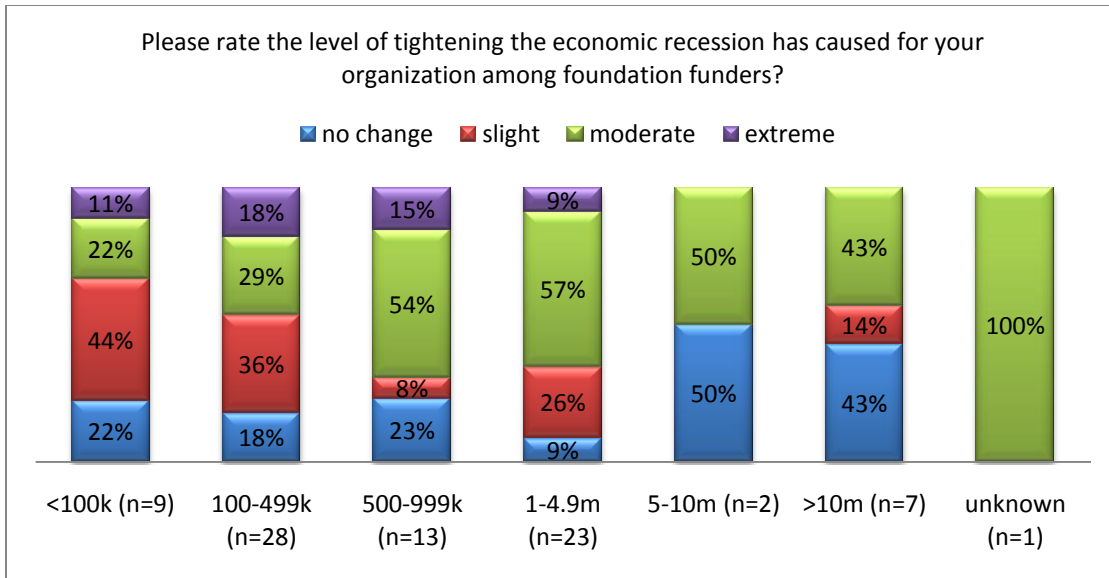


From the standpoint of mission, human services, community development, arts and the environment were affected the most. The arts, in particular, were stressed, with 85 percent reporting moderate to extreme corporate tightening.

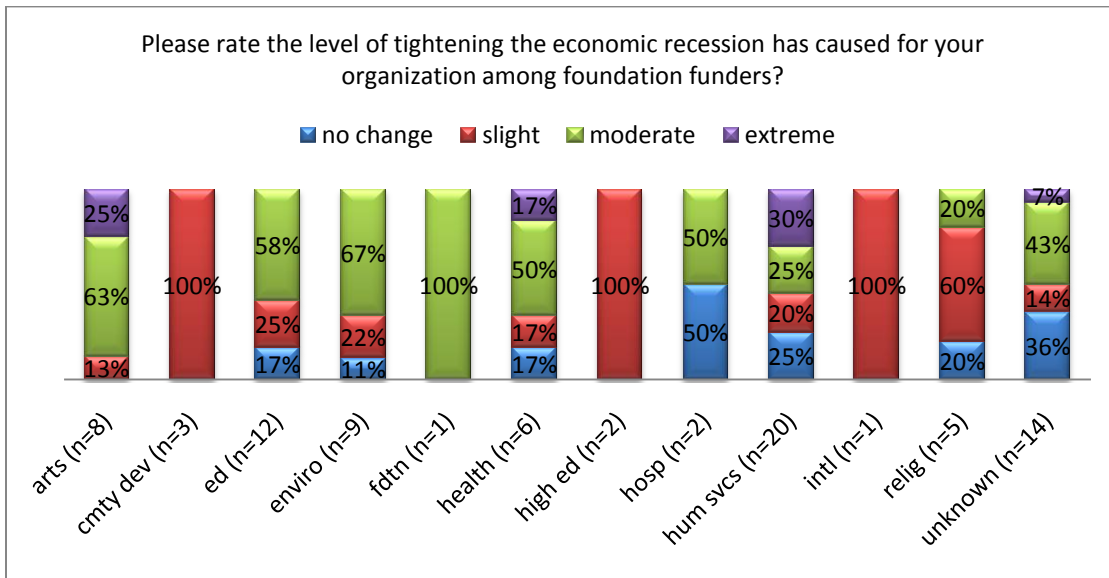
B. Please rate the level of tightening the economic recession has caused for your organization among foundation funders?



For the respondents who receive foundation funds (21 respondents do not), 81 percent said their nonprofit experienced a tightening in giving from foundation funders because of the economic recession. Of the 81 percent who experienced tightening in giving, 54 percent characterized the tightening as “moderate” or “extreme,” which is the same total we saw for corporate tightening in the previous question.

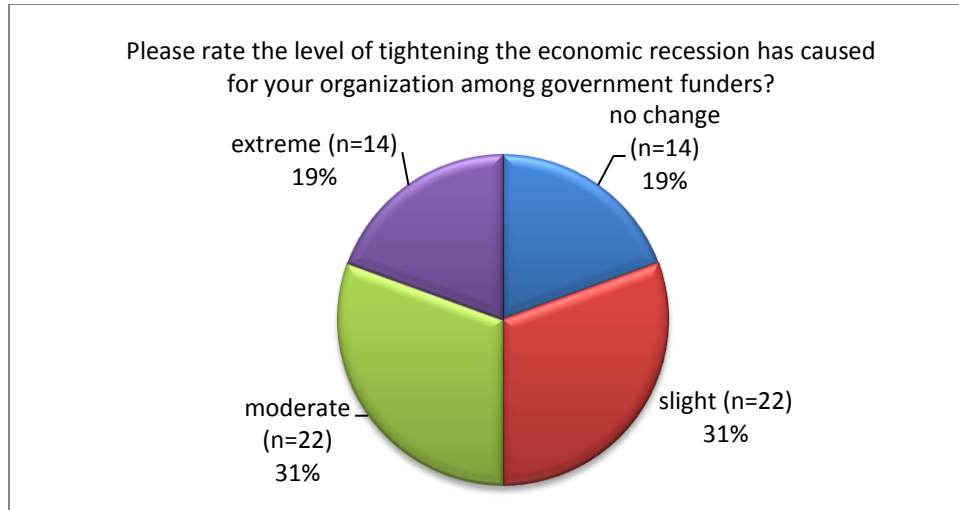


In a reversal of the trend seen in corporate philanthropy from the previous question, small to medium sized nonprofits experienced the highest concentrations of foundation tightening, while very large nonprofits experienced only “slight” to “no change” in foundation funding. The biggest impact was among those mid-sized organizations with budgets from \$500,000 to \$4,999,999.

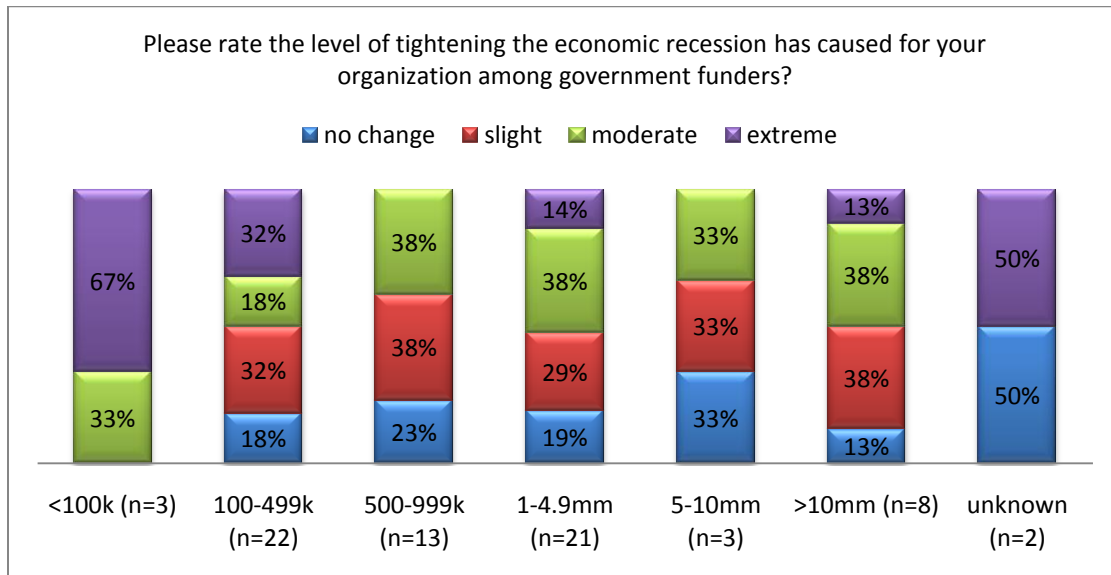


The largest foundation tightening is seen among arts, human services, health, environment and education nonprofits. As with corporate giving, beleaguered arts groups felt the greatest pressure with fully 88 percent experiencing moderate or extreme foundation tightening. Interesting, community development, higher education, and religious organizations maintained their foundation funding with little impact.

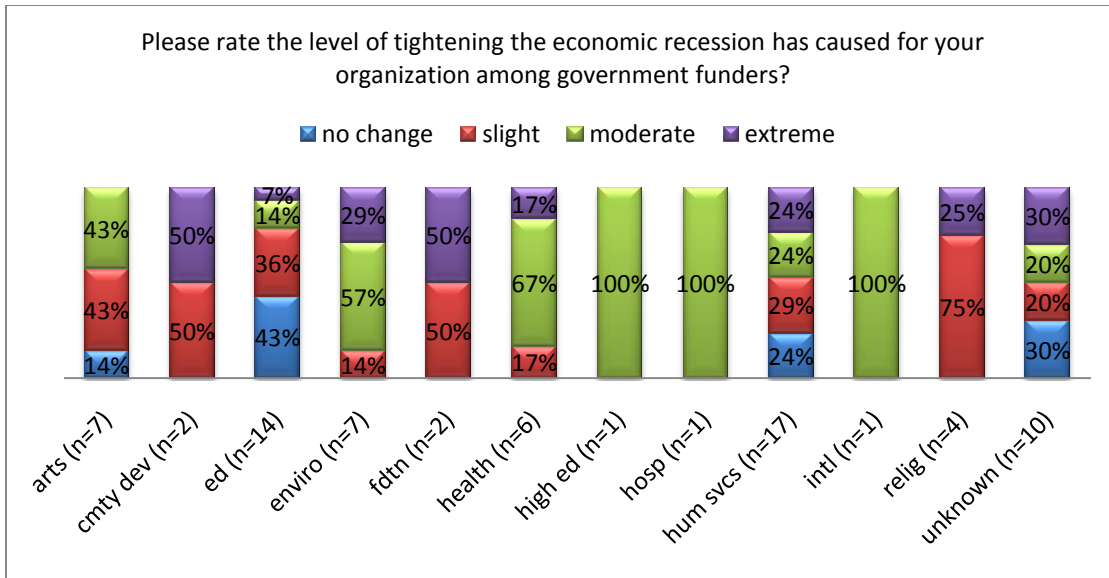
C. Please rate the level of tightening the economic recession has caused for your organization among government funders?



The majority of respondents, or 81 percent, believe government sources have tightened their level of financial support because of the economic recession, with fully half characterizing the level of tightening as moderate or extreme.

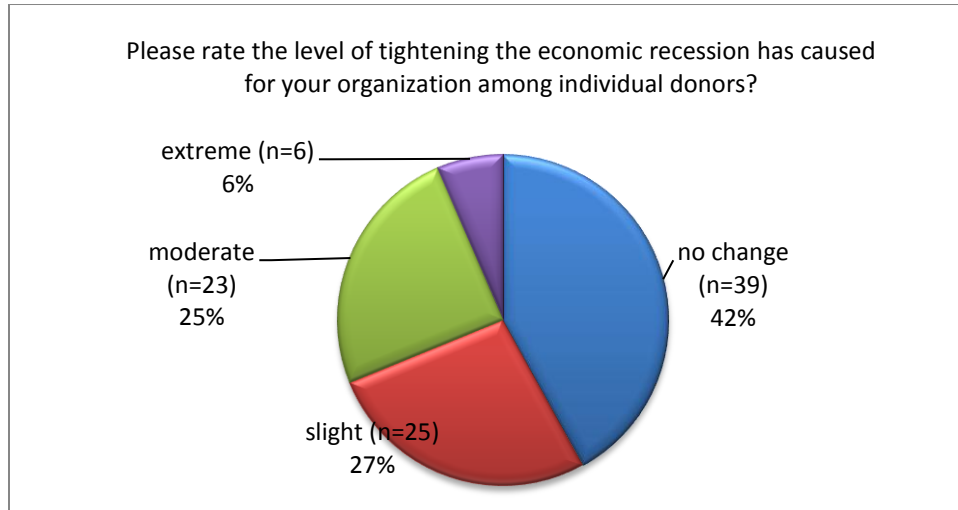


Smaller organizations reported more “extreme” levels of tightening from government sources, while medium and larger size nonprofits characterized the tightening as “slight” or “moderate.”



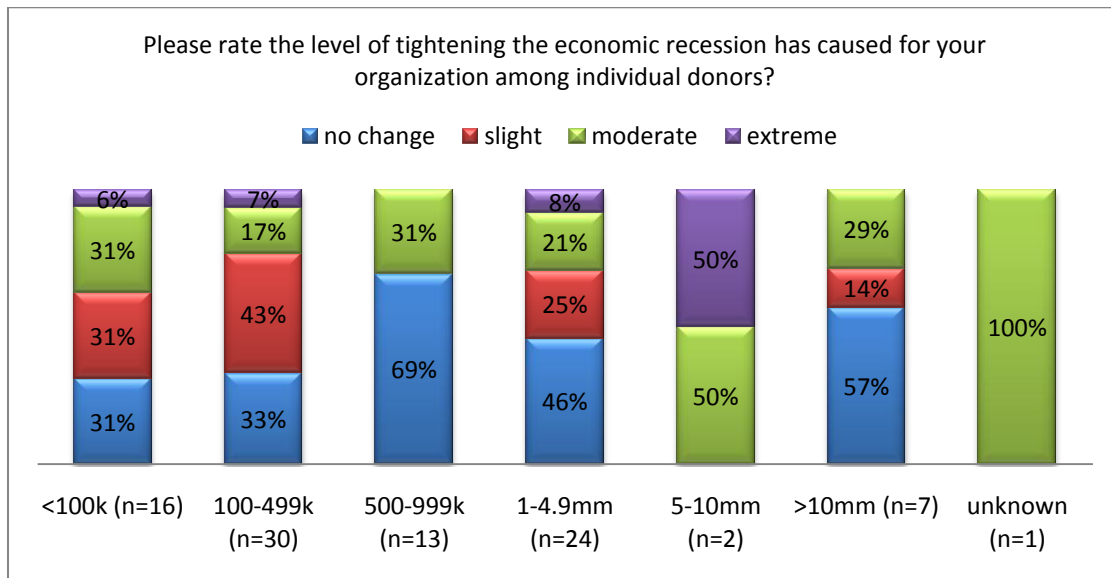
Community development, foundations, environmental and religious organizations all reported 25 percent or higher concentrations of “extreme” levels of tightening from government sources. Higher education, hospitals, international, health, environmental and arts nonprofits all reported 40 percent or higher concentrations of “moderate” levels of tightening.

D. Please rate the level of tightening the economic recession has caused for your organization among individual donors?



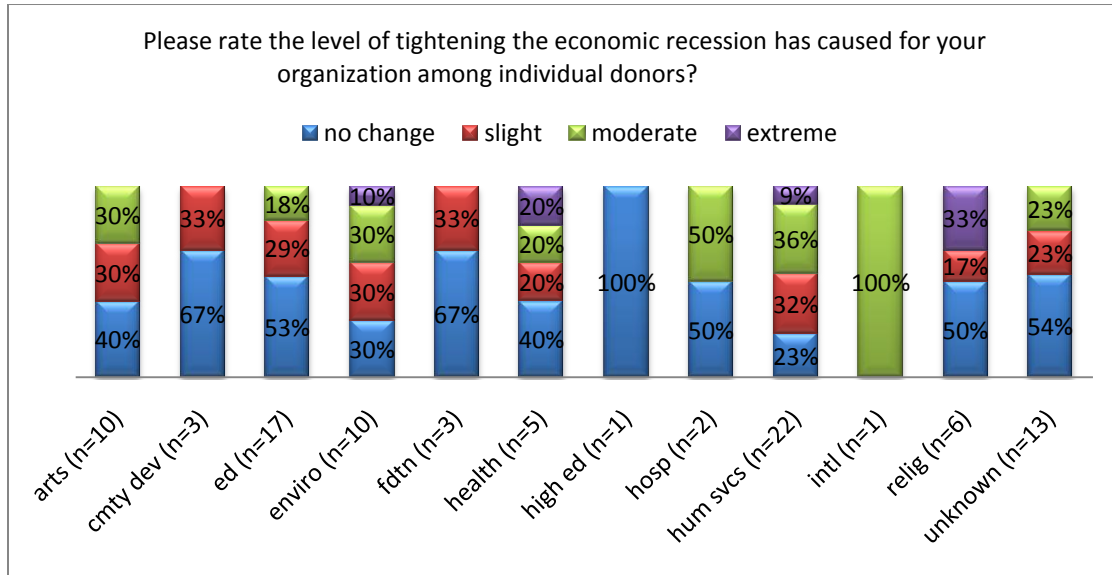
More than two out of five respondents (42 percent) said their organizations have noticed “no change” in individual giving as a result of the economic recession. This answer significantly differs from respondents’ portrayals of government, foundation and corporate giving.

Only six percent of respondents characterized a pullback in individual giving as “extreme,” half or less of the levels seen in the other three categories.

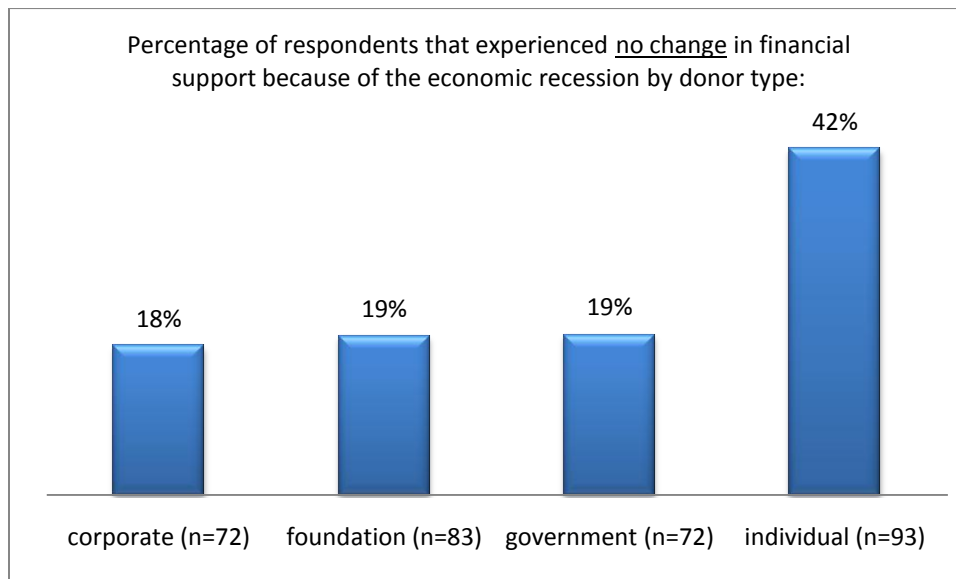


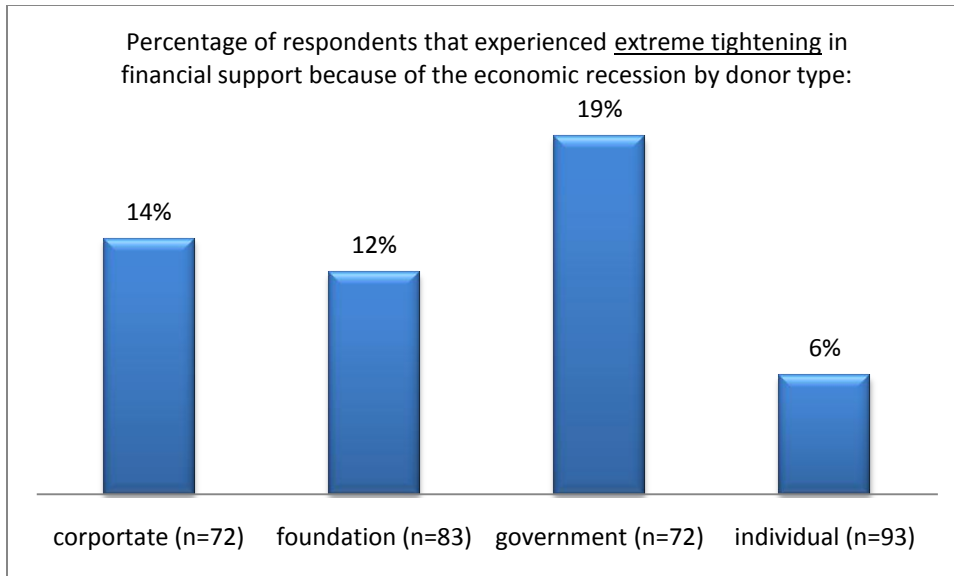
Very small organizations appear to have felt the most impact from a tightening in individual giving; 37 percent of organizations with budgets less than \$100,000 felt a “moderate” to “extreme” tightening in funding from individual giving. This could be the case that these organizations are heavily dependent on individual funding, so any drawback is immediately felt. Or, it could be the case that because they lack the development departments of larger organizations they do not enjoy strong individual donor

relationships. Medium to larger organizations, on the other hand, reported high concentrations of “no change” when asked to characterize how the recession has impacted individual giving.

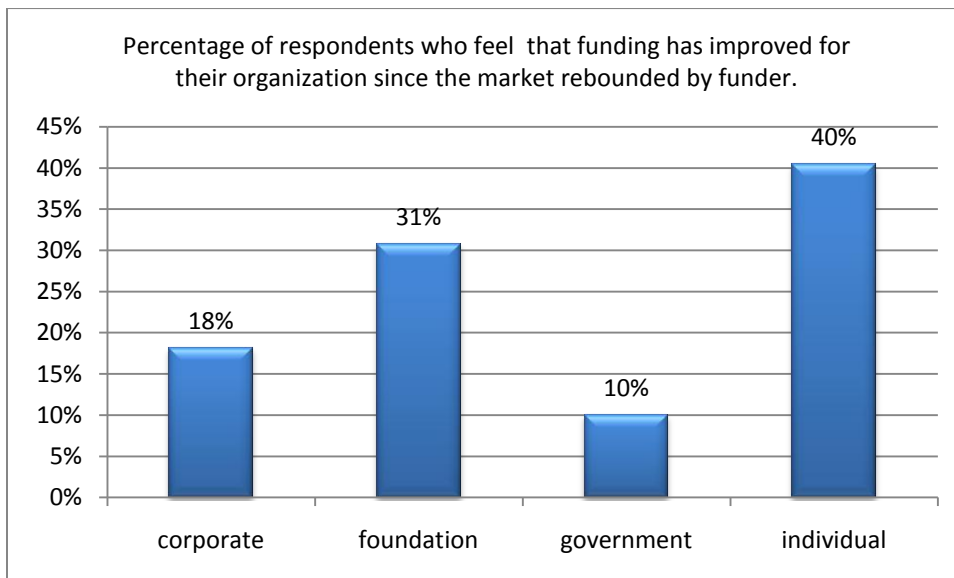


Religious organizations reported the highest incidence of extreme tightening (33 percent) of individual giving and human services had the highest total incidence of tightening.



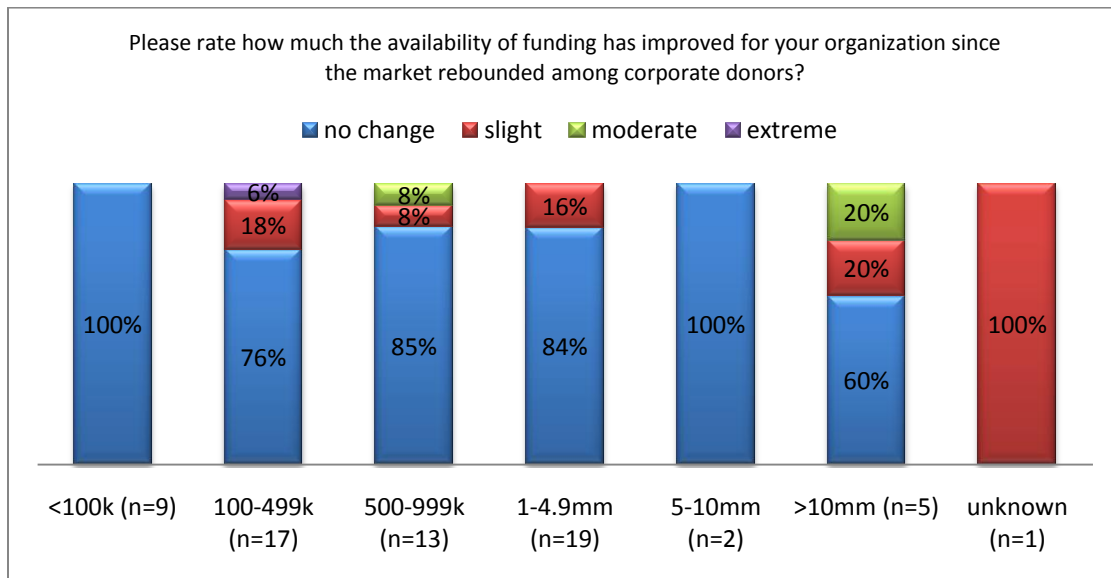
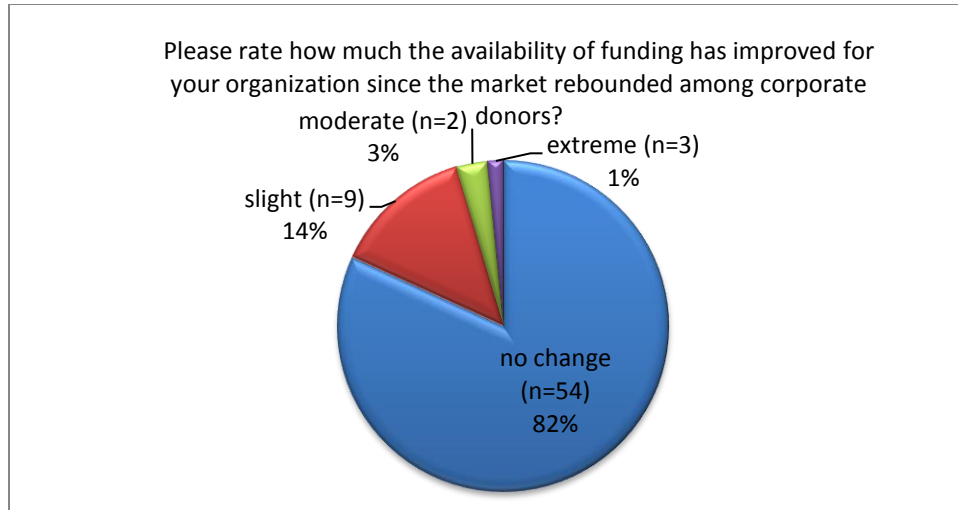


3. Please rate how much the availability of funding has improved for your organization since the market rebounded among funders?

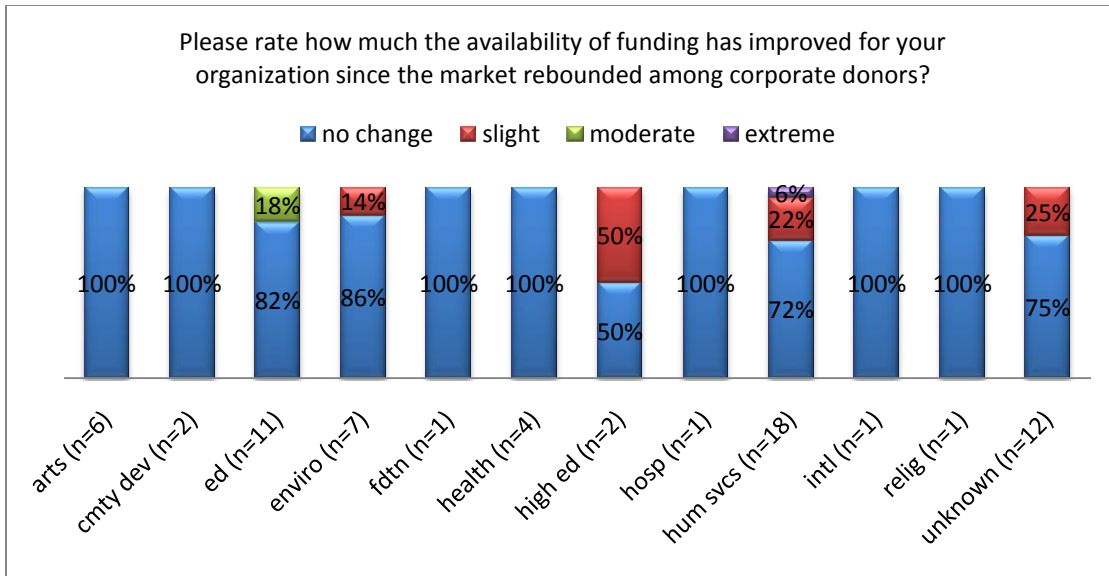


Funding has loosened some, but in varying degrees among donors. Of the four different donor types, individual donors appear to have relaxed the most (40 percent of respondents stated some improvement) since the market rebounded. Donor assistance from government and corporations remains largely unchanged.

A. Please rate how much the availability of funding has improved for your organization since the market rebounded among corporate donors?

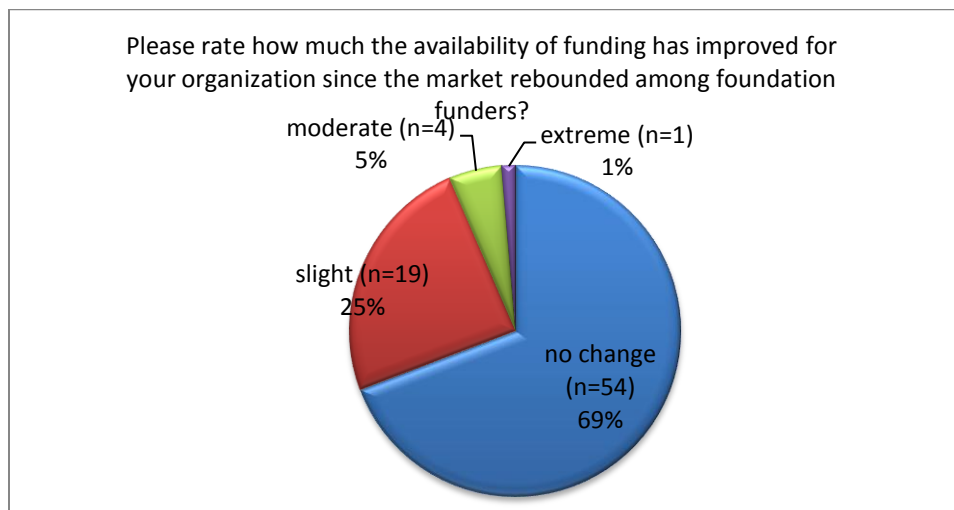


Overall, improvements in corporate donations remain low, but when operating budgets are considered, the most significant rebound in corporate donorship is among the organizations with the highest operating budgets (40 percent of the organizations with budgets exceeding ten million noted a slight or moderate improvement). No organization operating with the smallest budgets (<100k) noted any change at all from corporate donors.

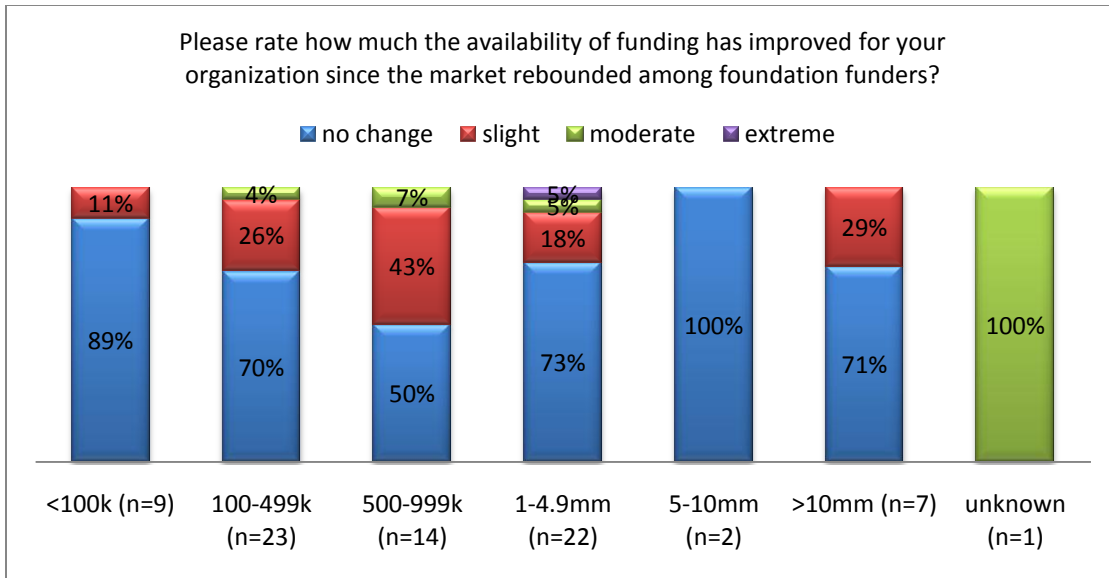


Only 4 of the mission types noted any improvement in corporate donorship (education, higher education, environment, and human services). Of these, only education and human services experienced more than “slight” improvements.

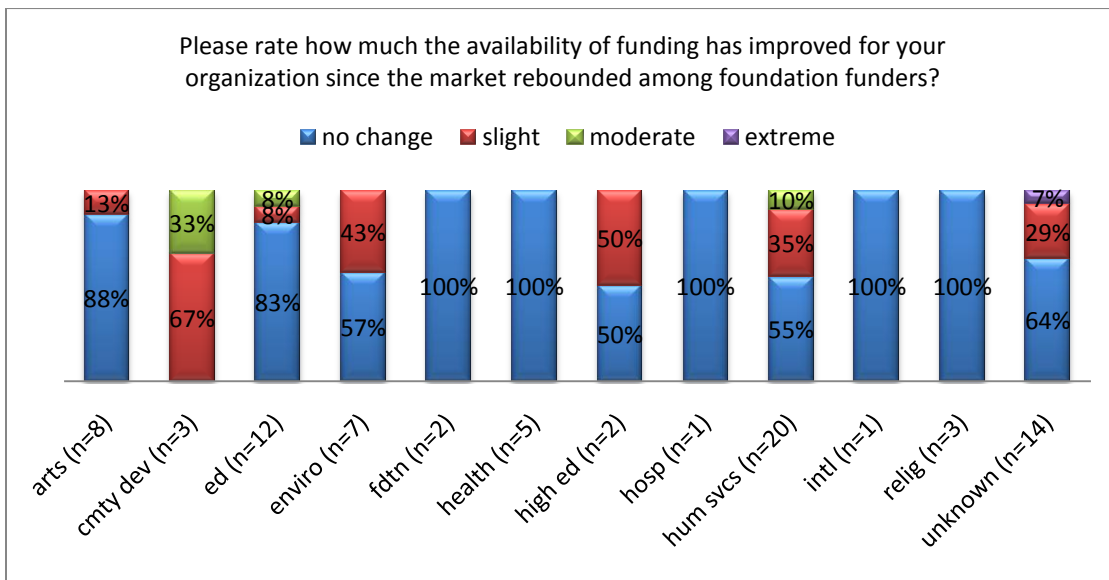
B. Please rate how much the availability of funding has improved for your organization since the market rebounded among foundation funders?



About one-third of nonprofits who responded experienced some improvement from foundation donors, though most of that improvement was slight.

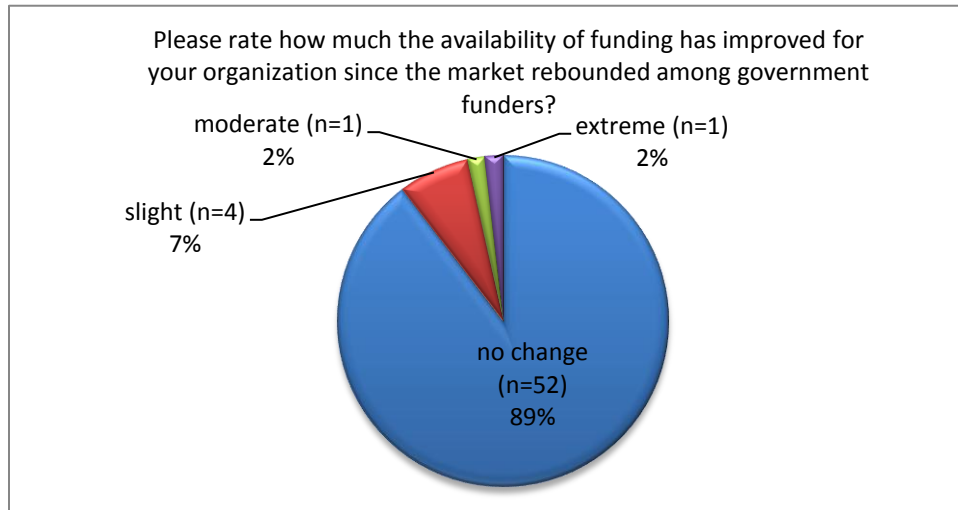


Medium sized organizations and the very largest appear to have gained the most improvement in funding from foundations, while the smallest organizations experienced little change.

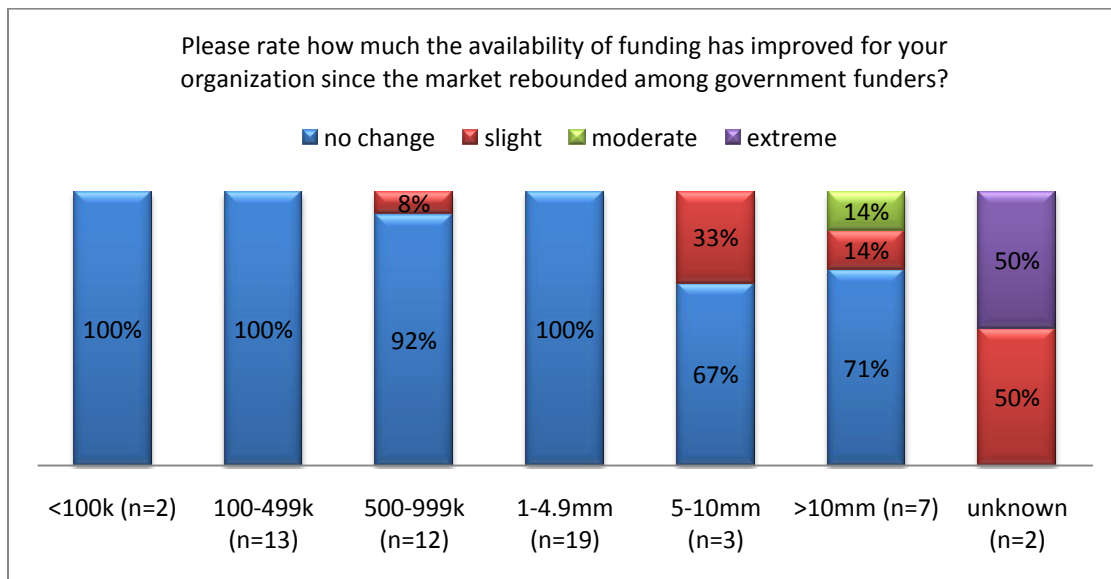


Foundation donors appear to have stepped up most for missions involving community development (100 percent noted improvement), human services (45 percent noted improvement), and environmental (43 percent noted improvement).

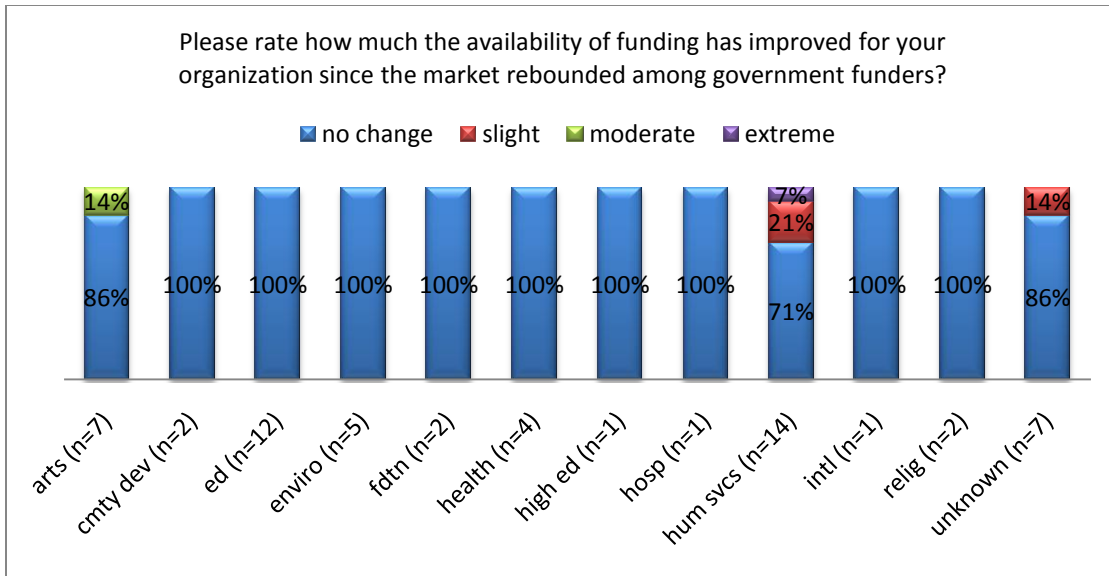
C. Please rate how much the availability of funding has improved for your organization since the market rebounded among government funders?



Only about one in ten respondents noted any improvement at all from the government, and 70 percent of those were of only a “slight” improvement.

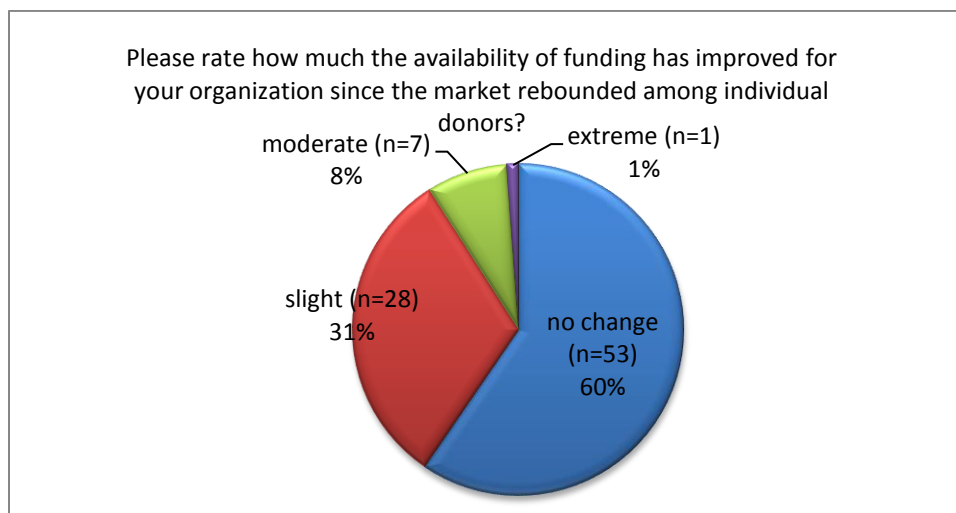


Government funding only appears to have improved among the organizations with larger operating budgets.

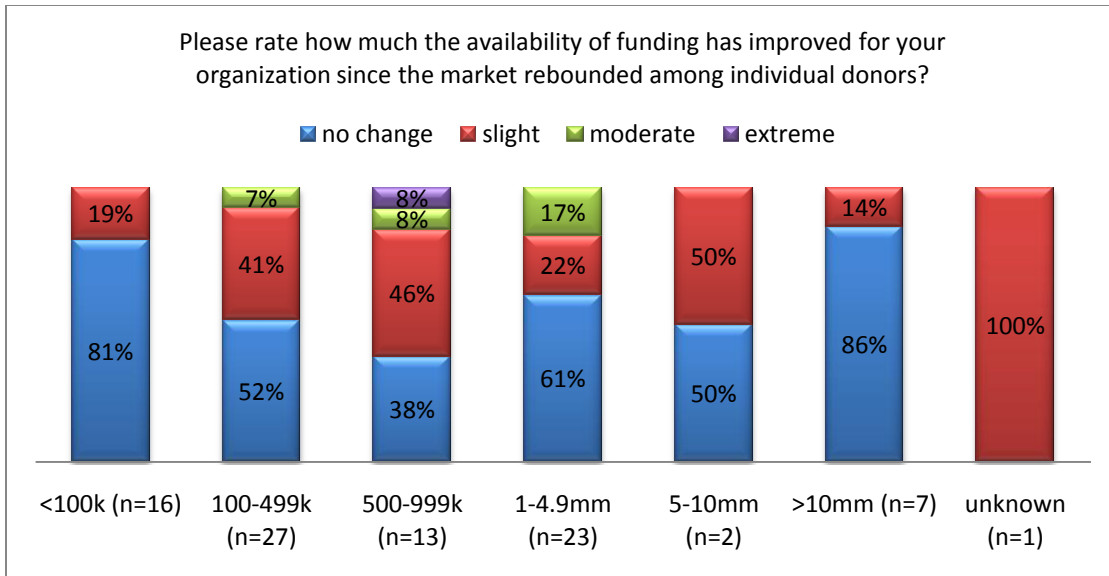


The only missions experiencing improved government funding were arts and human services.

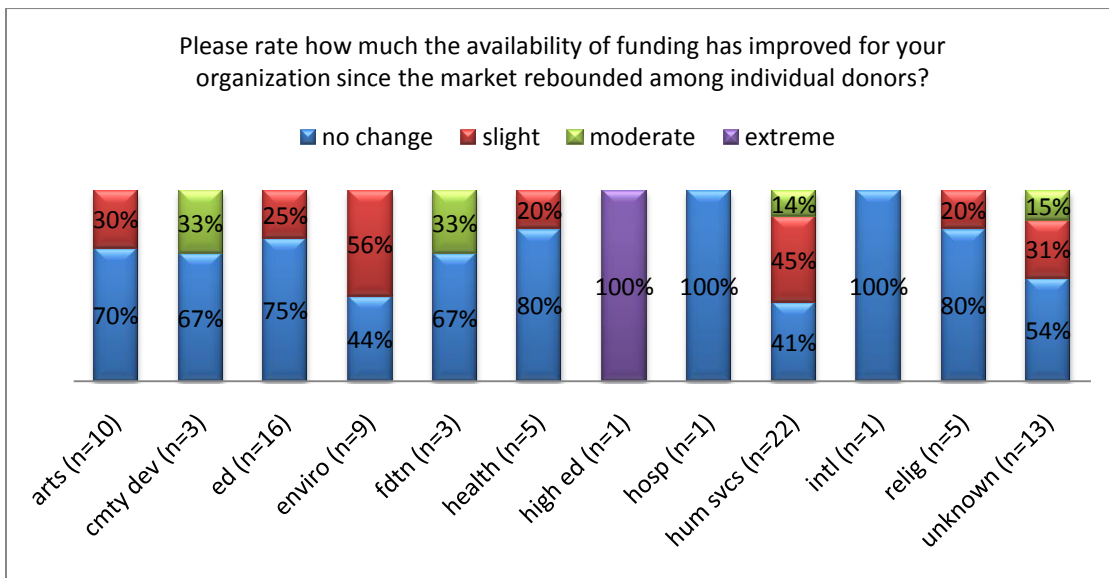
D. Please rate how much the availability of funding has improved for your organization since the market rebounded among individual donors?



While the majority of nonprofit organizations experienced “no change” in individual donations, about three in ten noted a “slight” improvement, and about one in ten noted a “moderate” or “extreme” improvement.

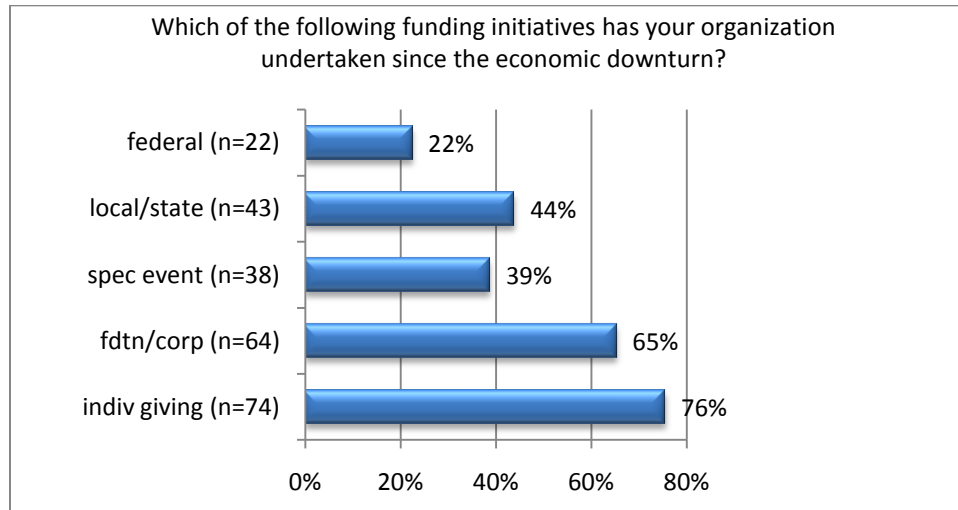


Improvements in funding from individual donors mainly surfaced in the mid-sized organizations with budgets between 100 thousand and five million dollars.

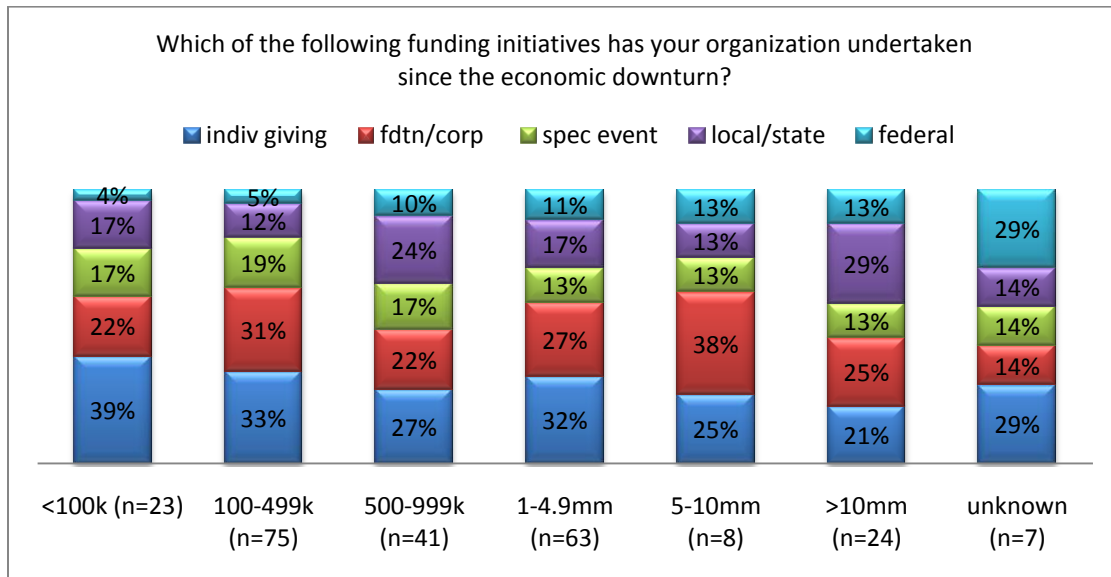


An increase in funding from individual donors appeared most in missions involving the environment and human services.

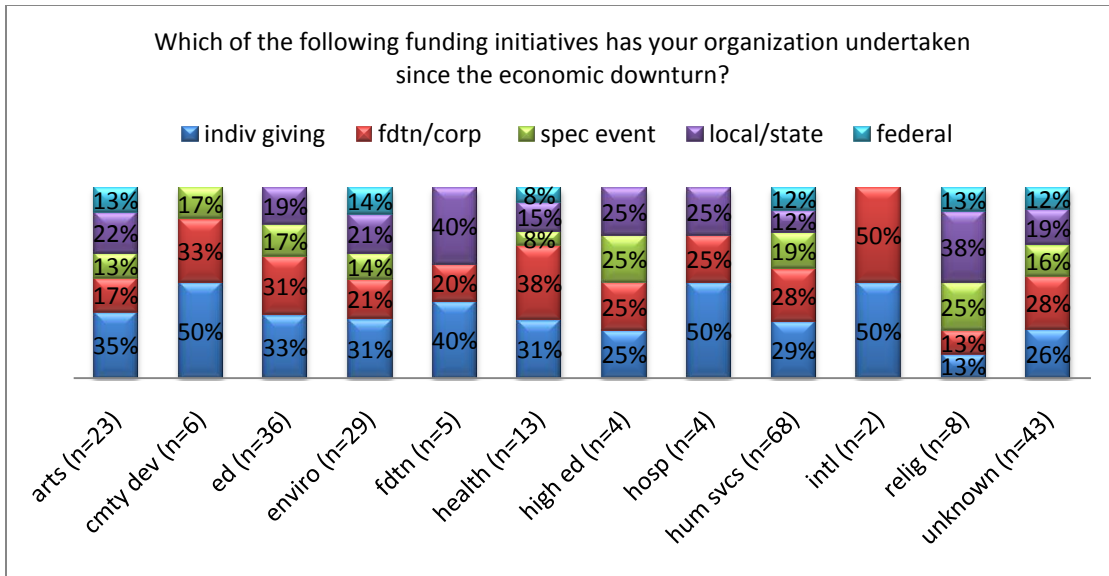
4. Which of the following funding initiatives has your organization undertaken since the economic downturn? (Check all that apply)



The overwhelming majority of respondents have pursued individual giving (76 percent) and new foundation/corporate support (65 percent) since the start of the economic recession. The least pursued new funding source has been the application for federal monies (22 percent)

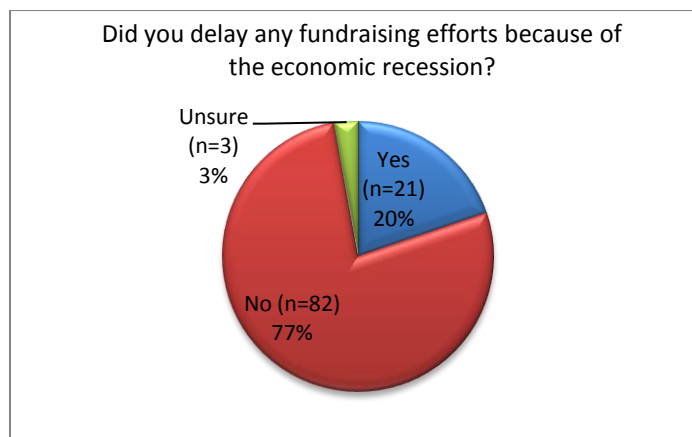


Types of funding initiatives are fairly consistent across budget sizes, with a skewing towards more government funding among larger organizations.



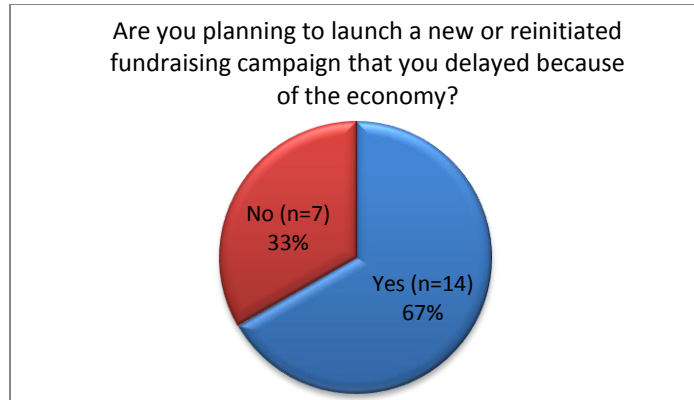
What is striking on this table is the finding that, despite the pressures all organizations are feeling, only those with arts, environmental, health, human services, and religious missions reported pursuing all five types of funding initiatives.

5. Did you delay any fundraising efforts because of the economic recession?

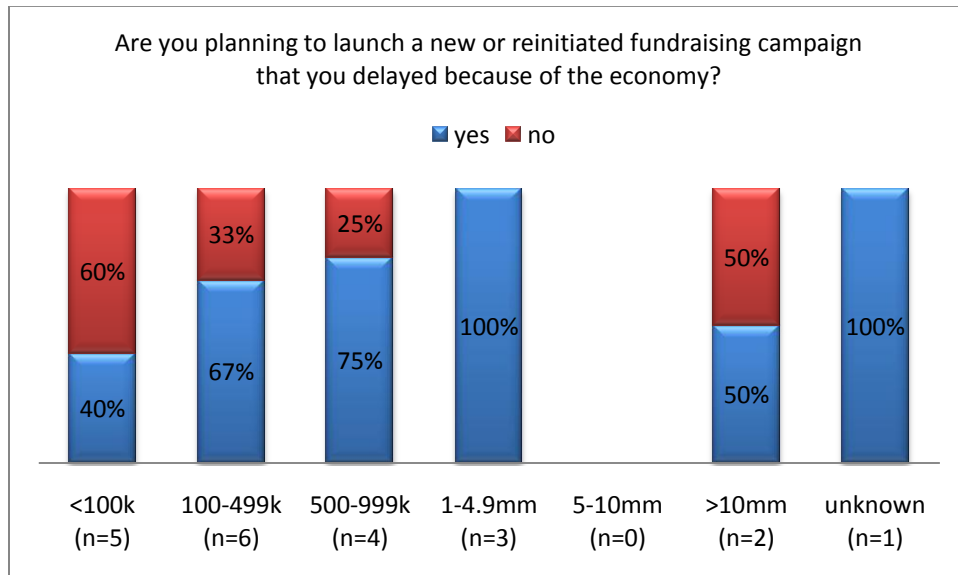


More than three out of four respondents answered, "No," their organization did not delay any fundraising efforts because of the economic recession.

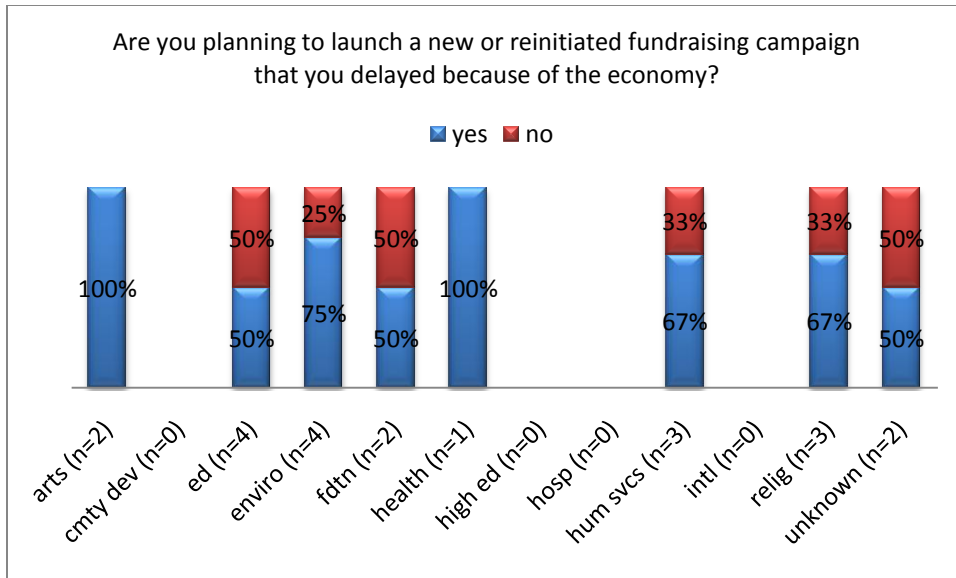
6. Are you planning to launch a new or reinitiated fundraising campaign that you delayed because of the economy?



Two out of three respondents intend to launch a new or renewed fundraising campaign.

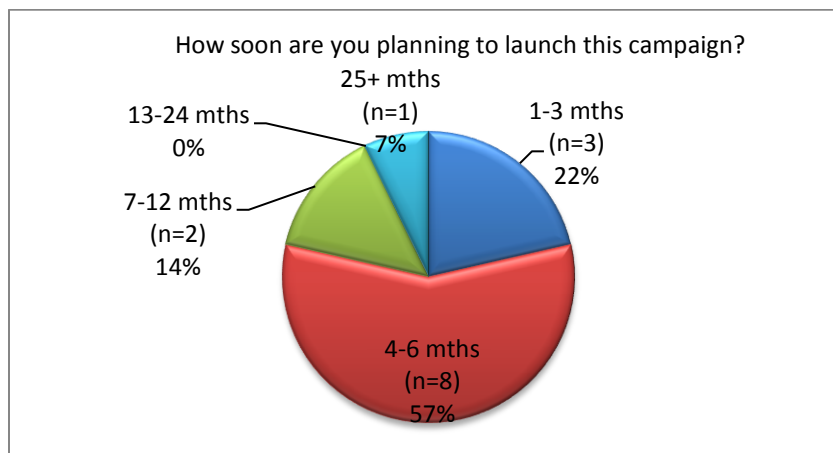


Campaign plans cross all budget sizes.



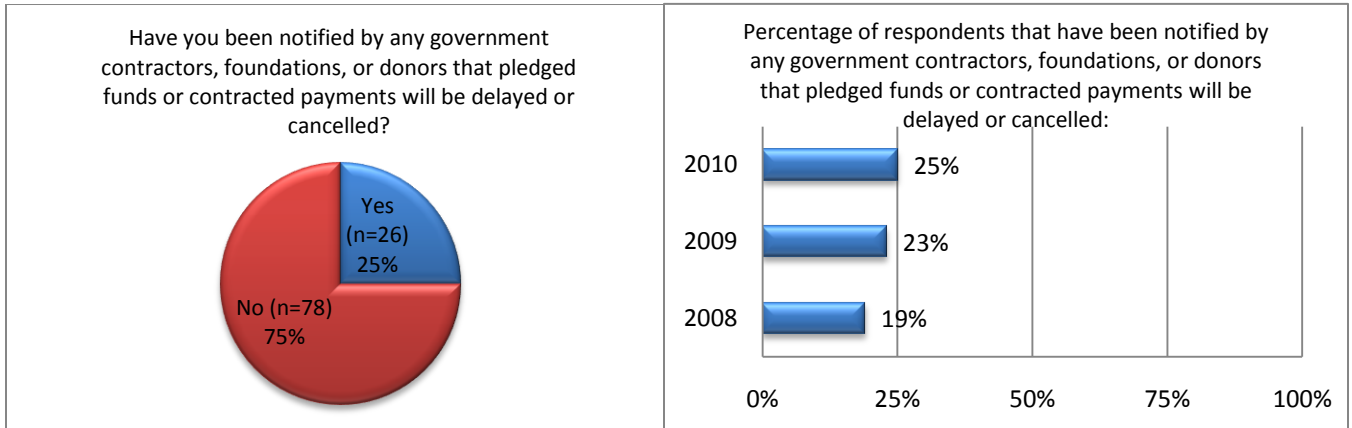
Campaign plans also cross all mission types.

7. How soon are you planning to launch this campaign?

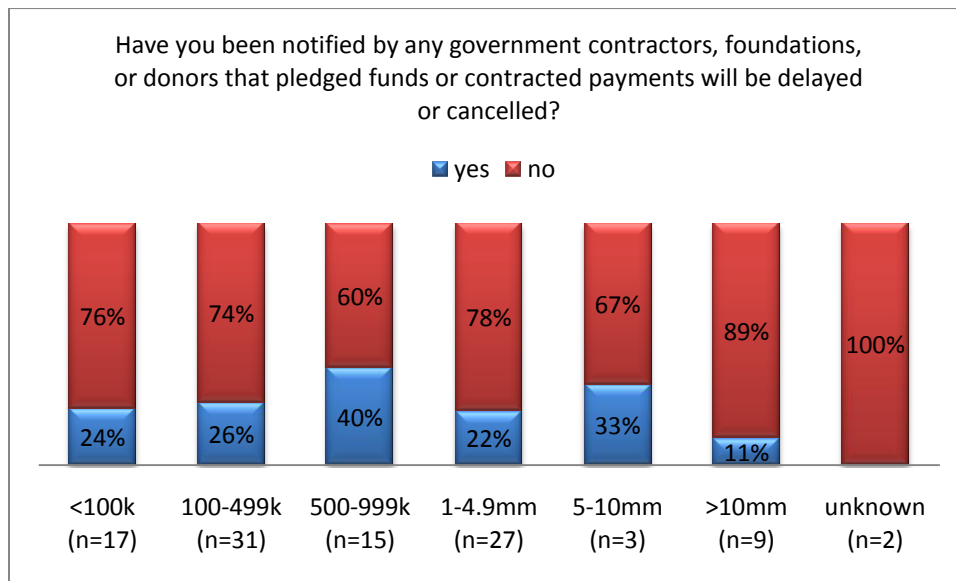


The majority of respondents who delayed a fundraising campaign because of the economy answered that their nonprofit plans to launch this new or reinitiated campaign in four to six months (57 percent).

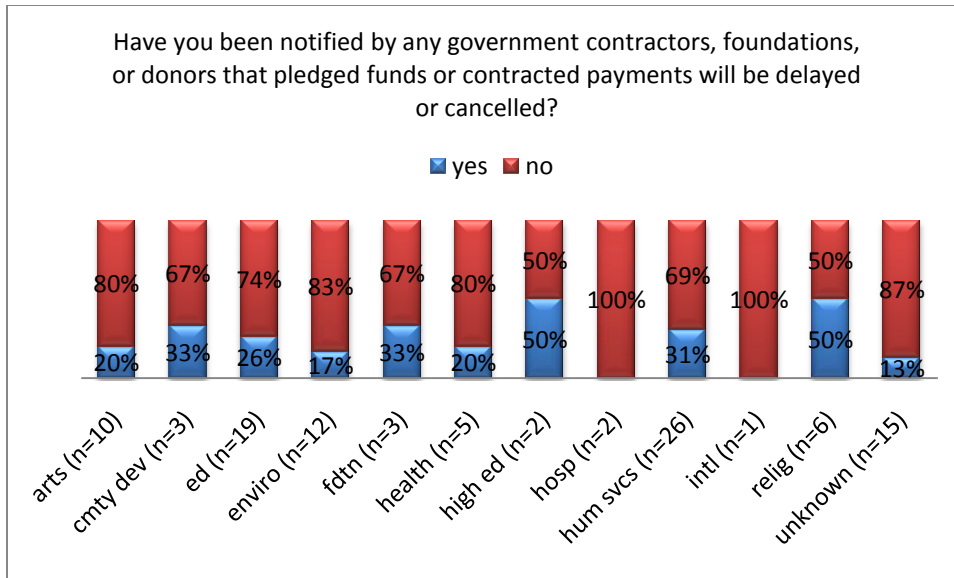
8. Have you been notified by any government contractors, foundations, or donors that pledged funds or contracted payments will be delayed or cancelled?



One in four respondents have been notified that pledge funds or contracted payments have been delayed or cancelled, representing a six percent increase since the 2008 survey (19 percent).

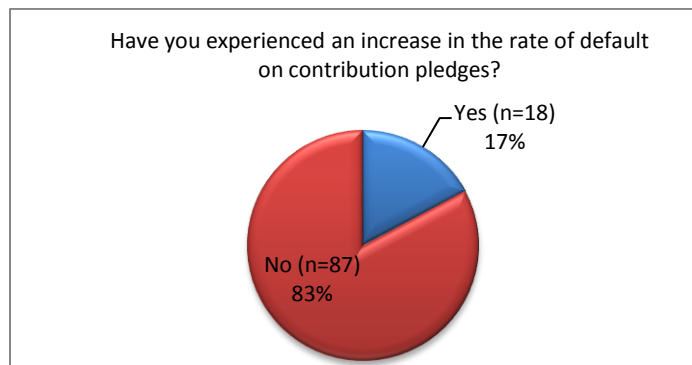


Though organization size does not appear to be a driving factor in loss or delay of pledged funds or payments, organizations with the largest budgets reported the lowest incidence.

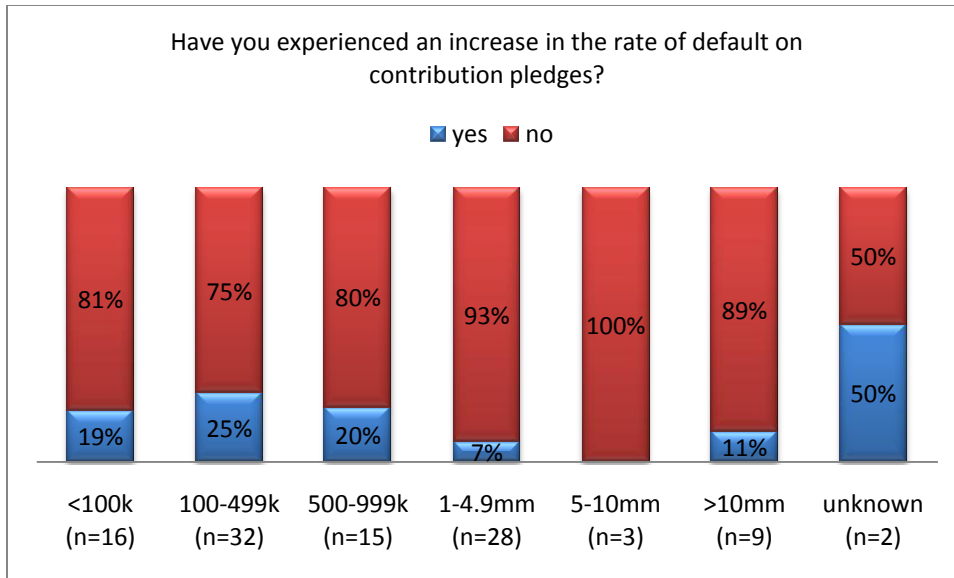


The nonprofits mission does not appear to be a driving factor in whether or not it was notified of cancelled or delayed funds.

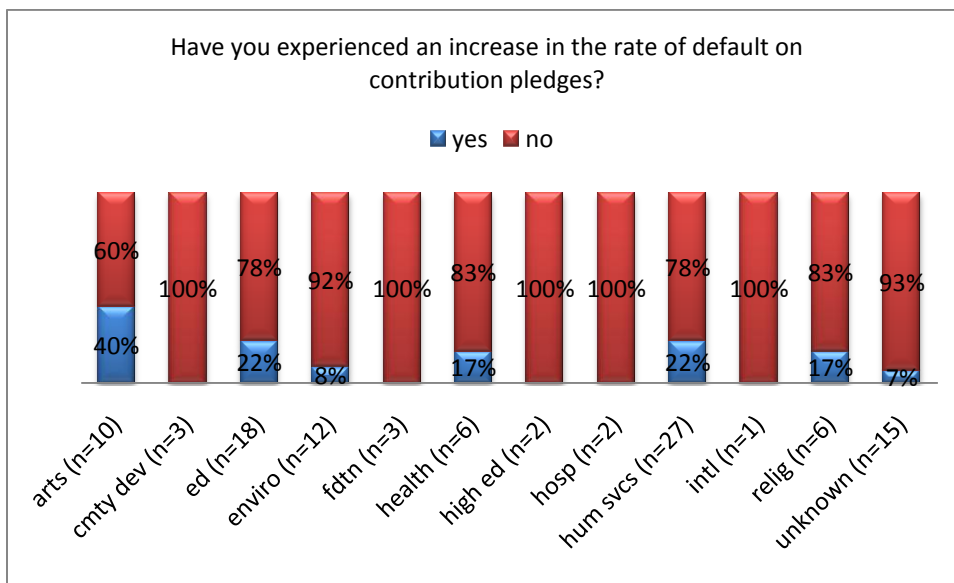
9. Have you experienced an increase in the rate of default on contribution pledges?



Nearly one in five respondents (17 percent) experienced an increase in the rate of default on contribution pledges.

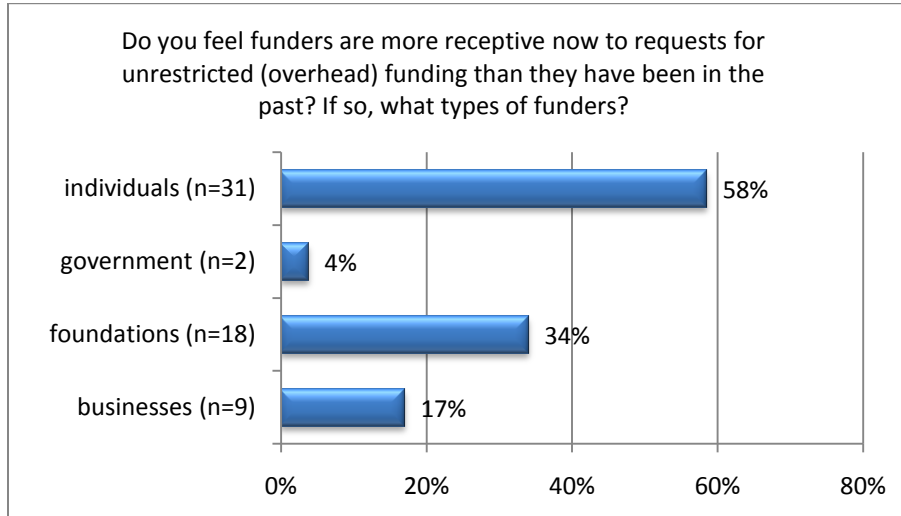


Smaller organizations report higher rates of pledge default than larger organizations.

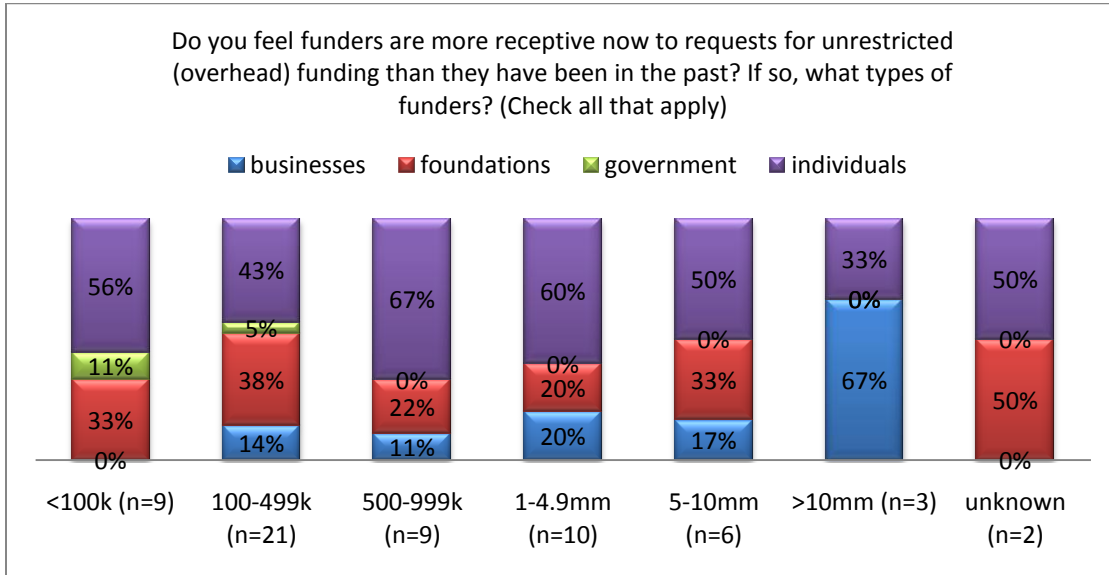


Of the missions that have been impacted the most by contribution pledge defaults, arts nonprofits stand out with a 40 percent “Yes” rate. Education, human services, health and religion were impacted as well.

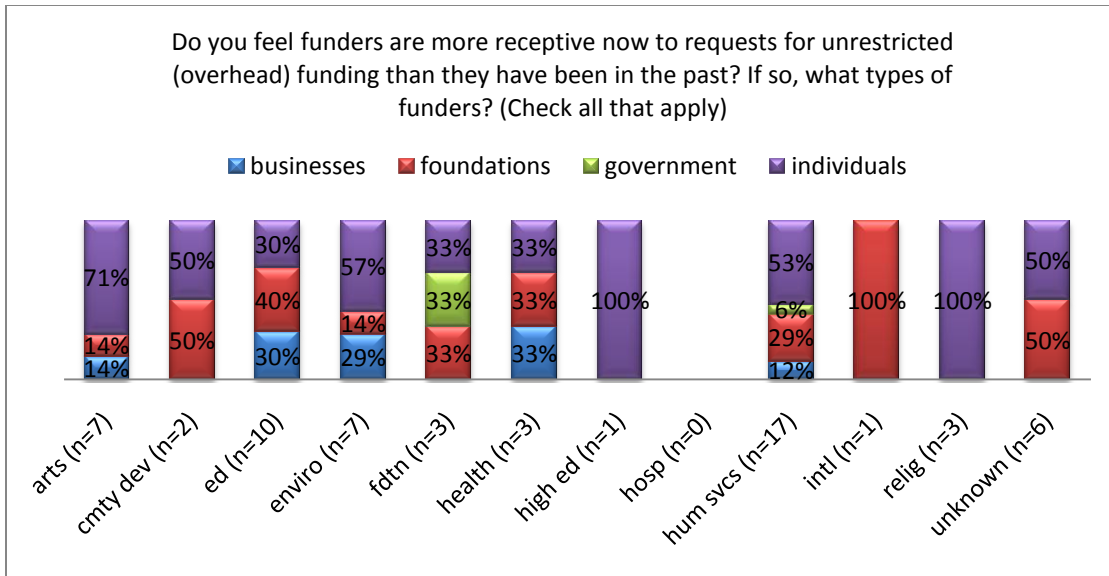
10. Do you feel funders are more receptive now to requests for unrestricted (overhead) funding than they have been in the past? If so, what types of funders? (Check all that apply)



Of the organizations who feel that it is easier now than in the past to solicit unrestricted funding, “individuals” were ranked highest among the four types. Government was rated lowest at nearly zero.



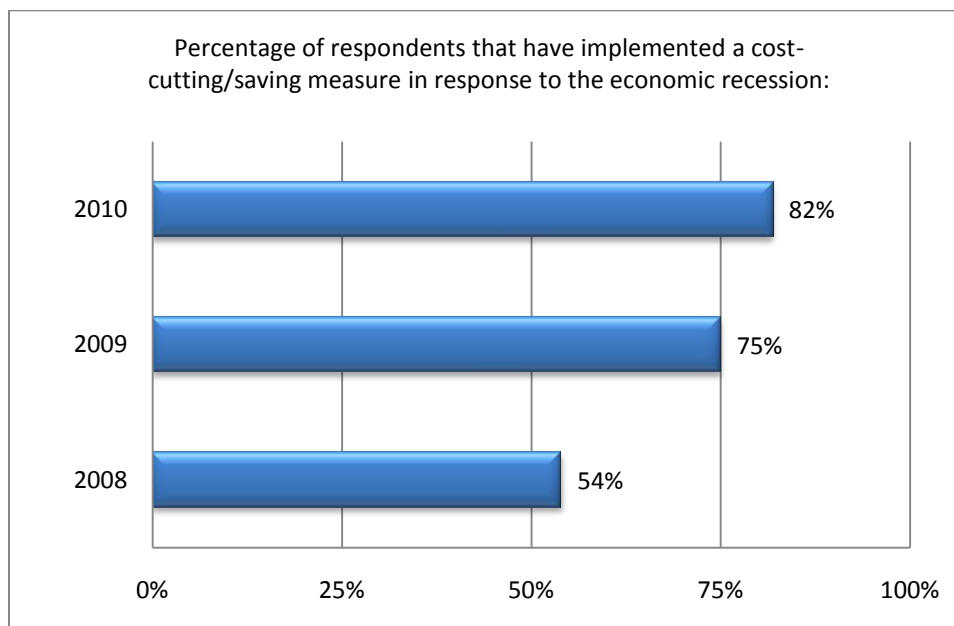
Among all organization sizes (except for the largest), respondents ranked individuals as the most receptive unrestricted funder. For smaller organizations, foundations appeared less restrictive, and for the largest organizations, businesses were.



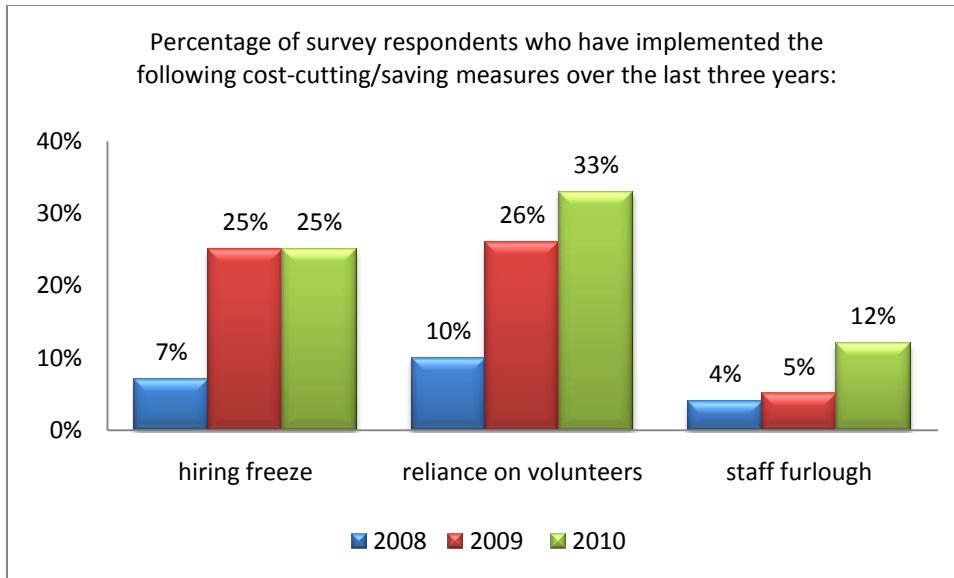
Nearly all missions feel that individual donors are now more receptive to unrestricted funding.

V. Organization

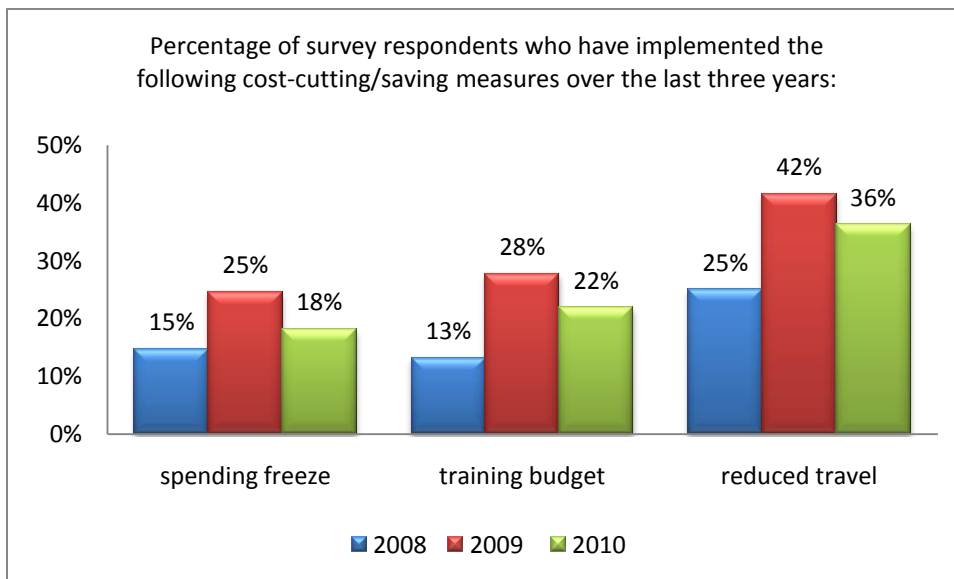
1. *Have you implemented any of the following cost-cutting/saving measures in response to the economic recession? (Check all that apply)*



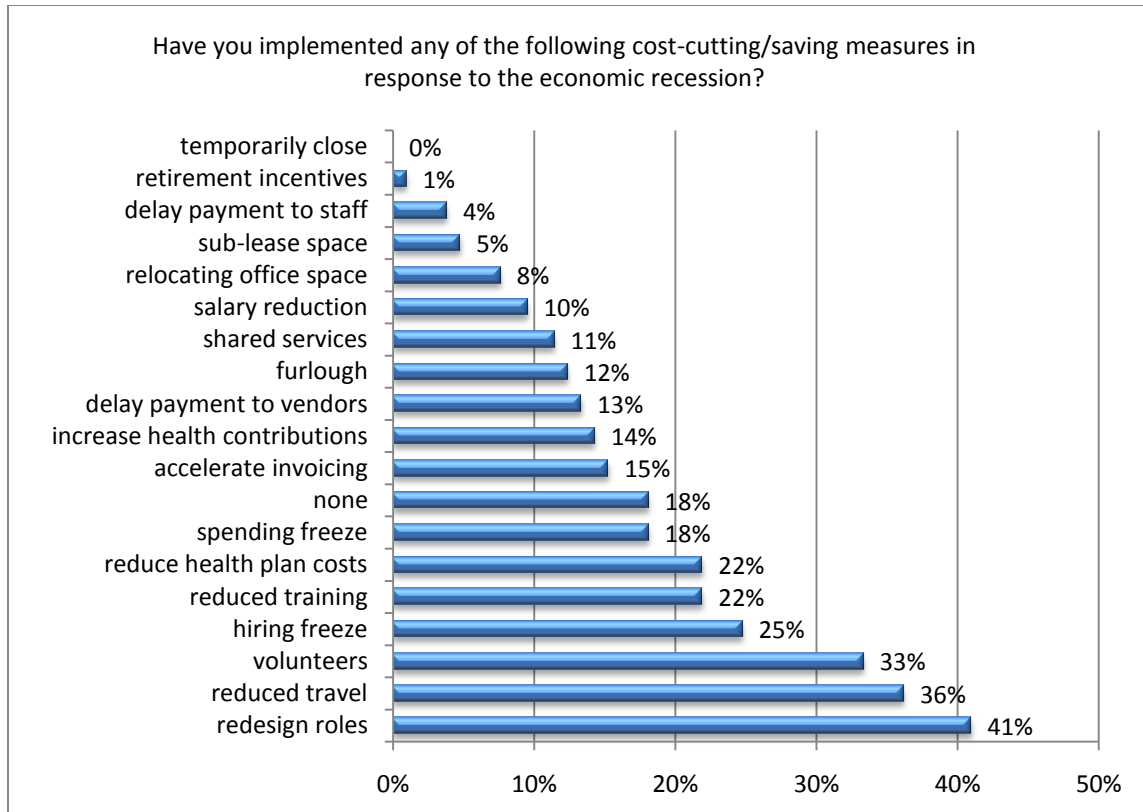
Over four out of five respondents (82 percent) have implemented some type of cost-cutting/saving measure in response to the economic recession. This is a significant increase from 2008, when slightly more than one half of respondents (54 percent) had implemented a cost-cutting/saving measure.



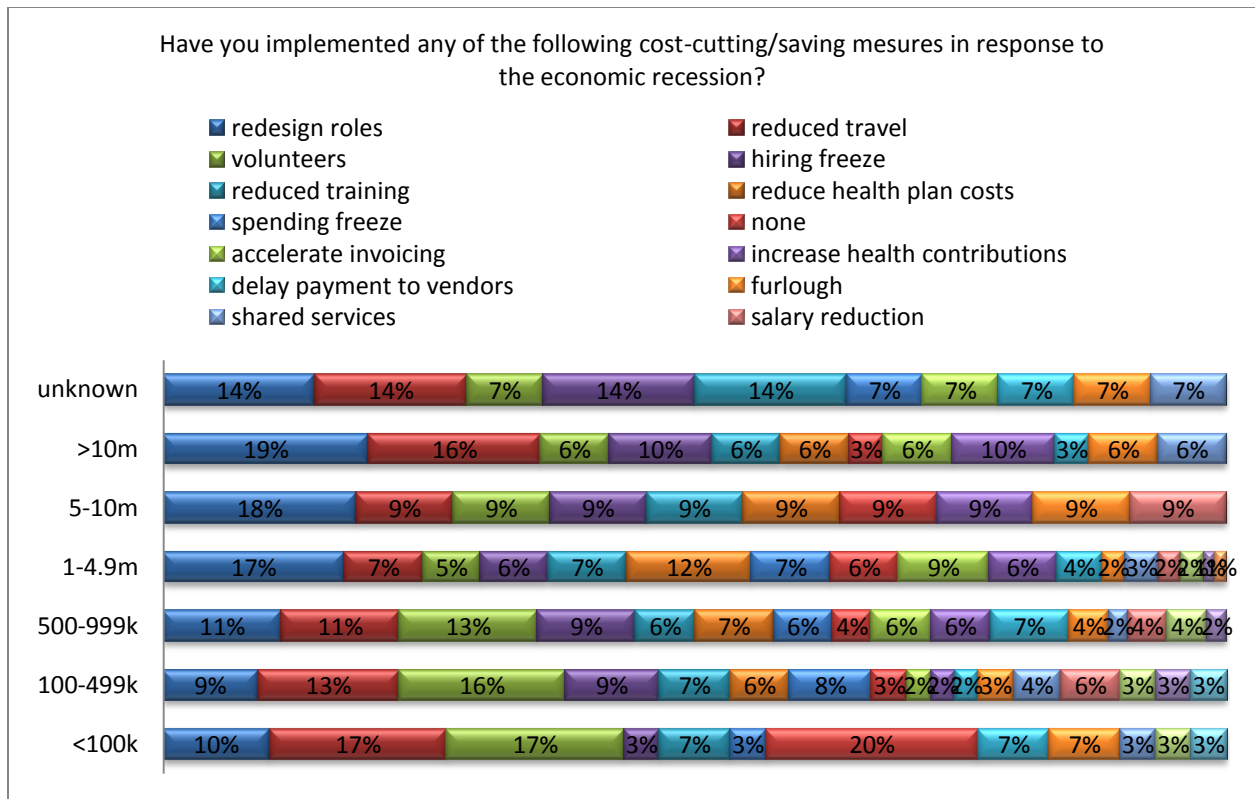
Nonprofits are increasingly relying on volunteers to fulfill staff roles and responsibilities as organizations are increasingly being asked to provide more programs and services with the same amount of resources, or less. Since 2008, regional nonprofits have increased their reliance on volunteers by 23 percent, to the point where one out of three respondents is relying on some type of volunteer help to fulfill its mission. Part of the reason for the increased reliance on volunteer help is that one out of four nonprofits has instituted a hiring freeze. Further, there has been an increase in the number of organizations that have instituted a staff furlough to save money.



On a positive note, it appears nonprofits are starting to spend again. Respondents indicated that their organizations are spending more money on training and travel than in 2009. Also, the number of respondents that indicated their organizations have implemented a spending freeze in response to the economic recession decreased from 2009 to 18 percent in 2010.



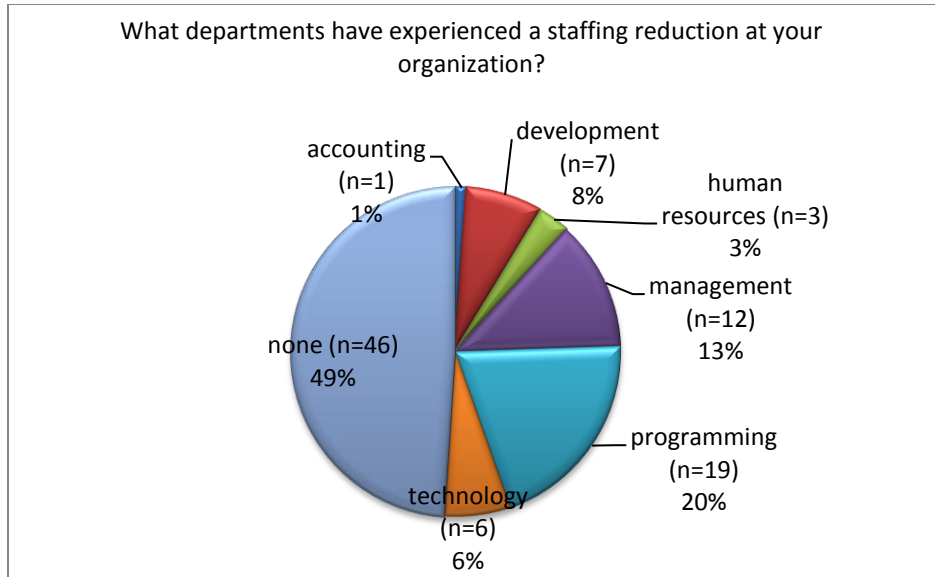
In response to the economic recession, the three dominant cost-cutting/saving measures nonprofits have enacted are redesigning staff roles and responsibilities (41 percent), reducing travel expenses (36 percent) and relying more heavily on volunteers (33 percent). Increasingly, nonprofits are redesigning staff roles to handle greater workloads – with the same or fewer resources available, relying more on volunteers to fill capacity gaps, and doing all of this with a vigilant eye toward keeping costs down. Not surprisingly, a number of respondents pointed to staff burnout as the single greatest threat to their organization.



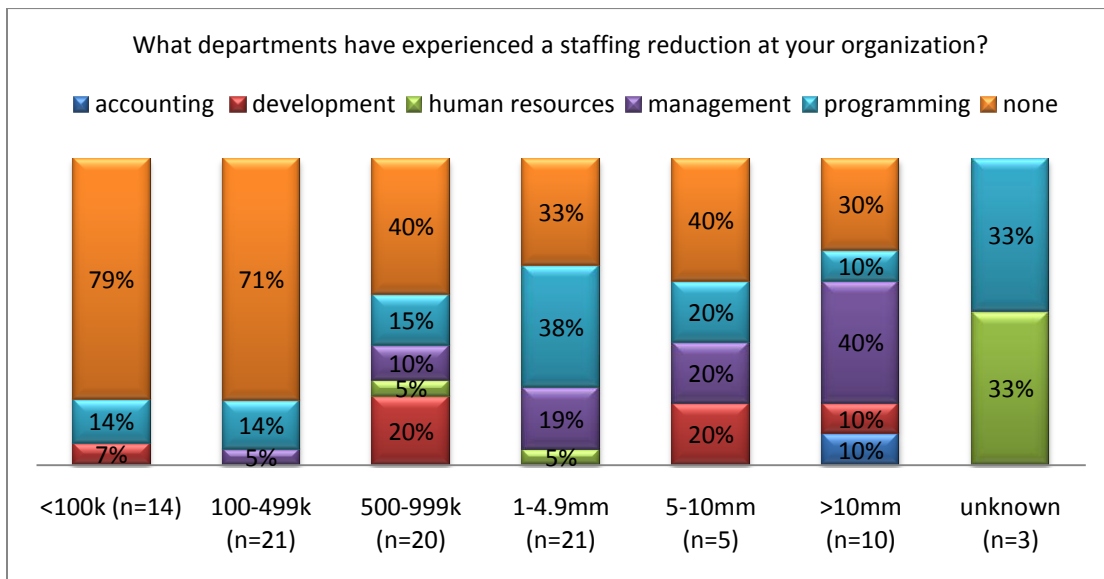
Some observations that stand out from the chart above:

- 20 percent of very small nonprofits (<\$100,000) have not implemented any cost-cutting/saving measures in response to the economic recession.
- There is a positive relationship between budget size and redesigning roles and responsibilities. Another way to look at this is very small organizations, since they have limited staff, simply do not have the luxury of redesigning staff roles and responsibilities because they are already doing much of the work of several full-time employees.
- There is an inverse relationship between reliance on volunteers and budget size, and also an inverse relationship between reduced travel expenses and budget sizes.
- There is a fairly consistent distribution of hiring freezes across budget sizes (nine percent), as well as reduced training (seven percent).
- There is a positive relationship between increasing employees' healthcare costs and budget size.
- There was a bookend response to staff furloughs and budget size, with the highest percentages found in very small organizations (<\$100,000) and very large organizations (\geq \$5,000,000).

2. What departments have experienced a staffing reduction at your organization? (Check all that apply)



Approximately 50 percent of organizations reduced their staff headcount. Programming (20 percent), management (13 percent) and development (eight percent) were the top three departments reduced.



Smaller nonprofits experienced fewer staffing reductions than larger nonprofits. For medium-sized organizations, programming and development positions were reduced more than others. As organizations grew larger, staffing reductions weighted more heavily toward management.

3. What do you consider to be the single greatest threat to your organization as a result of the economic recession?

The Arts

- A decreased willingness to fund the arts as opposed to social services.
- Staff burnout – “I’m tired!”
- Lack of dollars to maintain quality programs.

Community Development

- Job losses for citizens of the community.
- Trying to secure operating funds and drops in our earned income that provide unrestricted funds to operations.

Education

- A narrowing of funding to more conservative projects, with less funding available to new ideas.
- Rising healthcare costs.
- Not being able to move forward on plans for expansion or new facility.
- A reduction in foundation interest in funding management support activities.

Environment

- A perception in some quarters that environmental work is not as fundamentally important in hard times as human or social services.
- The state has been pushing payments through the treasury for some of our services, these payments are not timely and the database they insist we bill through is not working properly which leaves us unable to bill for some of our services.
- We are being asked to do more with less. Any significant cuts will affect many organizations resulting in closures, mergers, and more gaps in services.
- I think it would be easy to cut programs to cover the short term economic concerns but that this approach could have negative long term impact on the organization.

Higher Education

- Decreased income from earned investments.
- Drops/changes in support from the corporate community.

Hospitals

- No threat as a result of the economic recession.
- Inability to focus on vision for the future.

Human Services

- Staff morale – staff is being asked to do more with little growth in compensation, while healthcare and other costs of living continue to rise.
- Moving farther from our mission - it is all about fundraising, fundraising, fundraising for operational support.
- Reduced state and federal funds for large capital projects.
- Maintaining service levels.

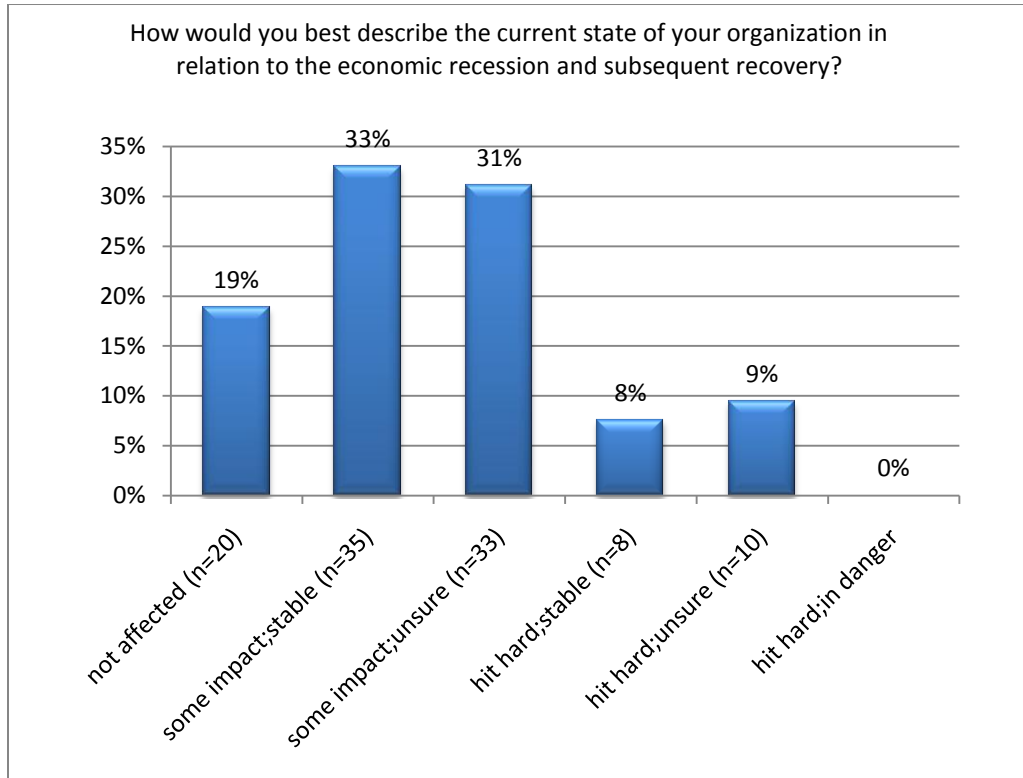
Religious

- Reduction in disposable income due to real or fear of continued economic downturn...we are concerned the recession will continue for several years.
- Loss of good staff due to burn-out.

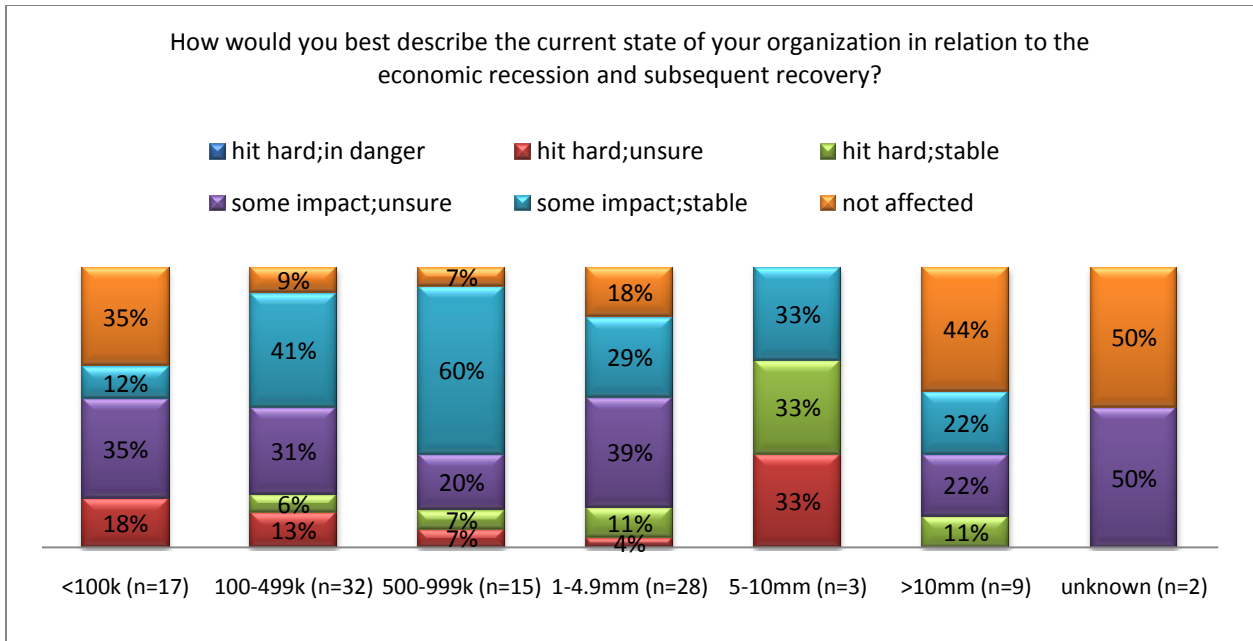
Unknown

- That the agency's staffing patterns will be stretched for too long of a period. We all can pitch in and do extra work during a crisis but what if the crisis becomes the norm?
- Halting and reducing growth to keep doors open.
- Little reserve. If we do not stay on target with our fundraising efforts we will be forced to consider a line of credit.
- Reluctance to enter into new contracts that will obligate an organization to spend capital.
- Reduction of services to people in need of them.

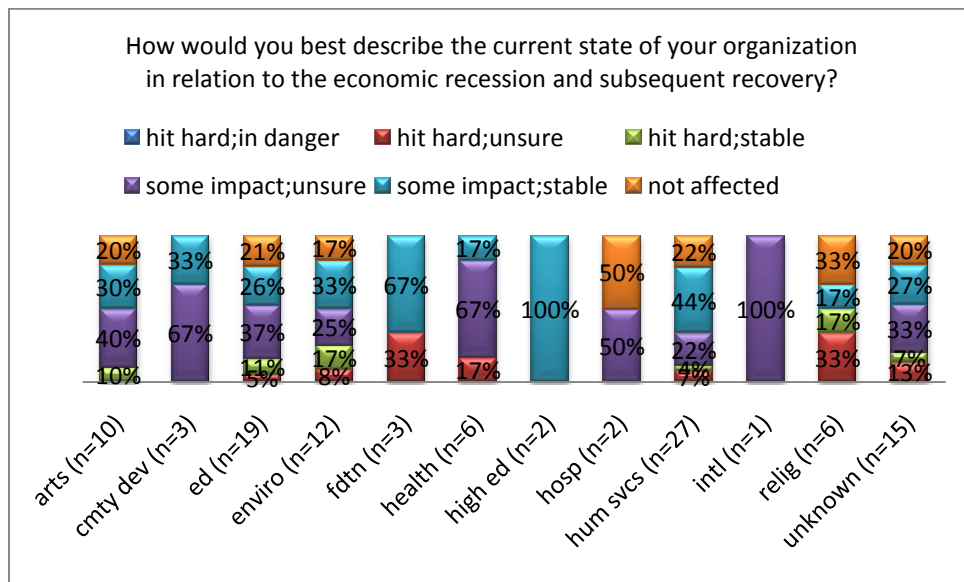
4. How would you best describe the current state of your organization in relation to the economic recession and subsequent recovery?



Approximately four out of five respondents, or 81 percent, were impacted by the economic recession. Of the 64 percent who answered that their organizations felt “some impact” due to the economic recession, half feel they are now in a “stable” position, and half are “unsure” of their organization’s future.

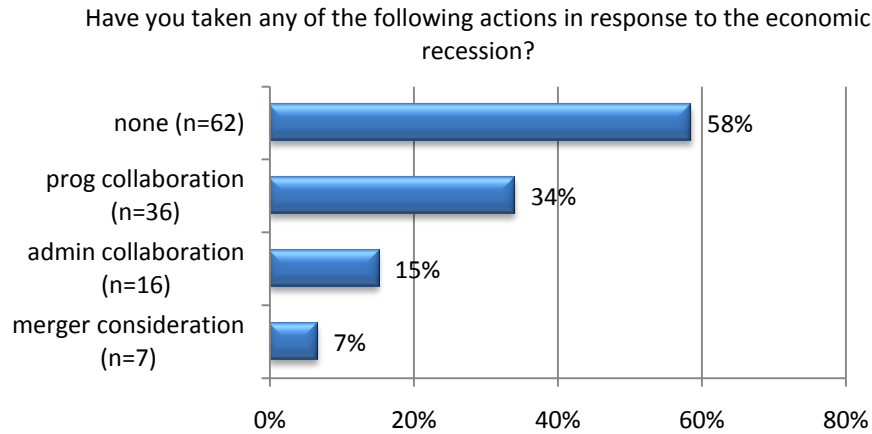


One in two (53 percent) very small nonprofits is “unsure” about their organizational futures and responded that they felt “some impact” or were “hit hard” by the recession. Smaller to medium-sized nonprofits also felt “some impact” but are more stable than very small nonprofits. Only a few nonprofits of any size reported being “hit hard” by the recession. Interestingly, when it comes to reporting not being affected at all, the results were book-ended with the very smallest and very largest having by far the highest reporting.

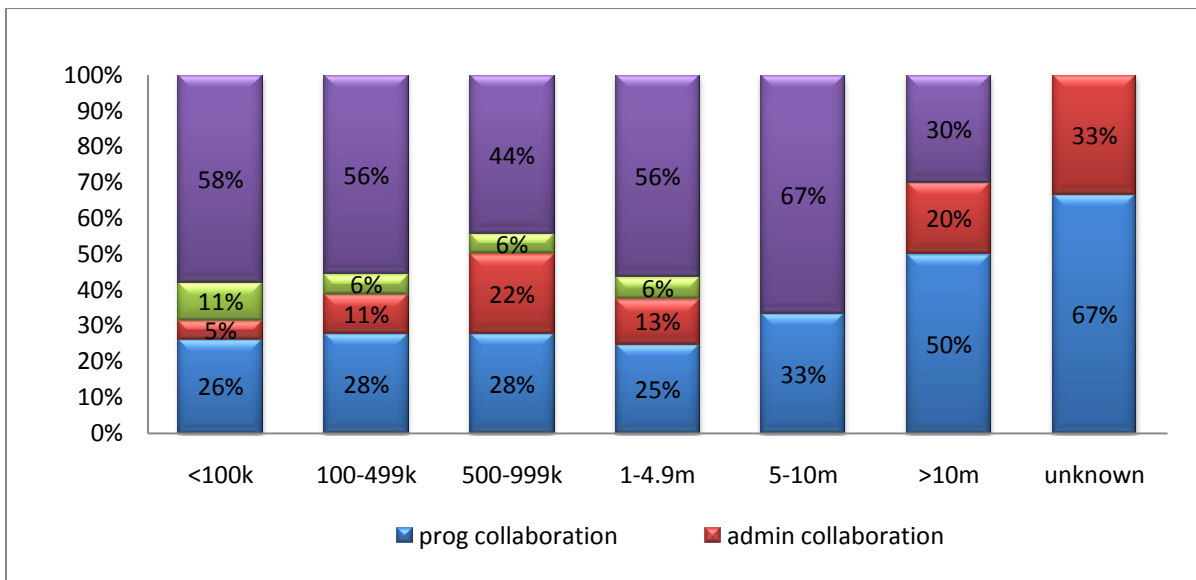


Of the missions that were “hit hard,” foundations and religious organizations had the highest concentration of responses (33 percent each), followed by health (17 percent). The mission types with the most “unsure” responses are health (84 percent), community development (67 percent), education (42 percent) and arts organizations (40 percent).

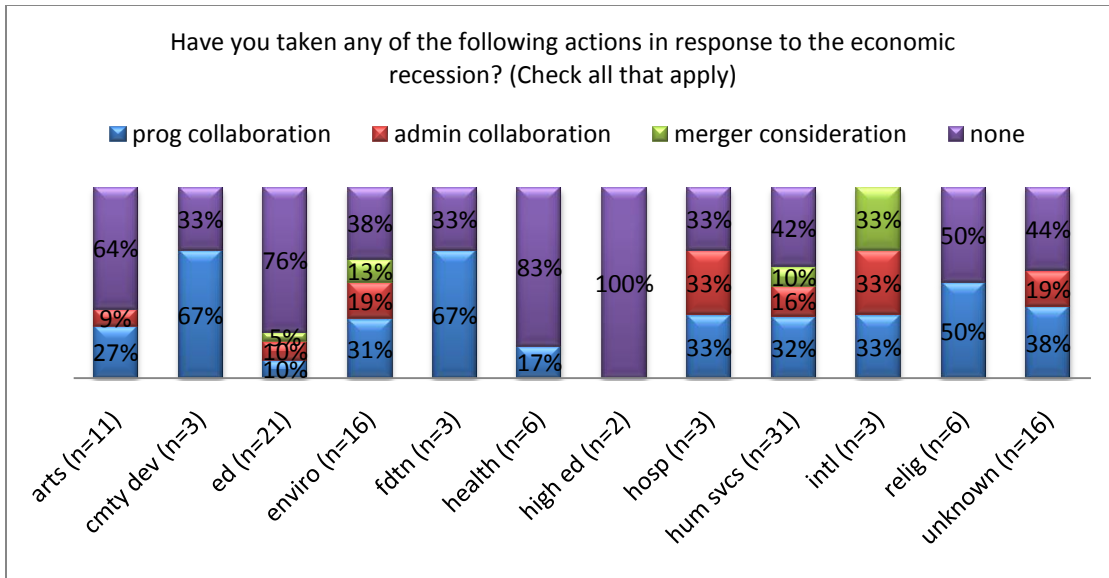
5. Have you taken any of the following actions in response to the economic recession? (Check all that apply)



Over four out of ten respondents (42 percent) are collaborating with another organization or considering a merger as a response to the economic recession.

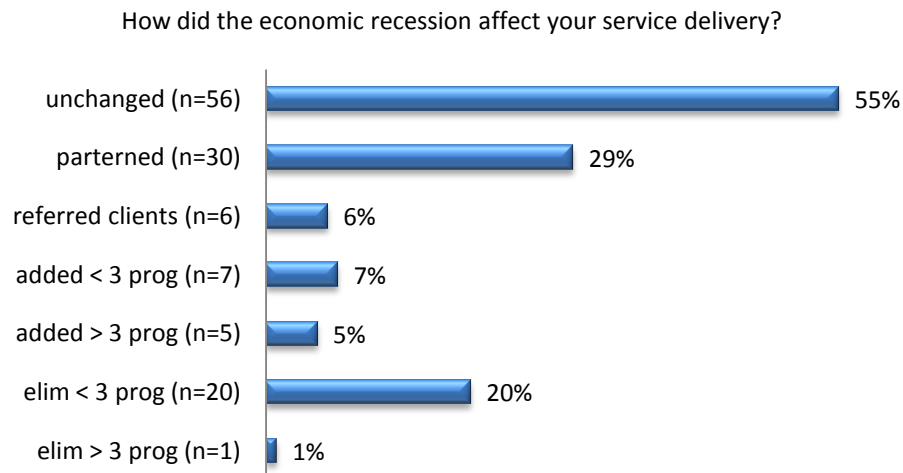


Nonprofits of all sizes reported some program collaboration. Merger considerations were more common among smaller nonprofits, while no collaboration was most prevalent among the largest respondents.

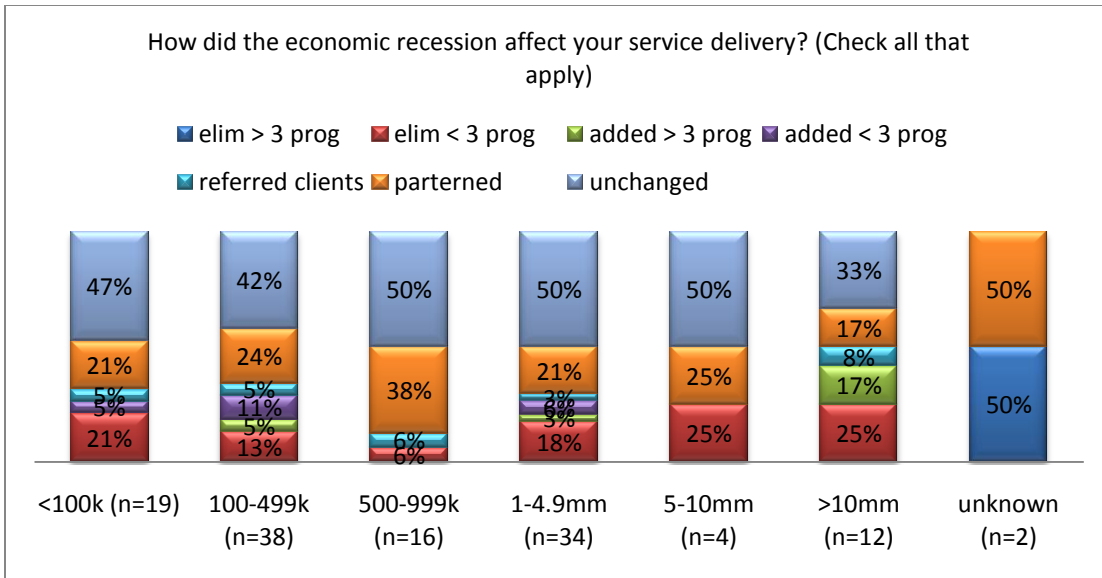


Respondents reported program collaborations across all mission types except for higher education while dealing with the recession. Environmental, human services, education, hospitals, internationals and arts programs also collaborated with administration. Merger considerations were most notable among respondents with environmental, international, or human service based missions. Resistance to any collaboration was evidenced most highly among arts, education, health, higher education and religious organizations.

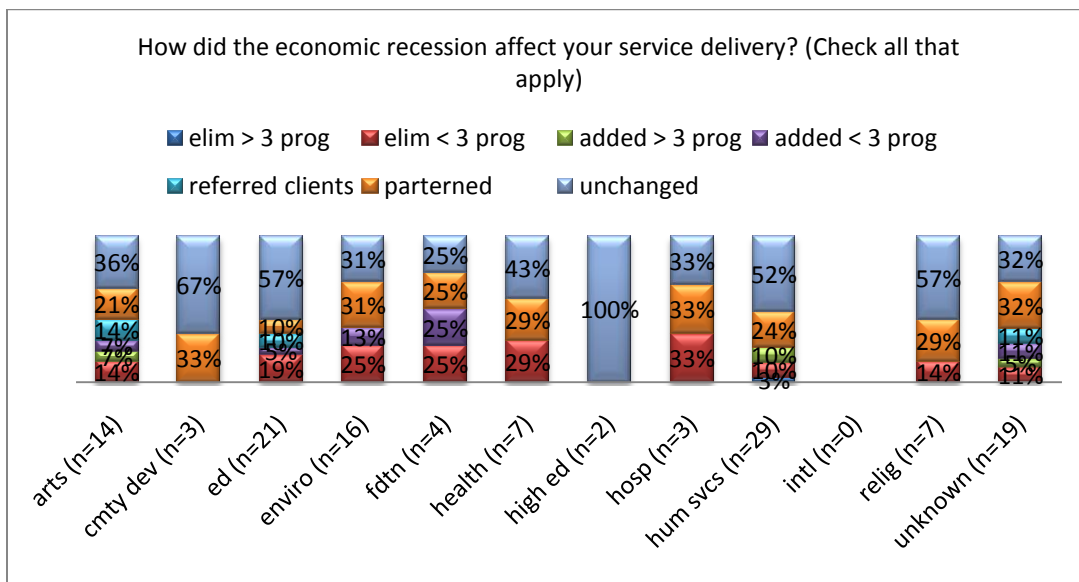
6. How did the economic recession affect your service delivery? (Check all that apply)



Approximately half the organizations (55 percent) responded that the recession had no effect on their service delivery. A little over one in four (29 percent) partnered, 12 percent added programs, 21 percent dropped programs, while six percent referred clients to other organizations. It was rare that any organization was forced to eliminate over three programs.



The largest and smallest organizations reported the highest frequency of program cutting. Interestingly, nearly one in five (17 percent) of organizations with budgets over \$10,000,000 reported adding more than three programs.



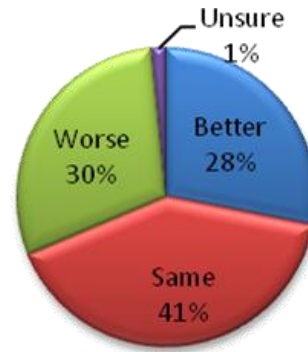
The nonprofit's mission does not appear to be a strong factor in the recession's impact on service delivery. Missions involving education and higher education, human services, religion and community development had the highest percentages of programs unchanged. The highest percentages of programs eliminated were found among missions involving the environment, health, foundations and hospitals. Only the arts and human services reported adding more than three programs.

Section 1 - FINANCE

Survey Question 1: What does your organization's financial situation look like today compared to one year ago?

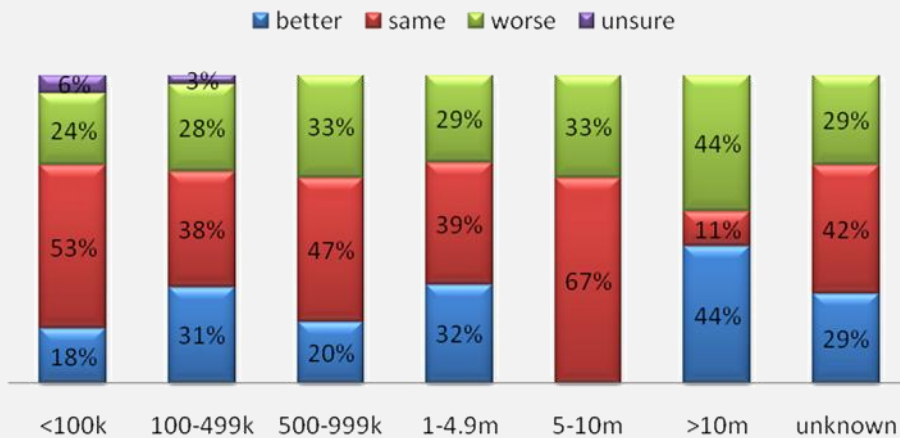
GENERAL RESULTS

Answer Options	Response Percent	Response Count
Better	28.1%	36
Same	40.6%	52
Worse	29.7%	38
Unsure	1.6%	2
answered question		128
skipped question		3



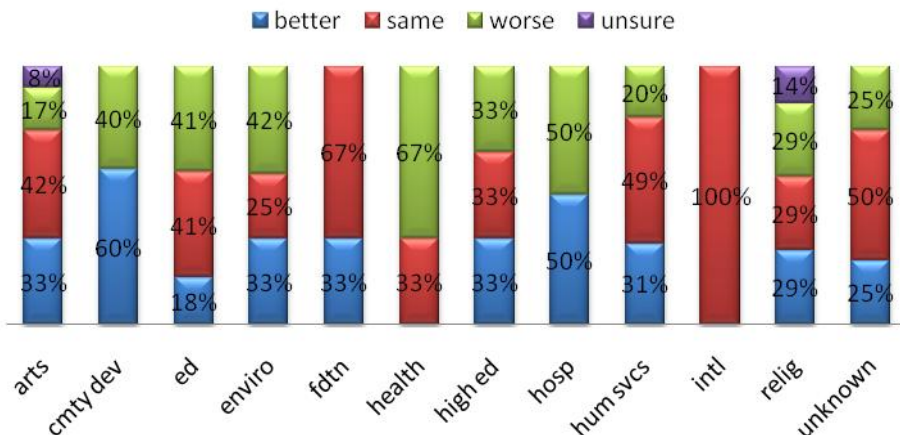
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
better	17.6% (3)	31.3% (10)	20.0% (3)	32.1% (9)		44.4% (4)	29.2% (7)
same	52.9% (9)	37.5% (12)	46.7% (7)	39.3% (11)	66.7% (2)	11.1% (1)	41.7% (10)
worse	23.5% (4)	28.1% (9)	33.3% (5)	28.6% (8)	33.3% (1)	44.4% (4)	29.2% (7)
unsure	5.9% (1)	3.1% (1)					



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
better	33.3% (4)	60.0% (3)	18.2% (4)	33.3% (4)	33.3% (1)	0.0% (0)	33.3% (1)	50.0% (1)	31.4% (11)		28.6% (2)	25.0% (5)
same	41.7% (5)		40.9% (9)	25.0% (3)	66.7% (2)	33.3% (2)	33.3% (1)		48.6% (17)	100.0% (1)	28.6% (2)	50.0% (10)
worse	16.7% (2)	40.0% (2)	40.9% (9)	41.7% (5)		66.7% (4)	33.3% (1)	50.0% (1)	20.0% (7)		28.6% (2)	25.0% (5)
unsure	8.3% (1)										14.3% (1)	

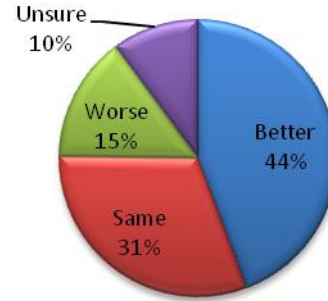


Section 1 - FINANCE

Survey Question 2: What do you anticipate your financial situation will look like one year from now compared to today?

GENERAL RESULTS

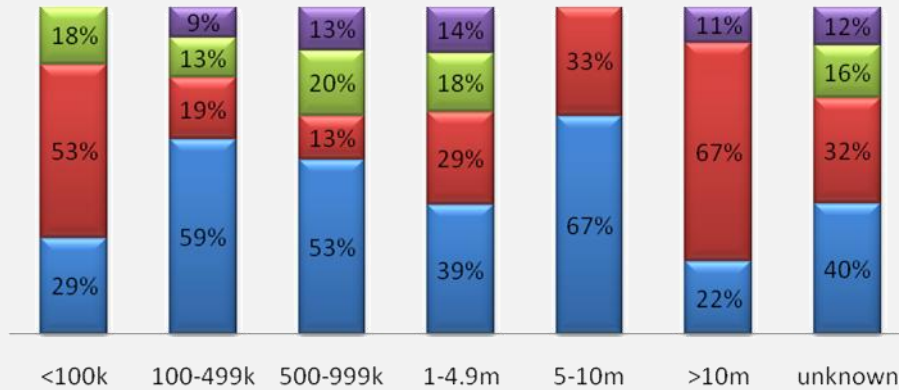
Answer Options	Response Percent	Response Count
Better	44.2%	57
Same	31.0%	40
Worse	14.7%	19
Unsure	10.1%	13
answered question		129
skipped question		2



BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
better	29.4% (5)	59.4% (19)	53.3% (8)	39.3% (11)	66.7% (2)	22.2% (2)	40.0% (10)
same	52.9% (9)	18.8% (6)	13.3% (2)	28.6% (8)	33.3% (1)	66.7% (6)	32.0% (8)
worse	17.6% (3)	12.5% (4)	20.0% (3)	17.9% (5)			16.0% (4)
unsure		9.4% (3)	13.3% (2)	14.3% (4)		11.1% (1)	12.0% (3)

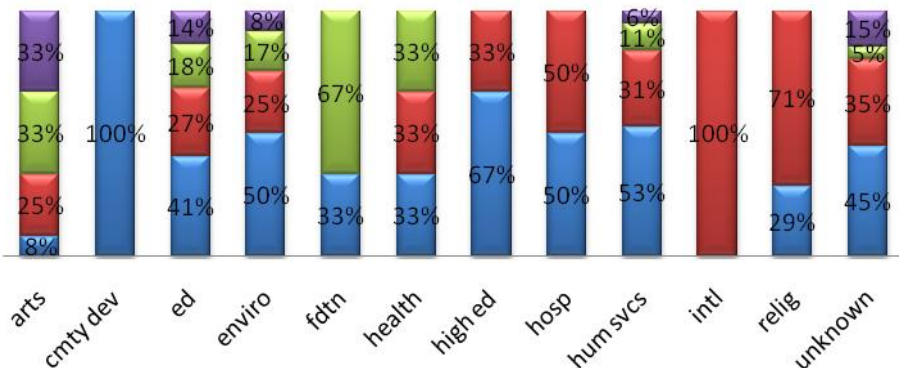
■ better ■ same ■ worse ■ unsure



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
better	8.3% (1)	100.0% (5)	40.9% (9)	50.0% (6)	33.3% (1)	33.3% (2)	66.7% (2)	50.0% (1)	52.8% (19)		28.6% (2)	45.0% (9)
same	25.0% (3)		27.3% (6)	25.0% (3)		33.3% (2)	33.3% (1)	50.0% (1)	30.6% (11)	100.0% (1)	71.4% (5)	35.0% (7)
worse	33.3% (4)		18.2% (4)	16.7% (2)	66.7% (2)	33.3% (2)			11.1% (4)			5.0% (1)
unsure	33.3% (4)		13.6% (3)	8.3% (1)					5.6% (2)			15.0% (3)

■ better ■ same ■ worse ■ unsure

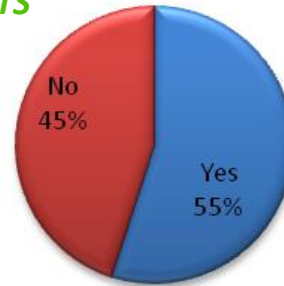


Section 1 - FINANCE

Survey Question 3: Are you expecting any cash flow challenges as a result of the current economic environment?

GENERAL RESULTS

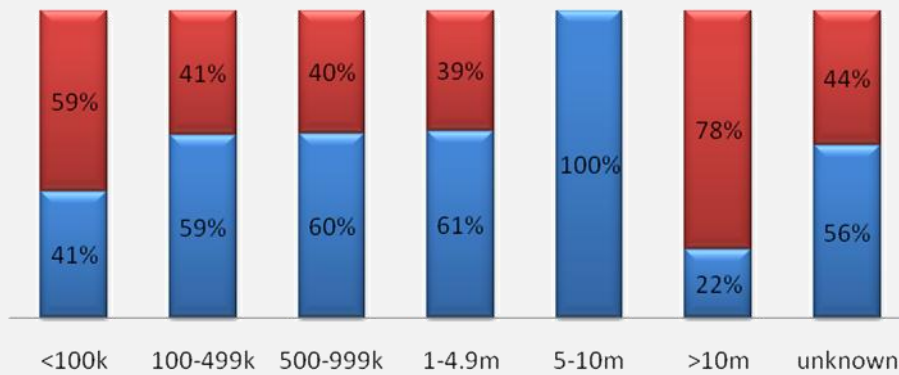
Answer Options	Response Percent	Response Count
Yes	55.0%	71
No	45.0%	58
answered question		129
skipped question		2



BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
no	58.8% (10)	40.6% (13)	40.0% (6)	39.3% (11)		77.8% (7)	44.0% (11)
yes	41.2% (7)	59.4% (19)	60.0% (9)	60.7% (17)	100.0% (3)	22.2% (2)	56.0% (14)

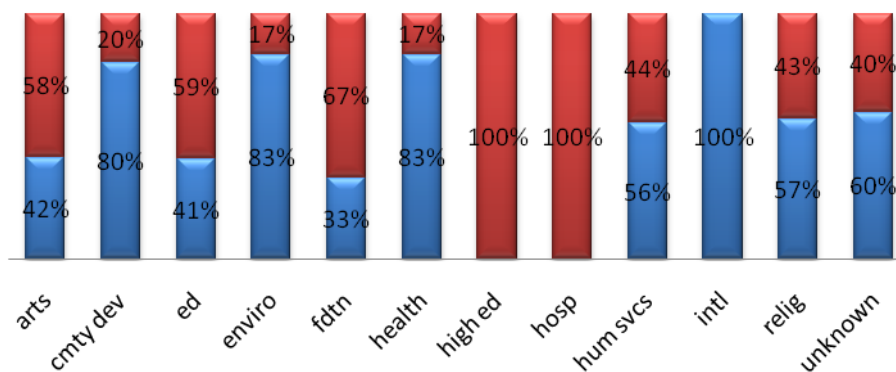
■ yes ■ no



BY MISSION

mission	arts	cmtty dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
no	58.3% (7)	20.0% (1)	59.1% (13)	16.7% (2)	66.7% (2)	16.7% (1)	100.0% (3)	100.0% (2)	44.4% (16)		42.9% (3)	40.0% (8)
yes	41.7% (5)	80.0% (4)	40.9% (9)	83.3% (10)	33.3% (1)	83.3% (5)			55.6% (20)	100.0% (1)	57.1% (4)	60.0% (12)

■ yes ■ no

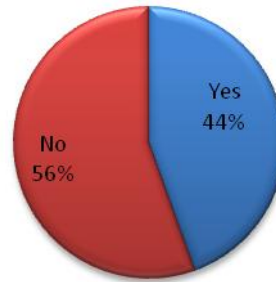


Section 1 - FINANCE

Survey Question 4: Do you have a line of credit?

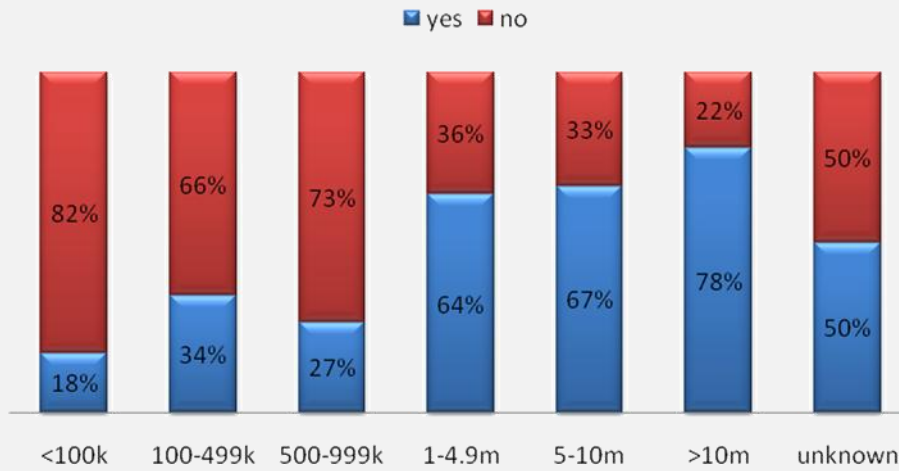
GENERAL RESULTS

Answer Options	Response Percent	Response Count
Yes	44.5%	57
No	55.5%	71
answered question		128
skipped question		3



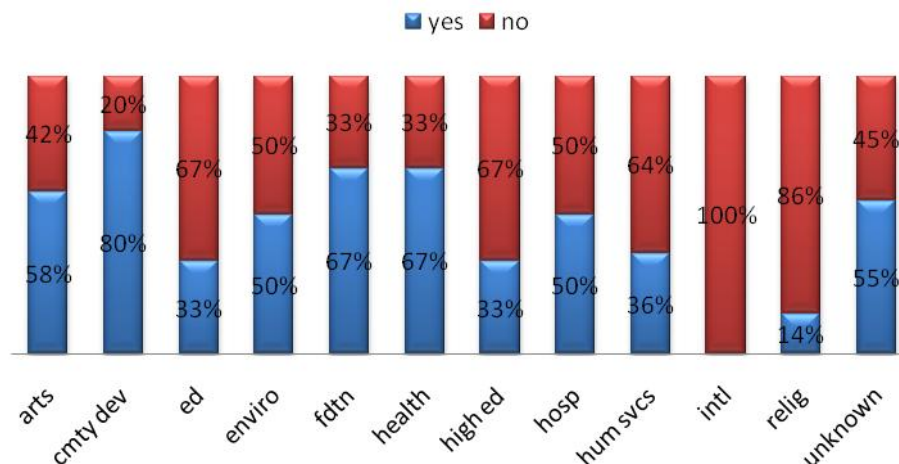
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
no	82.4% (14)	65.6% (21)	73.3% (11)	35.7% (10)	33.3% (1)	22.2% (2)	50.0% (12)
yes	17.6% (3)	34.4% (11)	26.7% (4)	64.3% (18)	66.7% (2)	77.8% (7)	50.0% (12)



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
no	41.7% (5)	20.0% (1)	66.7% (14)	50.0% (6)	33.3% (1)	33.3% (2)	66.7% (2)	50.0% (1)	63.9% (23)	100.0% (1)	85.7% (6)	45.0% (9)
yes	58.3% (7)	80.0% (4)	33.3% (7)	50.0% (6)	66.7% (2)	66.7% (4)	33.3% (1)	50.0% (1)	36.1% (13)		14.3% (1)	55.0% (11)

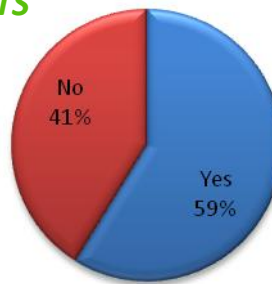


Section 1 - FINANCE

Survey Question 5a: Regarding your line of credit, do you use it for cash flow timing?

GENERAL RESULTS

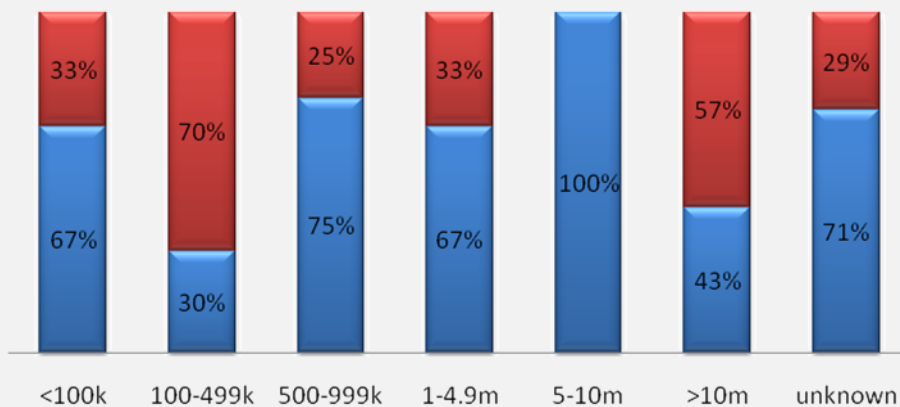
Answer Options	Response Percent	Response Count
Yes	58.8%	30
No	41.2%	21
answered question		51
skipped question		80



BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
no	33.3% (1)	70.0% (7)	25.0% (1)	33.3% (6)		57.1% (4)	28.6% (2)
yes	66.7% (2)	30.0% (3)	75.0% (3)	66.7% (12)	100.0% (2)	42.9% (3)	71.4% (5)

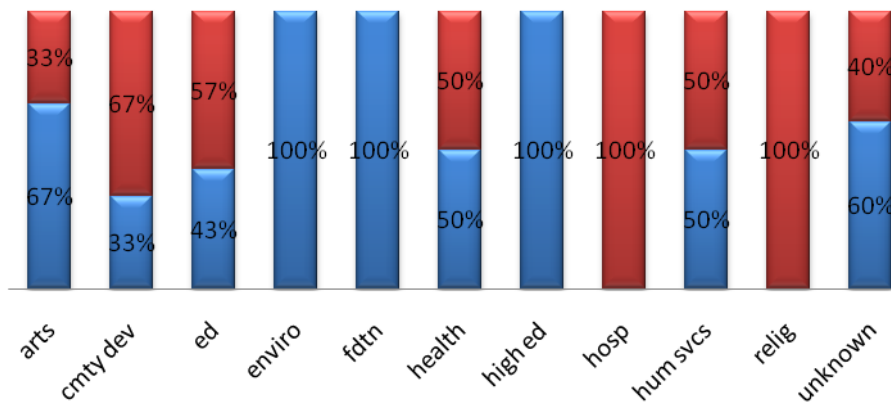
■ yes ■ no



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	relig	unknown
no	33.3% (2)	66.7% (2)	57.1% (4)			50.0% (2)		100.0% (1)	50.0% (5)	100.0% (1)	40.0% (4)
yes	66.7% (4)	33.3% (1)	42.9% (3)	100.0% (6)	100.0% (2)	50.0% (2)	100.0% (1)		50.0% (5)		60.0% (6)

■ yes ■ no

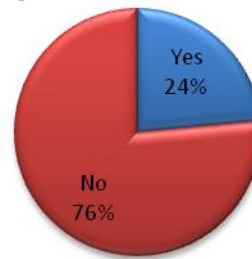


Section 1 - FINANCE

Survey Question 5b: Regarding your line of credit, do you use it without having a committed source of funds to pay it off?

GENERAL RESULTS

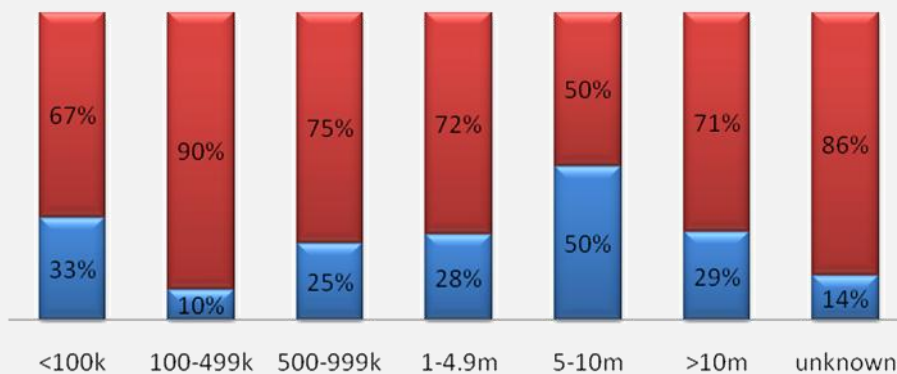
Answer Options	Response Percent	Response Count
Yes	23.5%	12
No	76.5%	39
answered question		51
skipped question		80



BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
no	66.7% (2)	90.0% (9)	75.0% (3)	72.2% (13)	50.0% (1)	71.4% (5)	85.7% (6)
yes	33.3% (1)	10.0% (1)	25.0% (1)	27.8% (5)	50.0% (1)	28.6% (2)	14.3% (1)

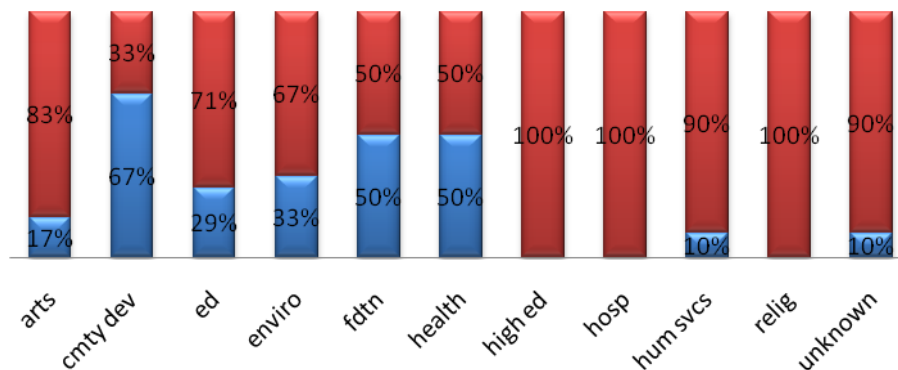
■ yes ■ no



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	relig	unknown
no	83.3% (5)	33.3% (1)	71.4% (5)	66.7% (4)	50.0% (1)	50.0% (2)	100.0% (1)	100.0% (1)	90.0% (9)	100.0% (1)	90.0% (9)
yes	16.7% (1)	66.7% (2)	28.6% (2)	33.3% (2)	50.0% (1)	50.0% (2)			10.0% (1)		10.0% (1)

■ yes ■ no

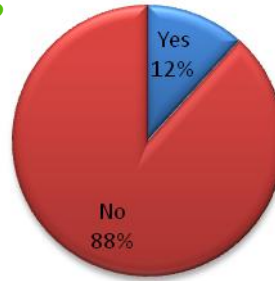


Section 1 - FINANCE

Survey Question 5c: Regarding your line of credit, is it fully borrowed?

GENERAL RESULTS

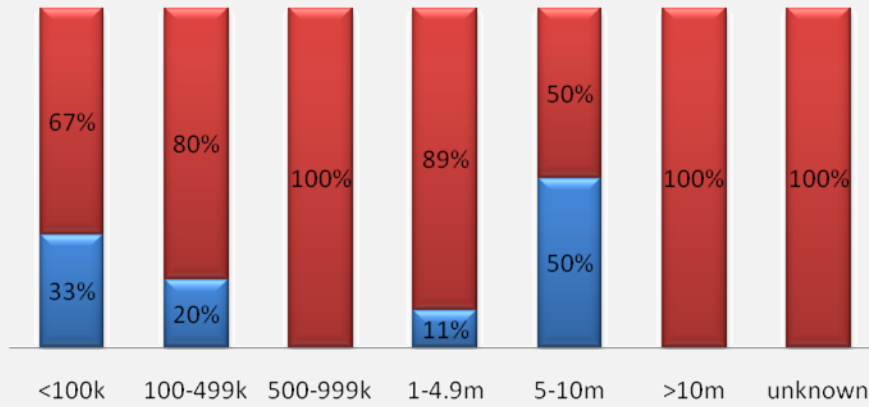
Answer Options	Response Percent	Response Count
Yes	11.8%	6
No	88.2%	45
answered question		51
skipped question		80



BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
no	66.7% (2)	80.0% (8)	100.0% (4)	88.9% (16)	50.0% (1)	100.0% (7)	100.0% (7)
yes	33.3% (1)	20.0% (2)		11.1% (2)	50.0% (1)		

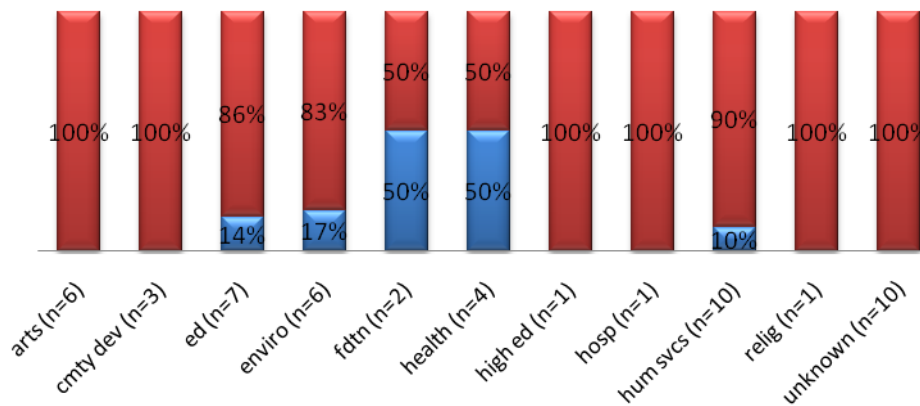
■ yes ■ no



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	hosp	hum svcs	relig	unknown
no	100.0% (6)	100.0% (3)	85.7% (6)	83.3% (5)	50.0% (1)	50.0% (2)	100.0% (1)	90.0% (1)	100.0% (9)	100.0% (1)
yes			14.3% (1)	16.7% (1)	50.0% (1)	50.0% (2)				

■ yes ■ no

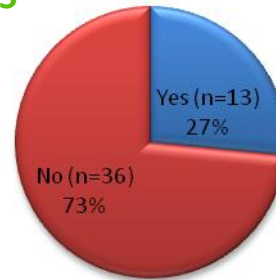


Section 1 - FINANCE

Survey Question 5d: Regarding your line of credit, do you expect to use it more than usual over the next year?

GENERAL RESULTS

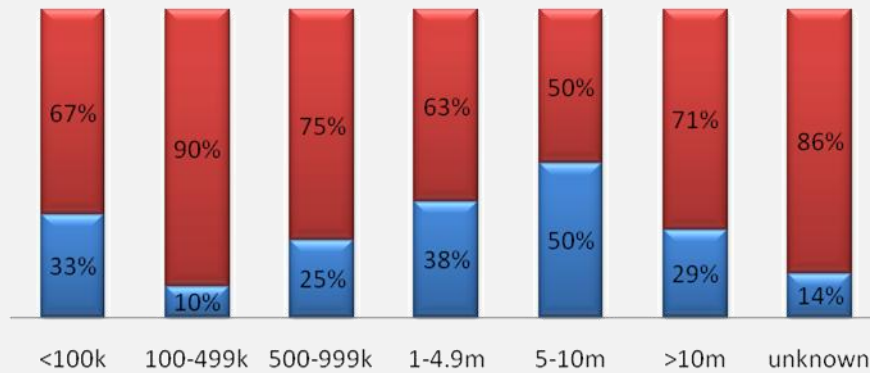
Answer Options	Response Percent	Response Count
Yes (n=13)	26.5%	13
No (n=36)	73.5%	36
answered question		49
skipped question		82



BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
no	66.7% (2)	90.0% (9)	75.0% (3)	62.5% (10)	50.0% (1)	71.4% (5)	85.7% (6)
yes	33.3% (1)	10.0% (1)	25.0% (1)	37.5% (6)	50.0% (1)	28.6% (2)	14.3% (1)

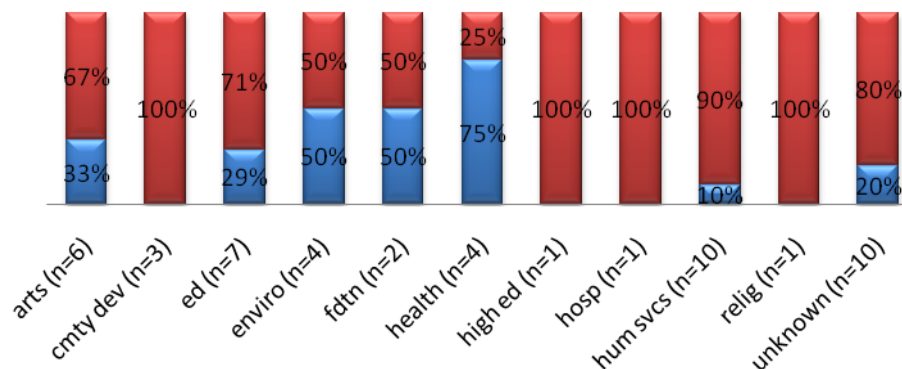
■ yes ■ no



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	relig	unknown
no	66.7% (4)	100.0% (3)	71.4% (5)	50.0% (2)	50.0% (1)	25.0% (1)	100.0% (1)	100.0% (1)	90.0% (9)	100.0% (1)	80.0% (8)
yes	33.3% (2)		28.6% (2)	50.0% (2)	50.0% (1)	75.0% (3)			10.0% (1)		20.0% (2)

■ yes ■ no

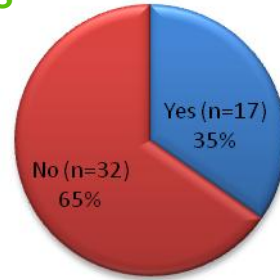


Section 1 - FINANCE

Survey Question 5e: Regarding your line of credit, does use of your line require board approval?

GENERAL RESULTS

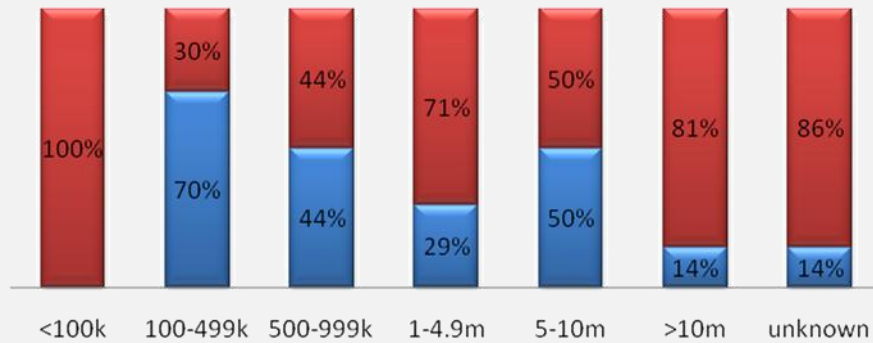
Answer Options	Response Percent	Response Count
Yes (n=17)	34.7%	17
No (n=32)	65.3%	32
answered question		49
skipped question		82



BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
no	100.0% (2)	30.0% (3)	43.8% (2)	70.6% (12)	50.0% (1)	81.4% (6)	85.7% (6)
yes		70.0% (7)	43.8% (2)	29.4% (5)	50.0% (1)	13.6% (1)	14.3% (1)

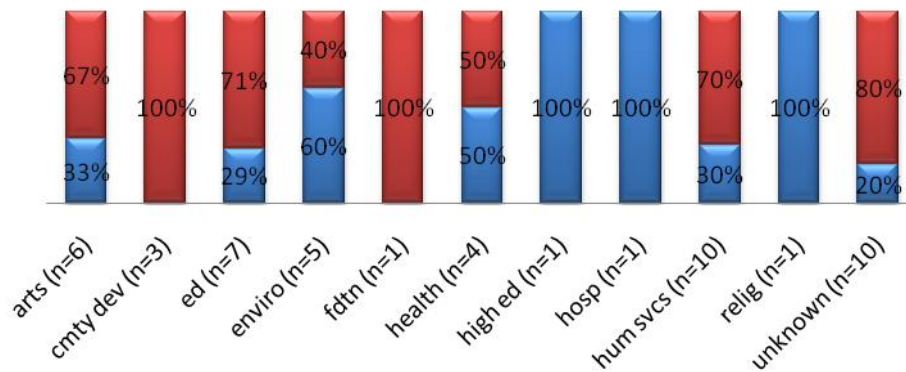
■ yes ■ no



BY MISSION

mission	arts	cmty dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	relig	unknown
no	66.7% (4)	100.0% (3)	71.4% (5)	40.0% (2)	100.0% (1)	50.0% (2)			70.0% (7)		80.0% (8)
yes	33.3% (2)		28.6% (2)	60.0% (3)		50.0% (2)	100.0% (1)	100.0% (1)	30.0% (3)	100.0% (1)	20.0% (2)

■ yes ■ no

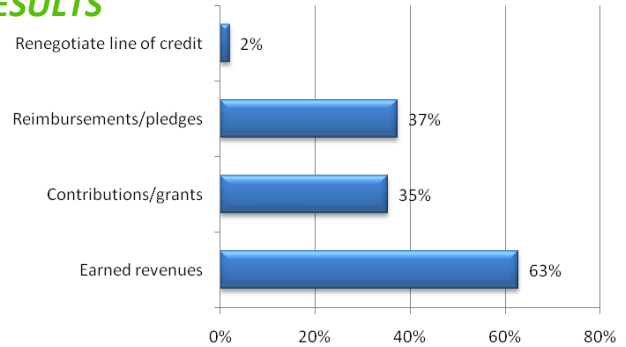


Section 1 - FINANCE

Survey Question 6: How does your organization plan on repaying its line of credit balance? (Check all that apply)

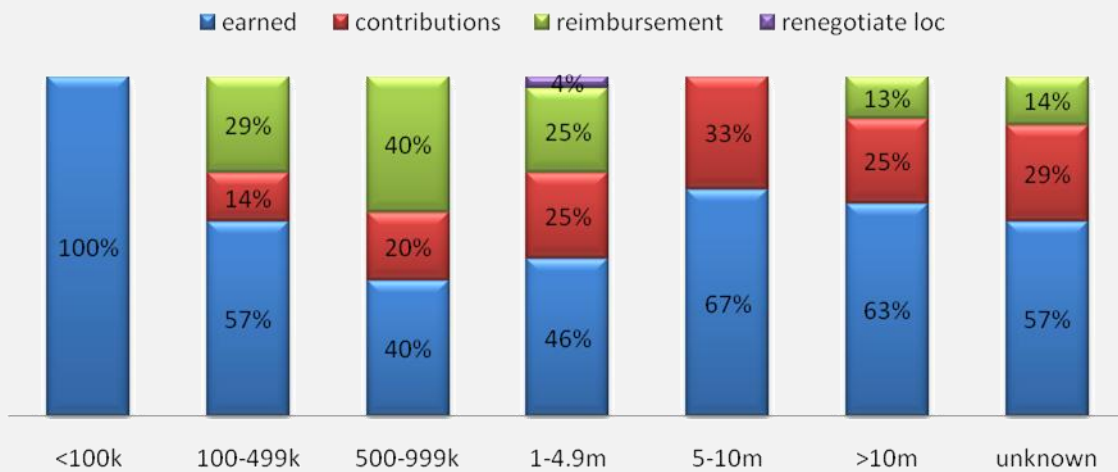
GENERAL RESULTS

Answer Options	Response Percent	Response Count
Earned revenues	63%	32
Contributions/grants	35%	18
Reimbursements/pledges	37%	19
Renegotiate line of credit	2%	1
answered question		51
skipped question		80



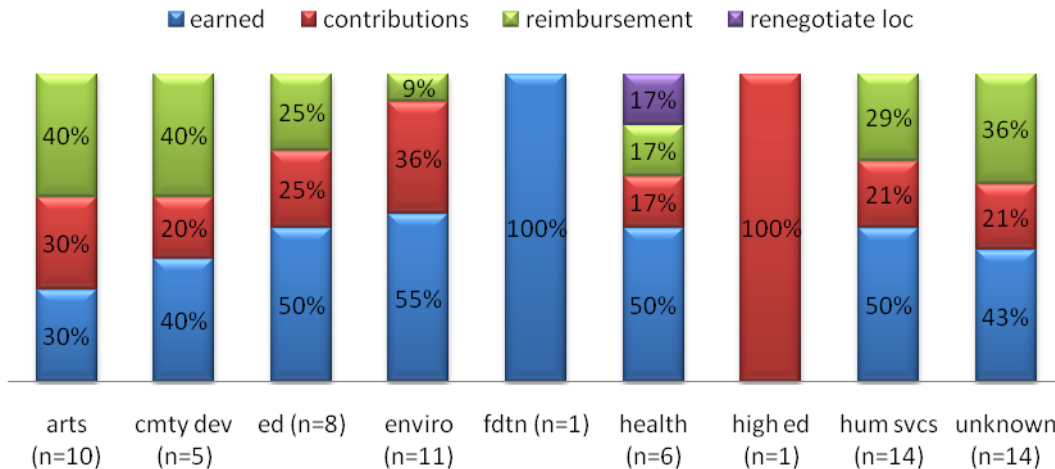
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
earned	100.0% (2)	57.1% (4)	40.0% (2)	46.4% (13)	66.7% (2)	62.5% (5)	57.1% (4)
contributions		14.3% (1)	20.0% (1)	25.0% (7)	33.3% (1)	25.0% (2)	28.6% (2)
reimbursement		28.6% (2)	40.0% (2)	25.0% (7)		12.5% (1)	14.3% (1)
renegotiate loc				3.6% (1)			



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hum svcs	unknown
earned	30.0% (3)	40.0% (2)	50.0% (4)	54.5% (6)	100.0% (1)	50.0% (3)		50.0% (7)	42.9% (6)
contributions	30.0% (3)	20.0% (1)	25.0% (2)	36.4% (4)		16.7% (1)	100.0% (1)	21.4% (3)	21.4% (3)
reimbursement	40.0% (4)	40.0% (2)	25.0% (2)	9.1% (1)		16.7% (1)		28.6% (4)	35.7% (5)
renegotiate loc						16.7% (1)			

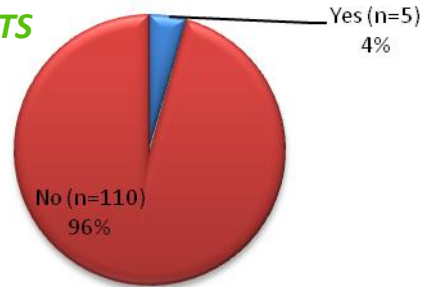


Section 1 - FINANCE

Survey Question 7: Have you been denied credit as a result of the economic environment?

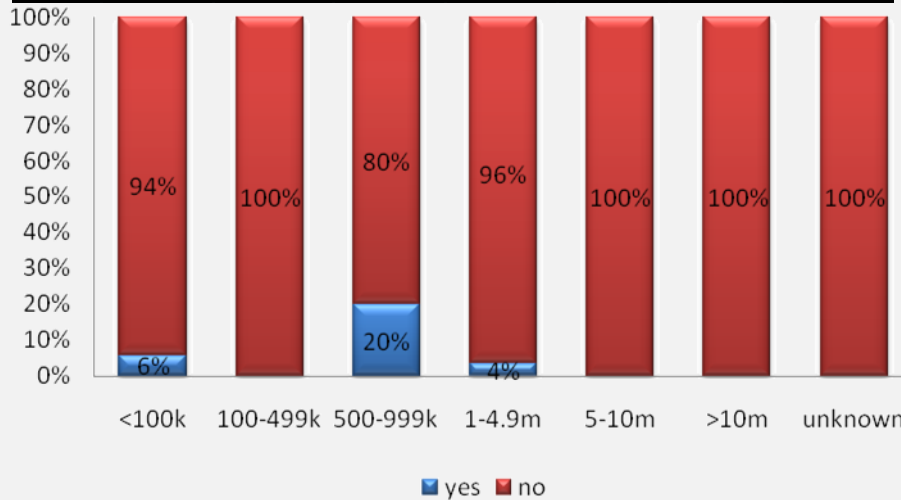
GENERAL RESULTS

Answer Options	Response Percent	Response Count
Yes (n=5)	4.3%	5
No (n=110)	95.7%	110
answered question		115
skipped question		16



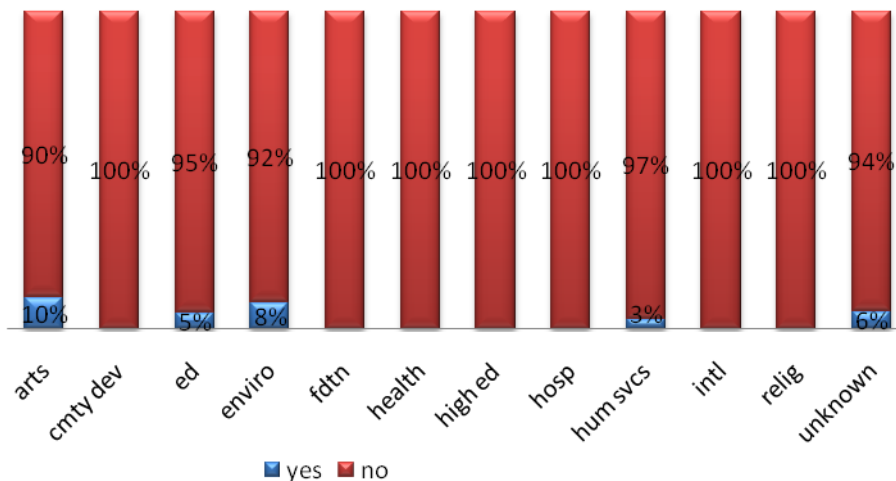
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
no	94.1% (16)	100.0% (31)	80.0% (12)	96.4% (27)	100.0% (3)	100.0% (9)	100.0% (12)
yes	5.9% (1)		20.0% (3)	3.6% (1)			



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
no	90.0% (9)	100.0% (3)	95.0% (19)	91.7% (11)	100.0% (3)	100.0% (6)	100.0% (3)	100.0% (2)	96.7% (29)	100.0% (1)	100.0% (7)	94.4% (17)
yes	10.0% (1)		5.0% (1)	8.3% (1)					3.3% (1)			5.6% (1)

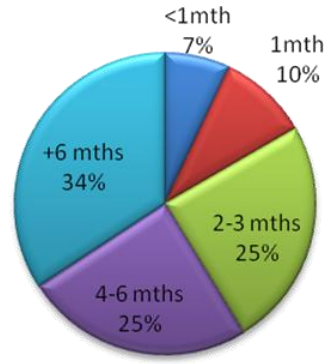


Section 1 - FINANCE

Survey Question 8: How much (unrestricted) cash do you currently have available, including reserves, to cover your monthly operating expenses?

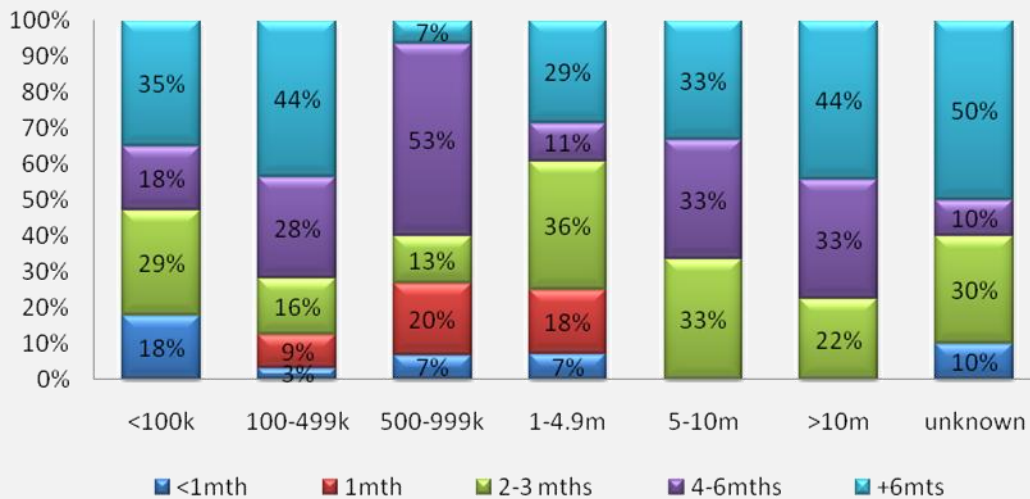
GENERAL RESULTS

Answer Options	Response Percent	Response Count
<1mth	7%	8
1mth	10%	11
2-3 mths	25%	28
4-6 mths	25%	28
+6 mths	34%	39
answered question		114
skipped question		17



BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
<1mth	17.6% (3)	3.1% (1)	6.7% (1)	7.1% (2)			10.0% (1)
1mth		9.4% (3)	20.0% (3)	17.9% (5)			
2-3 mths	29.4% (5)	15.6% (5)	13.3% (2)	35.7% (10)	33.3% (1)	22.2% (2)	30.0% (3)
4-6mths	17.6% (3)	28.1% (9)	53.3% (8)	10.7% (3)	33.3% (1)	33.3% (3)	10.0% (1)
+6mts	35.3% (6)	43.8% (14)	6.7% (1)	28.6% (8)	33.3% (1)	44.4% (4)	50.0% (5)

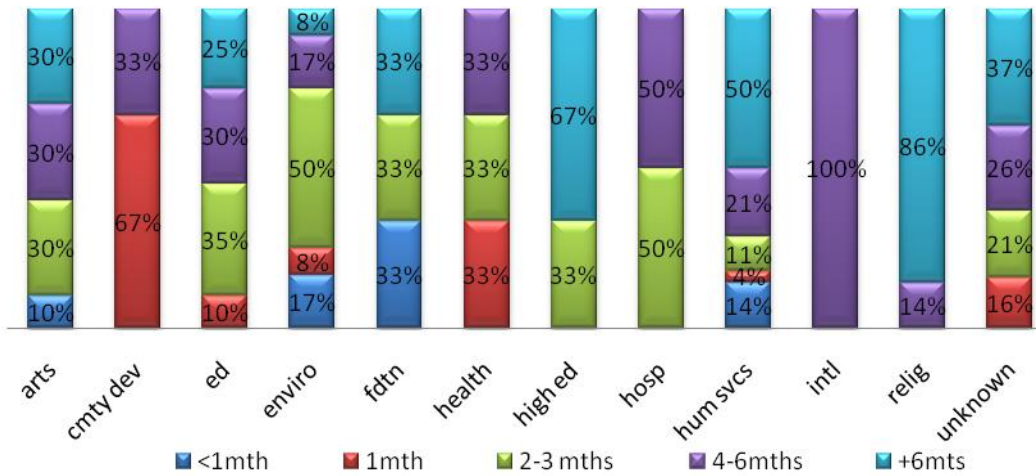


Section 1 - FINANCE

Survey Question 8 continued: How much (unrestricted) cash do you currently have available, including reserves, to cover your monthly operating expenses?

BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
<1mth	10.0% (1)			16.7% (2)	33.3% (1)				14.3% (4)			
1mth		66.7% (2)	10.0% (2)	8.3% (1)		33.3% (2)			3.6% (1)			15.8% (3)
2-3 mths	30.0% (3)		35.0% (7)	50.0% (6)	33.3% (1)	33.3% (2)	33.3% (1)	50.0% (1)	10.7% (3)			21.1% (4)
4-6mths	30.0% (3)	33.3% (1)	30.0% (6)	16.7% (2)		33.3% (2)		50.0% (1)	21.4% (6)	100.0% (1)	14.3% (1)	26.3% (5)
+6mts	30.0% (3)		25.0% (5)	8.3% (1)	33.3% (1)		66.7% (2)		50.0% (14)		85.7% (6)	36.8% (7)

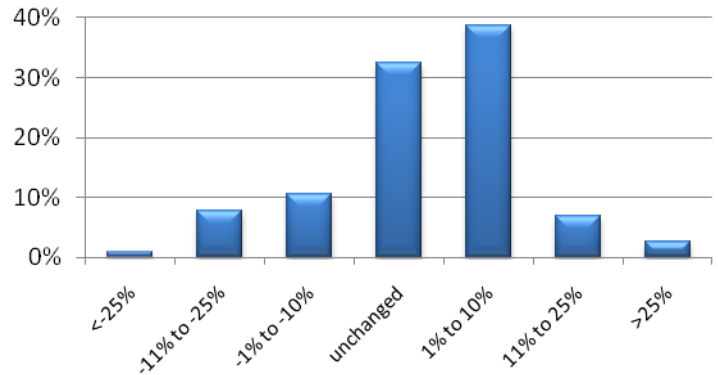


Section 1 - FINANCE

Survey Question 9: What are your budget plans for next fiscal year?

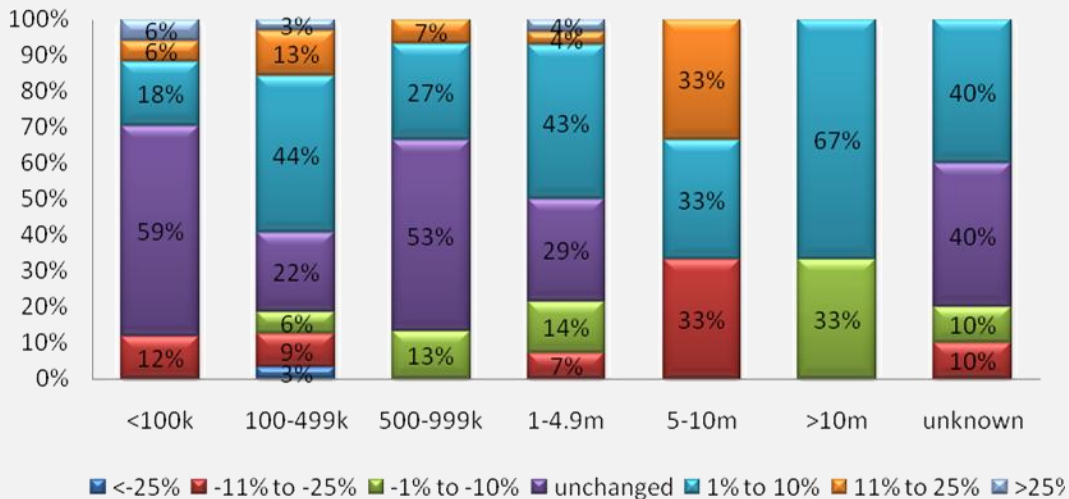
GENERAL RESULTS

Answer Options	Response Percent	Response Count
<-25%	1%	1
-11% to -25%	8%	9
-1% to -10%	11%	12
unchanged	32%	37
1% to 10%	39%	44
11% to 25%	7%	8
>25%	3%	3
answered question		114
skipped question		17



BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
<-25%		3.1% (1)					
-11% to -25%	11.8% (2)	9.4% (3)		7.1% (2)	33.3% (1)		10.0% (1)
-1% to -10%		6.3% (2)	13.3% (2)	14.3% (4)		33.3% (3)	10.0% (1)
unchanged	58.8% (10)	21.9% (7)	53.3% (8)	28.6% (8)			40.0% (4)
1% to 10%	17.6% (3)	43.8% (14)	26.7% (4)	42.9% (12)	33.3% (1)	66.7% (6)	40.0% (4)
11% to 25%	5.9% (1)	12.5% (4)	6.7% (1)	3.6% (1)	33.3% (1)		
>25%	5.9% (1)	3.1% (1)		3.6% (1)			

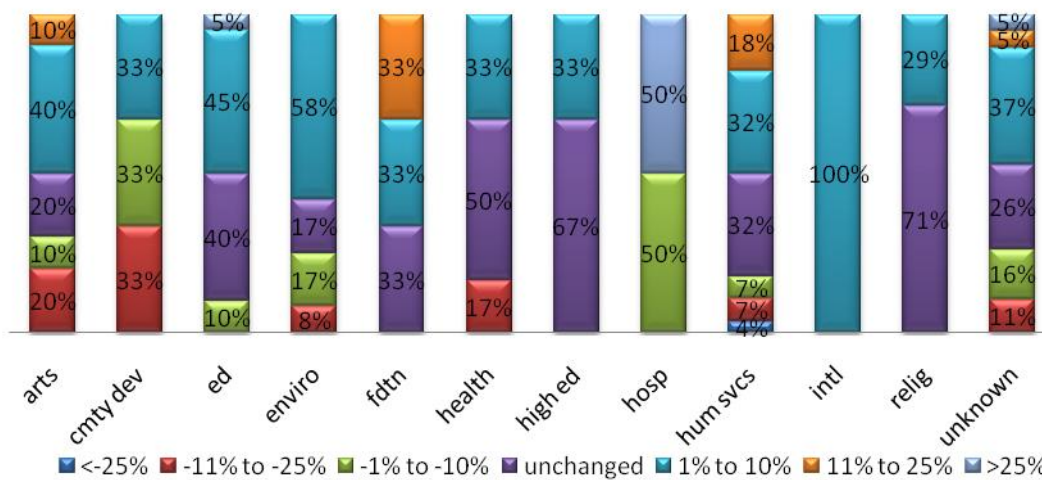


Section 1 - FINANCE

Survey Question 9 continued: What are your budget plans for next fiscal year?

BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
<-25%									3.6% (1)			
-11% to -25%	20.0% (2)	33.3% (1)		8.3% (1)		16.7% (1)			7.1% (2)			10.5% (2)
-1% to -10%	10.0% (1)	33.3% (1)	10.0% (2)	16.7% (2)				50.0% (1)	7.1% (2)			15.8% (3)
unchanged	20.0% (2)		40.0% (8)	16.7% (2)	33.3% (1)	50.0% (3)	66.7% (2)		32.1% (9)		71.4% (5)	26.3% (5)
1% to 10%	40.0% (4)	33.3% (1)	45.0% (9)	58.3% (7)	33.3% (1)	33.3% (2)	33.3% (1)		32.1% (9)	100.0% (1)	28.6% (2)	36.8% (7)
11% to 25%	10.0% (1)				33.3% (1)				17.9% (5)			5.3% (1)
>25%			5.0% (1)					50.0% (1)				5.3% (1)

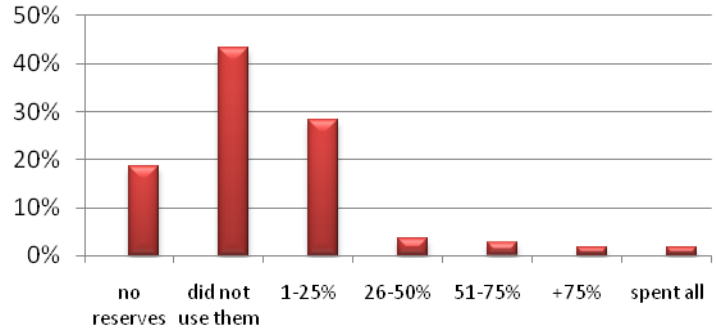


Section 1 - FINANCE

Survey Question 10: Did your organization use unanticipated reserve funds in the last 12 months?

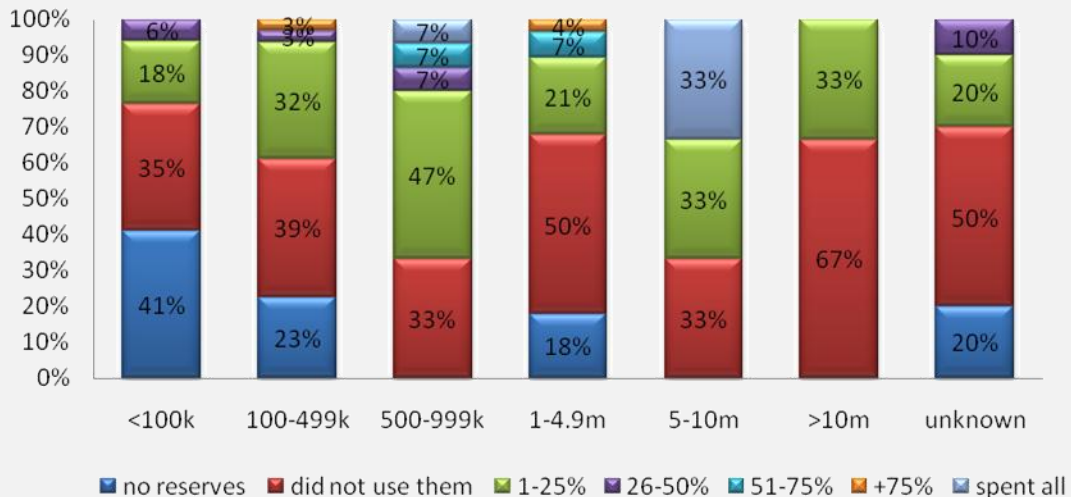
GENERAL RESULTS

Answer Options	Response Percent	Response Count
no reserves	19%	21
did not use	43%	49
1-25%	28%	32
26-50%	4%	4
51-75%	3%	3
+75%	2%	2
spent all	2%	2
answered question		113
skipped question		18



BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
no reserves	41.2% (7)	22.6% (7)		17.9% (5)			20.0% (2)
did not use them	35.3% (6)	38.7% (12)	33.3% (5)	50.0% (14)	33.3% (1)	66.7% (6)	50.0% (5)
1-25%	17.6% (3)	32.3% (10)	46.7% (7)	21.4% (6)	33.3% (1)	33.3% (3)	20.0% (2)
26-50%	5.9% (1)	3.2% (1)	6.7% (1)				10.0% (1)
51-75%			6.7% (1)	7.1% (2)			
+75%		3.2% (1)		3.6% (1)			
spent all			6.7% (1)		33.3% (1)		

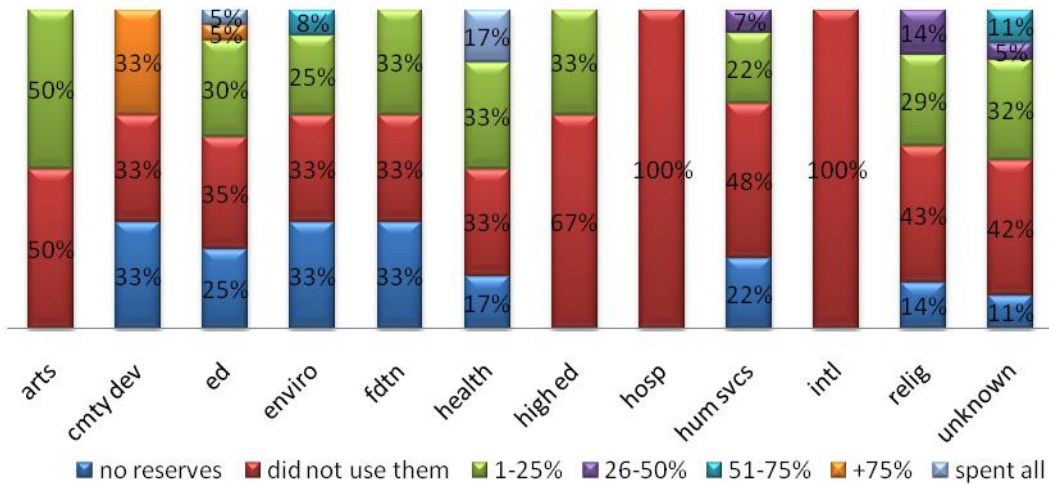


Section 1 - FINANCE

Survey Question 10 continued: Did your organization use unanticipated reserve funds in the last 12 months?

BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
no reserves		33.3% (1)	25.0% (5)	33.3% (4)	33.3% (1)	16.7% (1)			22.2% (6)		14.3% (1)	10.5% (2)
did not use them	50.0% (5)	33.3% (1)	35.0% (7)	33.3% (4)	33.3% (1)	33.3% (2)	66.7% (2)	100.0% (2)	48.1% (13)	100.0% (1)	42.9% (3)	42.1% (8)
1-25%	50.0% (5)		30.0% (6)	25.0% (3)	33.3% (1)	33.3% (2)	33.3% (1)		22.2% (6)		28.6% (2)	31.6% (6)
26-50%									7.4% (2)		14.3% (1)	5.3% (1)
51-75%				8.3% (1)								10.5% (2)
+75%		33.3% (1)	5.0% (1)									
spent all			5.0% (1)			16.7% (1)						

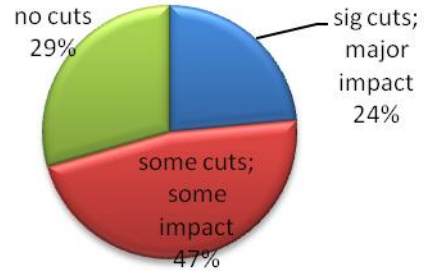


Section 1 - FINANCE

Survey Question 11: How do you feel your organization will be effected by the upcoming state budget?

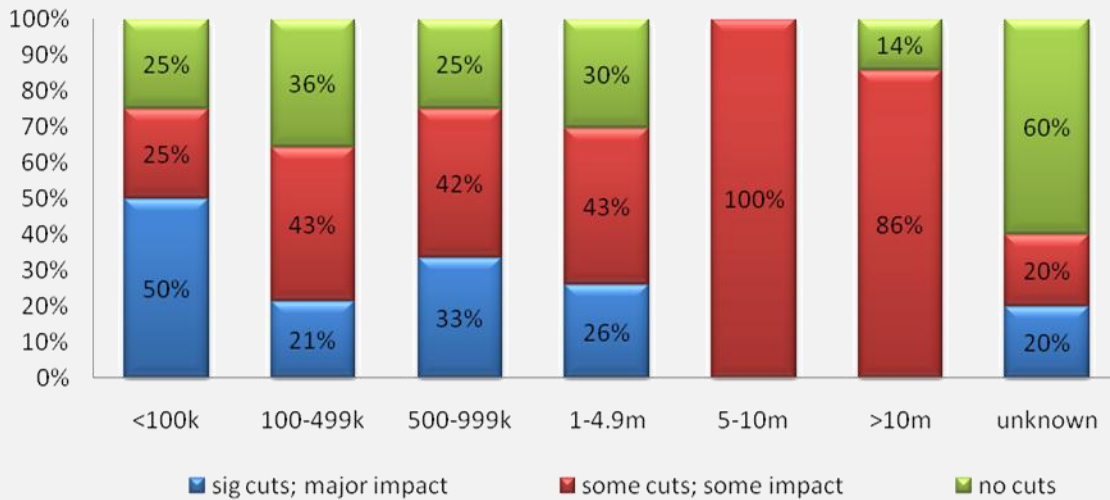
GENERAL RESULTS

Answer Options	Response Percent	Response Count
sig cuts; major impact	24%	16
some cuts; some impact	47%	32
no cuts	29%	20
answered question		68
do not receive state funding		45
skipped question		18



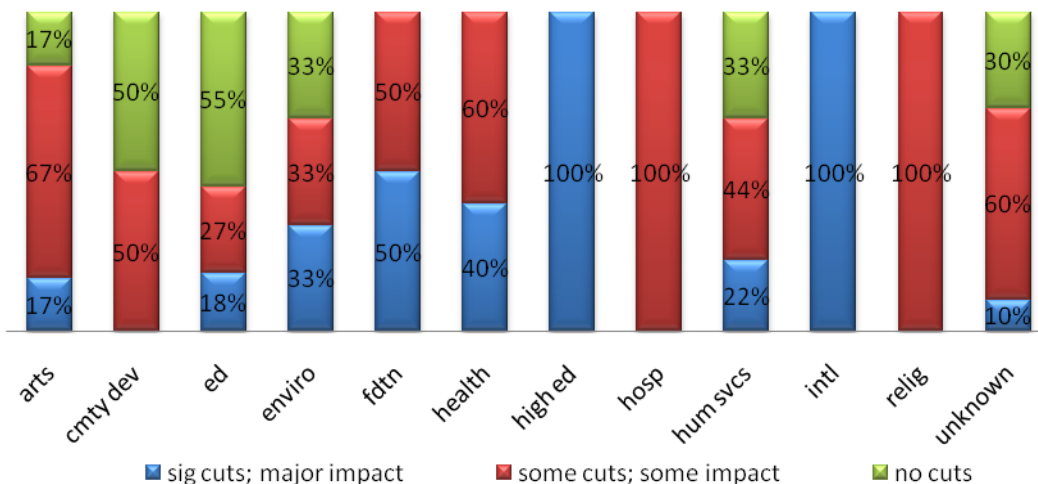
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
sig cuts; major impact	50.0% (2)	21.4% (3)	33.3% (4)	26.1% (6)			20.0% (1)
some cuts; some impact	25.0% (1)	42.9% (6)	41.7% (5)	43.5% (10)	100.0% (3)	85.7% (6)	20.0% (1)
no cuts	25.0% (1)	35.7% (5)	25.0% (3)	30.4% (7)		14.3% (1)	60.0% (3)



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
sig cuts; major impact	16.7% (1)		18.2% (2)	33.3% (3)	50.0% (1)	40.0% (2)	100.0% (1)		22.2% (4)	100.0% (1)		10.0% (1)
some cuts; some impact	66.7% (4)	50.0% (1)	27.3% (3)	33.3% (3)	50.0% (1)	60.0% (3)		100.0% (1)	44.4% (8)		100.0% (2)	60.0% (6)
no cuts	16.7% (1)	50.0% (1)	54.5% (6)	33.3% (3)					33.3% (6)			30.0% (3)



Section 2 - FUNDRAISING

Survey Question 1: Are you currently in a capital campaign?

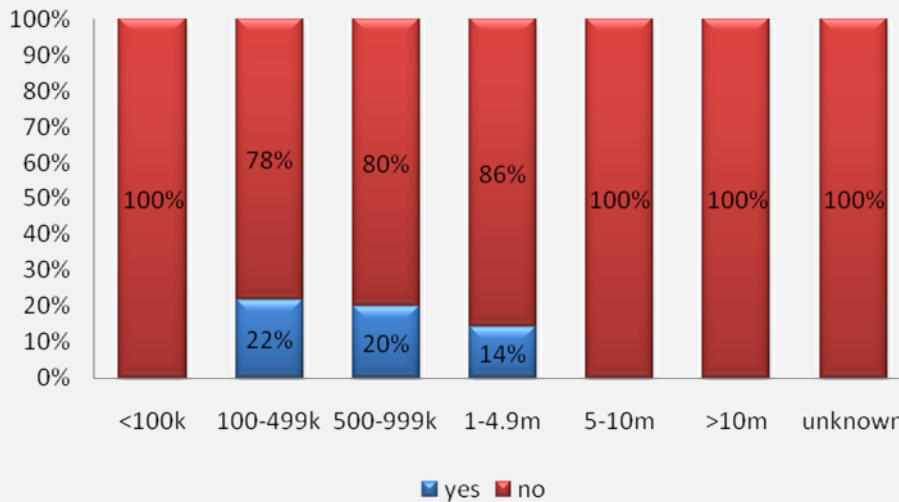
GENERAL RESULTS

Answer Options	Response Percent	Response Count
Yes	12.6%	14
No	87.4%	97
answered question		111
skipped question		20



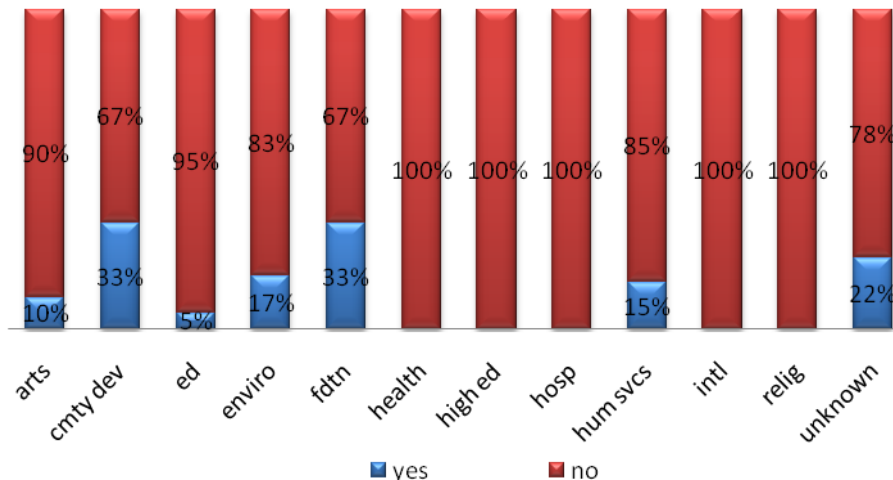
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
no	100.0% (16)	78.1% (25)	80.0% (12)	85.7% (24)	100.0% (3)	100.0% (8)	100.0% (9)
yes		21.9% (7)	20.0% (3)	14.3% (4)			



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
no	90.0% (9)	66.7% (2)	94.7% (18)	83.3% (10)	66.7% (2)	100.0% (6)	100.0% (3)	100.0% (2)	85.2% (23)	100.0% (1)	100.0% (7)	77.8% (14)
yes	10.0% (1)	33.3% (1)	5.3% (1)	16.7% (2)	33.3% (1)				14.8% (4)			22.2% (4)

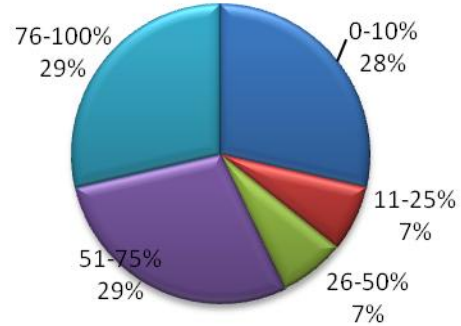


Section 2 - FUNDRAISING

Survey Question 2: What percent of your capital campaign goal remains outstanding?

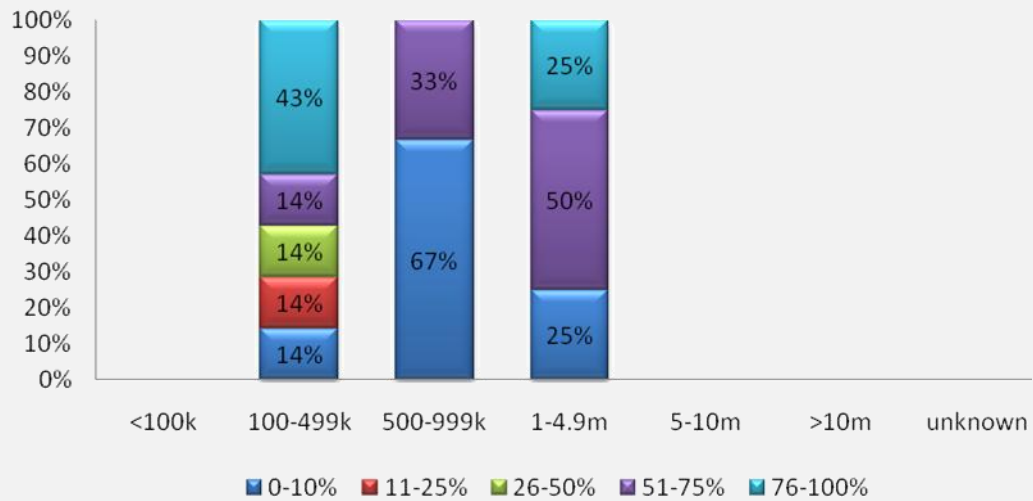
GENERAL RESULTS

Answer Options	Response Percent	Response Count
0-10%	29%	4
11-25%	7%	1
26-50%	7%	1
51-75%	29%	4
76-100%	29%	4
answered question		14
skipped question		117



BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
0-10%		14.3% (1)	66.7% (2)	25.0% (1)			
11-25%		14.3% (1)					
26-50%		14.3% (1)					
51-75%		14.3% (1)	33.3% (1)	50.0% (2)			
76-100%		42.9% (3)		25.0% (1)			

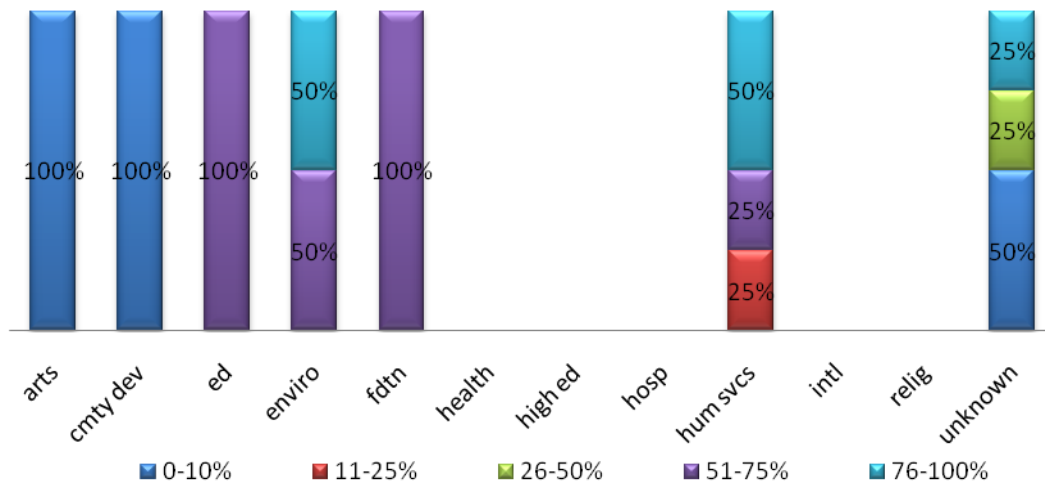


Section 2 - FUNDRAISING

Survey Question 2 continued: What percent of your capital campaign goal remains outstanding?

BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
0-10%	100.0% (1)	100.0% (1)										50.0% (2)
11-25%									25.0% (1)			
26-50%												25.0% (1)
51-75%			100.0% (1)	50.0% (1)	100.0% (1)				25.0% (1)			
76-100%				50.0% (1)					50.0% (2)			25.0% (1)

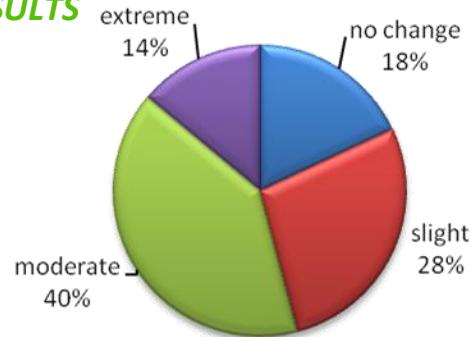


Section 2 - FUNDRAISING

Survey Question 3a: Please rate the level of tightening the economic recession has caused for your organization among corporate donors?

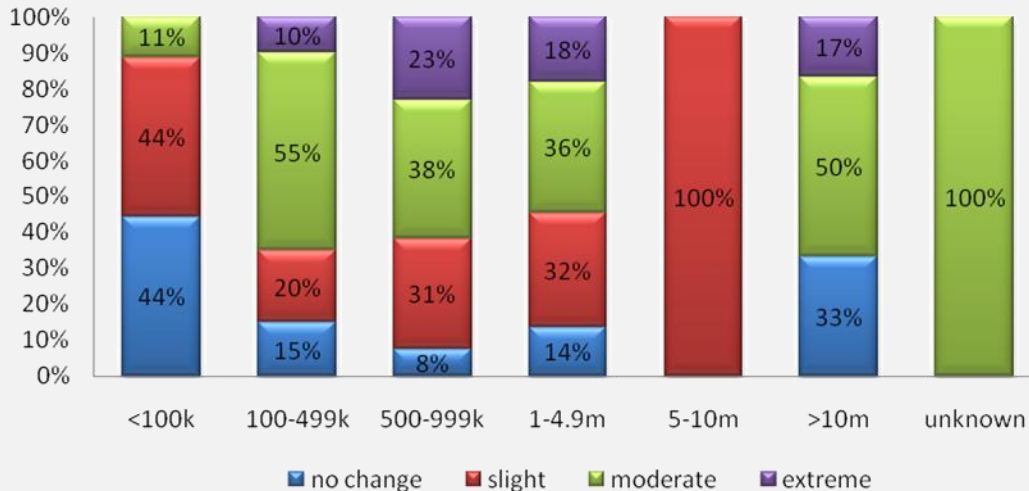
GENERAL RESULTS

Answer Options	Response Percent	Response Count
no change	18%	13
slight	28%	20
moderate	40%	29
extreme	14%	10
answered question		72
not applicable		32
skipped question		27



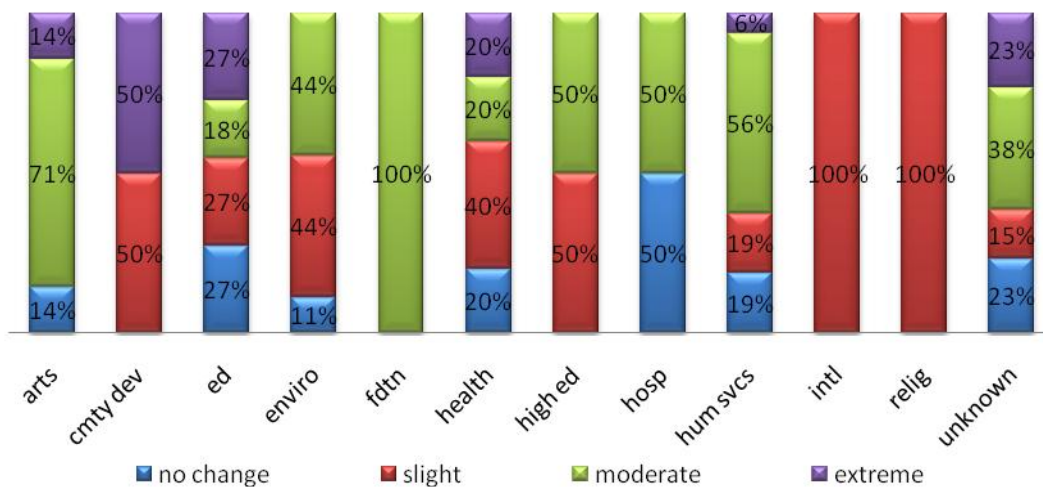
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
no change	44.4% (4)	15.0% (3)	7.7% (1)	13.6% (3)		33.3% (2)	
slight	44.4% (4)	20.0% (4)	30.8% (4)	31.8% (7)	100.0% (1)		
moderate	11.1% (1)	55.0% (11)	38.5% (5)	36.4% (8)		50.0% (3)	100.0% (1)
extreme		10.0% (2)	23.1% (3)	18.2% (4)		16.7% (1)	



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
no change	14.3% (1)		27.3% (3)	11.1% (1)		20.0% (1)		50.0% (1)	18.8% (3)			23.1% (3)
slight		50.0% (1)	27.3% (3)	44.4% (4)		40.0% (2)	50.0% (1)		18.8% (3)	100.0% (1)	100.0% (3)	15.4% (2)
moderate	71.4% (5)		18.2% (2)	44.4% (4)	100.0% (1)	20.0% (1)	50.0% (1)	50.0% (1)	56.3% (9)			38.5% (5)
extreme	14.3% (1)	50.0% (1)	27.3% (3)			20.0% (1)			6.3% (1)			23.1% (3)

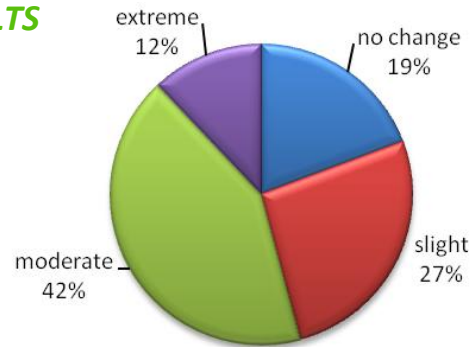


Section 2 - FUNDRAISING

Survey Question 3b: Please rate the level of tightening the economic recession has caused for your organization among foundation funders?

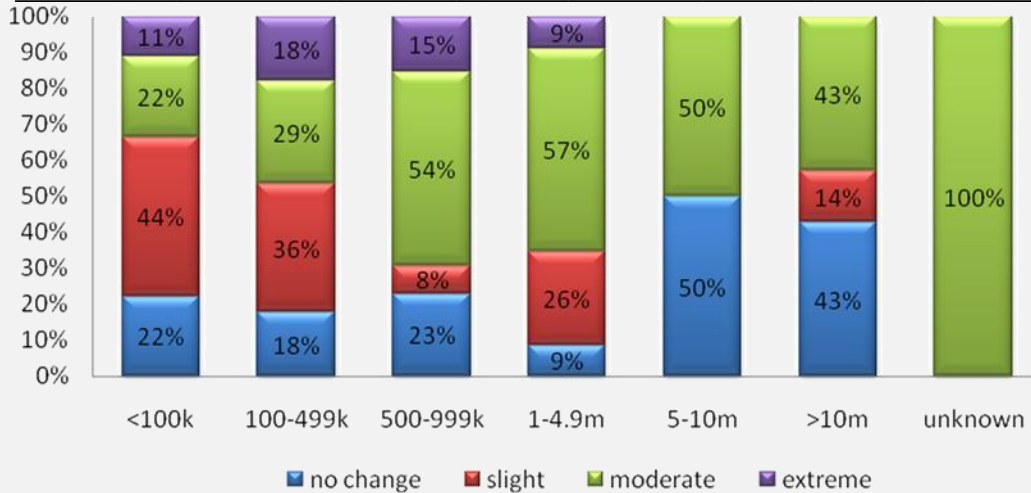
GENERAL RESULTS

Answer Options	Response Percent	Response Count
no change	19%	16
slight	27%	22
moderate	42%	35
extreme	12%	10
answered question		83
not applicable		21
skipped question		27



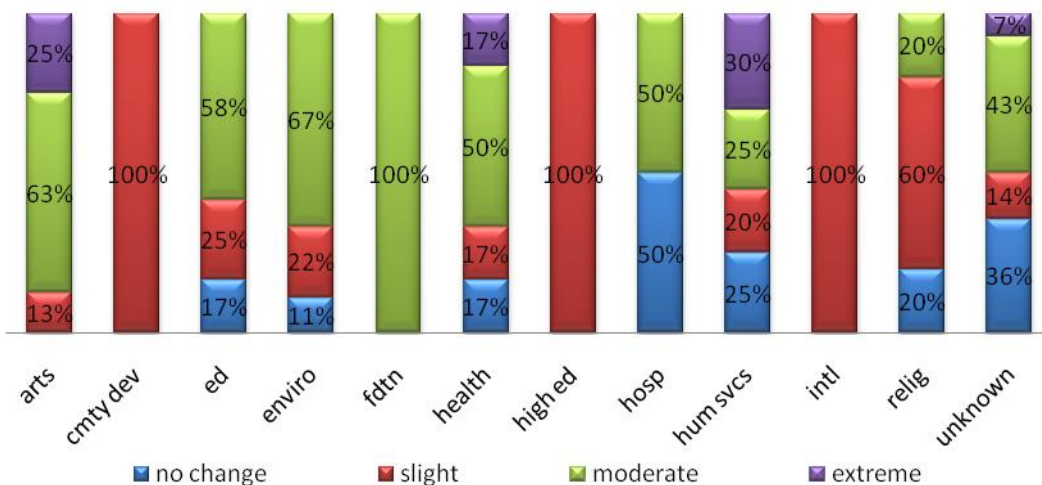
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
no change	22.2% (2)	17.9% (5)	23.1% (3)	8.7% (2)	50.0% (1)	42.9% (3)	
slight	44.4% (4)	35.7% (10)	7.7% (1)	26.1% (6)		14.3% (1)	
moderate	22.2% (2)	28.6% (8)	53.8% (7)	56.5% (13)	50.0% (1)	42.9% (3)	100.0% (1)
extreme	11.1% (1)	17.9% (5)	15.4% (2)	8.7% (2)			



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
no change			16.7% (2)	11.1% (1)		16.7% (1)		50.0% (1)	25.0% (5)		20.0% (1)	35.7% (5)
slight	12.5% (1)	100.0% (3)	25.0% (3)	22.2% (2)		16.7% (1)	100.0% (2)		20.0% (4)	100.0% (1)	60.0% (3)	14.3% (2)
moderate	62.5% (5)		58.3% (7)	66.7% (6)	100.0% (1)	50.0% (3)		50.0% (1)	25.0% (5)		20.0% (1)	42.9% (6)
extreme	25.0% (2)					16.7% (1)			30.0% (6)			7.1% (1)

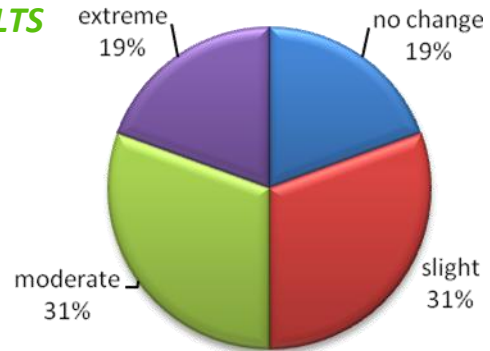


Section 2 - FUNDRAISING

Survey Question 3c: Please rate the level of tightening the economic recession has caused for your organization among government funders?

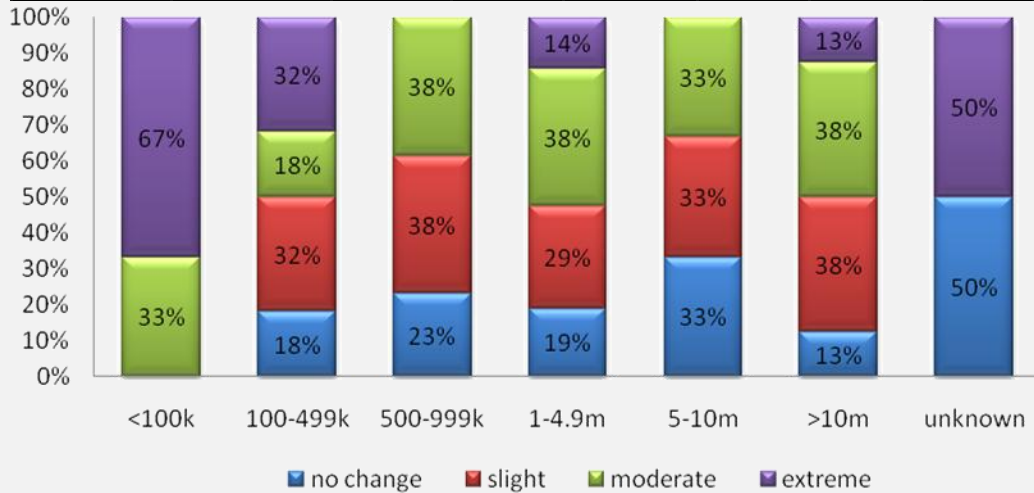
GENERAL RESULTS

Answer Options	Response Percent	Response Count
no change	19%	14
slight	31%	22
moderate	31%	22
extreme	19%	14
answered question		72
not applicable		34
skipped question		25



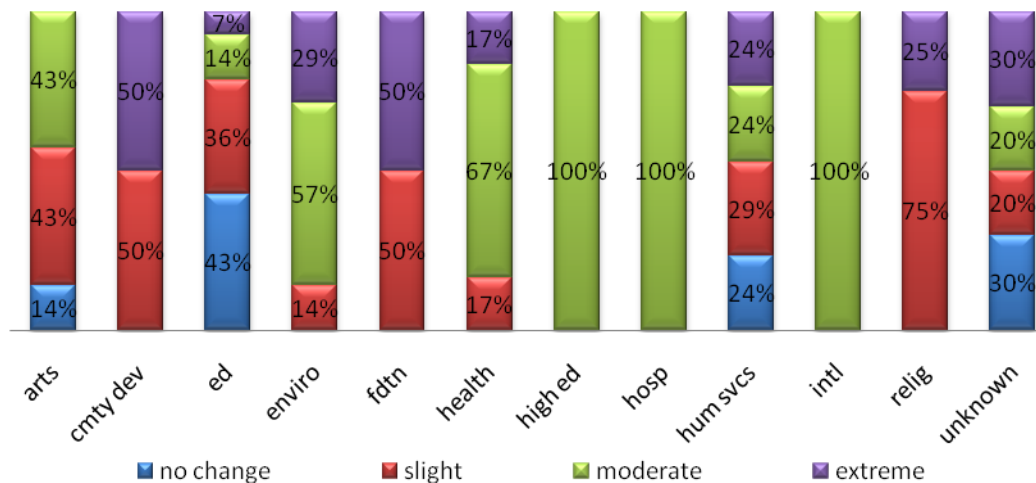
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
no change		18.2% (4)	23.1% (3)	19.0% (4)	33.3% (1)	12.5% (1)	50.0% (1)
slight		31.8% (7)	38.5% (5)	28.6% (6)	33.3% (1)	37.5% (3)	
moderate	33.3% (1)	18.2% (4)	38.5% (5)	38.1% (8)	33.3% (1)	37.5% (3)	
extreme	66.7% (2)	31.8% (7)		14.3% (3)		12.5% (1)	50.0% (1)



BY MISSION

mission	arts	cmty dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
no change	14.3% (1)		42.9% (6)						23.5% (4)			30.0% (3)
slight	42.9% (3)	50.0% (1)	35.7% (5)	14.3% (1)	50.0% (1)	16.7% (1)			29.4% (5)		75.0% (3)	20.0% (2)
moderate	42.9% (3)		14.3% (2)	57.1% (4)		66.7% (4)	100.0% (1)	100.0% (1)	23.5% (4)	100.0% (1)		20.0% (2)
extreme		50.0% (1)	7.1% (1)	28.6% (2)	50.0% (1)	16.7% (1)			23.5% (4)		25.0% (1)	30.0% (3)

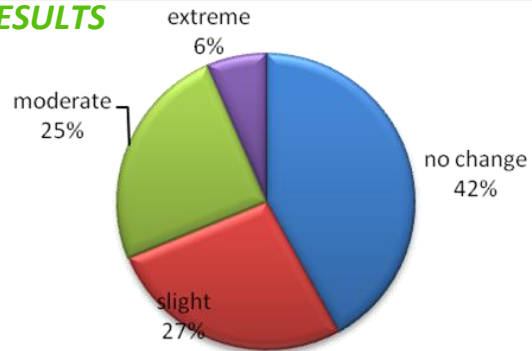


Section 2 - FUNDRAISING

Survey Question 3d: Please rate the level of tightening the economic recession has caused for your organization among individual donors?

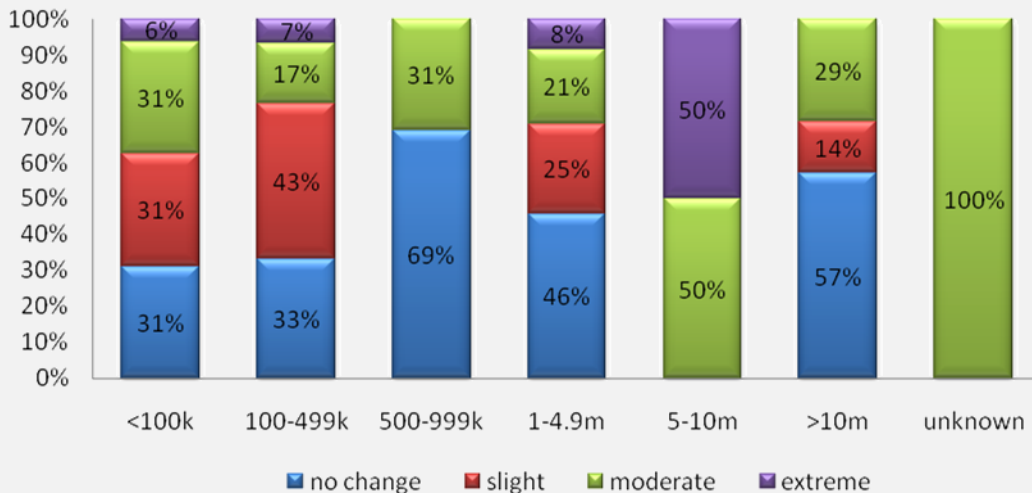
GENERAL RESULTS

Answer Options	Response Percent	Response Count
no change	42%	39
slight	27%	25
moderate	25%	23
extreme	6%	6
answered question		93
not applicable		11
skipped question		27



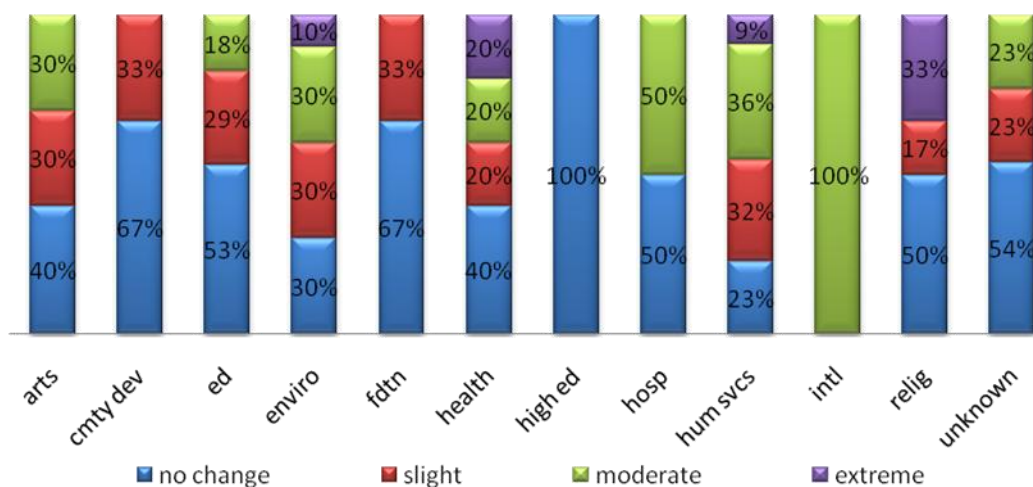
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
no change	31.3% (5)	33.3% (10)	69.2% (9)	45.8% (11)		57.1% (4)	
slight	31.3% (5)	43.3% (13)		25.0% (6)		14.3% (1)	
moderate	31.3% (5)	16.7% (5)	30.8% (4)	20.8% (5)	50.0% (1)	28.6% (2)	100.0% (1)
extreme	6.3% (1)	6.7% (2)		8.3% (2)	50.0% (1)		



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
no change	40.0% (4)	66.7% (2)	52.9% (9)	30.0% (3)	66.7% (2)	40.0% (2)	100.0% (1)	50.0% (1)	22.7% (5)		50.0% (3)	53.8% (7)
slight	30.0% (3)	33.3% (1)	29.4% (5)	30.0% (3)	33.3% (1)	20.0% (1)			31.8% (7)		16.7% (1)	23.1% (3)
moderate	30.0% (3)		17.6% (3)	30.0% (3)		20.0% (1)		50.0% (1)	36.4% (8)	100.0% (1)		23.1% (3)
extreme				10.0% (1)		20.0% (1)			9.1% (2)		33.3% (2)	

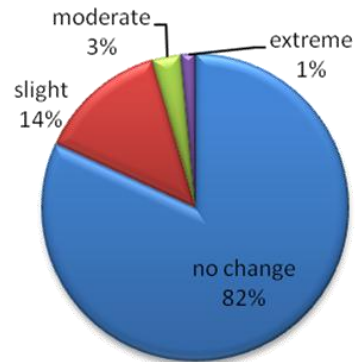


Section 2 - FUNDRAISING

Survey Question 4a: Please rate how much the availability of funding has improved for your organization since the market rebounded among corporate donors?

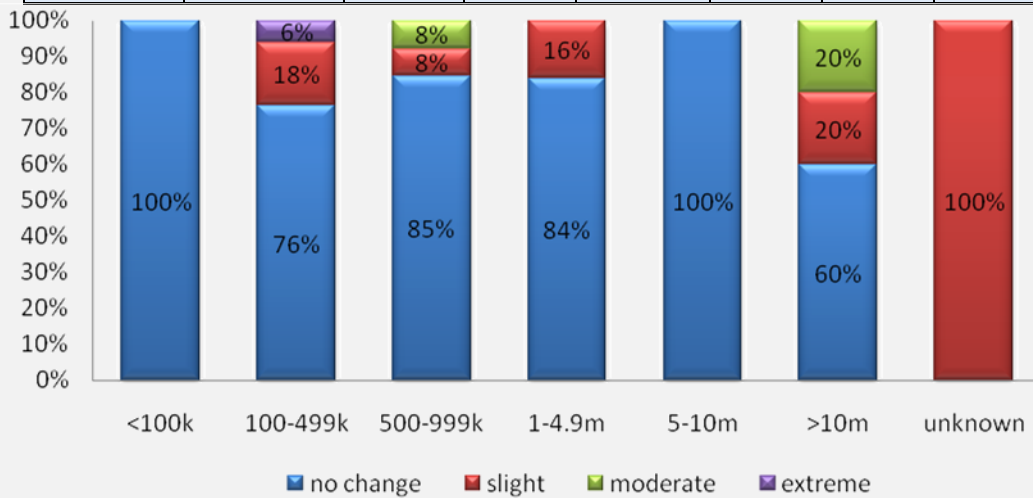
GENERAL RESULTS

Answer Options	Response Percent	Response Count
no change	82%	54
slight	14%	9
moderate	3%	2
extreme	2%	1
answered question		66
not applicable		36
skipped question		29



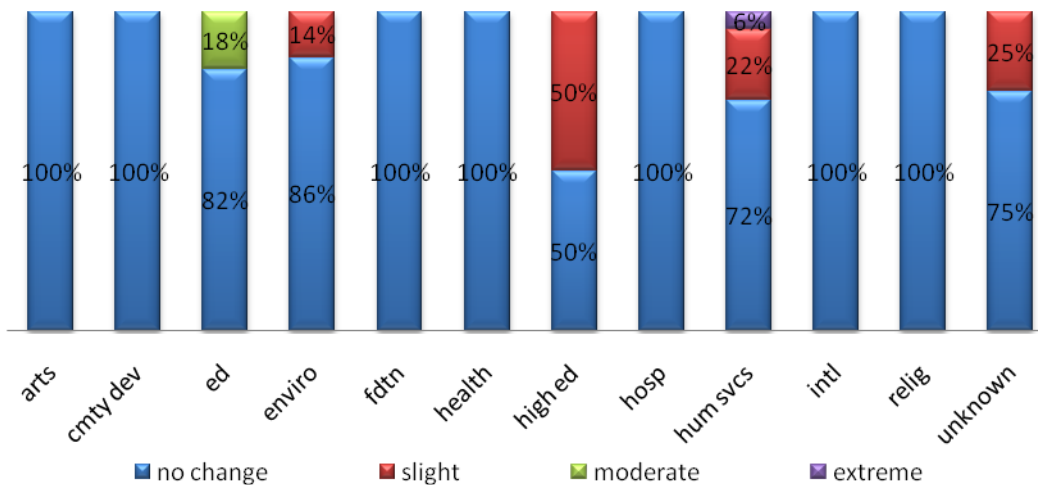
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
no change	100.0% (9)	76.5% (13)	84.6% (11)	84.2% (16)	100.0% (2)	60.0% (3)	
slight		17.6% (3)	7.7% (1)	15.8% (3)		20.0% (1)	100.0% (1)
moderate			7.7% (1)			20.0% (1)	
extreme		5.9% (1)					



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
no change	100.0% (6)	100.0% (2)	81.8% (9)	85.7% (6)	100.0% (1)	100.0% (4)	50.0% (1)	100.0% (1)	72.2% (13)	100.0% (1)	100.0% (1)	75.0% (9)
slight				14.3% (1)			50.0% (1)		22.2% (4)			25.0% (3)
moderate			18.2% (2)									
extreme									5.6% (1)			

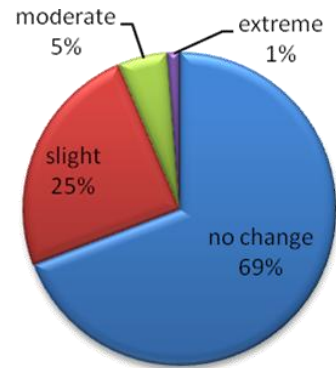


Section 2 - FUNDRAISING

Survey Question 4b: Please rate how much the availability of funding has improved for your organization since the market rebounded among foundation donors?

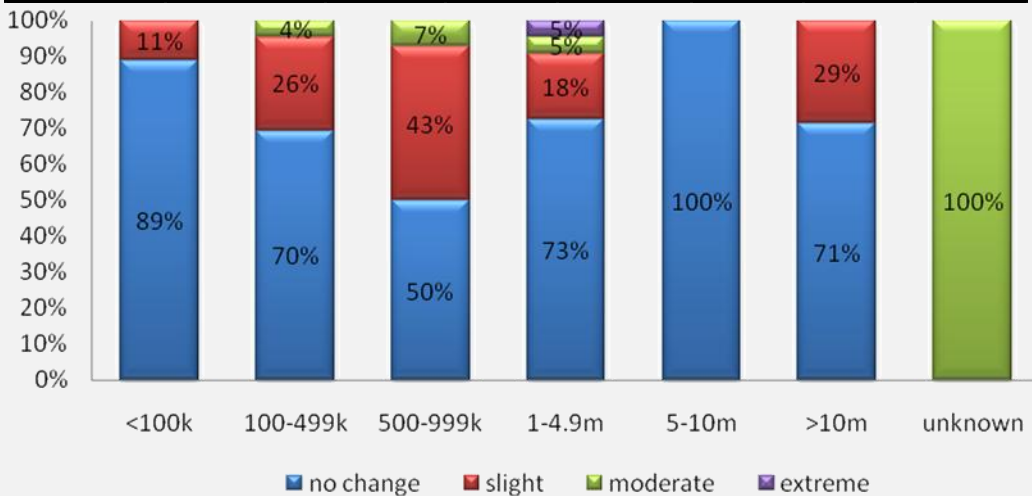
GENERAL RESULTS

Answer Options	Response Percent	Response Count
no change	69%	54
slight	24%	19
moderate	5%	4
extreme	1%	1
answered question		78
not applicable		24
skipped question		29



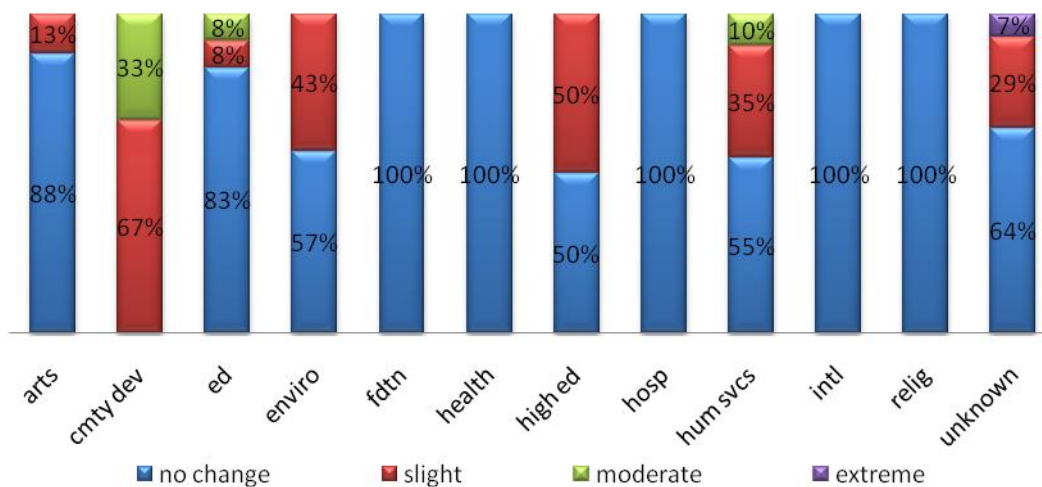
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
no change	88.9% (8)	69.6% (16)	50.0% (7)	72.7% (16)	100.0% (2)	71.4% (5)	
slight	11.1% (1)	26.1% (6)	42.9% (6)	18.2% (4)		28.6% (2)	
moderate		4.3% (1)	7.1% (1)	4.5% (1)			100.0% (1)
extreme				4.5% (1)			



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
no change	87.5% (7)		83.3% (10)	57.1% (4)	100.0% (2)	100.0% (5)	50.0% (1)	100.0% (1)	55.0% (11)	100.0% (1)	100.0% (3)	64.3% (9)
slight	12.5% (1)	66.7% (2)	8.3% (1)	42.9% (3)			50.0% (1)		35.0% (7)			28.6% (4)
moderate		33.3% (1)	8.3% (1)						10.0% (2)			
extreme												7.1% (1)

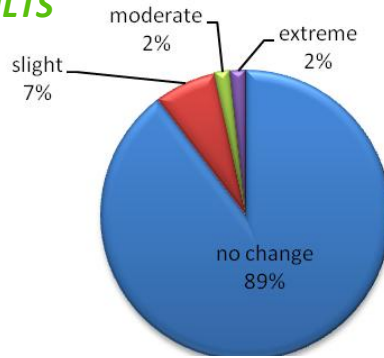


Section 2 - FUNDRAISING

Survey Question 4c: Please rate how much the availability of funding has improved for your organization since the market rebounded among government funders?

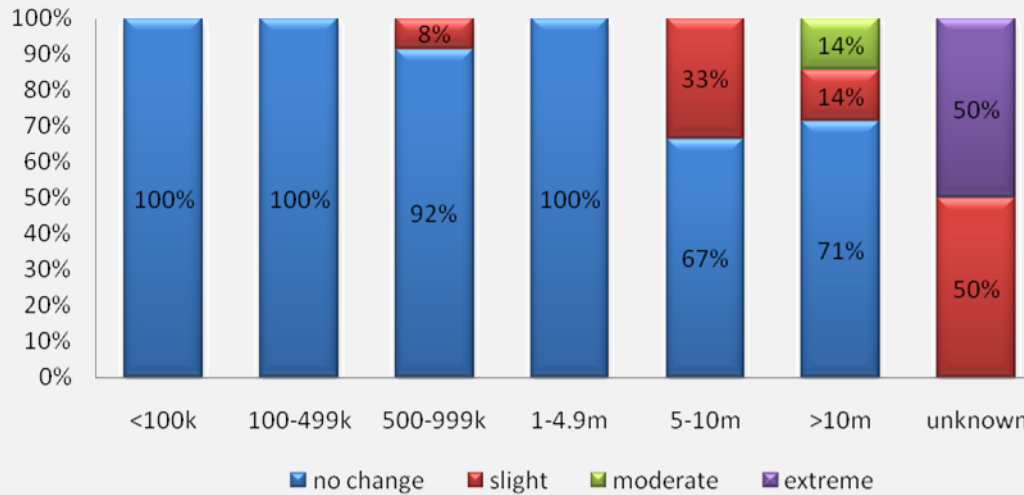
GENERAL RESULTS

Answer Options	Response Percent	Response Count
no change	90%	52
slight	7%	4
moderate	2%	1
extreme	2%	1
answered question		58
not applicable		46
skipped question		25



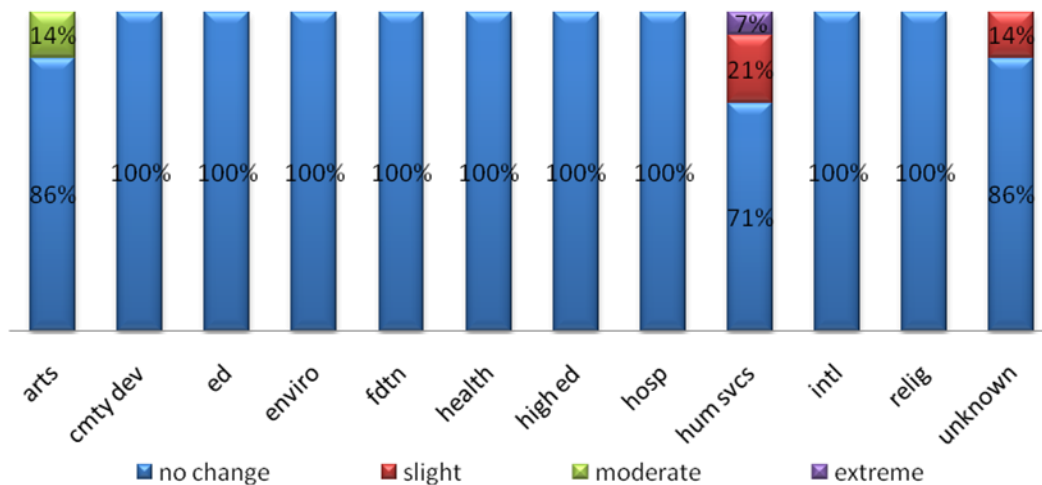
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
no change	100.0% (2)	100.0% (13)	91.7% (11)	100.0% (19)	66.7% (2)	71.4% (5)	
slight			8.3% (1)		33.3% (1)	14.3% (1)	50.0% (1)
moderate						14.3% (1)	
extreme							50.0% (1)



BY MISSION

mission	arts	cmtty dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
no change	85.7% (6)	100.0% (2)	100.0% (12)	100.0% (5)	100.0% (2)	100.0% (4)	100.0% (1)	100.0% (1)	71.4% (10)	100.0% (1)	100.0% (2)	85.7% (6)
slight									21.4% (3)			14.3% (1)
moderate	14.3% (1)											
extreme									7.1% (1)			

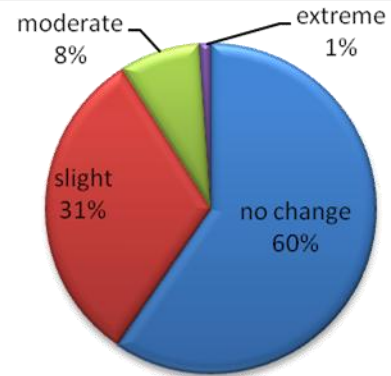


Section 2 - FUNDRAISING

Survey Question 4d: Please rate how much the availability of funding has improved for your organization since the market rebounded among individual donors?

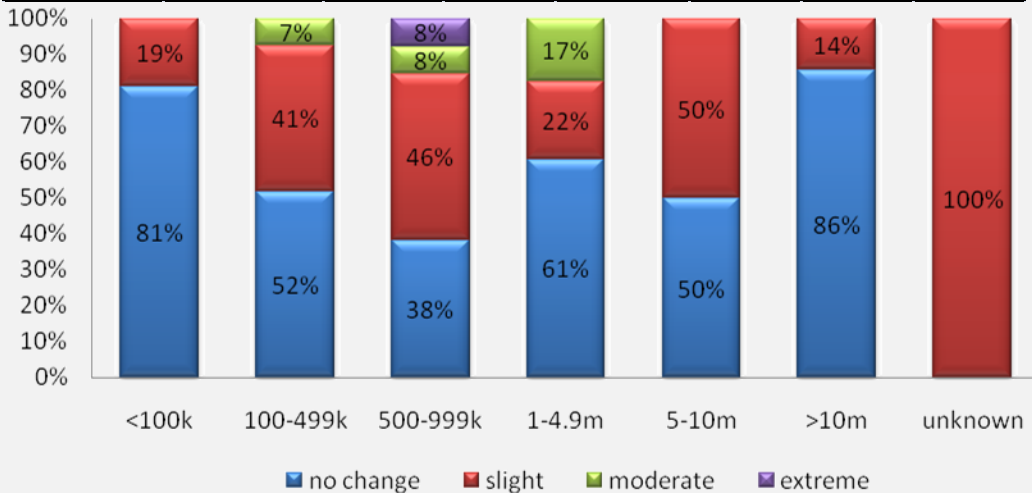
GENERAL RESULTS

Answer Options	Response Percent	Response Count
no change	60%	53
slight	31%	28
moderate	8%	7
extreme	1%	1
answered question		89
not applicable		11
skipped question		31



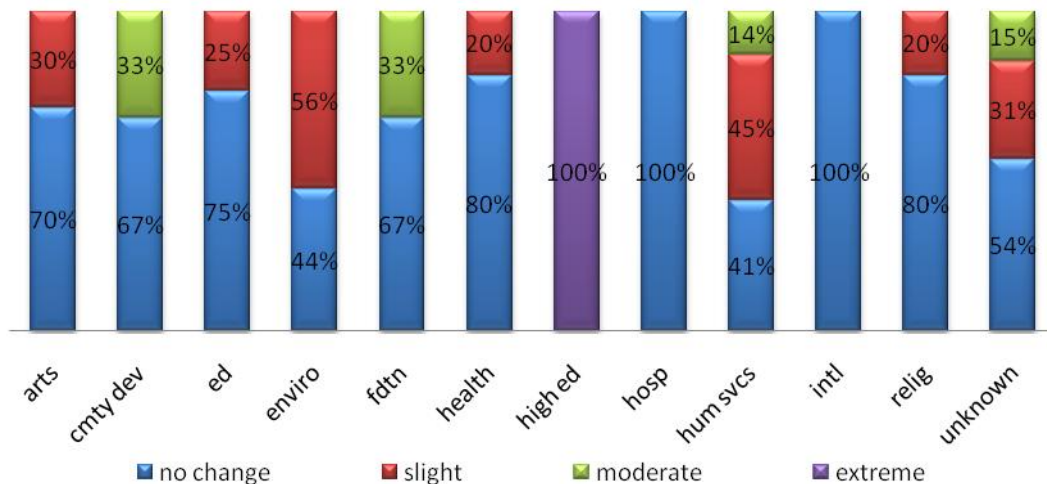
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
no change	81.3% (13)	51.9% (14)	38.5% (5)	60.9% (14)	50.0% (1)	85.7% (6)	
slight	18.8% (3)	40.7% (11)	46.2% (6)	21.7% (5)	50.0% (1)	14.3% (1)	100.0% (1)
moderate		7.4% (2)	7.7% (1)	17.4% (4)			
extreme			7.7% (1)				



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
no change	70.0% (7)	66.7% (2)	75.0% (12)	44.4% (4)	66.7% (2)	80.0% (4)		100.0% (1)	40.9% (9)	100.0% (1)	80.0% (4)	53.8% (7)
slight	30.0% (3)		25.0% (4)	55.6% (5)		20.0% (1)			45.5% (10)		20.0% (1)	30.8% (4)
moderate		33.3% (1)			33.3% (1)				13.6% (3)			15.4% (2)
extreme							100.0% (1)					

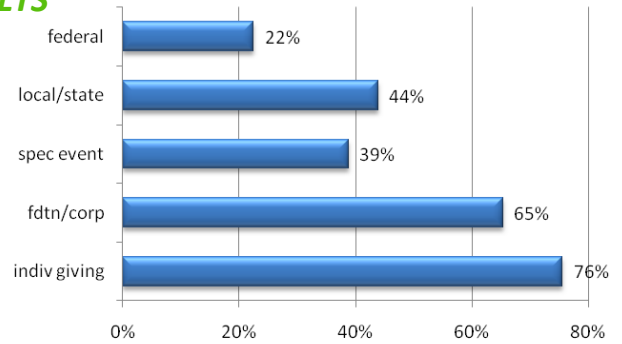


Section 2 - FUNDRAISING

Survey Question 5: Which of the following funding initiatives has your organization undertaken since the economic downturn? (Check all that apply)

GENERAL RESULTS

Answer Options	Response Percent	Response Count
indiv giving	76%	74
fdtn/corp	65%	64
spec event	39%	38
local/state	44%	43
federal	22%	22
answered question		98
skipped question		33



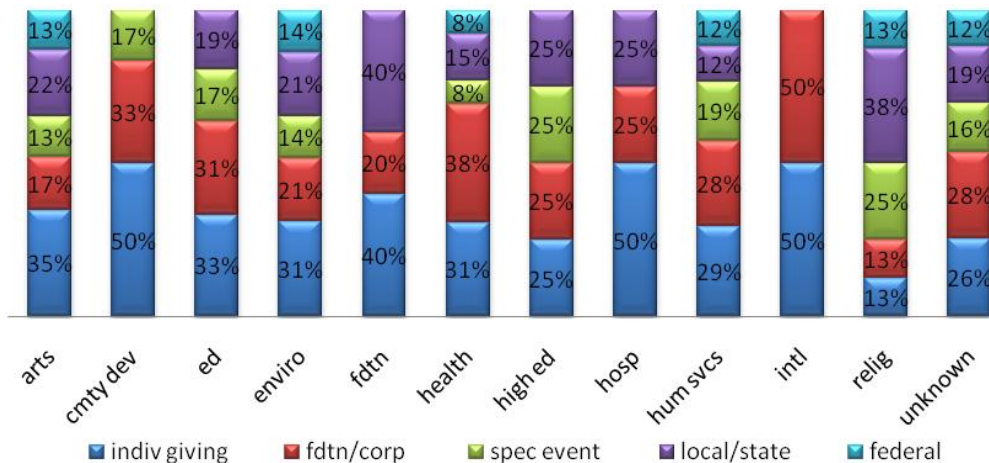
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
indiv giving	39.1% (9)	33.3% (25)	26.8% (11)	31.7% (20)	25.0% (2)	20.8% (5)	28.6% (2)
fdtn/corp	21.7% (5)	30.7% (23)	22.0% (9)	27.0% (17)	37.5% (3)	25.0% (6)	14.3% (1)
spec event	17.4% (4)	18.7% (14)	17.1% (7)	12.7% (8)	12.5% (1)	12.5% (3)	14.3% (1)
local/state	17.4% (4)	12.0% (9)	24.4% (10)	17.5% (11)	12.5% (1)	29.2% (7)	14.3% (1)
federal	4.3% (1)	5.3% (4)	9.8% (4)	11.1% (7)	12.5% (1)	12.5% (3)	28.6% (2)



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
indiv giving	34.8% (8)	50.0% (3)	33.3% (12)	31.0% (9)	40.0% (2)	30.8% (4)	25.0% (1)	50.0% (2)	29.4% (20)	50.0% (1)	12.5% (1)	25.6% (11)
fdtn/corp	17.4% (4)	33.3% (2)	30.6% (11)	20.7% (6)	20.0% (1)	38.5% (5)	25.0% (1)	25.0% (1)	27.9% (19)	50.0% (1)	12.5% (1)	27.9% (12)
spec event	13.0% (3)	16.7% (1)	16.7% (6)	13.8% (4)		7.7% (1)	25.0% (1)		19.1% (13)		25.0% (2)	16.3% (7)
local/state	21.7% (5)		19.4% (7)	20.7% (6)	40.0% (2)	15.4% (2)	25.0% (1)	25.0% (1)	11.8% (8)		37.5% (3)	18.6% (8)
federal	13.0% (3)			13.8% (4)		7.7% (1)			11.8% (8)		12.5% (1)	11.6% (5)

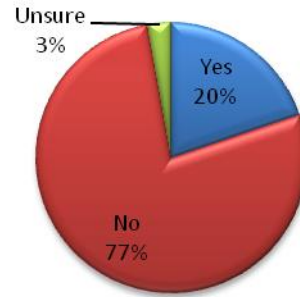


Section 2 - FUNDRAISING

Survey Question 6: Did you delay any fundraising efforts because of the economic recession?

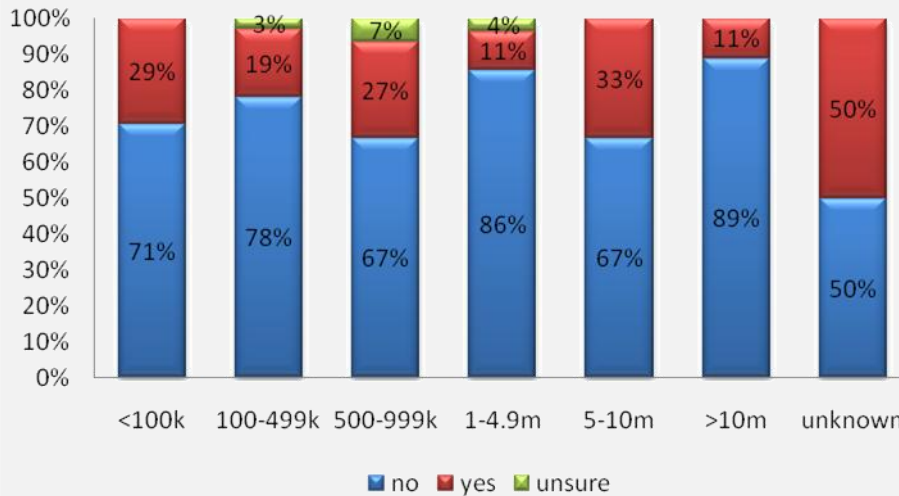
GENERAL RESULTS

Answer Options	Response Percent	Response Count
Yes	19.8%	21
No	77.4%	82
Unsure	2.8%	3
answered question		106
skipped question		25



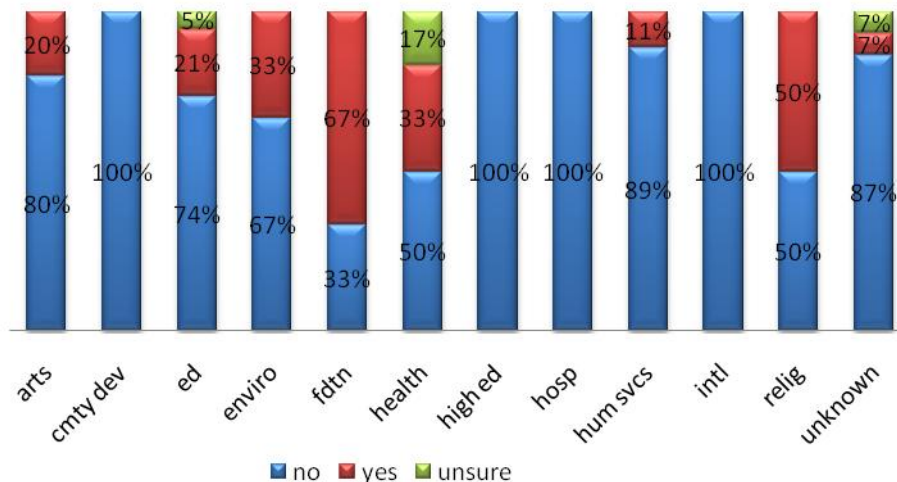
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
no	70.6% (12)	78.1% (25)	66.7% (10)	85.7% (24)	66.7% (2)	88.9% (8)	50.0% (1)
yes	29.4% (5)	18.8% (6)	26.7% (4)	10.7% (3)	33.3% (1)	11.1% (1)	50.0% (1)
unsure		3.1% (1)	6.7% (1)	3.6% (1)			



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
no	80.0% (8)	100.0% (3)	73.7% (14)	66.7% (8)	33.3% (1)	50.0% (3)	100.0% (2)	100.0% (2)	88.9% (24)	100.0% (1)	50.0% (3)	86.7% (13)
yes	20.0% (2)		21.1% (4)	33.3% (4)	66.7% (2)	33.3% (2)			11.1% (3)		50.0% (3)	6.7% (1)
unsure			5.3% (1)			16.7% (1)						6.7% (1)

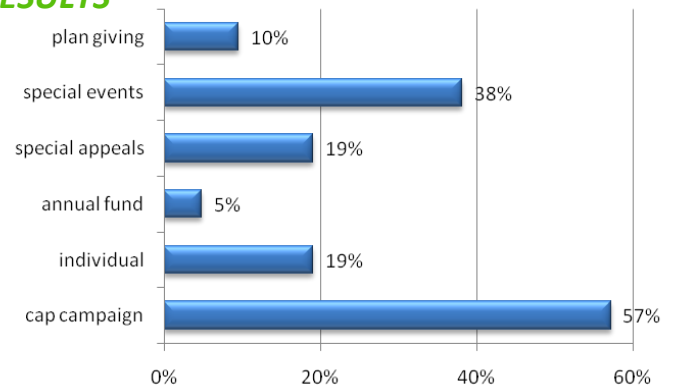


Section 2 - FUNDRAISING

Survey Question 7: What types of fundraising efforts did you delay? (Check all that apply)

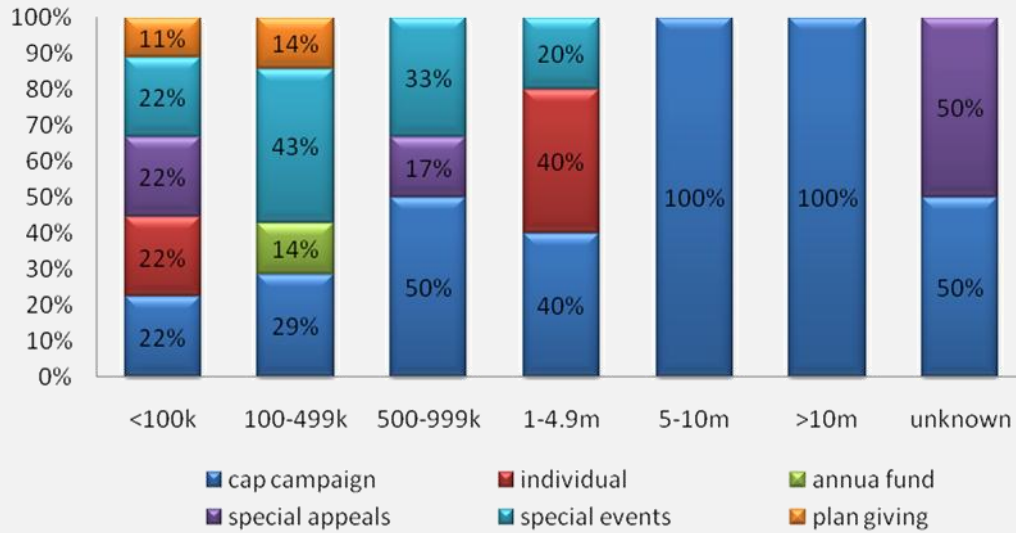
GENERAL RESULTS

Answer Options	Response Percent	Response Count
cap campaign	57%	12
individual	19%	4
annual fund	5%	1
special appeals	19%	4
special events	38%	8
plan giving	10%	2
answered question		21
skipped question		110



BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
cap campaign	22.2% (2)	28.6% (2)	50.0% (3)	40.0% (2)	100.0% (1)	100.0% (1)	50.0% (1)
individual	22.2% (2)			40.0% (2)			
annua fund		14.3% (1)					
special appeals	22.2% (2)		16.7% (1)				50.0% (1)
special events	22.2% (2)	42.9% (3)	33.3% (2)	20.0% (1)			
plan giving	11.1% (1)	14.3% (1)					

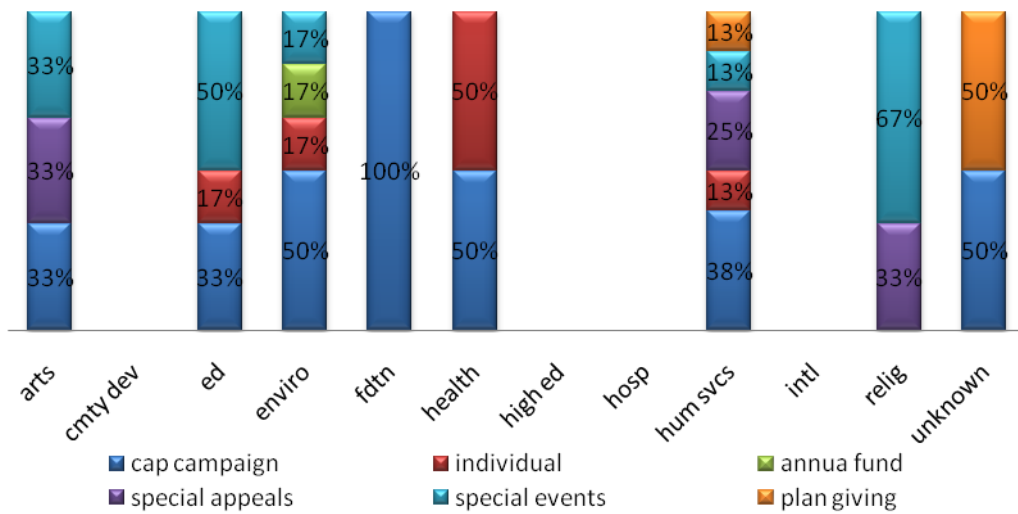


Section 2 - FUNDRAISING

**Survey Question 7 continued: What types of fundraising efforts did you delay?
(Check all that apply)**

BY MISSION

mission	arts	cmtty dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
cap campaign	33.3% (1)		33.3% (2)	50.0% (3)	100.0% (1)	50.0% (1)			37.5% (3)			50.0% (1)
individual			16.7% (1)	16.7% (1)		50.0% (1)			12.5% (1)			
annua fund				16.7% (1)								
special appeals	33.3% (1)								25.0% (2)		33.3% (1)	
special events	33.3% (1)		50.0% (3)	16.7% (1)					12.5% (1)		66.7% (2)	
plan giving									12.5% (1)			50.0% (1)

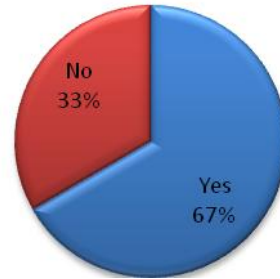


Section 2 - FUNDRAISING

Survey Question 8: Are you planning to launch a new or reinitiated fundraising campaign that you delayed because of the economy?

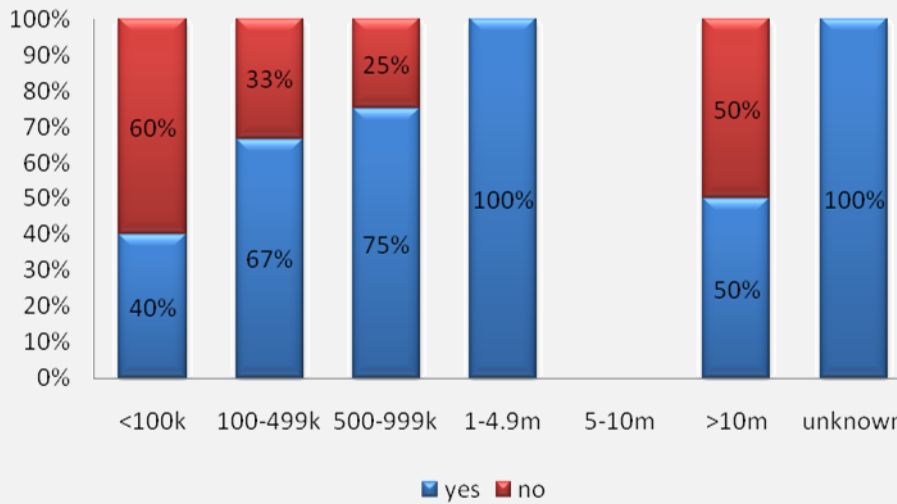
GENERAL RESULTS

Answer Options	Response Percent	Response Count
Yes	66.7%	14
No	33.3%	7
answered question		21
skipped question		110



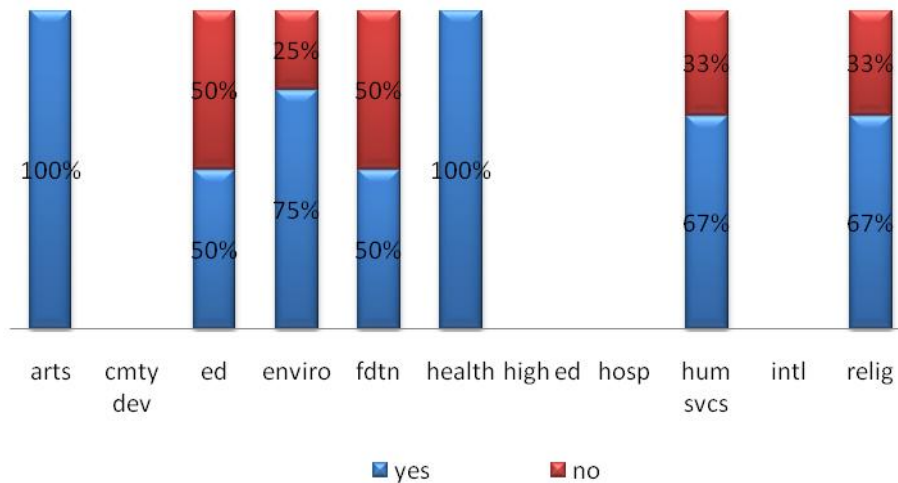
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
no	60.0% (3)	33.3% (2)	25.0% (1)			50.0% (1)	
yes	40.0% (2)	66.7% (4)	75.0% (3)	100.0% (3)		50.0% (1)	100.0% (1)



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
no			50.0% (2)	25.0% (1)	50.0% (1)				33.3% (1)		33.3% (1)	50.0% (1)
yes	100.0% (2)		50.0% (2)	75.0% (3)	50.0% (1)	100.0% (1)			66.7% (2)		66.7% (2)	50.0% (1)

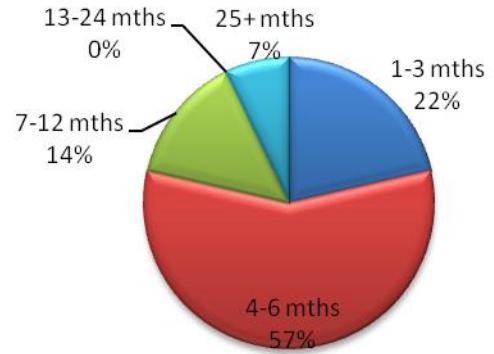


Section 2 - FUNDRAISING

Survey Question 9: How soon are you planning to launch this campaign?

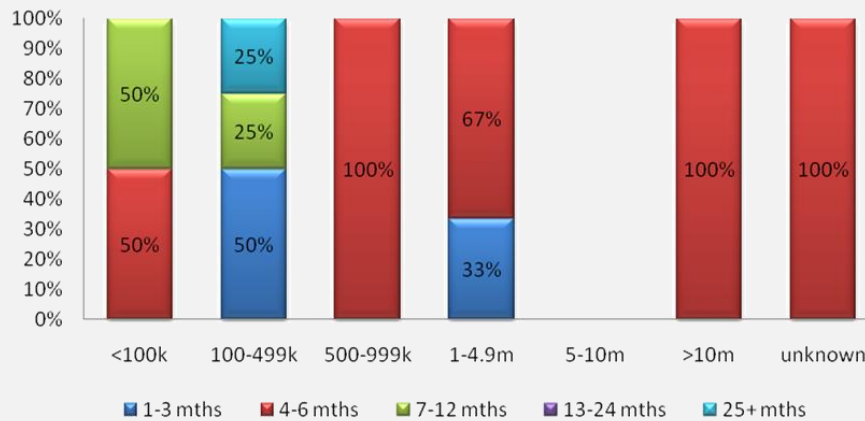
GENERAL RESULTS

Answer Options	Response Percent	Response Count
1-3 mths	21%	3
4-6 mths	57%	8
7-12 mths	14%	2
13-24 mths	0%	0
25+ mths	7%	1
answered question		14
skipped question		117



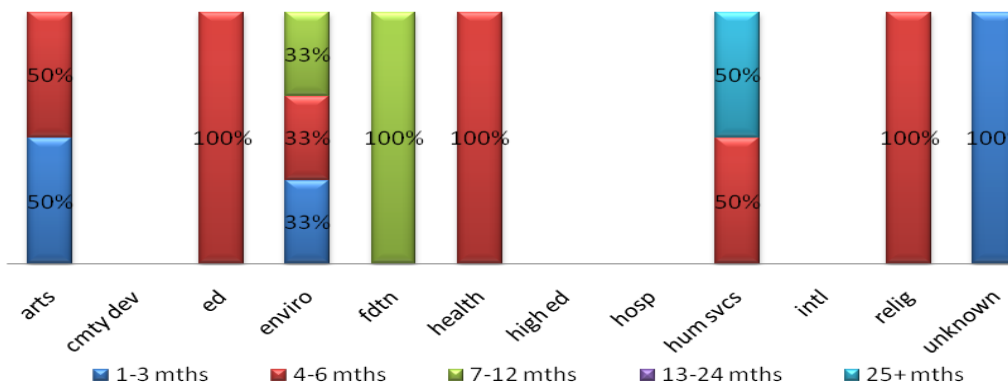
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
1-3 mths		50.0% (2)		33.3% (1)			
4-6 mths	50.0% (1)		100.0% (3)	66.7% (2)	0.0% (0)	100.0% (1)	100.0% (1)
7-12 mths	50.0% (1)	25.0% (1)					
13-24 mths							
25+ mths		25.0% (1)					



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
1-3 mths	50.0% (1)			33.3% (1)								100.0% (1)
4-6 mths	50.0% (1)		100.0% (2)	33.3% (1)		100.0% (1)			50.0% (1)		100.0% (2)	
7-12 mths				33.3% (1)	100.0% (1)							
13-24 mths												
25+ mths									50.0% (1)			

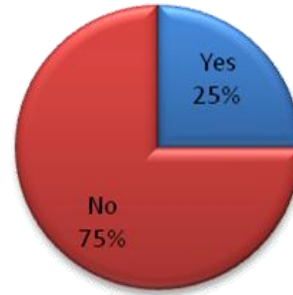


Section 2 - FUNDRAISING

Survey Question 10: Have you been notified by any government contractors, foundations, or donors that pledged funds or contracted payments will be delayed or cancelled?

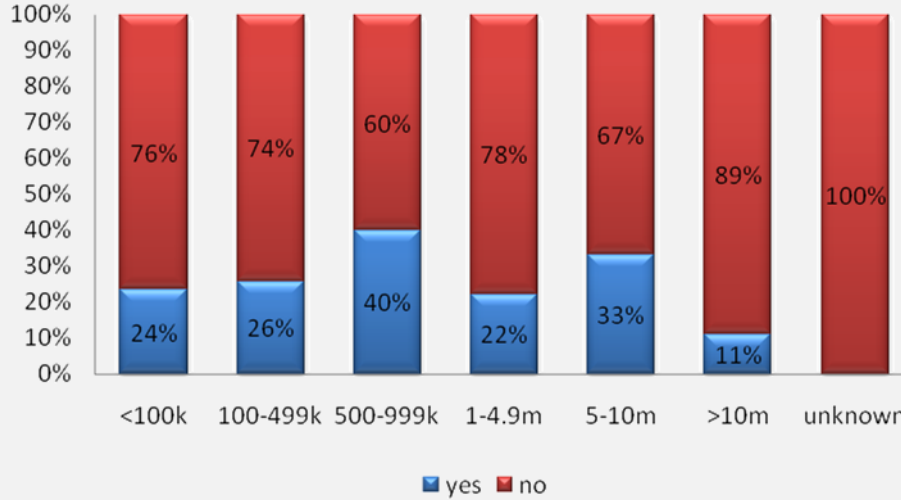
GENERAL RESULTS

Answer Options	Response Percent	Response Count
Yes	25.0%	26
No	75.0%	78
answered question		104
skipped question		27



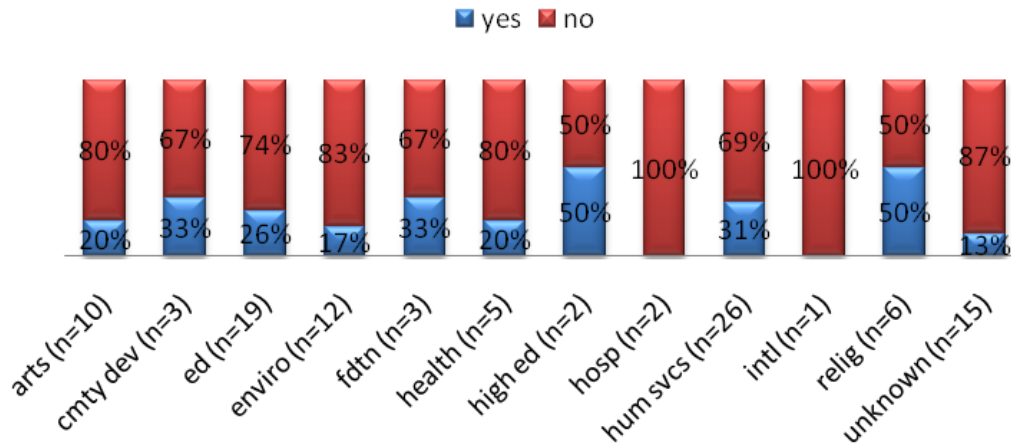
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
no	76.5% (13)	74.2% (23)	60.0% (9)	77.8% (21)	66.7% (2)	88.9% (8)	100.0% (2)
yes	23.5% (4)	25.8% (8)	40.0% (6)	22.2% (6)	33.3% (1)	11.1% (1)	



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
no	80.0% (8)	66.7% (2)	73.7% (14)	83.3% (10)	66.7% (2)	80.0% (4)	50.0% (1)	100.0% (2)	69.2% (18)	100.0% (1)	50.0% (3)	86.7% (13)
yes	20.0% (2)	33.3% (1)	26.3% (5)	16.7% (2)	33.3% (1)	20.0% (1)	50.0% (1)		30.8% (8)		50.0% (3)	13.3% (2)

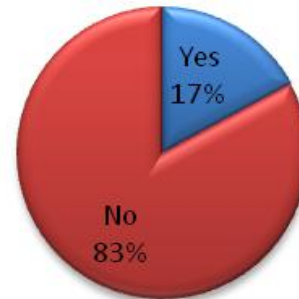


Section 2 - FUNDRAISING

Survey Question 11: Have you experienced an increase in the rate of default on contribution pledges?

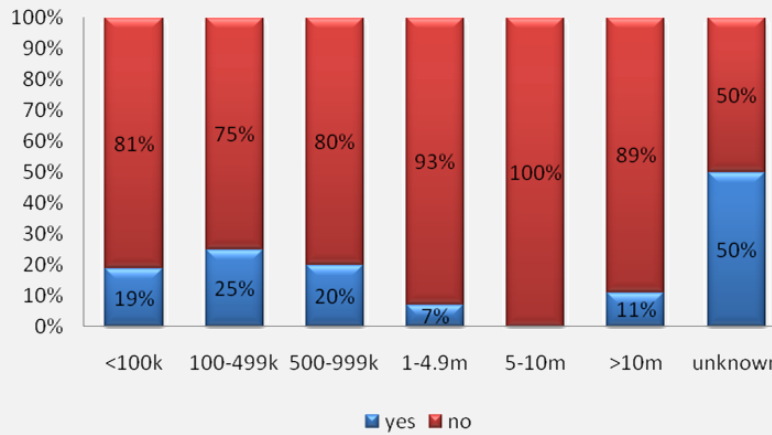
GENERAL RESULTS

Answer Options	Response Percent	Response Count
Yes	25.0%	26
No	75.0%	78
answered question		104
skipped question		27



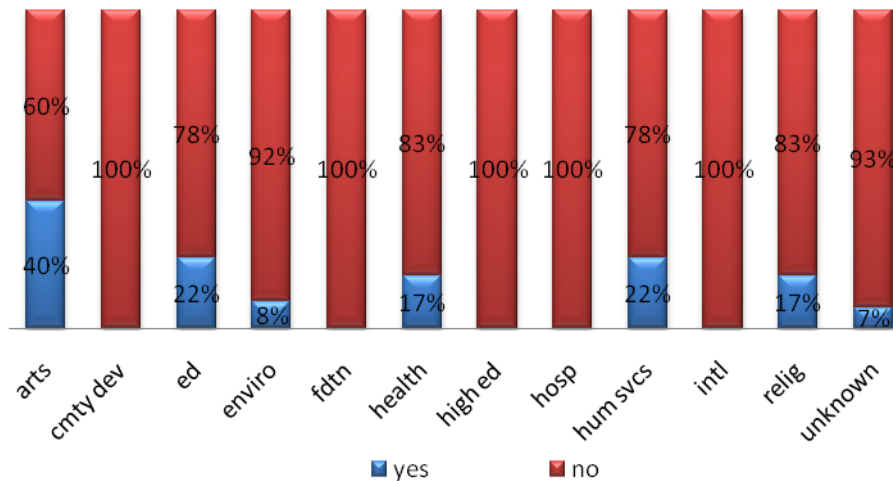
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
no	81.3% (13)	75.0% (24)	80.0% (12)	92.9% (26)	100.0% (3)	88.9% (8)	50.0% (1)
yes	18.8% (3)	25.0% (8)	20.0% (3)	7.1% (2)		11.1% (1)	50.0% (1)



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
no	60.0% (6)	100.0% (3)	77.8% (14)	91.7% (11)	100.0% (3)	83.3% (5)	100.0% (2)	100.0% (2)	77.8% (21)	100.0% (1)	83.3% (5)	93.3% (14)
yes	40.0% (4)		22.2% (4)	8.3% (1)		16.7% (1)			22.2% (6)		16.7% (1)	6.7% (1)

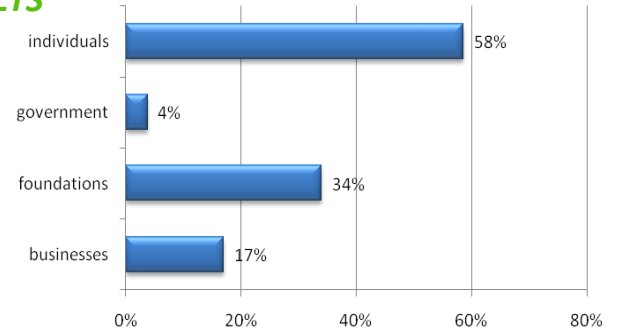


Section 2 - FUNDRAISING

Survey Question 12: Do you feel funders are more receptive now to requests for unrestricted (overhead) funding than they have been in the past? If so, what types of funders? (Check all that apply)

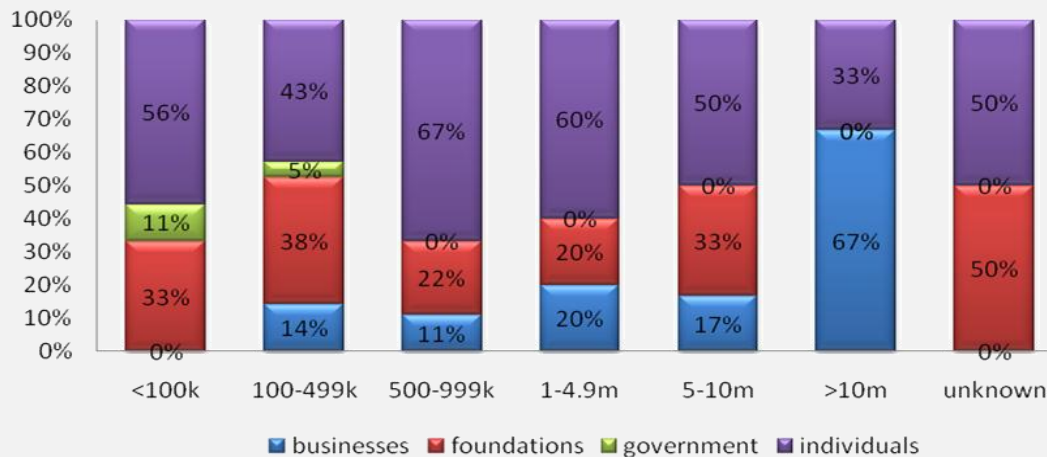
GENERAL RESULTS

Answer Options	Response Percent	Response Count
businesses	17%	9
foundations	34%	18
government	4%	2
individuals	58%	31
answered question		53
skipped question		78



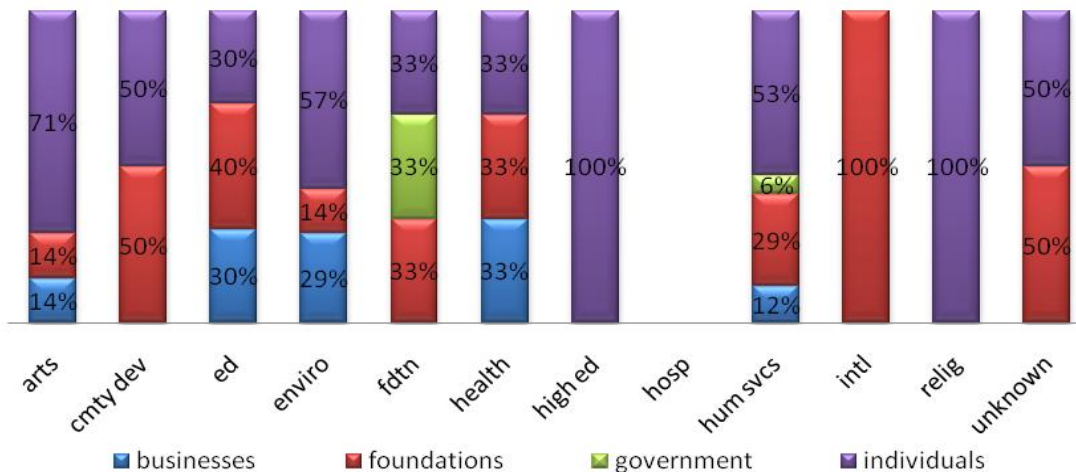
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
businesses		14.3% (3)	11.1% (1)	20.0% (2)	16.7% (1)	66.7% (2)	
foundations	33.3% (3)	38.1% (8)	22.2% (2)	20.0% (2)	33.3% (2)		50.0% (1)
government	11.1% (1)	4.8% (1)					
individuals	55.6% (5)	42.9% (9)	66.7% (6)	60.0% (6)	50.0% (3)	33.3% (1)	50.0% (1)



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
businesses	14.3% (1)		30.0% (3)	28.6% (2)		33.3% (1)			11.8% (2)			
foundations	14.3% (1)	50.0% (1)	40.0% (4)	14.3% (1)	33.3% (1)	33.3% (1)			29.4% (5)	100.0% (1)		50.0% (3)
government					33.3% (1)				5.9% (1)			
individuals	71.4% (5)	50.0% (1)	30.0% (3)	57.1% (4)	33.3% (1)	33.3% (1)	100.0% (1)		52.9% (9)		100.0% (3)	50.0% (3)

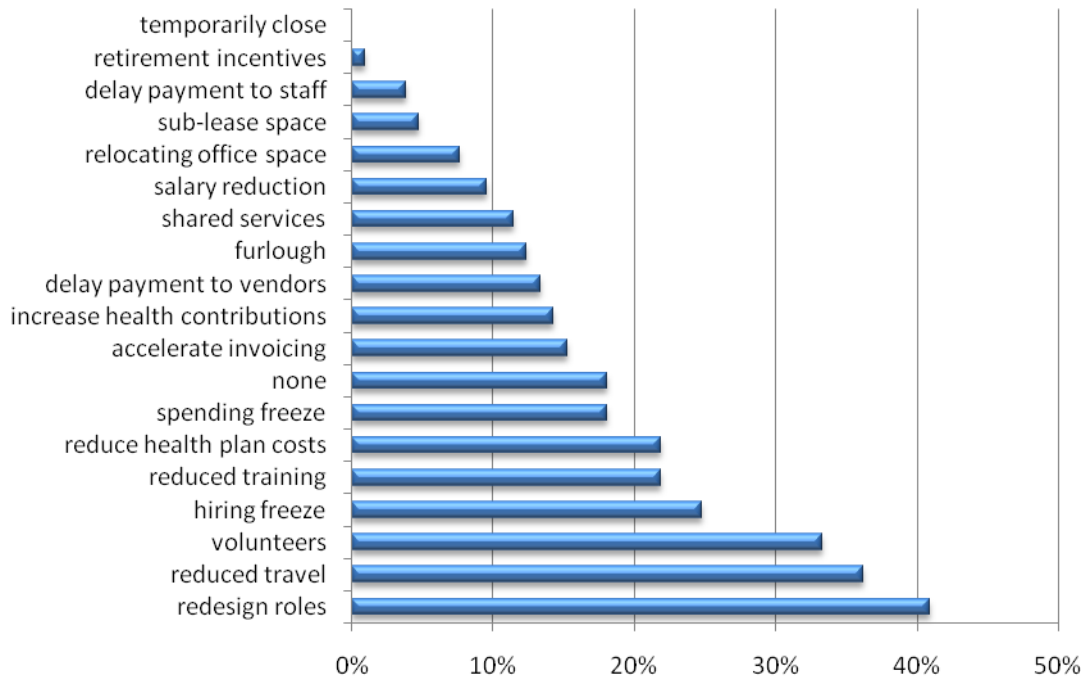


Section 3 - ORGANIZATION

Survey Question 1: Have you implemented any of the following cost-cutting/saving measures in response to the economic recession? (Check all that apply)

GENERAL RESULTS

Answer Options	Response	Response
	Percent	Count
redesign roles	41%	43
reduced travel	36%	38
volunteers	33%	35
hiring freeze	25%	26
reduced training	22%	23
reduce health plan costs	22%	23
spending freeze	18%	19
none	18%	19
accelerate invoicing	15%	16
increase health contributions	14%	15
delay payment to vendors	13%	14
furlough	12%	13
shared services	11%	12
salary reduction	10%	10
relocating office space	8%	8
sub-lease space	5%	5
delay payment to staff	4%	4
retirement incentives	1%	1
temporarily close	0%	0
answered question		105
skipped question		26

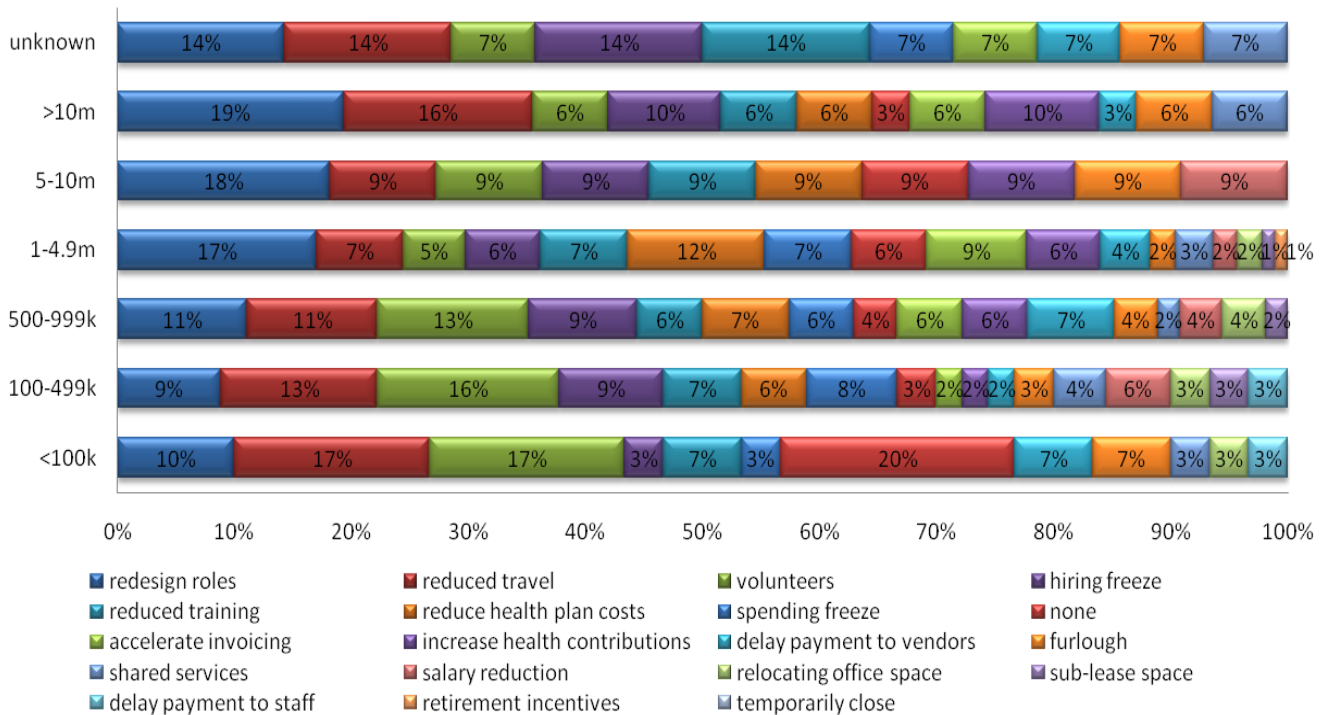


Section 3 - ORGANIZATION

Survey Question 1 continued: Have you implemented any of the following cost-cutting/saving measures in response to the economic recession? (Check all that apply)

BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
redesign roles	10.0% (3)	8.9% (8)	11.1% (6)	17.0% (16)	18.2% (2)	19.4% (6)	14.3% (2)
reduced travel	16.7% (5)	13.3% (12)	11.1% (6)	7.4% (7)	9.1% (1)	16.1% (5)	14.3% (2)
volunteers	16.7% (5)	15.6% (14)	13.0% (7)	5.3% (5)	9.1% (1)	6.5% (2)	7.1% (1)
hiring freeze	3.3% (1)	8.9% (8)	9.3% (5)	6.4% (6)	9.1% (1)	9.7% (3)	14.3% (2)
reduced training	6.7% (2)	6.7% (6)	5.6% (3)	7.4% (7)	9.1% (1)	6.5% (2)	14.3% (2)
reduce health plan costs		5.6% (5)	7.4% (4)	11.7% (11)	9.1% (1)	6.5% (2)	
spending freeze	3.3% (1)	7.8% (7)	5.6% (3)	7.4% (7)			7.1% (1)
none	20.0% (6)	3.3% (3)	3.7% (2)	6.4% (6)	9.1% (1)	3.2% (1)	
accelerate invoicing		2.2% (2)	5.6% (3)	8.5% (8)		6.5% (2)	7.1% (1)
increase health contributions		2.2% (2)	5.6% (3)	6.4% (6)	9.1% (1)	9.7% (3)	
delay payment to vendors	6.7% (2)	2.2% (2)	7.4% (4)	4.3% (4)		3.2% (1)	7.1% (1)
furlough	6.7% (2)	3.3% (3)	3.7% (2)	2.1% (2)	9.1% (1)	6.5% (2)	7.1% (1)
shared services	3.3% (1)	4.4% (4)	1.9% (1)	3.2% (3)		6.5% (2)	7.1% (1)
salary reduction		5.6% (5)	3.7% (2)	2.1% (2)	9.1% (1)		
relocating office space	3.3% (1)	3.3% (3)	3.7% (2)	2.1% (2)			
sub-lease space		3.3% (3)	1.9% (1)	1.1% (1)			
delay payment to staff	3.3% (1)	3.3% (3)					
retirement incentives				1.1% (1)			
temporarily close							

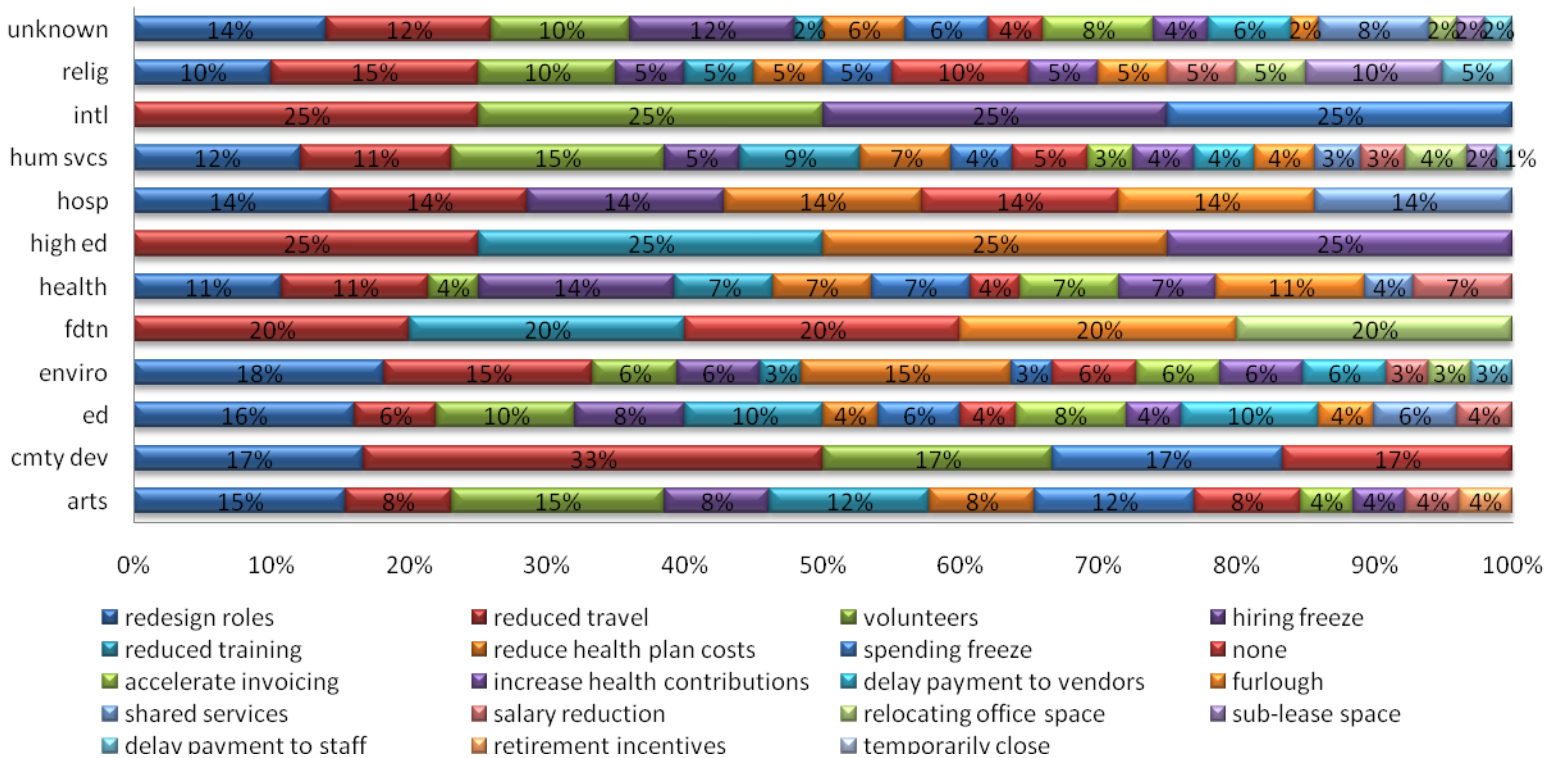


Section 3 - ORGANIZATION

Survey Question 1 continued: Have you implemented any of the following cost-cutting/saving measures in response to the economic recession? (Check all that apply)

BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
redesign roles	15.4% (4)	16.7% (1)	16.0% (8)	18.2% (6)		10.7% (3)		14.3% (1)	12.1% (11)		10.0% (2)	14.0% (7)
reduced travel	7.7% (2)	33.3% (2)	6.0% (3)	15.2% (5)	20.0% (1)	10.7% (3)	25.0% (1)	14.3% (1)	11.0% (10)	25.0% (1)	15.0% (3)	12.0% (6)
volunteers	15.4% (4)	16.7% (1)	10.0% (5)	6.1% (2)		3.6% (1)			15.4% (14)	25.0% (1)	10.0% (2)	10.0% (5)
hiring freeze	7.7% (2)		8.0% (4)	6.1% (2)		14.3% (4)		14.3% (1)	5.5% (5)	25.0% (1)	5.0% (1)	12.0% (6)
reduced training	11.5% (3)		10.0% (5)	3.0% (1)	20.0% (1)	7.1% (2)	25.0% (1)		8.8% (8)		5.0% (1)	2.0% (1)
reduce health plan costs	7.7% (2)		4.0% (2)	15.2% (5)		7.1% (2)	25.0% (1)	14.3% (1)	6.6% (6)		5.0% (1)	6.0% (3)
spending freeze	11.5% (3)	16.7% (1)	6.0% (3)	3.0% (1)		7.1% (2)			4.4% (4)	25.0% (1)	5.0% (1)	6.0% (3)
none	7.7% (2)	16.7% (1)	4.0% (2)	6.1% (2)	20.0% (1)	3.6% (1)		14.3% (1)	5.5% (5)		10.0% (2)	4.0% (2)
accelerate invoicing	3.8% (1)		8.0% (4)	6.1% (2)		7.1% (2)			3.3% (3)			8.0% (4)
increase health contributions	3.8% (1)		4.0% (2)	6.1% (2)		7.1% (2)	25.0% (1)		4.4% (4)		5.0% (1)	4.0% (2)
delay payment to vendors			10.0% (5)	6.1% (2)					4.4% (4)			6.0% (3)
furlough			4.0% (2)		20.0% (1)	10.7% (3)		14.3% (1)	4.4% (4)		5.0% (1)	2.0% (1)
shared services			6.0% (3)			3.6% (1)		14.3% (1)	3.3% (3)			8.0% (4)
salary reduction	3.8% (1)		4.0% (2)	3.0% (1)		7.1% (2)			3.3% (3)		5.0% (1)	
relocating office space				3.0% (1)	20.0% (1)				4.4% (4)		5.0% (1)	2.0% (1)
sub-lease space									2.2% (2)		10.0% (2)	2.0% (1)
delay payment to staff				3.0% (1)					1.1% (1)		5.0% (1)	2.0% (1)
retirement incentives	3.8% (1)											
temporarily close												

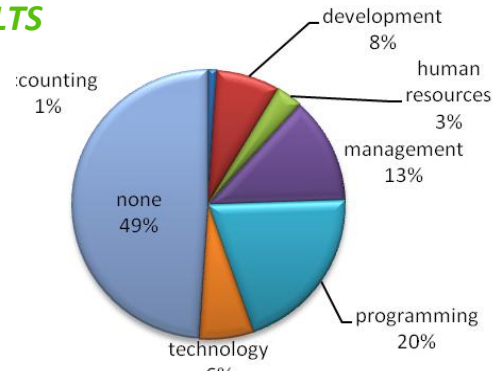


Section 3 - ORGANIZATION

Survey Question 2: What departments have experienced a staffing reduction at your organization? (Check all that apply)

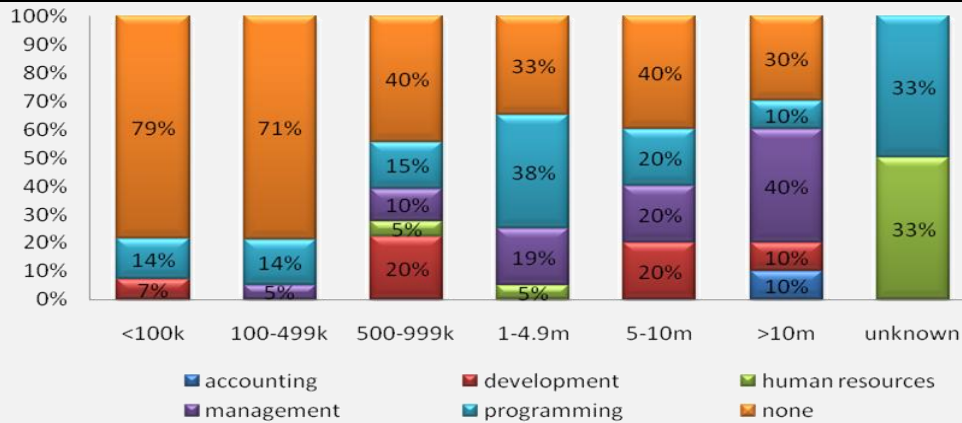
GENERAL RESULTS

Answer Options	Response Percent	Response Count
accounting	1%	1
development	7%	7
human resources	3%	3
management	13%	12
programming	20%	19
technology	6%	6
none	49%	46
answered question		94
skipped question		37



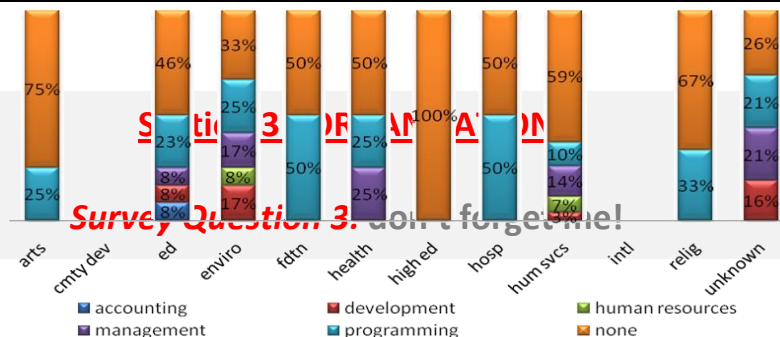
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
accounting						10.0% (1)	
development	7.1% (1)		20.0% (4)		20.0% (1)	10.0% (1)	
human resources			5.0% (1)	4.8% (1)			33.3% (1)
management		4.8% (1)	10.0% (2)	19.0% (4)	20.0% (1)	40.0% (4)	
programming	14.3% (2)	14.3% (3)	15.0% (3)	38.1% (8)	20.0% (1)	10.0% (1)	33.3% (1)
technology		9.5% (2)	10.0% (2)	4.8% (1)			33.3% (1)
none	78.6% (11)	71.4% (15)	40.0% (8)	33.3% (7)	40.0% (2)	30.0% (3)	



BY MISSION

mission	arts	cmtv dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
accounting			7.7% (1)									
development			7.7% (1)	16.7% (2)					3.4% (1)			15.8% (3)
human resources				8.3% (1)					6.9% (2)			
management			7.7% (1)	16.7% (2)		25.0% (1)			13.8% (4)			21.1% (4)
programming	25.0% (2)		23.1% (3)	25.0% (3)	50.0% (1)	25.0% (1)		50.0% (1)	10.3% (3)		33.3% (1)	21.1% (4)
technology			7.7% (1)						6.9% (2)			15.8% (3)
none	75.0% (6)		46.2% (6)	33.3% (4)	50.0% (1)	50.0% (2)	100.0% (2)	50.0% (1)	58.6% (17)		66.7% (2)	26.3% (5)

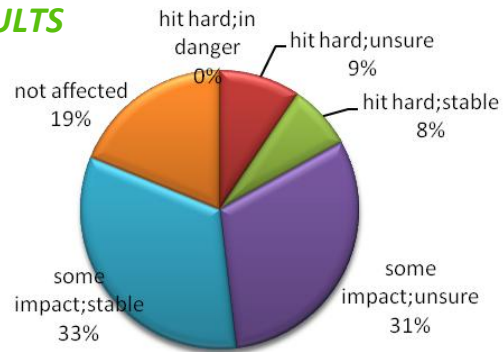


Section 3 - ORGANIZATION

Survey Question 4: How would you best describe the current state of your organization in relation to the economic recession and subsequent recovery?

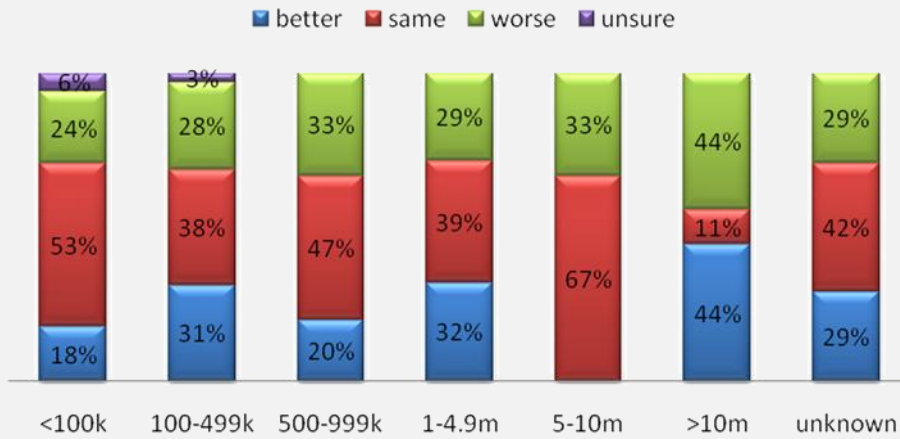
GENERAL RESULTS

Answer Options	Response Percent	Response Count
hit hard;in danger	0%	0
hit hard;unsure	9%	10
hit hard;stable	8%	8
some impact;unsure	31%	33
some impact;stable	33%	35
not affected	19%	20
answered question		106
skipped question		25



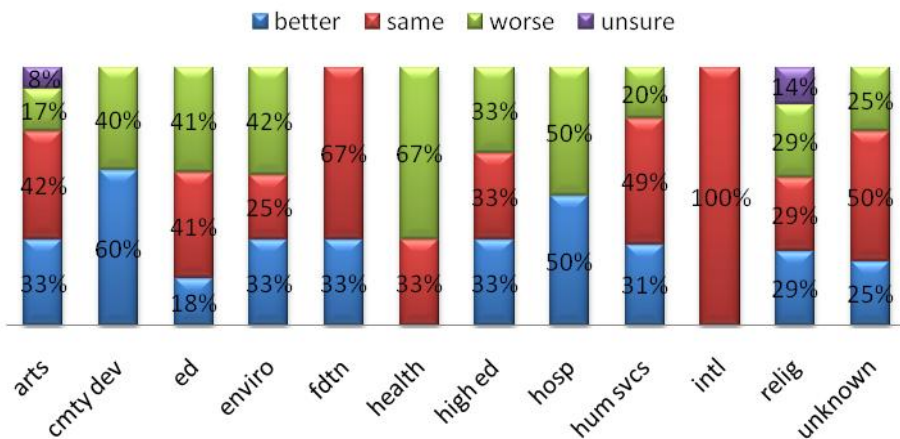
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
better	17.6% (3)	31.3% (10)	20.0% (3)	32.1% (9)		44.4% (4)	29.2% (7)
same	52.9% (9)	37.5% (12)	46.7% (7)	39.3% (11)	66.7% (2)	11.1% (1)	41.7% (10)
worse	23.5% (4)	28.1% (9)	33.3% (5)	28.6% (8)	33.3% (1)	44.4% (4)	29.2% (7)
unsure	5.9% (1)	3.1% (1)					



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
better	33.3% (4)	60.0% (3)	18.2% (4)	33.3% (4)	33.3% (1)	0.0% (0)	33.3% (1)	50.0% (1)	31.4% (11)		28.6% (2)	25.0% (5)
same	41.7% (5)		40.9% (9)	25.0% (3)	66.7% (2)	33.3% (2)	33.3% (1)		48.6% (17)	100.0% (1)	28.6% (2)	50.0% (10)
worse	16.7% (2)	40.0% (2)	40.9% (9)	41.7% (5)		66.7% (4)	33.3% (1)	50.0% (1)	20.0% (7)		28.6% (2)	25.0% (5)
unsure	8.3% (1)										14.3% (1)	

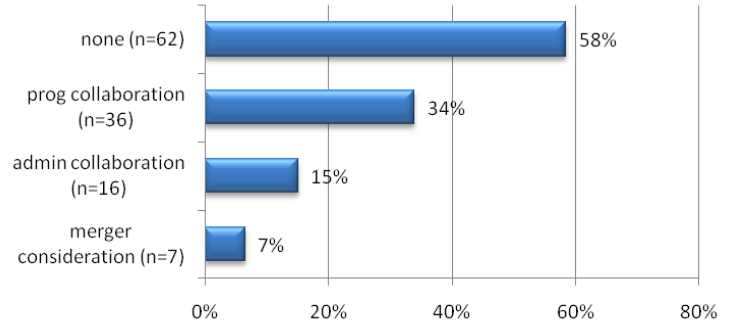


Section 3 - ORGANIZATION

Survey Question 5: Have you taken any of the following actions in response to the economic recession? (Check all that apply)

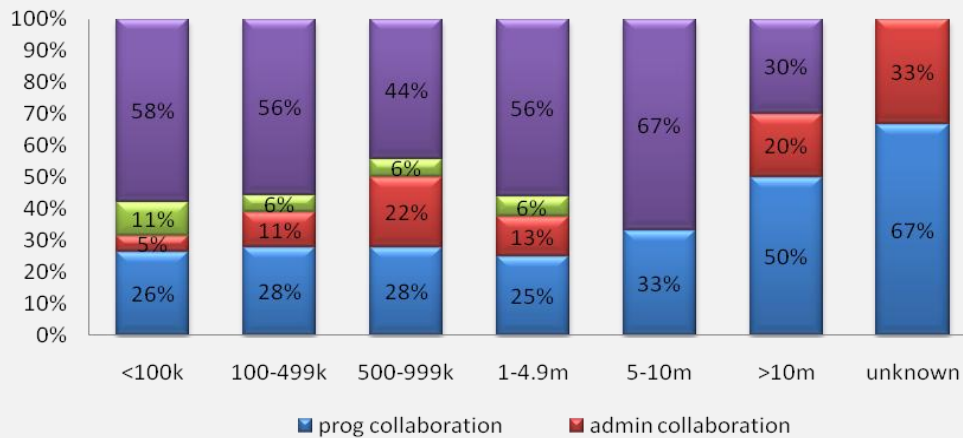
GENERAL RESULTS

Answer Options	Response Percent	Response Count
merger consideration	7%	7
admin collaboration	15%	16
prog collaboration	34%	36
none (n=62)	58%	62
answered question		106
skipped question		25



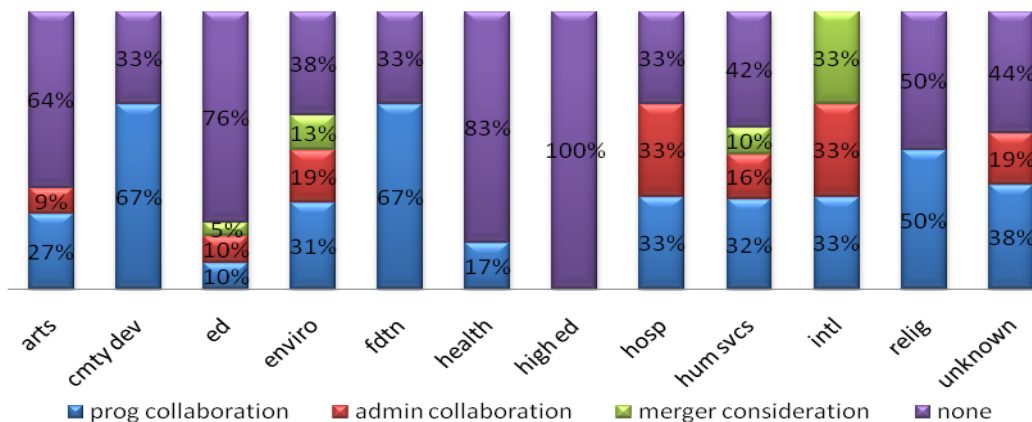
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
prog collaboration		27.8% (10)	27.8% (5)	25.0% (8)	33.3% (1)	50.0% (5)	
admin collaboration	5.3% (1)	11.1% (4)	22.2% (4)	12.5% (4)			33.3% (1)
merger consideration	10.5% (2)	5.6% (2)					
none	57.9% (11)	55.6% (20)	44.4% (8)	56.3% (18)	66.7% (2)	30.0% (3)	



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
prog collaboration	27.3% (3)	66.7% (2)	9.5% (2)	31.3% (5)	66.7% (2)	16.7% (1)		33.3% (1)	32.3% (10)	33.3% (1)	50.0% (3)	37.5% (6)
admin collaboration	9.1% (1)		9.5% (2)	18.8% (3)				33.3% (1)	16.1% (5)	33.3% (1)		18.8% (3)
merger consideration			4.8% (1)	12.5% (2)					9.7% (3)	33.3% (1)		
none	63.6% (7)	33.3% (1)	76.2% (16)	37.5% (6)	33.3% (1)	83.3% (5)	100.0% (2)	33.3% (1)	41.9% (13)		50.0% (3)	43.8% (7)

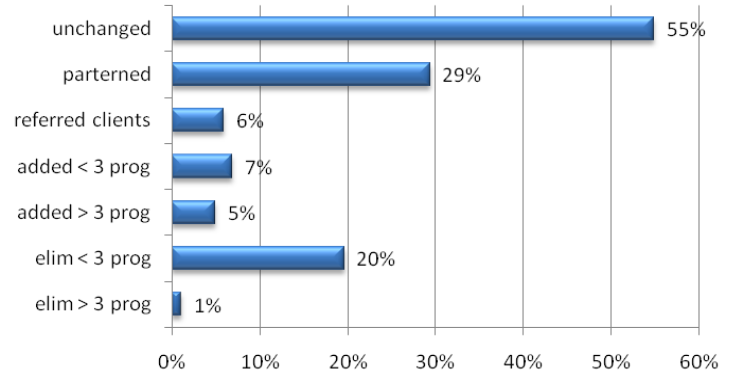


Section 3: ORGANIZATION

Survey Question 6: How did the economic recession affect your service delivery? (Check all that apply)

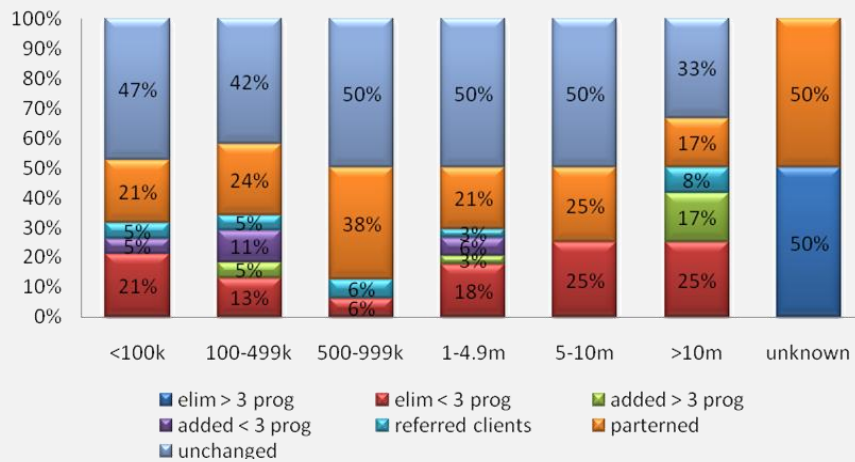
GENERAL RESULTS

How did the economic recession affect your service delivery? (Check all that apply)		
Answer Options	Response Percent	Response Count
elim > 3 prog	1%	1
elim < 3 prog	20%	20
added > 3 prog	5%	5
added < 3 prog	7%	7
referred clients	6%	6
partnered	29%	30
unchanged	55%	56
answered question		102
skipped question		29



BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
elim > 3 prog							50.0% (1)
elim < 3 prog	21.1% (4)	13.2% (5)	6.3% (1)	17.6% (6)	25.0% (1)	25.0% (3)	
added > 3 prog		5.3% (2)		2.9% (1)		16.7% (2)	
added < 3 prog	5.3% (1)	10.5% (4)		5.9% (2)			
referred clients	5.3% (1)	5.3% (2)	6.3% (1)	2.9% (1)		8.3% (1)	
partnered	21.1% (4)	23.7% (9)	37.5% (6)	20.6% (7)	25.0% (1)	16.7% (2)	50.0% (1)
unchanged	47.4% (9)	42.1% (16)	50.0% (8)	50.0% (17)	50.0% (2)	33.3% (4)	

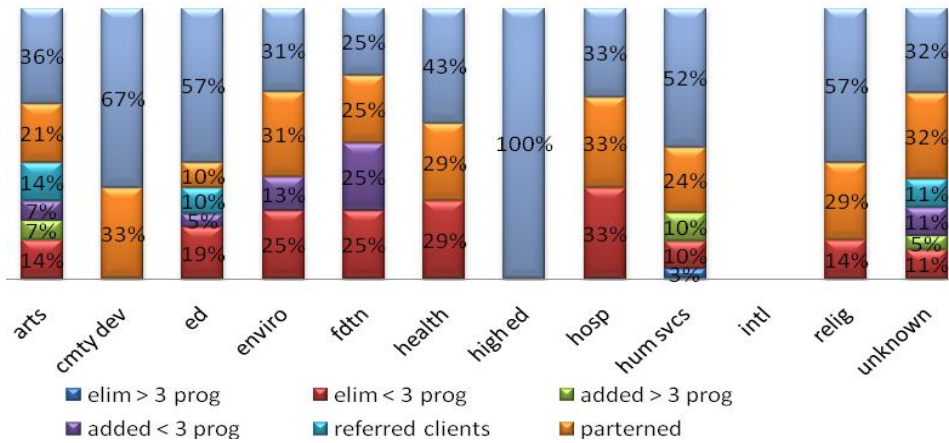


Section 3: ORGANIZATION

Survey Question 6 continued: How did the economic recession affect your service delivery? (Check all that apply)

BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
elim > 3 prog									3.4% (1)			
elim < 3 prog	14.3% (2)		19.0% (4)	25.0% (4)	25.0% (1)	28.6% (2)		33.3% (1)	10.3% (3)		14.3% (1)	10.5% (2)
added > 3 prog	7.1% (1)								10.3% (3)			5.3% (1)
added < 3 prog	7.1% (1)		4.8% (1)	12.5% (2)	25.0% (1)							10.5% (2)
referred clients	14.3% (2)		9.5% (2)									10.5% (2)
parterned	21.4% (3)	33.3% (1)	9.5% (2)	31.3% (5)	25.0% (1)	28.6% (2)		33.3% (1)	24.1% (7)		28.6% (2)	31.6% (6)
unchanged	35.7% (5)	66.7% (2)	57.1% (12)	31.3% (5)	25.0% (1)	42.9% (3)	100.0% (2)	33.3% (1)	51.7% (15)		57.1% (4)	31.6% (6)

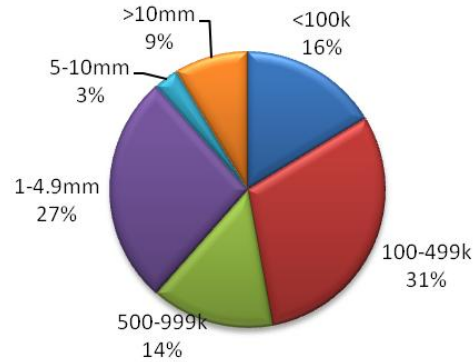


Section 4 - DEMOGRAPHICS

Survey Question 1: What is your organization's approximate annual budget?

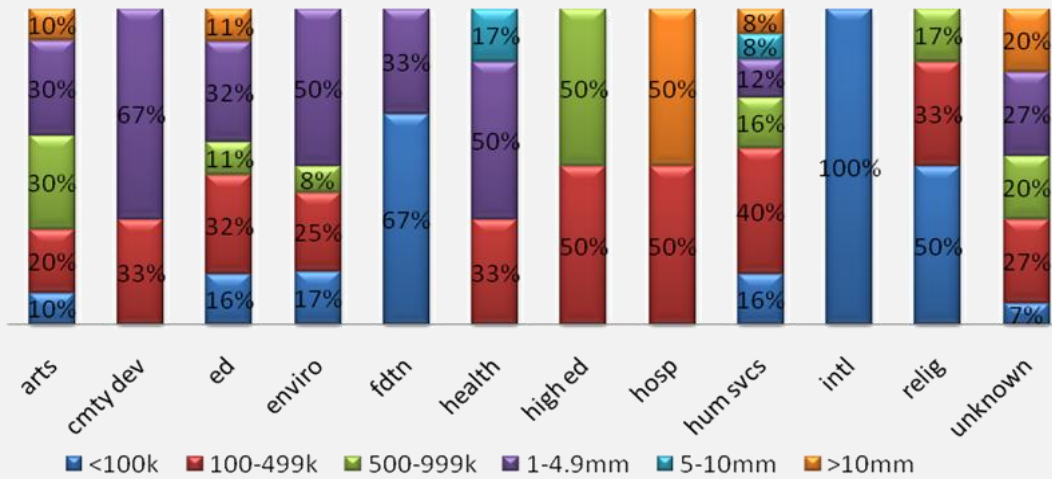
GENERAL RESULTS

Answer Options	Response Percent	Response Count
<100k	16%	17
100-499k	31%	32
500-999k	14%	15
1-4.9mm	27%	28
5-10mm	3%	3
>10mm	9%	9
answered question		104
skipped question		27



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
<100k	10.0% (1)		15.8% (3)	16.7% (2)	66.7% (2)				16.0% (4)	100.0% (1)	50.0% (3)	6.7% (1)
100-499k	20.0% (2)	33.3% (1)	31.6% (6)	25.0% (3)		33.3% (2)	50.0% (1)	50.0% (1)	40.0% (10)		33.3% (2)	26.7% (4)
500-999k	30.0% (3)		10.5% (2)	8.3% (1)			50.0% (1)		16.0% (4)		16.7% (1)	20.0% (3)
1-4.9mm	30.0% (3)	66.7% (2)	31.6% (6)	50.0% (6)	33.3% (1)	50.0% (3)			12.0% (3)			26.7% (4)
5-10mm						16.7% (1)			8.0% (2)			
>10mm	10.0% (1)		10.5% (2)					50.0% (1)	8.0% (2)			20.0% (3)

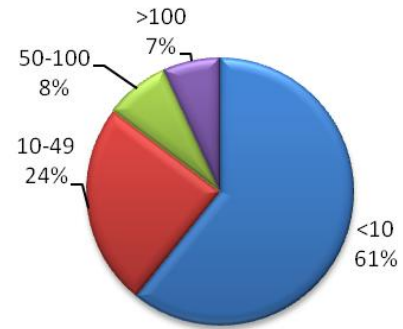


Section 4 - DEMOGRAPHICS

Survey Question 2: How many full-time employees does your organization have on staff?

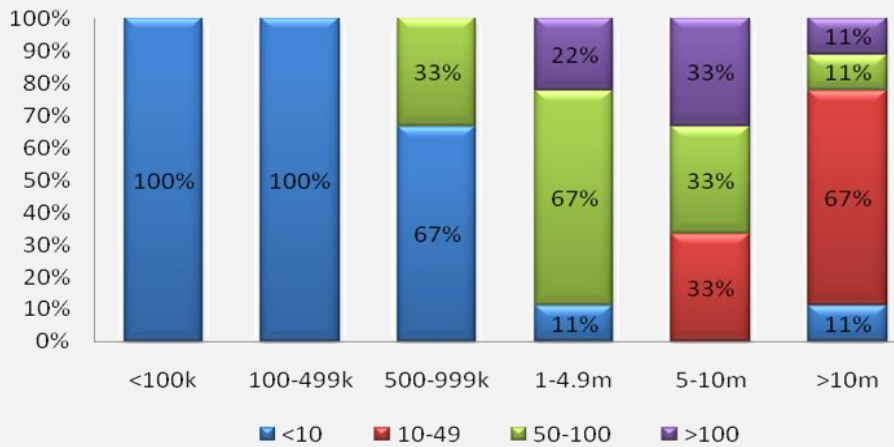
GENERAL RESULTS

Answer Options	Response Percent	Response Count
<10	61%	62
10-49	25%	25
50-100	8%	8
>100	7%	7
answered question		102
skipped question		29



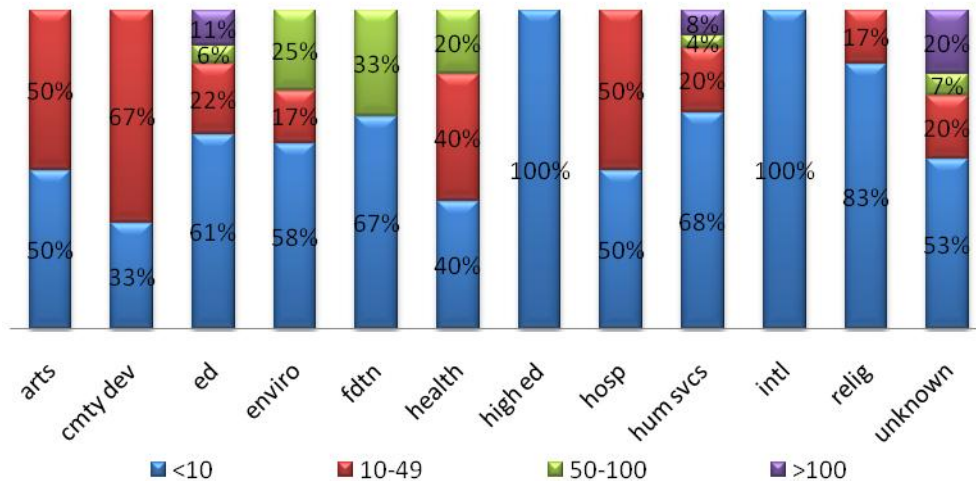
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
<10	100.0% (17)	100.0% (31)	66.7% (10)	11.1% (3)		11.1% (1)	
10-49					33.3% (1)	66.7% (6)	
50-100			33.3% (5)	66.7% (18)	33.3% (1)	11.1% (1)	
>100				22.2% (6)	33.3% (1)	11.1% (1)	



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
<10	50.0% (5)	33.3% (1)	61.1% (11)	58.3% (7)	66.7% (2)	40.0% (2)	100.0% (2)	50.0% (1)	68.0% (17)	100.0% (1)	83.3% (5)	53.3% (8)
10-49	50.0% (5)	66.7% (2)	22.2% (4)	16.7% (2)		40.0% (2)		50.0% (1)	20.0% (5)		16.7% (1)	20.0% (3)
50-100			5.6% (1)	25.0% (3)	33.3% (1)	20.0% (1)			4.0% (1)			6.7% (1)
>100			11.1% (2)						8.0% (2)			20.0% (3)

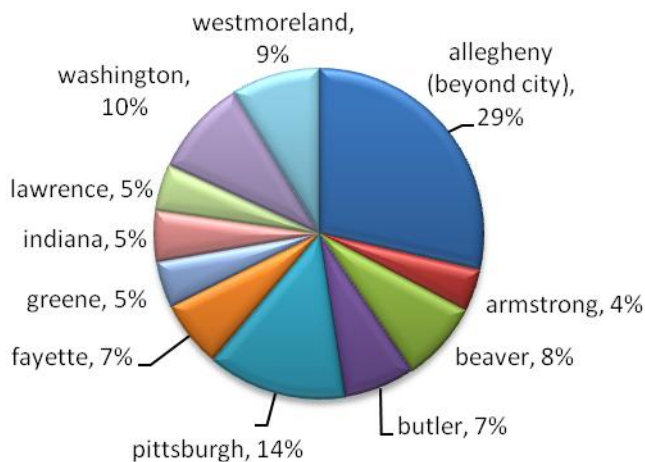


Section 4 - DEMOGRAPHICS

Survey Question 3: Which area(s) does your organization primarily serve?

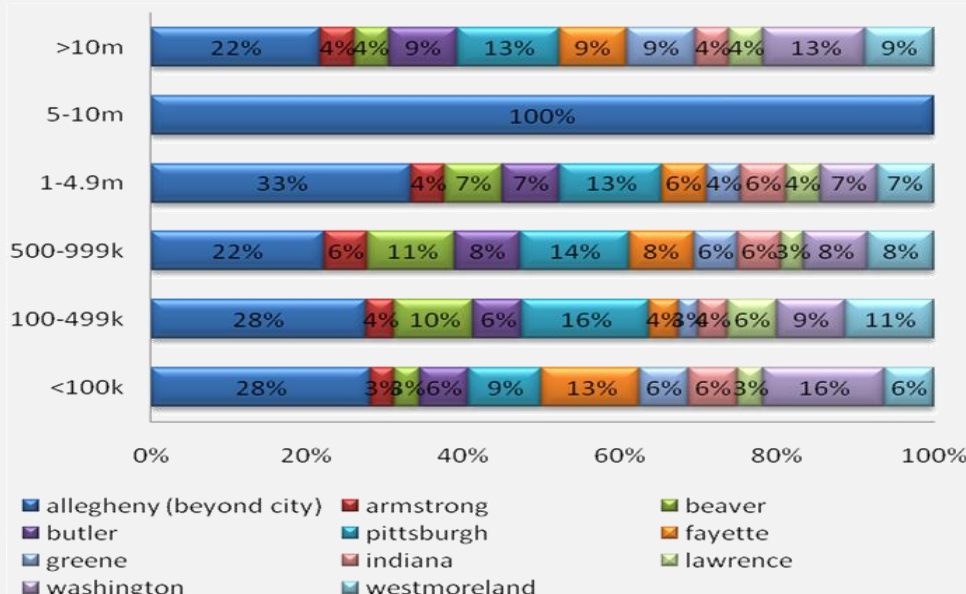
GENERAL RESULTS

Answer Options	Response Percent	Response Count
allegheny (beyond city)	29%	69
armstrong	4%	10
beaver	8%	19
butler	7%	17
pittsburgh	14%	33
fayette	7%	16
greene	5%	11
indiana	5%	12
lawrence	5%	11
washington	10%	23
westmoreland	9%	21
answered question		103
skipped question		28



BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
allegheny (beyond city)	28.1% (9)	27.5% (22)	22.2% (8)	33.3% (23)	100.0% (2)	21.7% (5)	
armstrong	3.1% (1)	3.8% (3)	5.6% (2)	4.3% (3)		4.3% (1)	
beaver	3.1% (1)	10.0% (8)	11.1% (4)	7.2% (5)		4.3% (1)	
butler	6.3% (2)	6.3% (5)	8.3% (3)	7.2% (5)		8.7% (2)	
pittsburgh	9.4% (3)	16.3% (13)	13.9% (5)	13.0% (9)		13.0% (3)	
fayette	12.5% (4)	3.8% (3)	8.3% (3)	5.8% (4)		8.7% (2)	
greene	6.3% (2)	2.5% (2)	5.6% (2)	4.3% (3)		8.7% (2)	
indiana	6.3% (2)	3.8% (3)	5.6% (2)	5.8% (4)		4.3% (1)	
lawrence	3.1% (1)	6.3% (5)	2.8% (1)	4.3% (3)		4.3% (1)	
washington	15.6% (5)	8.8% (7)	8.3% (3)	7.2% (5)		13.0% (3)	
westmoreland	6.3% (2)	11.3% (9)	8.3% (3)	7.2% (5)		8.7% (2)	

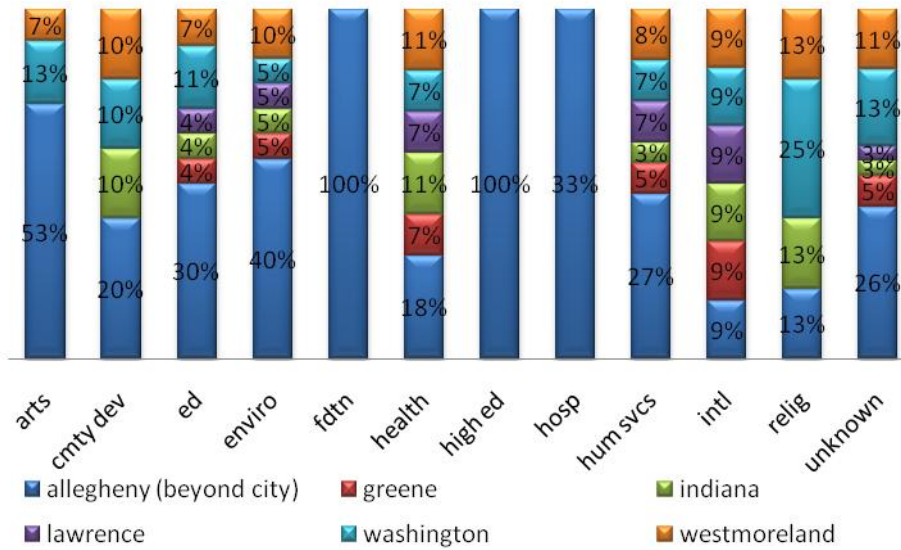


Section 4 - DEMOGRAPHICS

Survey Question 3 continued: Which area(s) does your organization primarily serve?

BY MISSION

mission	arts	cmty dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
alleghehy (beyond city)	53.3% (8)	20.0% (2)	30.4% (14)	40.0% (8)	100.0% (2)	17.9% (5)	100.0% (1)	33.3% (1)	26.7% (16)	9.1% (1)	12.5% (1)	26.3% (10)
armstrong			4.3% (2)			7.1% (2)			6.7% (4)	9.1% (1)		2.6% (1)
beaver		10.0% (1)	6.5% (3)			10.7% (3)			8.3% (5)	9.1% (1)	25.0% (2)	10.5% (4)
butler		10.0% (1)	6.5% (3)	10.0% (2)		7.1% (2)			8.3% (5)	9.1% (1)		7.9% (3)
pittsburgh	13.3% (2)	20.0% (2)	15.2% (7)	15.0% (3)		7.1% (2)		66.7% (2)	13.3% (8)	9.1% (1)	12.5% (1)	13.2% (5)
fayette	13.3% (2)	10.0% (1)	6.5% (3)	5.0% (1)		7.1% (2)			6.7% (4)	9.1% (1)		5.3% (2)
greene			4.3% (2)	5.0% (1)		7.1% (2)			5.0% (3)	9.1% (1)		5.3% (2)
indiana		10.0% (1)	4.3% (2)	5.0% (1)		10.7% (3)			3.3% (2)	9.1% (1)	12.5% (1)	2.6% (1)
lawrence			4.3% (2)	5.0% (1)		7.1% (2)			6.7% (4)	9.1% (1)		2.6% (1)
washington	13.3% (2)	10.0% (1)	10.9% (5)	5.0% (1)		7.1% (2)			6.7% (4)	9.1% (1)	25.0% (2)	13.2% (5)
westmoreland	6.7% (1)	10.0% (1)	6.5% (3)	10.0% (2)		10.7% (3)			8.3% (5)	9.1% (1)	12.5% (1)	10.5% (4)

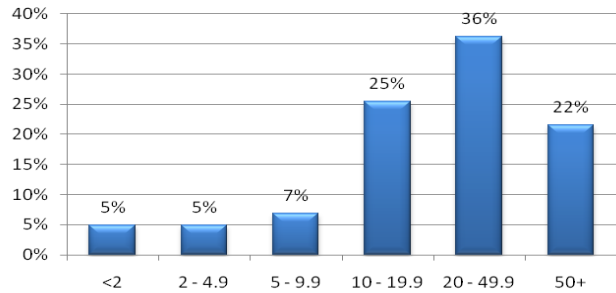


Section 4- DEMOGRAPHICS

Survey Question 4: In what year was your organization founded? (In years since founded)

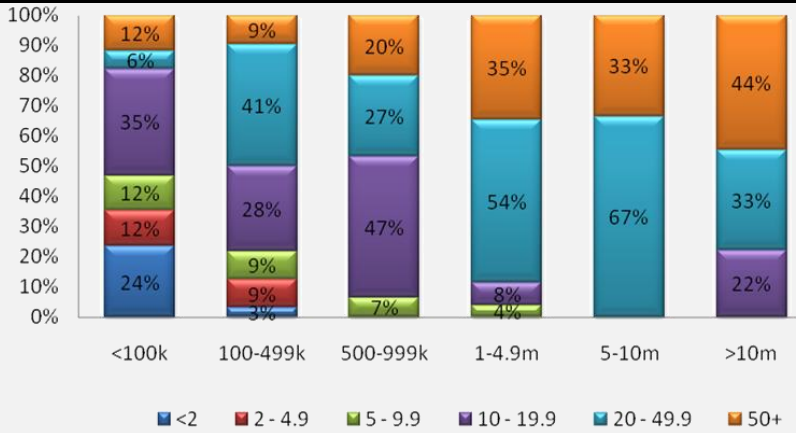
GENERAL RESULTS

Answer Options	Response Percent	Response Count
<2	5%	5
2 - 4.9	5%	5
5 - 9.9	7%	7
10 - 19.9	25%	26
20 - 49.9	36%	37
50+	22%	22
answered question		102
skipped question		25



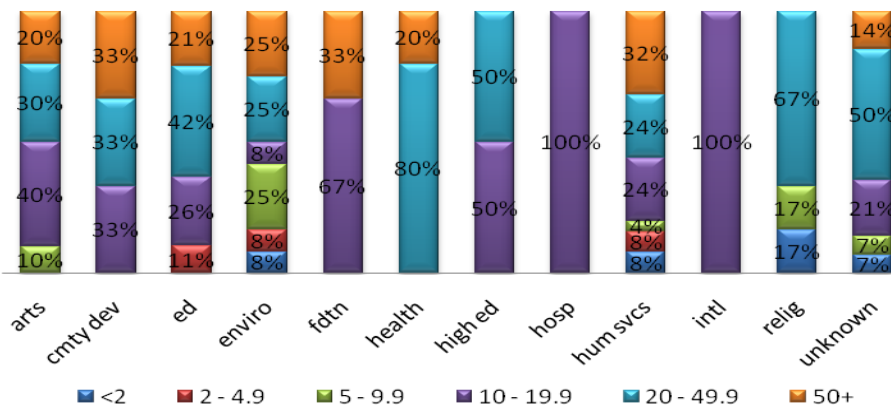
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
<2	23.5% (4)	3.1% (1)					
2 - 4.9	11.8% (2)	9.4% (3)					
5 - 9.9	11.8% (2)	9.4% (3)	6.7% (1)	3.8% (1)			
10 - 19.9	35.3% (6)	28.1% (9)	46.7% (7)	7.7% (2)		22.2% (2)	
20 - 49.9	5.9% (1)	40.6% (13)	26.7% (4)	53.8% (14)	66.7% (2)	33.3% (3)	
50+	11.8% (2)	9.4% (3)	20.0% (3)	34.6% (9)	33.3% (1)	44.4% (4)	



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
<2				8.3% (1)					8.0% (2)		16.7% (1)	7.1% (1)
2 - 4.9			10.5% (2)	8.3% (1)					8.0% (2)			
5 - 9.9	10.0% (1)			25.0% (3)					4.0% (1)		16.7% (1)	7.1% (1)
10 - 19.9	40.0% (4)	33.3% (1)	26.3% (5)	8.3% (1)	66.7% (2)		50.0% (1)	100.0% (2)	24.0% (6)	100.0% (1)		21.4% (3)
20 - 49.9	30.0% (3)	33.3% (1)	42.1% (8)	25.0% (3)		80.0% (4)	50.0% (1)		24.0% (6)		66.7% (4)	50.0% (7)
50+	20.0% (2)	33.3% (1)	21.1% (4)	25.0% (3)	33.3% (1)	20.0% (1)			32.0% (8)			14.3% (2)

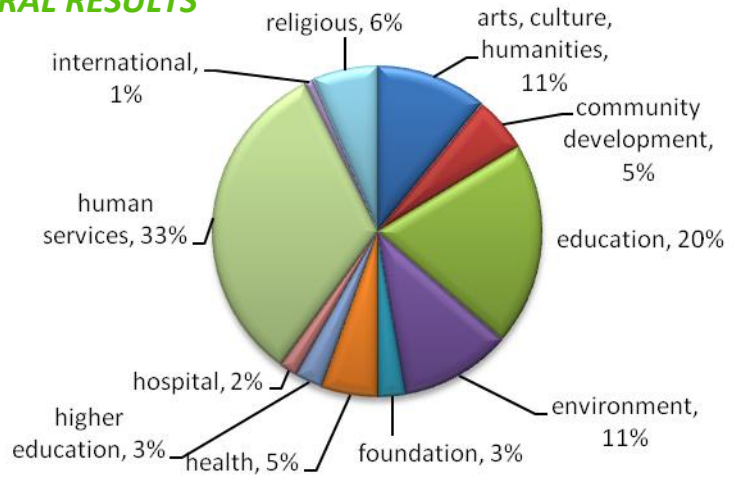


Section 4 - DEMOGRAPHICS

Survey Question 5: What type of nonprofit organization are you?

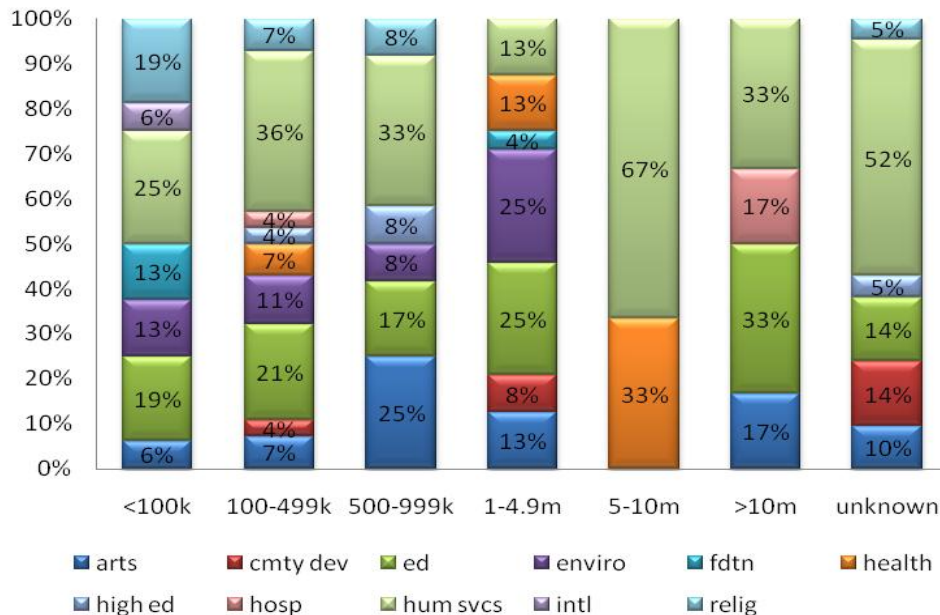
GENERAL RESULTS

Answer Options	Response Percent	Response Count
arts, culture, humanities	11%	12
community development	5%	6
education	20%	22
environment	11%	12
foundation	3%	3
health	5%	6
higher education	3%	3
hospital	2%	2
human services	33%	36
international	1%	1
religious	6%	7
answered question		110
skipped question		21



BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
arts, culture, humanities	6.3% (1)	7.1% (2)	25.0% (3)	12.5% (3)		16.7% (1)	9.5% (2)
community development		3.6% (1)		8.3% (2)			14.3% (3)
education	18.8% (3)	21.4% (6)	16.7% (2)	25.0% (6)		33.3% (2)	14.3% (3)
environment	12.5% (2)	10.7% (3)	8.3% (1)	25.0% (6)			
foundation	12.5% (2)			4.2% (1)			
health		7.1% (2)		12.5% (3)	33.3% (1)		
higher education		3.6% (1)	8.3% (1)				4.8% (1)
hospital		3.6% (1)				16.7% (1)	
human services	25.0% (4)	35.7% (10)	33.3% (4)	12.5% (3)	66.7% (2)	33.3% (2)	52.4% (11)
international	6.3% (1)						
religious	18.8% (3)	7.1% (2)	8.3% (1)				4.8% (1)

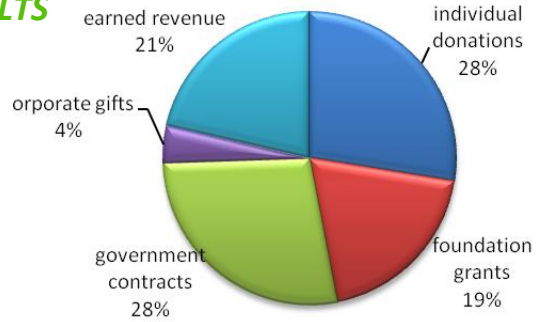


Section 4 - DEMOGRAPHICS

Survey Question 6: What is your primary funding source?

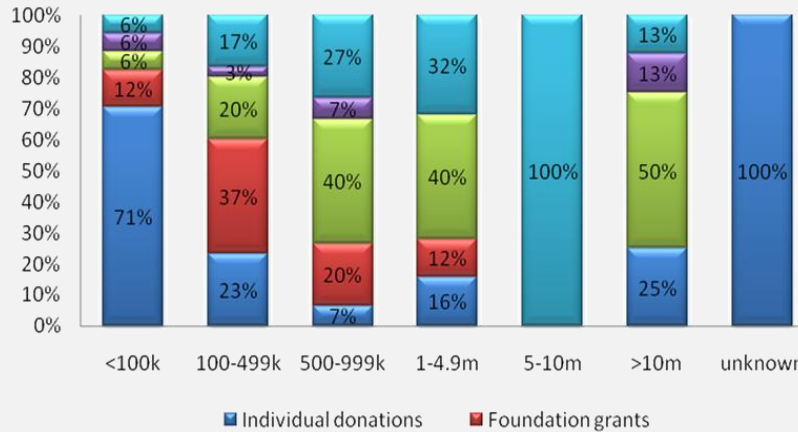
GENERAL RESULTS

Answer Options	Response Percent	Response Count
individual donations	28%	27
foundation grants	19%	19
government contracts	28%	27
corporate gifts	4%	4
earned revenue	21%	21
answered question		98
answered "other"		6
skipped question		27



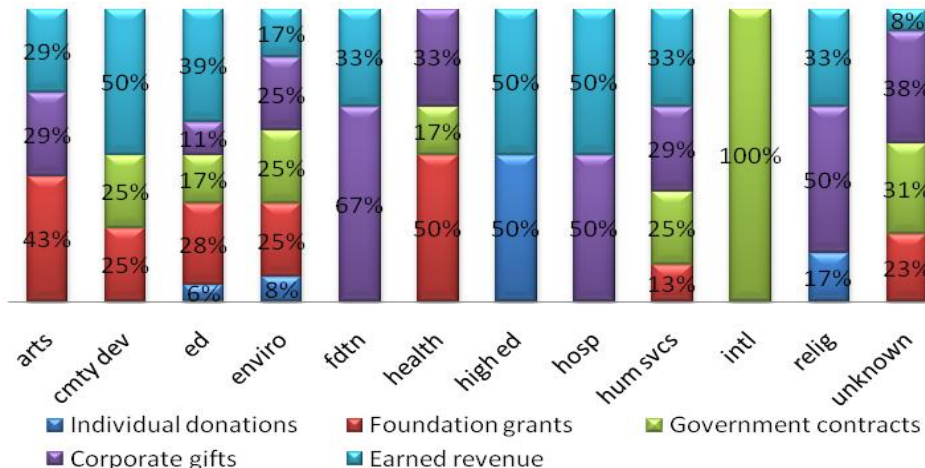
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
Individual donations	70.6% (12)	23.3% (7)	6.7% (1)	16.0% (4)		25.0% (2)	100.0% (1)
Foundation grants	11.8% (2)	36.7% (11)	20.0% (3)	12.0% (3)			
Government contracts	5.9% (1)	20.0% (6)	40.0% (6)	40.0% (10)		50.0% (4)	
Corporate gifts	5.9% (1)	3.3% (1)	6.7% (1)			12.5% (1)	
Earned revenue	5.9% (1)	16.7% (5)	26.7% (4)	32.0% (8)	100.0% (2)	12.5% (1)	



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
Individual donations			5.6% (1)	8.3% (1)				50.0% (1)			16.7% (1)	
Foundation grants	42.9% (3)	25.0% (1)	27.8% (5)	25.0% (3)		50.0% (3)			12.5% (3)			23.1% (3)
Government contracts		25.0% (1)	16.7% (3)	25.0% (3)		16.7% (1)			25.0% (6)	100.0% (1)		30.8% (4)
Corporate gifts	28.6% (2)		11.1% (2)	25.0% (3)	66.7% (2)	33.3% (2)		50.0% (1)	29.2% (7)		50.0% (3)	38.5% (5)
Earned revenue	28.6% (2)	50.0% (2)	38.9% (7)	16.7% (2)	33.3% (1)		50.0% (1)	50.0% (1)	33.3% (8)		33.3% (2)	7.7% (1)

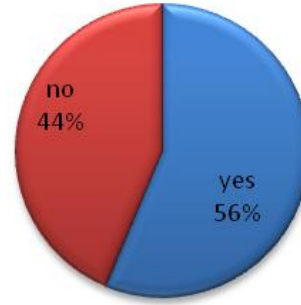


Section 4: DEMOGRAPHICS

Survey Question 7: Does your organization provide critical services to people in need?

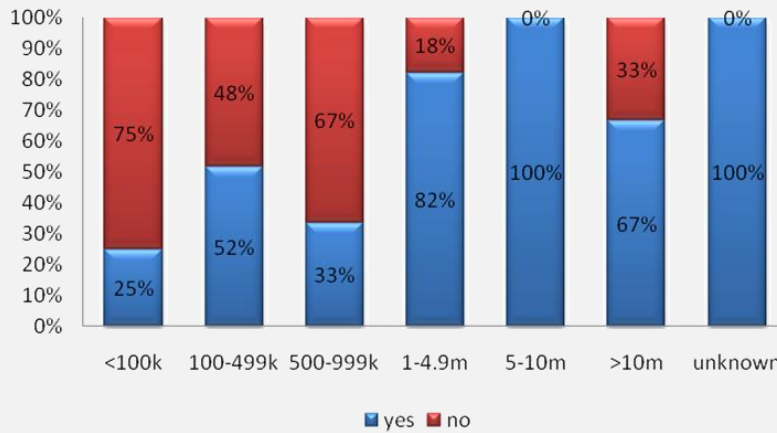
GENERAL RESULTS

Answer Options	Response Percent	Response Count
yes	56.3%	58
no	43.7%	45
answered question		103
skipped question		28



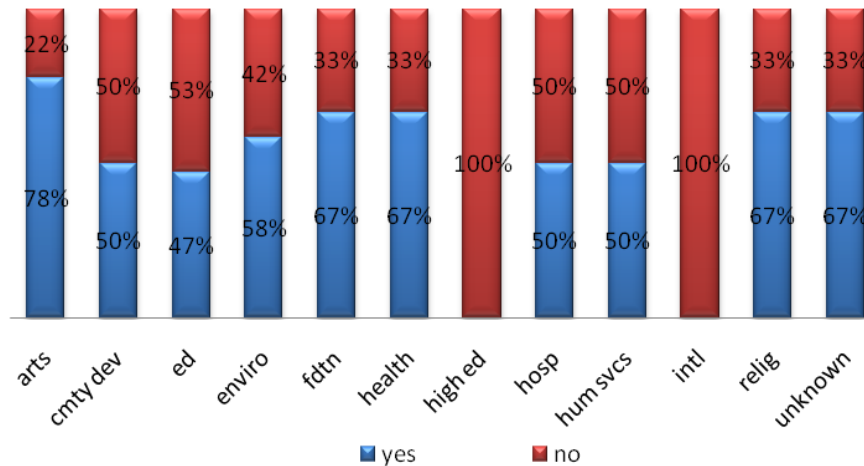
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
no	75.0% (12)	48.4% (15)	66.7% (10)	17.9% (5)		33.3% (3)	
yes	25.0% (4)	51.6% (16)	33.3% (5)	82.1% (23)	100.0% (3)	66.7% (6)	100.0% (1)



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
no	22.2% (2)	50.0% (2)	52.6% (10)	41.7% (5)	33.3% (1)	33.3% (2)	100.0% (2)	50.0% (1)	50.0% (12)	100.0% (1)	33.3% (2)	33.3% (5)
yes	77.8% (7)	50.0% (2)	47.4% (9)	58.3% (7)	66.7% (2)	66.7% (4)		50.0% (1)	50.0% (12)		66.7% (4)	66.7% (10)

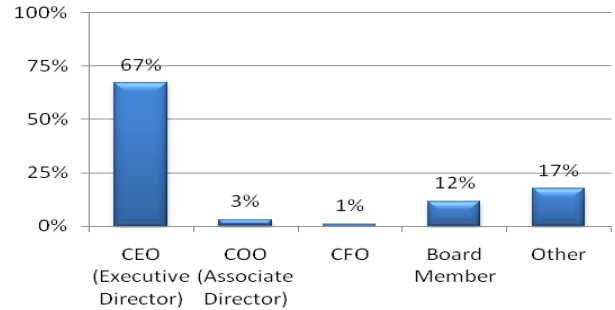


Section 4 - DEMOGRAPHICS

Survey Question 8: What is your current position?

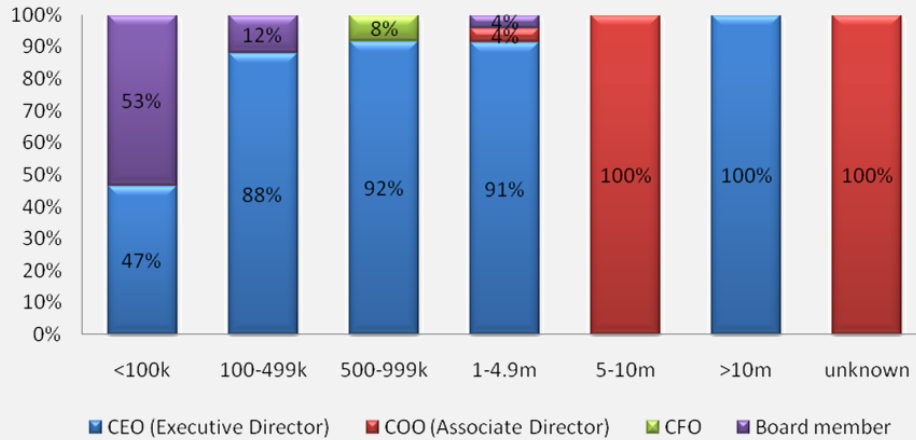
GENERAL RESULTS

Answer Options	Response Percent	Response Count
CEO (Executive Director)	67%	69
COO (Associate Director)	3%	3
CFO	1%	1
Board Member	12%	12
Other	17%	18
answered question		103
skipped question		28



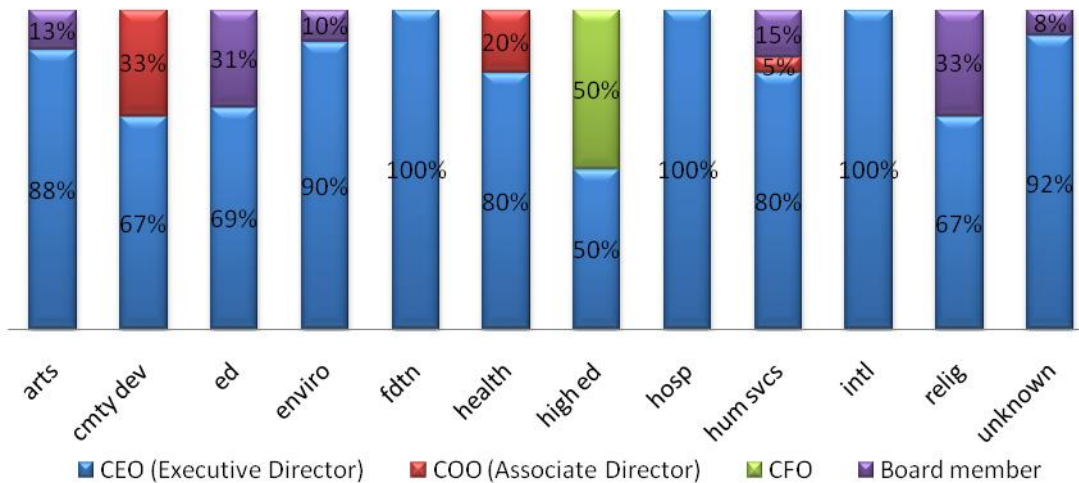
BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
CEO (Executive Director)	46.7% (7)	88.0% (22)	91.7% (11)	91.3% (21)	0.0% (0)	100.0% (8)	0.0% (0)
COO (Associate Director)	0.0% (0)	0.0% (0)	0.0% (0)	4.3% (1)	100.0% (1)	0.0% (0)	100.0% (1)
CFO		0.0% (0)	8.3% (1)	0.0% (0)			
Board member		12.0% (3)	0.0% (0)	4.3% (1)			



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
CEO (Executive Director)	87.5% (7)	66.7% (2)	69.2% (9)	90.0% (9)	100.0% (3)	80.0% (4)	50.0% (1)	100.0% (2)	80.0% (16)	100.0% (1)	66.7% (4)	91.7% (11)
COO (Associate Director)	0.0% (0)		0.0% (0)	0.0% (0)	0.0% (0)	20.0% (1)			5.0% (1)		0.0% (0)	0.0% (0)
CFO			0.0% (0)			0.0% (0)						0.0% (0)
Board member			30.8% (4)			0.0% (0)						8.3% (1)

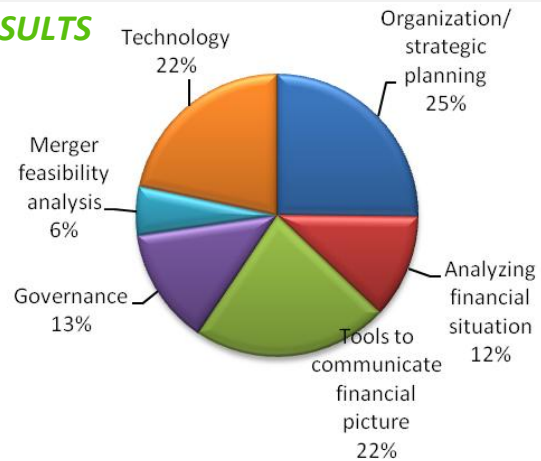


Section 4 - DEMOGRAPHICS

Survey Question 9: Which of the following types of technical assistance would be most helpful to your organization? (Check all that apply)

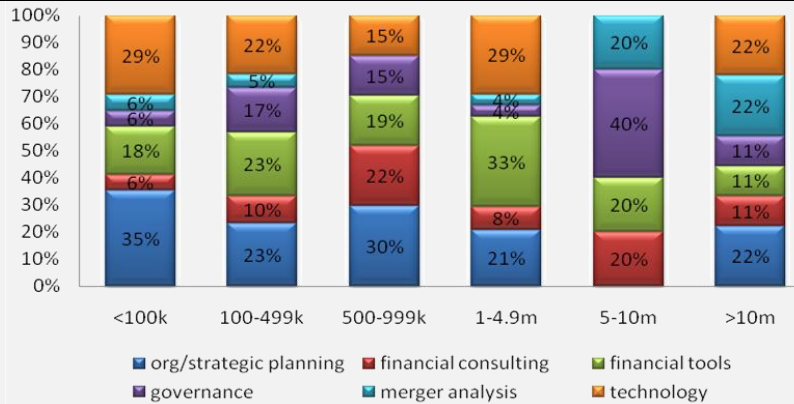
GENERAL RESULTS

Answer Options	Response Percent	Response Count
Organization/strategic planning	25%	36
Analyzing financial situation	12%	17
Tools to communicate financial picture	22%	32
Governance	13%	19
Merger feasibility analysis	6%	8
Technology	22%	31
answered question		86
answered "other"		12
skipped question		45



BY ORGANIZATIONAL SIZE

budget	<100k	100-499k	500-999k	1-4.9m	5-10m	>10m	unknown
org/strategic planning	35.3% (6)	23.3% (14)	29.6% (8)	20.8% (5)		22.2% (2)	100.0% (1)
financial consulting	5.9% (1)	10.0% (6)	22.2% (6)	8.3% (2)	20.0% (1)	11.1% (1)	
financial tools	17.6% (3)	23.3% (14)	18.5% (5)	33.3% (8)	20.0% (1)	11.1% (1)	
governance	5.9% (1)	16.7% (10)	14.8% (4)	4.2% (1)	40.0% (2)	11.1% (1)	
merger analysis	5.9% (1)	5.0% (3)		4.2% (1)	20.0% (1)	22.2% (2)	
technology	29.4% (5)	21.7% (13)	14.8% (4)	29.2% (7)		22.2% (2)	



BY MISSION

mission	arts	cmtly dev	ed	enviro	fdtn	health	high ed	hosp	hum svcs	intl	relig	unknown
org/strategic planning	38.5% (5)		9.5% (2)	21.7% (5)	33.3% (1)	27.3% (3)	33.3% (1)	20.0% (1)	23.1% (9)	50.0% (1)	40.0% (2)	50.0% (6)
financial consulting	15.4% (2)		14.3% (3)	13.0% (3)		9.1% (1)		20.0% (1)	10.3% (4)		20.0% (1)	16.7% (2)
financial tools	23.1% (3)	33.3% (2)	42.9% (9)	34.8% (8)		9.1% (1)		20.0% (1)	20.5% (8)			
governance	15.4% (2)	16.7% (1)		8.7% (2)		18.2% (2)	33.3% (1)	20.0% (1)	17.9% (7)		20.0% (1)	16.7% (2)
merger analysis			14.3% (3)	8.7% (2)					7.7% (3)			
technology	7.7% (1)	50.0% (3)	19.0% (4)	13.0% (3)	66.7% (2)	36.4% (4)	33.3% (1)	20.0% (1)	20.5% (8)	50.0% (1)	20.0% (1)	16.7% (2)

