



2023

**FLORIDA
NONPROFITS
SURVEY**

FEBRUARY 2024



Florida Nonprofit Alliance is the state's collective voice, respected advocate, effective connector, and powerful mobilizer for the nonprofit sector.

We focus in five major areas:

- ▲ Advocacy and lobbying on behalf of the sector
- ▲ Education for nonprofits about advocacy and lobbying
- ▲ Research that benefits the state's nonprofits
- ▲ Resources that are important to all nonprofits
- ▲ Fostering collaborations and connections

Florida Nonprofit Alliance (FNA) is the statewide, nonpartisan membership organization for the nonprofit sector in Florida. FNA provides a wide range of sector specific resources and specialized trainings to our members and the sector at large.

For more information, visit us at:



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I EXECUTIVE SUMMARY

Florida Nonprofit Alliance has been conducting regular surveys within the Florida nonprofit sector since April of 2020, as the early days of the COVID-19 pandemic launched uncertainty and fear across our state. Our three reports in 2020 and the annual check-ins in 2021 and 2022 have provided an overview of the sector's strengths and a real time look at the challenges it is facing.

2023 marked the end of the federal COVID-19 public health emergency declaration, and we knew from the [2022 Report](#) that a majority of nonprofits in Florida were not as concerned about the pandemic and its effects. The 2023 survey, for the first time, did not include questions specifically about the pandemic, and is instead a look at how nonprofits fared in five major categories – programs, people, finances, fundraising, and barriers to success – in the calendar year 2023.

This year's report contains two new sections. The first is data on how many nonprofit organizations provide some sort of access to health insurance for their employees and how many would be interested in doing so. As the sector wrestles with a workforce shortage, improving access to benefits is one way to attract and retain talent. The second is information on how many nonprofit organizations were affected by new state laws in 2023 and if they need assistance either in complying with the new laws, or in challenging or protecting themselves from the new laws. The Florida Legislature has passed several bills in the last two years that affect nonprofits as employers and as service providers.

The 2023 report highlights the state of Florida nonprofit organizations in three categories: things that are going well for the sector (Positives), things that are challenging (Pressure Points), and things that the sector needs (Present Opportunities).

Positives

- ▲ Program and service delivery continues to be a strength for the sector. Two thirds of nonprofits are providing services fully in person. Half of the nonprofit organizations report serving more people in 2023 than in 2022, and the majority are serving more people now than in pre-pandemic 2019.
- ▲ Nonprofits are benefitting from volunteer activity. Volunteer absences have dropped 30% since the height of the pandemic, and over half of nonprofits are using volunteers at the same or increase rates from 2019.
- ▲ Financially, organizations feel slightly more secure. Half of nonprofits in Florida had a larger budget in 2023 than in 2019, pre-pandemic, and organizations are slightly more likely in 2023 to have not seen a decrease in unrestricted funding. And nonprofits are slightly less concerned about cash flow and loss of income than they were in 2020 and 2021.
- ▲ Fundraising was slightly more stable than in previous years. 59% of organizations generated the same amount or more income from fundraising activities in 2023 compared to 2022 - a 39% increase from 2020.

Pressure Points

- ▲ Both costs and demand for services are increasing. 50% of nonprofits are experiencing increased costs for recurring expenses, and 36% have seen decreased fundraising for program expenses. 28% of organizations had increased demand for their programs and services, which will be hard to meet if costs are also up and fundraising is down.
- ▲ Nonprofits need new sources of funding. A record 42% of nonprofits say fundraising is their biggest challenge and 62% of nonprofits say they need more funding. 72% of organizations receive a significant portion of their fundraising from existing individual donors, and existing corporate donors, foundation grants, and fees for service all generate more revenue than new corporate donors, foundation grants, and fees for service. In order to grow, nonprofits need access to individuals and institutions that do not currently fund them.
- ▲ More volunteers are needed. 42% of nonprofits say more volunteers is a resource they need. More than one third of nonprofit organizations have challenges finding program volunteers. About 20% of current volunteers and Board members are experiencing burnout.
- ▲ CEO transitions are happening frequently and will continue to do so. One third of current CEOs will leave their jobs by 2026. More organizations experienced a CEO transition in 2023 than were expecting one in 2022, so there may be even more transitions – either quick or unplanned – to come.
- ▲ Changing advocacy needs. At the state level, there are more bills that include nonprofit organizations than ever before, and Florida nonprofits may need support – education and funding – to be sure they are either complying with or challenging legislation that affects their ability to meet their mission.

Present Opportunities

- ▲ Convince more individuals to give to formal nonprofit organizations. This will allow nonprofits to be more financially secure, to continue meeting the demand for their services, and to have a greater impact in their communities.
- ▲ Increase availability of health insurance providers. 21% of nonprofit organizations that would like to provide health insurance access to staff cannot find an insurance provider. Finding a solution in the current health insurance marketplace is very important to nonprofits, and will take private companies, government, and nonprofits working together to find a solution.
- ▲ Support nonprofit staff. Even though 17% of organizations have open staff positions, and 15% are experiencing voluntary staff resignations, 1 in 5 organizations did not offer any work options for their staff in 2023. Organizations can look for ways to support staff, especially in allowing hybrid work when possible. Increasing benefits, like health insurance options or paid time off, is another way that may support employees and decrease staff turnover. Funders can also support these activities by giving unrestricted funding that can be used for pay increases or other benefits.
- ▲ Increase unrestricted revenue for nonprofits. This allows for building of reserve funds (27% of organizations have no reserves, and one third have used some or all of them since the beginning of the pandemic) and support for staff as mentioned above. It also allows nonprofits to implement and adapt their programming based on what is best for a community, rather than based on a funder's interests.

II METHODOLOGY

This survey, designed for 501(c)(3) charitable organizations located in and serving the state of Florida, was conducted in the fall of 2023. The online survey was open from October 26 to November 30, 2023, and the research results were published in February of 2024. The 30-question survey was distributed through FNA's website and online communication channels. It was also shared by the Florida Department of Agriculture and Consumer Services with all 501(c)(3) organizations that have permits to fundraise in the state of Florida.

1,704 nonprofit organizations responded. Unless noted otherwise under the tables in this report, that was the number of responses to each question. Many of the questions allowed respondents to select all that applied, so percentages on those questions will total more than 100%.

If you have any questions about this research, please contact Leah McDermott, Program Director at Florida Nonprofit Alliance, at lmcdermott@flnonprofits.org.

III PROGRAMS AND SERVICES

Overall, program delivery was a bright spot for most organizations in 2023. Nonprofits are meeting increased demands, providing programs and services in person, and seeing fewer disruptions to their services.

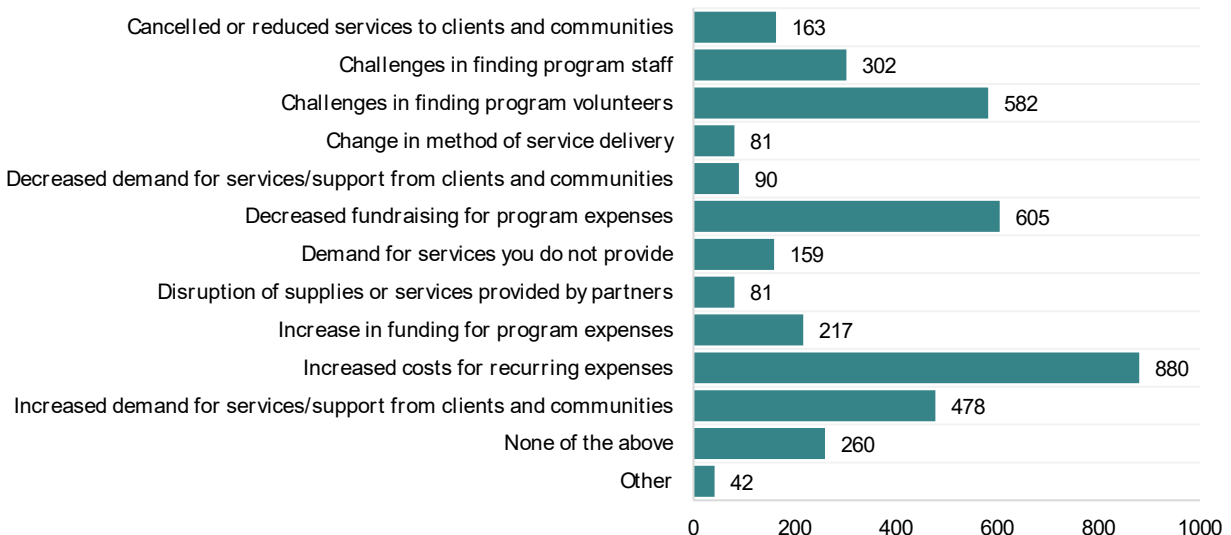
2/3 of Florida nonprofits are providing services fully in person – a 13% increase over last year. Almost a third are providing hybrid services – a mix of in person and virtual. This is the same as last year, indicating this may be a program delivery option we see in the long term. Only 4% of nonprofits are exclusively providing virtual services, a 14% decrease from the height of the pandemic in 2020.

Half of nonprofit organizations served more people in 2023 than in 2022, and 29% served the same amount of people as the previous year. Only 10% served fewer people than in 2022. Almost half also report serving more clients than they did pre-pandemic, in 2019 – up 5% over last year.

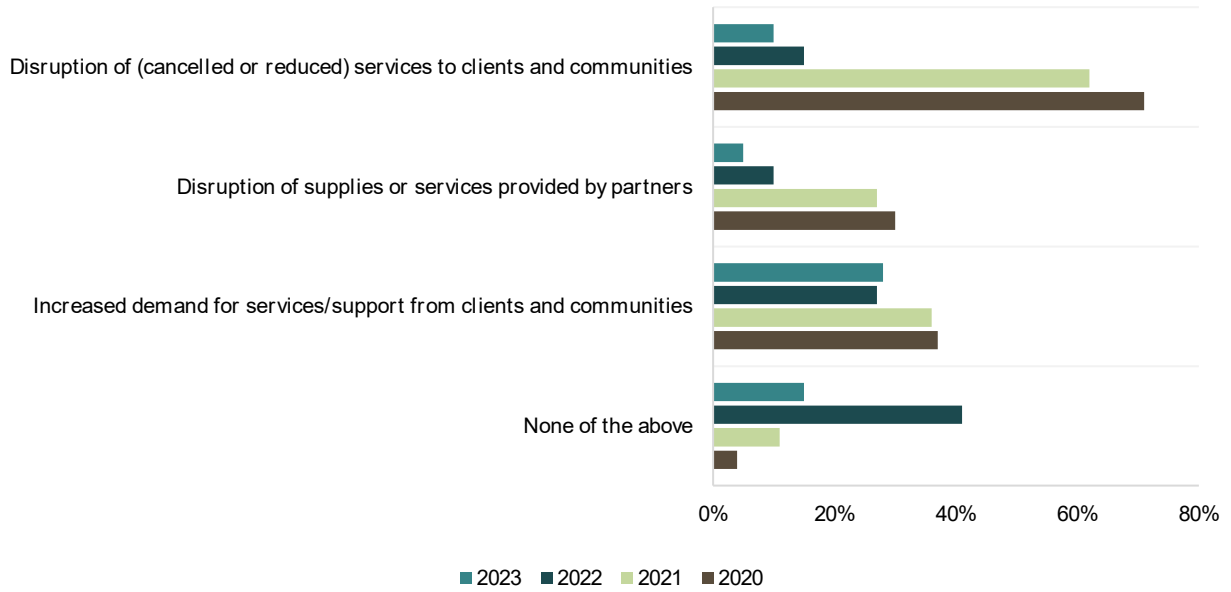
Half of nonprofit organizations are experiencing increased costs for recurring expenses, and at the same time 36% are experiencing decreased fundraising for program expenses, while 28% have increased demand. Programs are also being affected by available human resources – more than 1/3 of organizations have challenges finding program volunteers, and 17% have challenges finding program staff.

Organizations also shared other program issues: membership numbers are down, they have issues with finding or maintaining facilities, and that there are nonprofit organizations that are still recovering from Hurricane Ian in 2022. Although the number of organizations that mentioned hurricane recovery was small, it is a good reminder that disasters have long term repercussions in the community, and recovery takes longer than the public’s attention span for disasters.

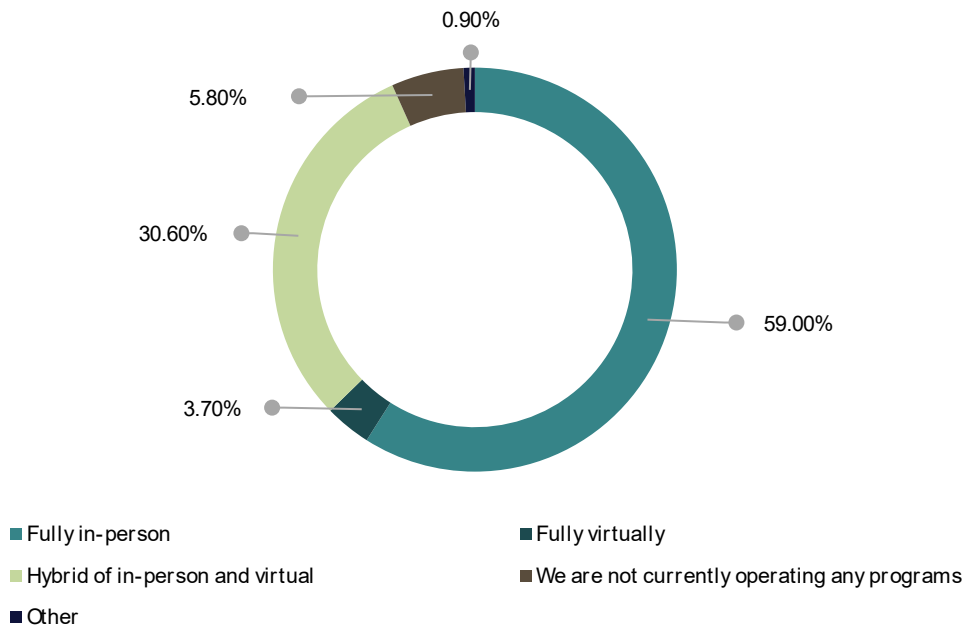
Q 1 Which of the following programmatic impacts is your organization currently experiencing?
(Select all that apply)



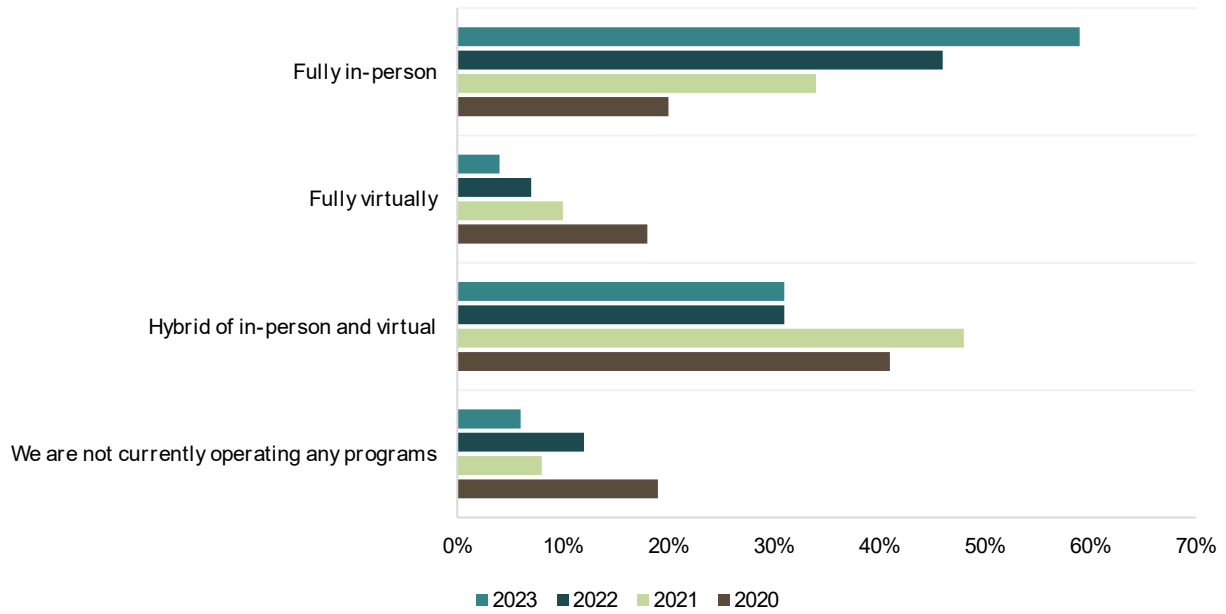
YEAR TO YEAR COMPARISON



Q 2 How are you currently operating your programs?

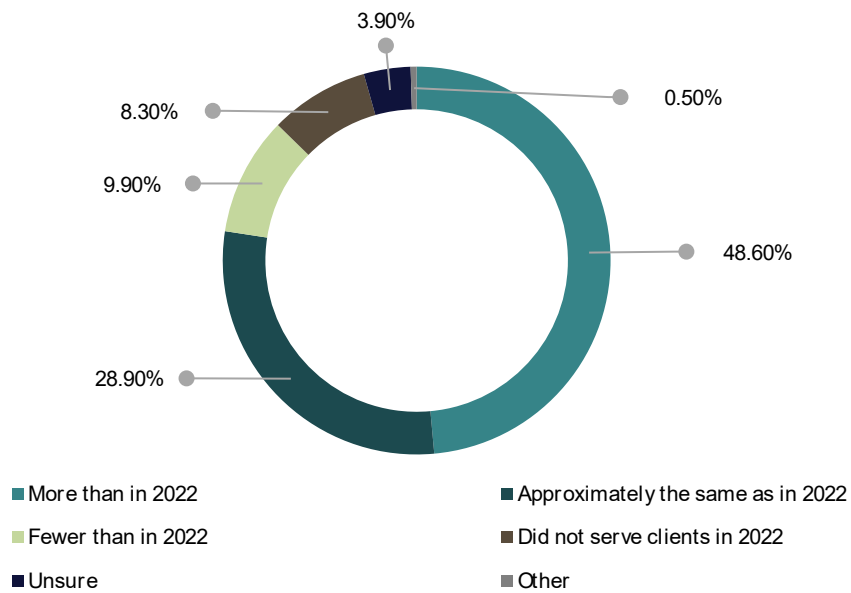


YEAR TO YEAR COMPARISON

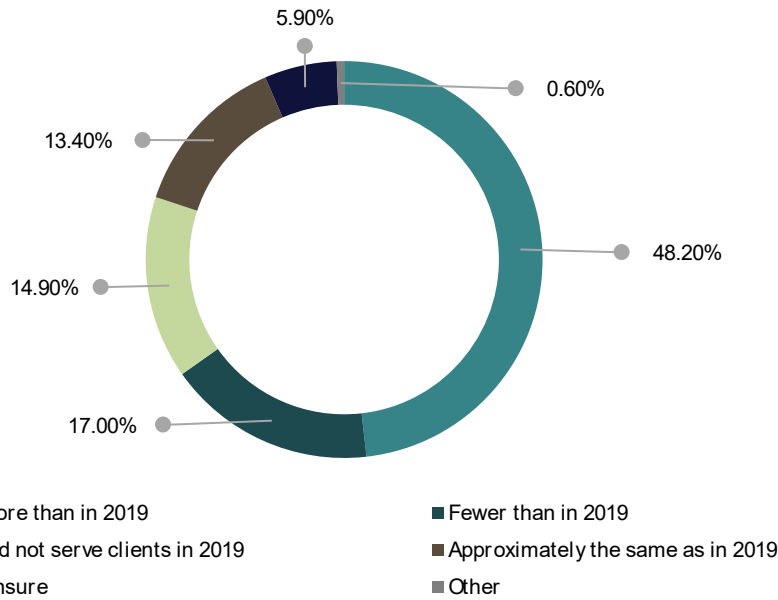


Q 3

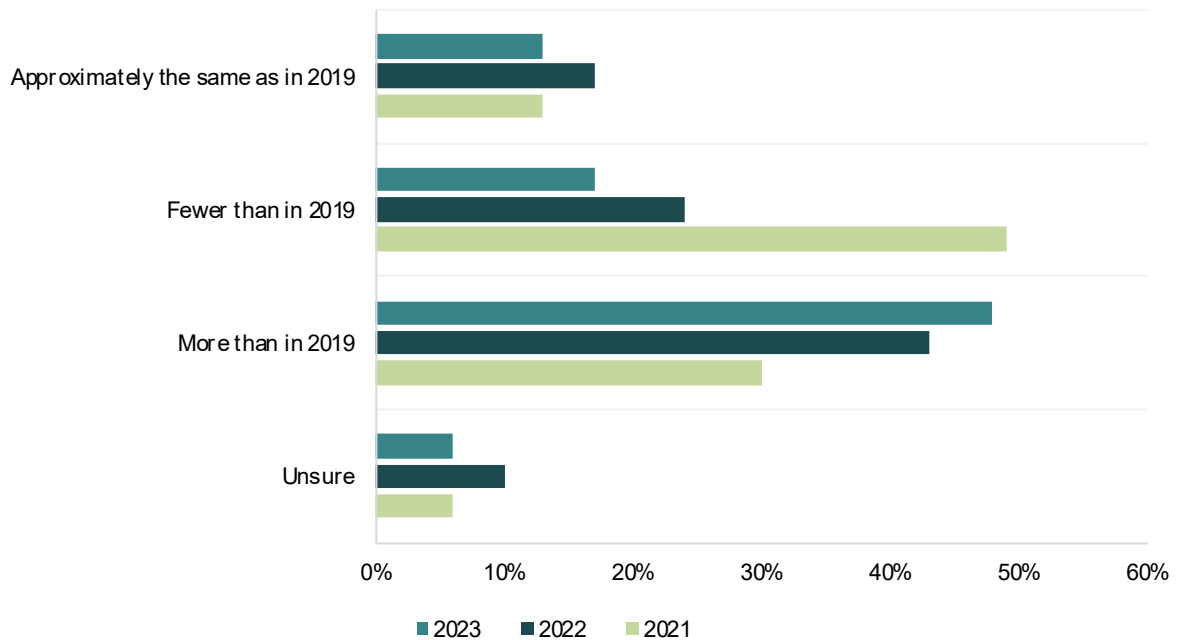
Compared to 2022, how many clients have you served in 2023?



Q 4 Compared to 2019, how many clients have you served in 2023?



YEAR TO YEAR COMPARISON



IV HUMAN RESOURCES

People, both staff and volunteers, are the backbone of nonprofit organizations. They also were one of the resources most affected by the pandemic, and in 2023, we are still seeing repercussions. These include volunteer absences (22%), volunteer burnout (21%), and board burnout (21%)” (lowercase b is the difference). For those organizations with paid staff, about 1 in 6 have experienced workforce shortages and staff resignations.

The good news is that some of the repercussions have lessened over the last two years. Since the height of the pandemic, effects on staff and volunteers’ mental health have dropped 31% and 34%, respectively. Staff and volunteer burnout is also down 25% each. Volunteer absences dropped 30%.

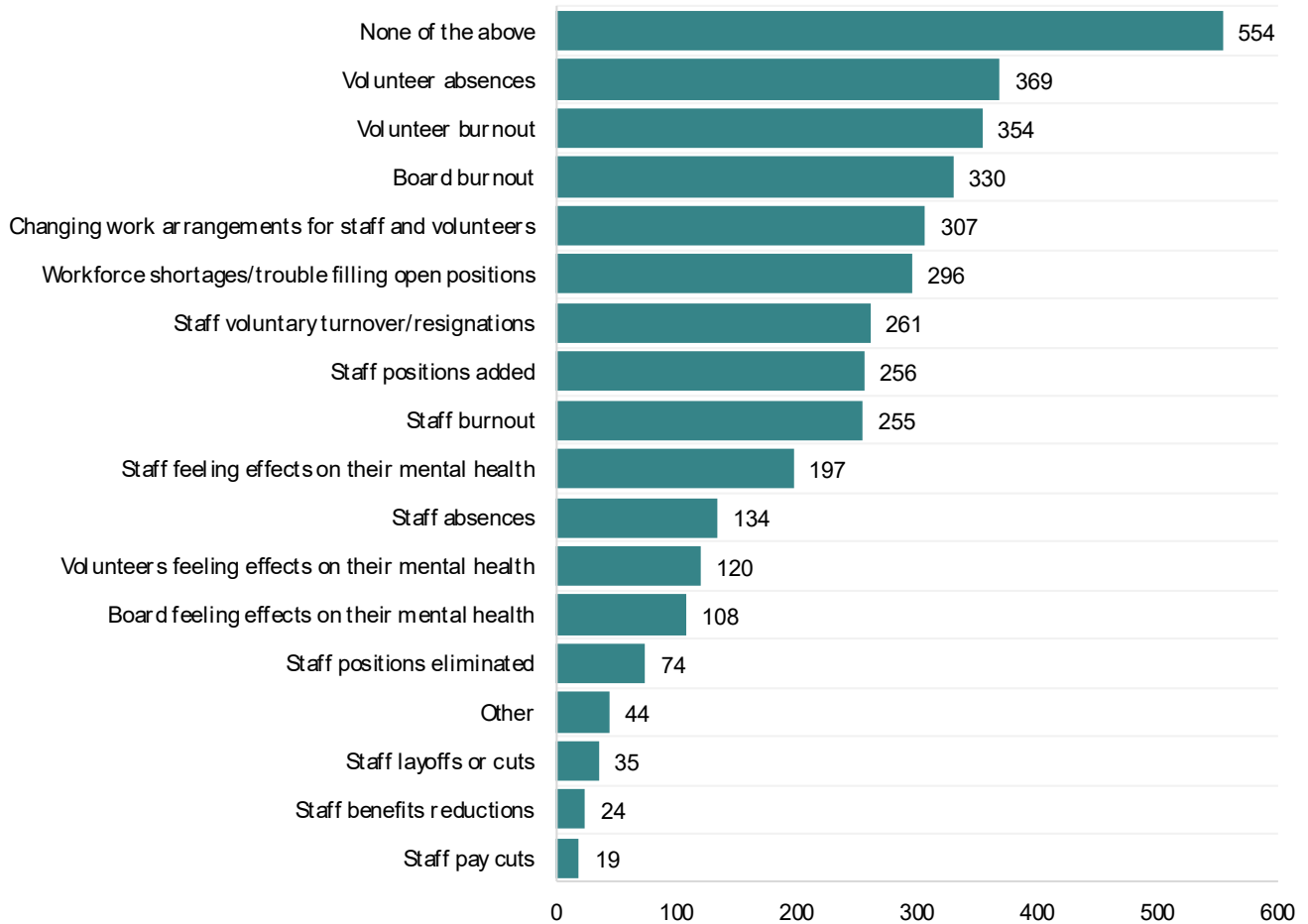
On the volunteer front, some more good news – over half of nonprofits are using volunteers at the same or at increased levels from 2019, which is a 6% increase from 2022. About 15% are not using volunteers, and some organizations shared that they are still re-evaluating how to use volunteers that did not return after the pandemic.

When we look at paid staff, voluntary turnover has increased 14% since the height of the pandemic, and 14% of nonprofits have added staff positions. Even though more staff is needed and there are fewer people applying to fill those spots, changing work arrangements for staff and volunteers has dropped 30%, which may be contributing to staff turnover.

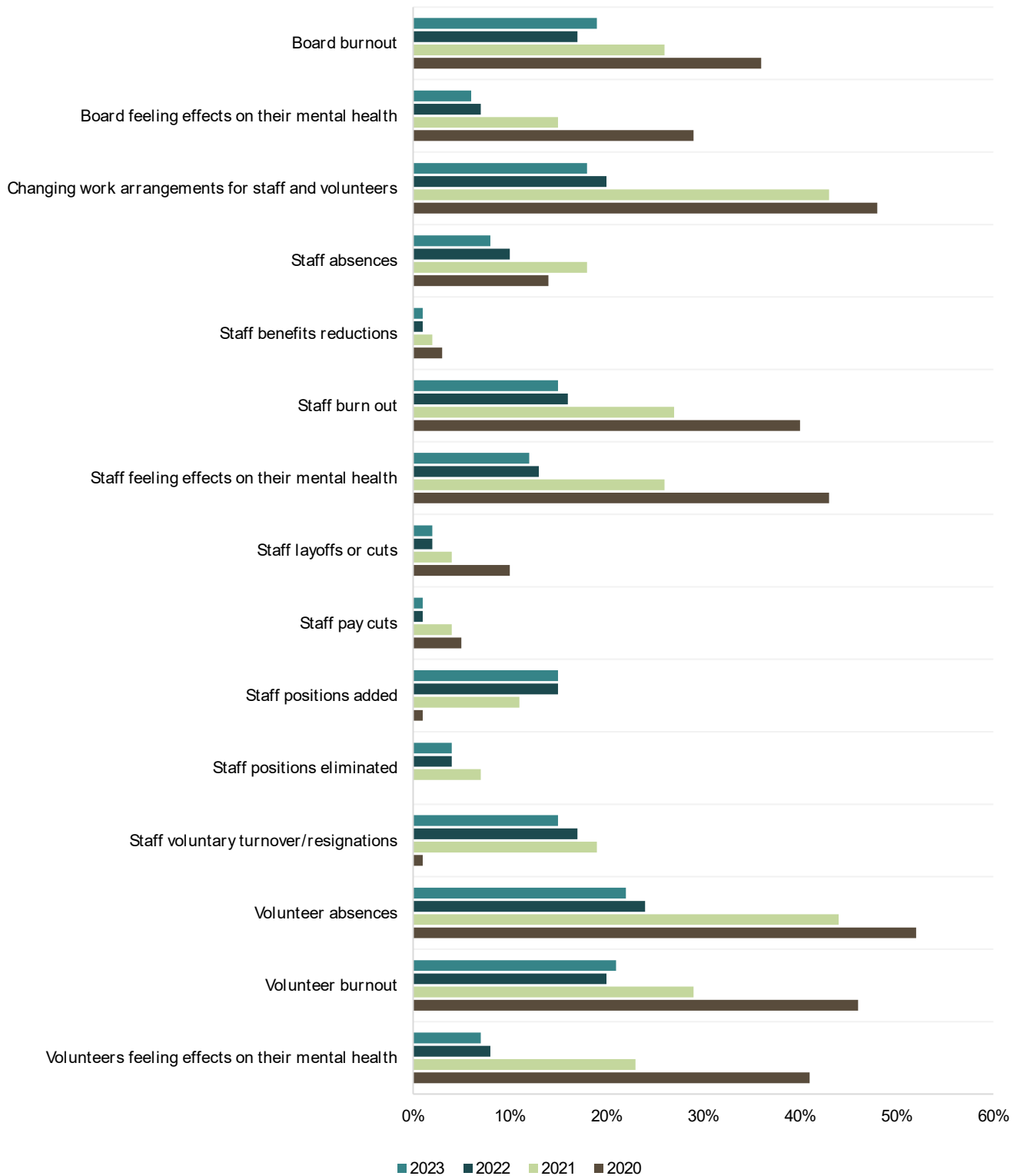
Given the nonprofit staff shortage, FNA asked nonprofit organizations with employees to share what kind of accommodations they have made in the last year. 18% of organizations with employees have not offered any work options for their staff. 60% of nonprofit organizations with paid staff allow them to have flexible schedules, 28% have a hybrid work model, allowing staff to work both from home and at the office, and 19% allow fully remote work. 38% have implemented pay increases or bonuses. In addition, some organizations (~17%) have increased time off. Other work options offered include a shorter work week, paid family leave, child care accommodations, and retirement benefits.

CEO transitions continue to impact the sector. 13% of nonprofits experienced a CEO turnover in 2022, and 1 in 5 Florida nonprofit organizations expect a CEO change in the next two years. That means 1/3 of existing CEOs will be different by 2026. Also of note – more organizations are anticipating a change in the next 24 months than did in 2022. In 2022, 10.5% of nonprofits told us they expected a leadership change in 2023. In 2023, 13% reported one, which shows some were either unplanned, or were announced and completed in less than 12 months.

Q 5 What changes to your staffing (paid and volunteer) have you experienced in 2023?
Select all that apply.



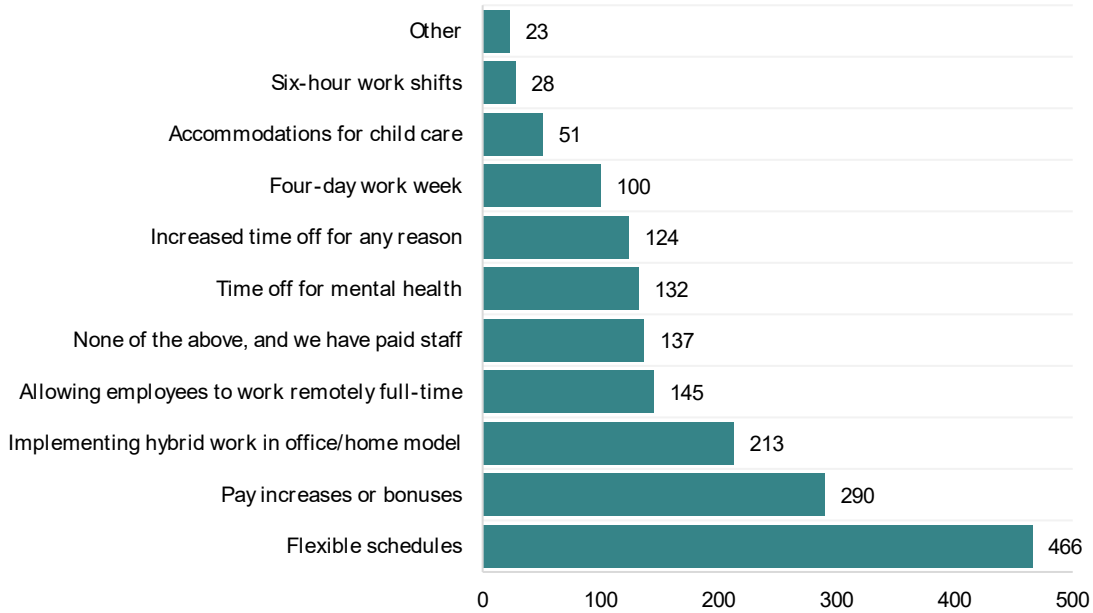
YEAR TO YEAR COMPARISON



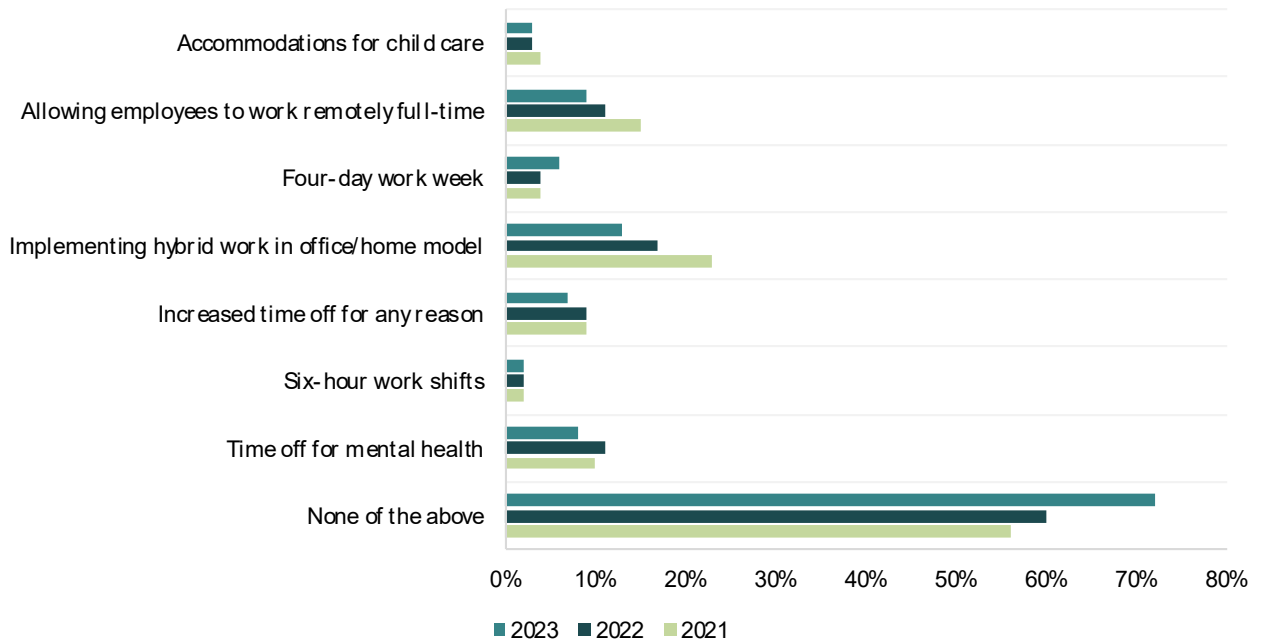
Q 6 What work options are you currently offering to employees?
Select all that apply

Answers below only include nonprofit organizations with paid employees.

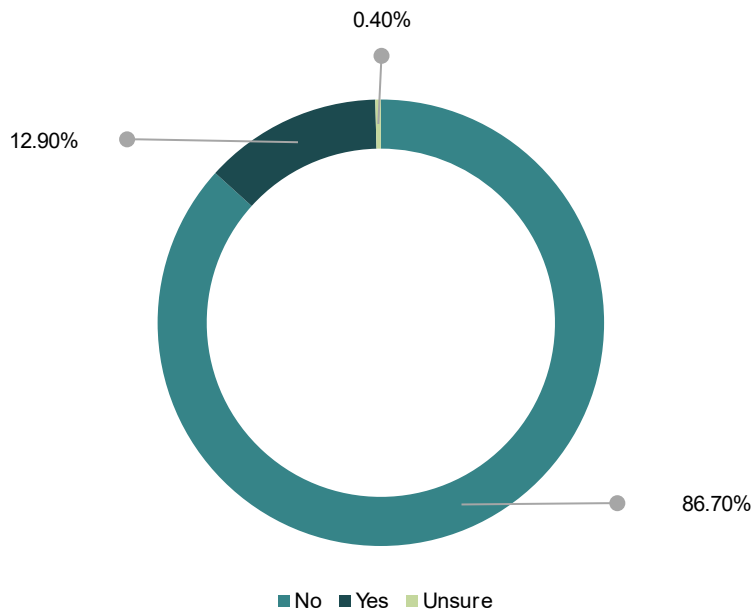
N=772



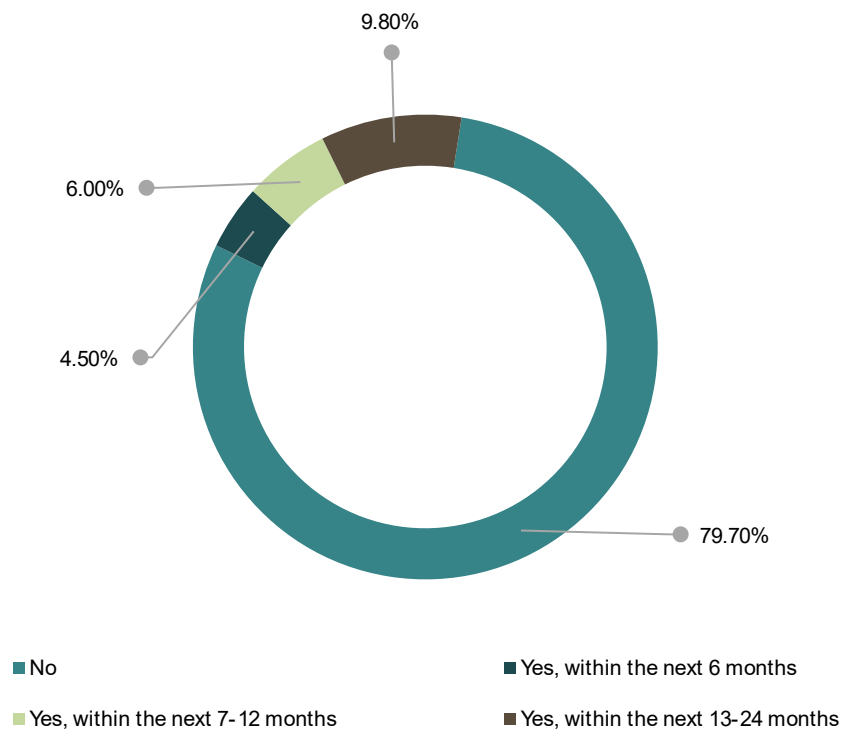
YEAR TO YEAR COMPARISON



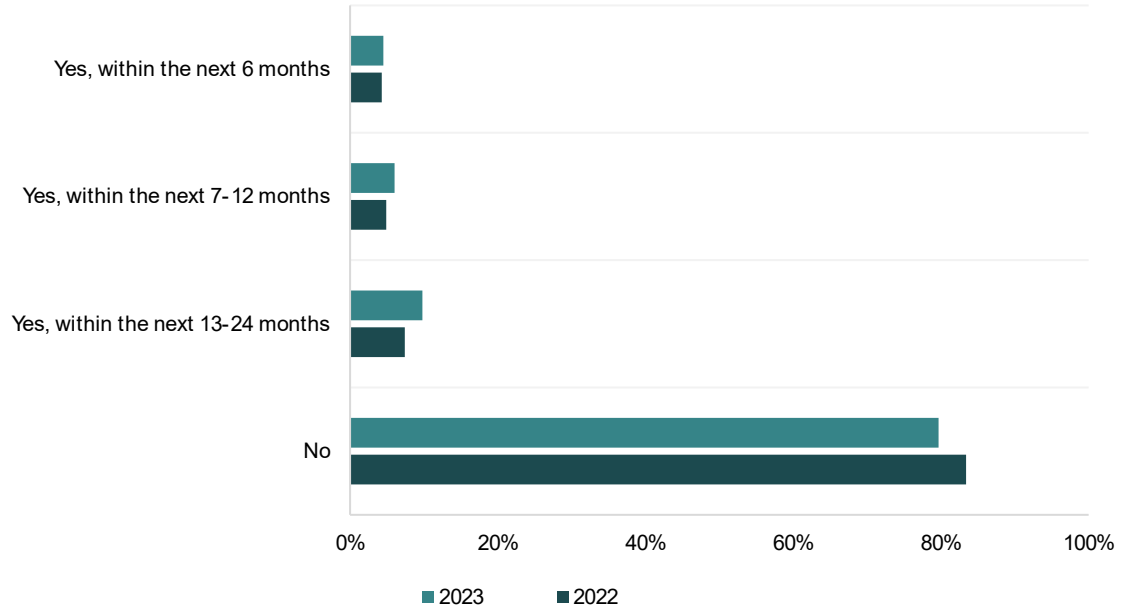
Q 7 Have you had a change in CEO leadership at your organization in the last year?



Q 8 Do you anticipate a turnover in the CEO/ED position at your organization?

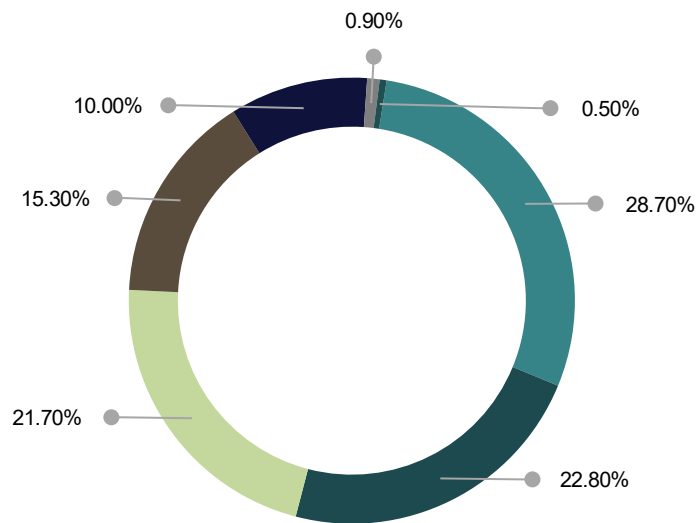


YEAR TO YEAR COMPARISON



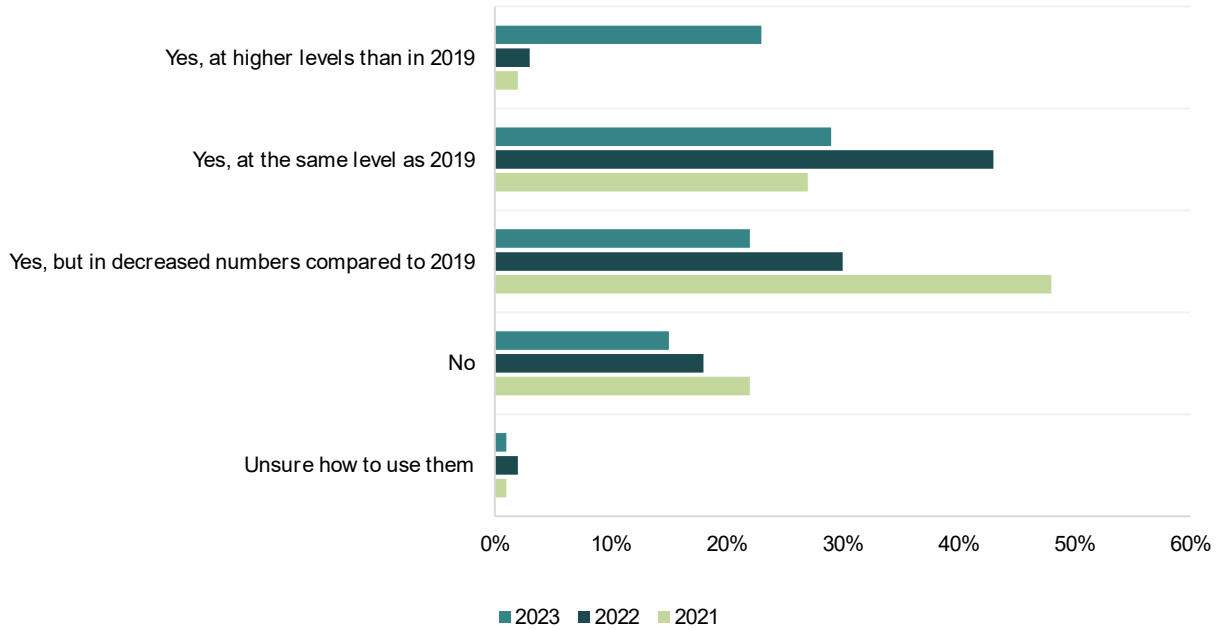
Q 9

Are you currently using volunteers at your organization, excluding your Board members?



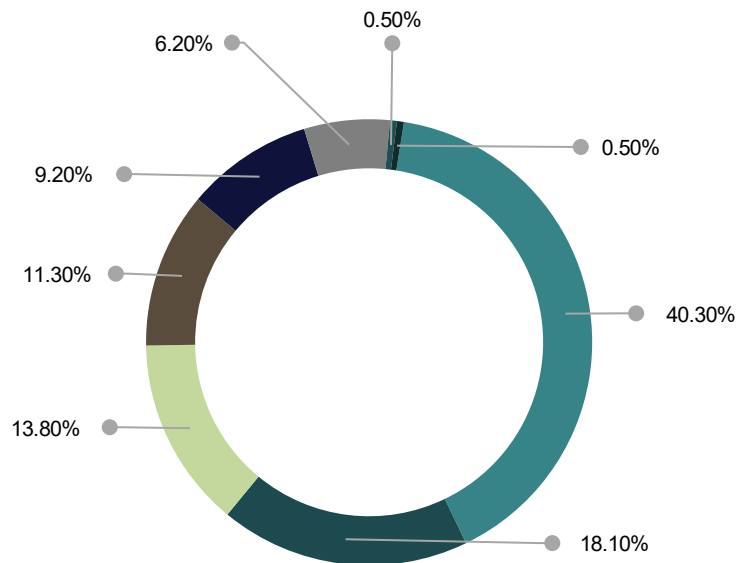
- Yes, at the same level as 2019
- Yes, in increased numbers compared to 2019
- Yes, but in decreased numbers compared to 2019
- No
- Organization did not exist in 2019
- Other
- Unsure how to use them

YEAR TO YEAR COMPARISON



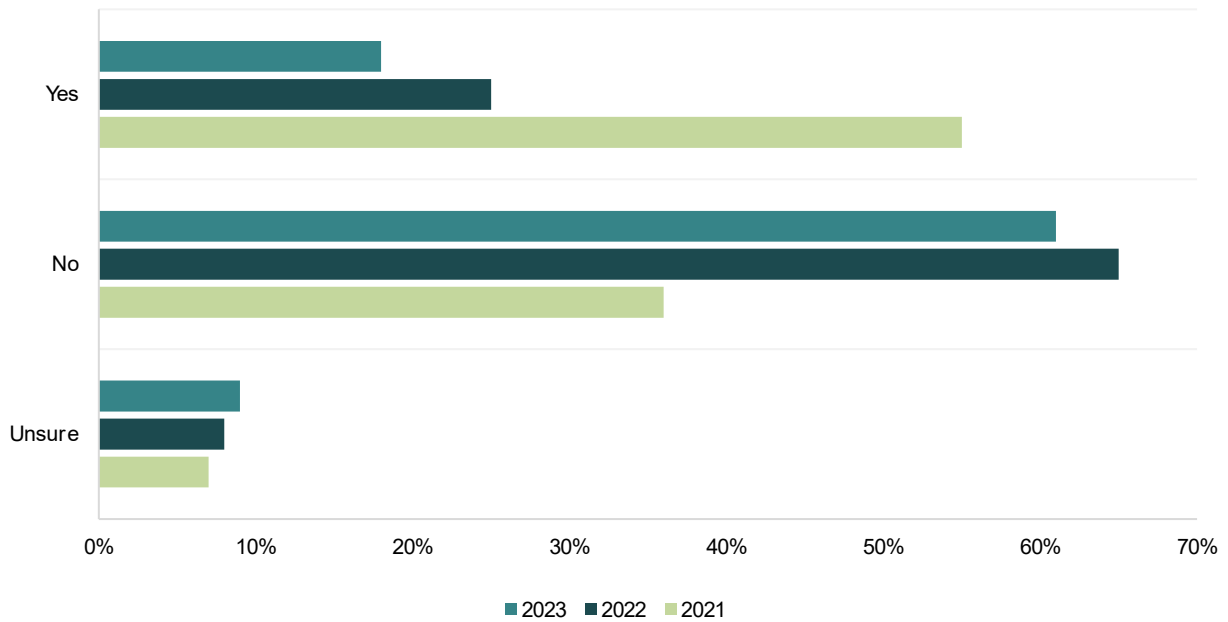
Q 10

Have you altered the type of process in which you provide volunteer experiences compared to before the pandemic?



- No, and we do not plan to
- Yes
- We did at some point in 2020-2022, but no longer do
- Organization did not exist in 2019
- Unsure
- No, but we would like to
- Do not use volunteers
- Other

YEAR TO YEAR COMPARISON



Health Insurance

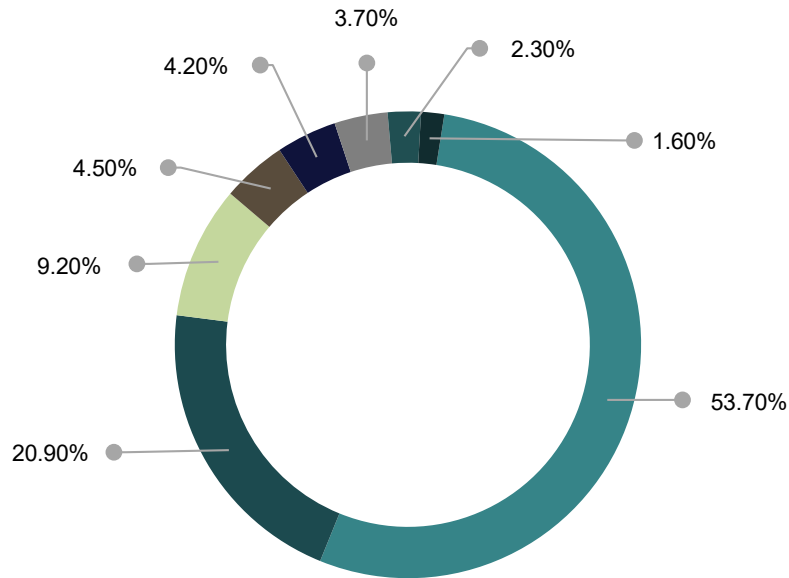
Of the organizations with paid staff, 54% of them provide some sort of health insurance access to staff (defined as HMOs, PPOs, HSAs, health care stipends, QSEHRAs, etc.).

31% of organizations with paid staff who do not currently offer health insurance are interested in doing so, and 17% are unsure if they are interested.

For organizations with paid staff that do not provide health insurance access, 21% have not been able to find an insurance provider, 5% cannot afford it, and 2% said their organization is too small.

Q 11 Do you currently offer health insurance to your employees?

N=709

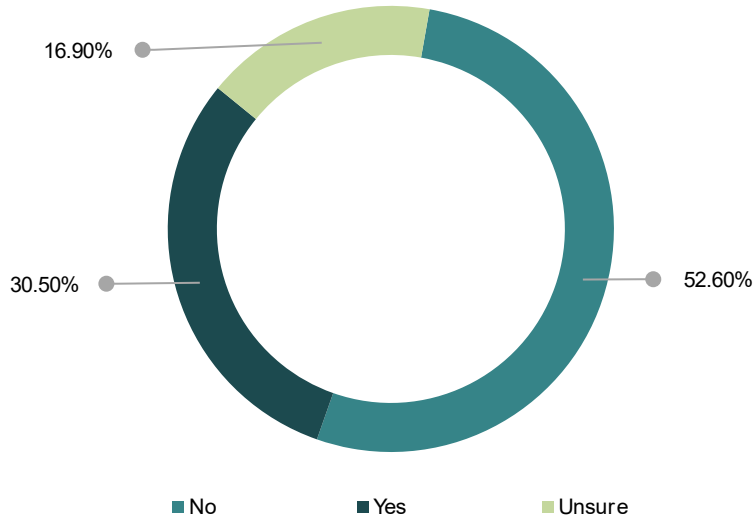


- Yes, we provide some sort of health insurance to qualified staff (this could include HMOs, PPOs, HSAs, health care stipend, QSEHRAs, etc.)
- No, we have not been able to find an insurance provider
- No (undisclosed reason)
- No, cannot afford to
- No, we only have part-time staff
- Other
- No, employees have access to health insurance from other sources
- No, our organization is too small

**58% of the survey respondents answered this question with "we do not have paid staff". This includes organizations that work with paid independent contractors. Their responses are not included in the table above.*

Q 12 If you do not currently offer health insurance to your employees, would you be interested in doing so?

N=485



V FINANCIAL HEALTH

To evaluate the financial health of Florida nonprofits, we look at three indicators – level of unrestricted revenue, budget size, and level of reserve funds. These indicators, while not perfect, can give us a picture of whether a nonprofit has appropriate financial resources to run its business and meet its mission.

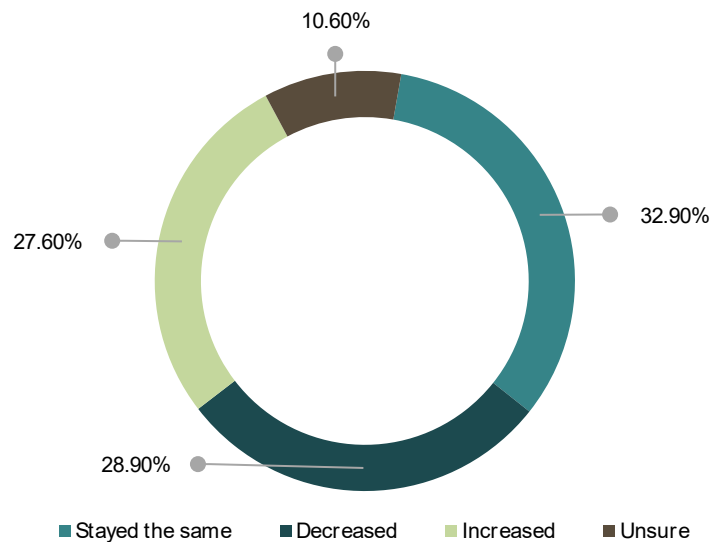
For the first time since 2020, more nonprofit organizations reported their unrestricted revenue stayed the same from the previous year, rather than decreased. Responses were fairly evenly divided between unrestricted revenue having stayed the same (33%), decreased (29%), and increased (28%).

Budgets are also showing signs of post-pandemic life. One third of nonprofit organizations have larger budgets with larger amounts of services provided than in 2019, before the pandemic began. Approximately 14% of organizations have the same size budget as in 2019, and 14% have a larger budget with the same amount of services as in 2019, showing the impact that higher costs have on the sector. 19% of nonprofits have a smaller budget than in 2019, and 50% have a larger budget.

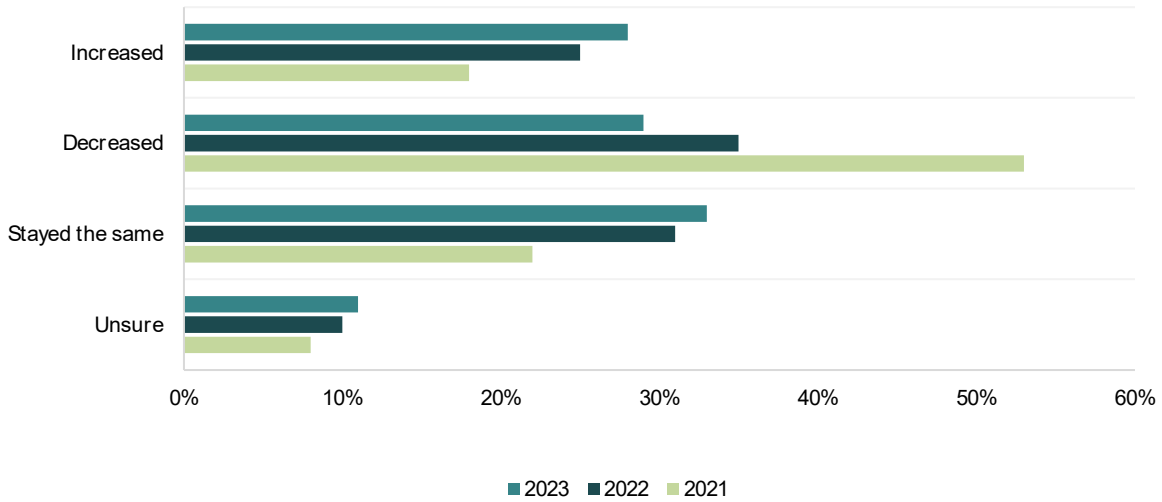
52% of organizations expect their 2024 budget to be larger than their 2023 budgets – of those, 36% of nonprofits expect a corresponding increase in services and 16% expect services to remain at 2023 levels. 20% expect their 2024 budget to remain the same as 2023, and only 8% expect their 2024 budget to be smaller than 2023. This mirrors what organizations expected in 2022.

27% of nonprofits report having no reserve funds. One third of nonprofit organizations have less reserves than before the pandemic: 15% have used some and not replaced them, 11% have used some and replaced part of those used, and 7% depleted them and have not replaced them. 8% of nonprofits used or depleted their reserves since 2020 but have replenished them already. And 17% of nonprofits did not need to use their reserve funds during the pandemic. These numbers have remained consistent since the beginning of the pandemic.

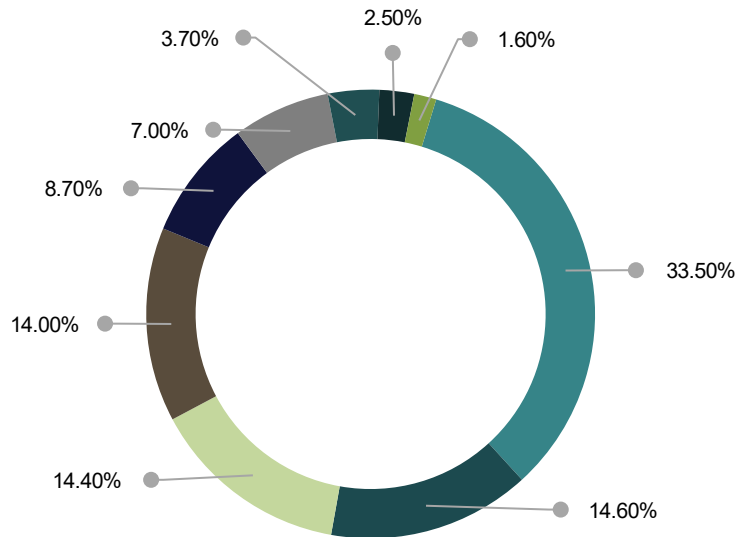
Q 13 Has your unrestricted revenue in 2023?



YEAR TO YEAR COMPARISON

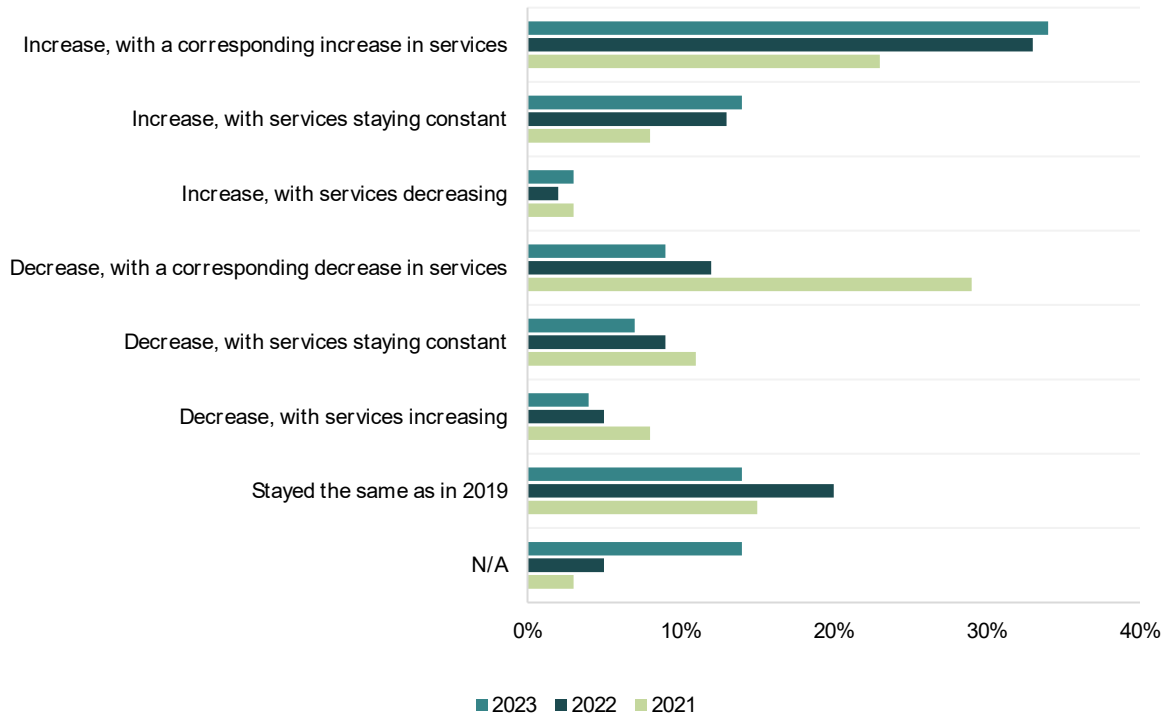


Q 14 Compared to your 2019 budget (pre-pandemic), did your 2023 budget:

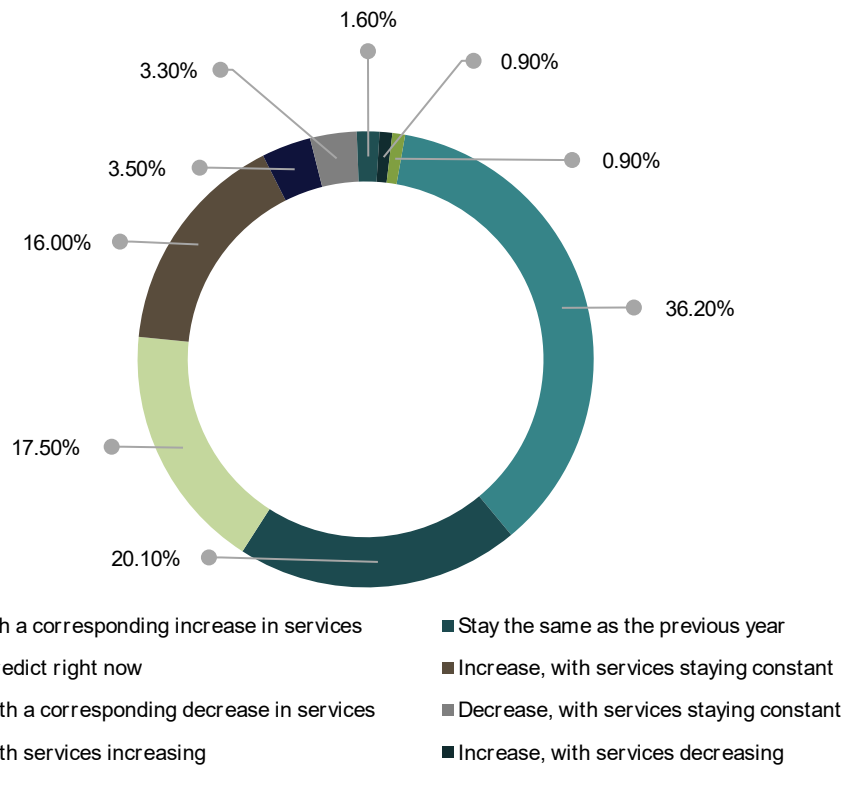


- Increase, with a corresponding increase in services
- Stayed the same as in 2019
- Organization did not exist in 2019
- Increase, with services staying constant
- Decrease, with a corresponding decrease in services
- Decrease, with services staying constant
- Decrease, with services increasing
- Increase, with services decreasing
- Other

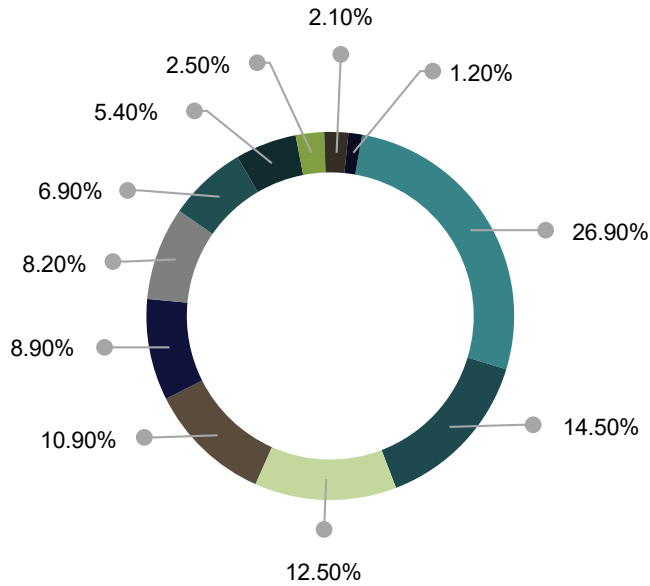
YEAR TO YEAR COMPARISON



Q 15 Compared to your 2023 budget, do you expect your 2024 budget to:

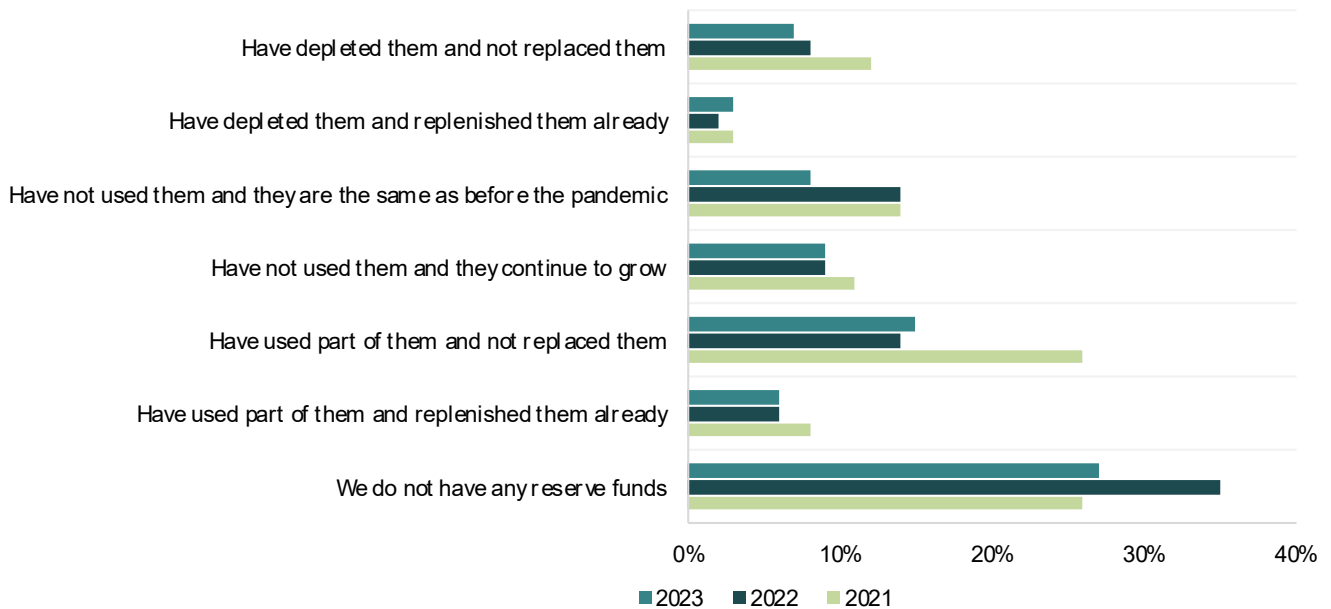


Q 16 How have you used reserve funds since the start of the pandemic?



- We do not have any reserve funds
- Have used part of them and not replaced them
- Organization did not exist in 2019
- Have used part of them and replaced part of them
- Have not used them and they continue to grow
- Have not used them and they are the same as before the pandemic
- Have depleted them and not replaced them
- Have used part of them and replenished them already
- Have depleted them and replenished them already
- Have not used them but they have decreased
- Other

YEAR TO YEAR COMPARISON



VI FUNDRAISING

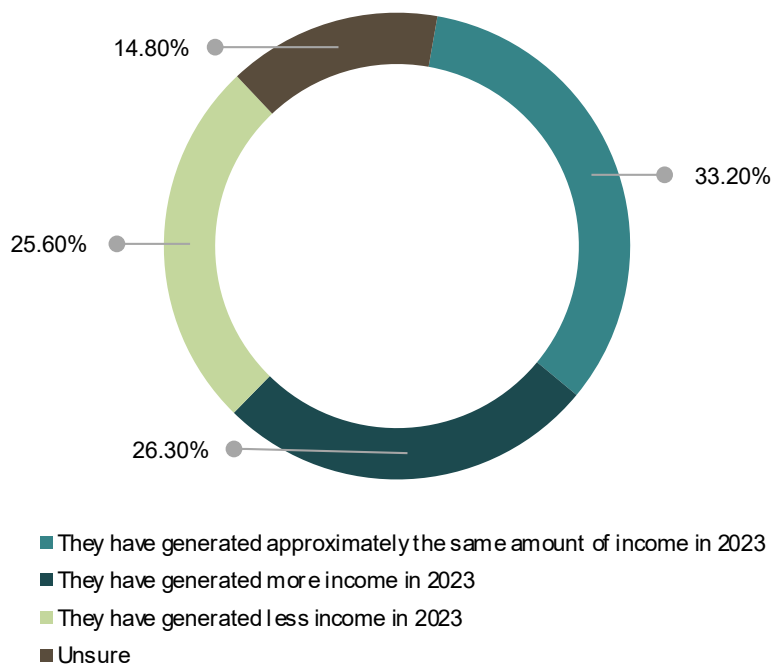
One third of nonprofit organizations saw their fundraising activities hold steady from 2022 to 2023. 26% generated more income and 26% generated less income. When we compare year to year, 2023 shows the highest percentage of nonprofits with steady fundraising from the previous year.

Individual donors continue to be the primary fundraising source for Florida nonprofits. 72% received donations from existing individual donors, and 43% received donations from new individual donors. Existing corporate donors, existing foundation grants, and existing fees for service were the next most common answers. Existing government grants at all levels are accessed by an average of 10% of organizations. New government grants at all levels were even less common – only about 3% of nonprofits on average received new government funding in 2023.

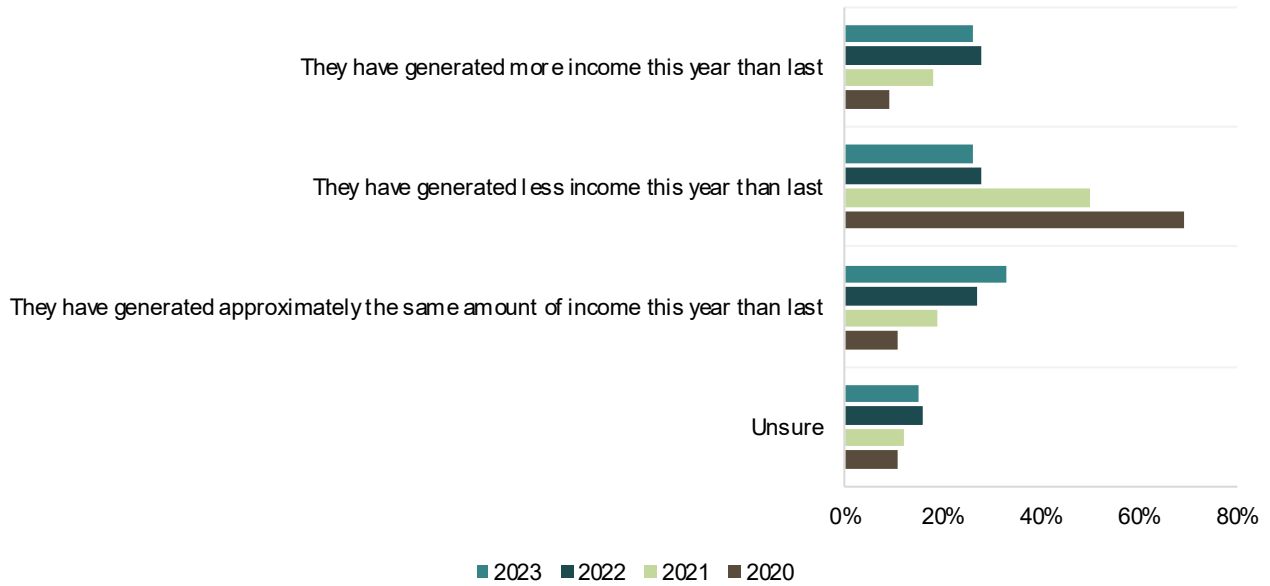
When we compare what nonprofits thought they would fundraise in 2022 with what they actually fundraised in 2023, we can see for the second year in a row that nonprofits are overestimating raising funds from new sources of funding. It is much more likely that nonprofits receive money from those already giving to their organization than it is to find a new source of funding.

This is especially concerning because nonprofits continue to predict that new sources of funding (all kinds) will be more successful for them in 2024. Past data has not shown that to be true, so if nonprofits are building budgets based on the assumption of new sources of funding, they should proceed with caution.

Q 17 How do your fundraising activities in 2023 compare to your fundraising activities in 2022?



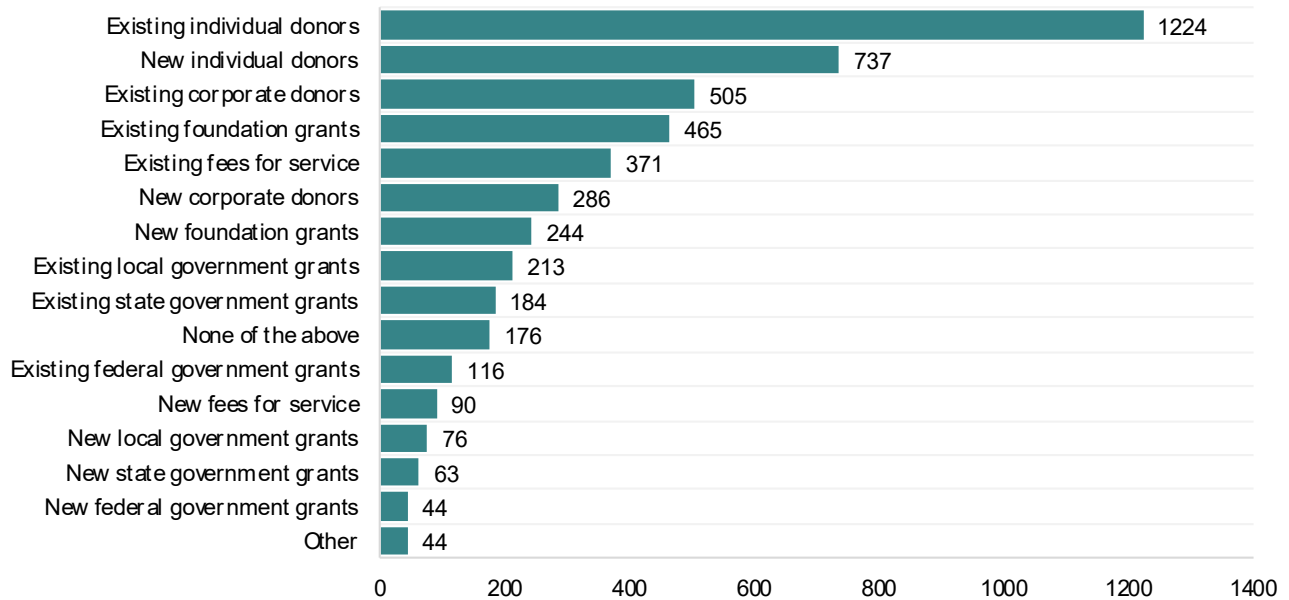
YEAR TO YEAR COMPARISON



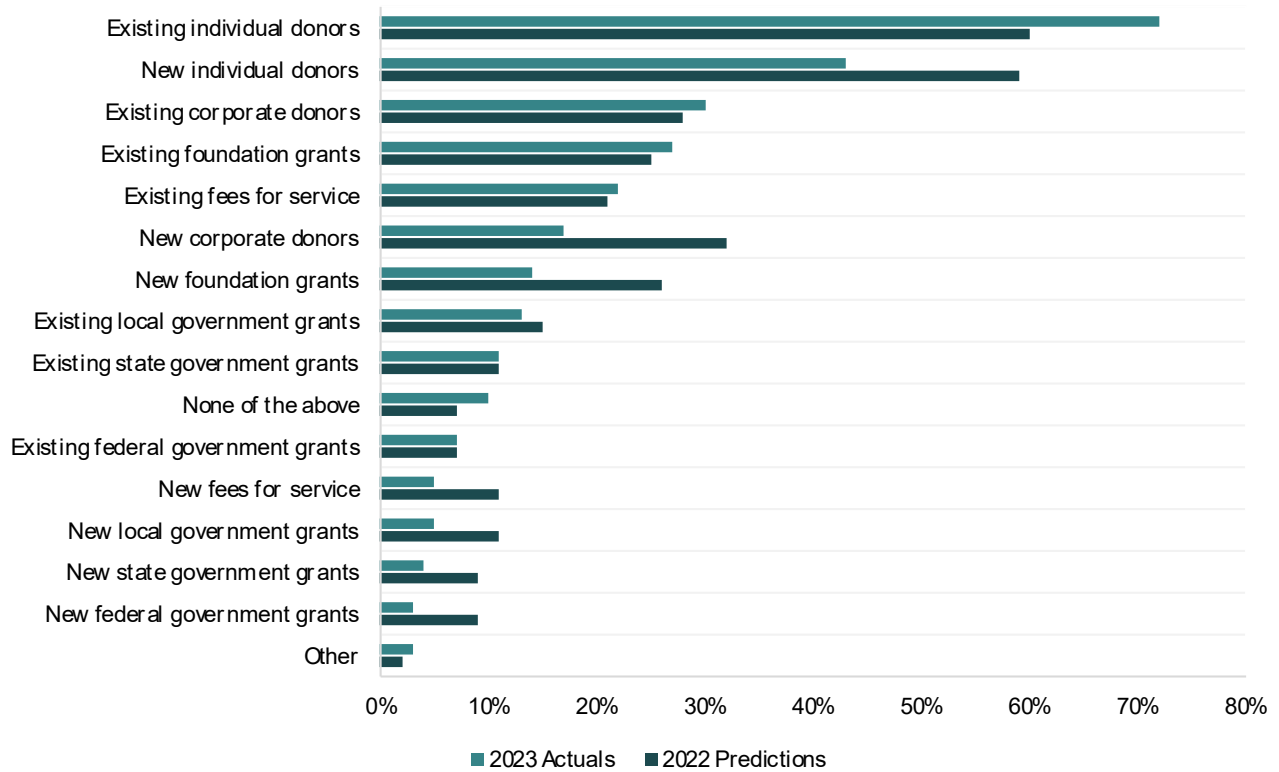
Q 18

What are the significant sources of your current fundraising dollars?

Select all that apply. (NOTE: individual donors includes membership, events, online donations, etc.)



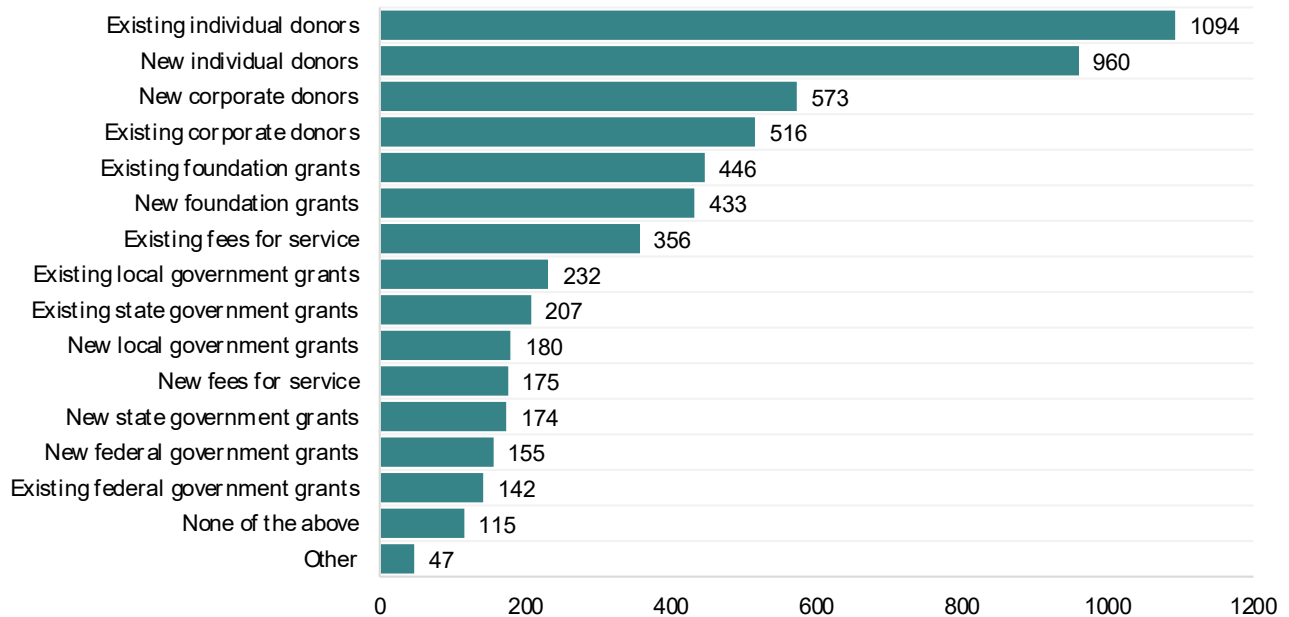
COMPARISON: 2022 PREDICTIONS VS. 2023 ACTUALS



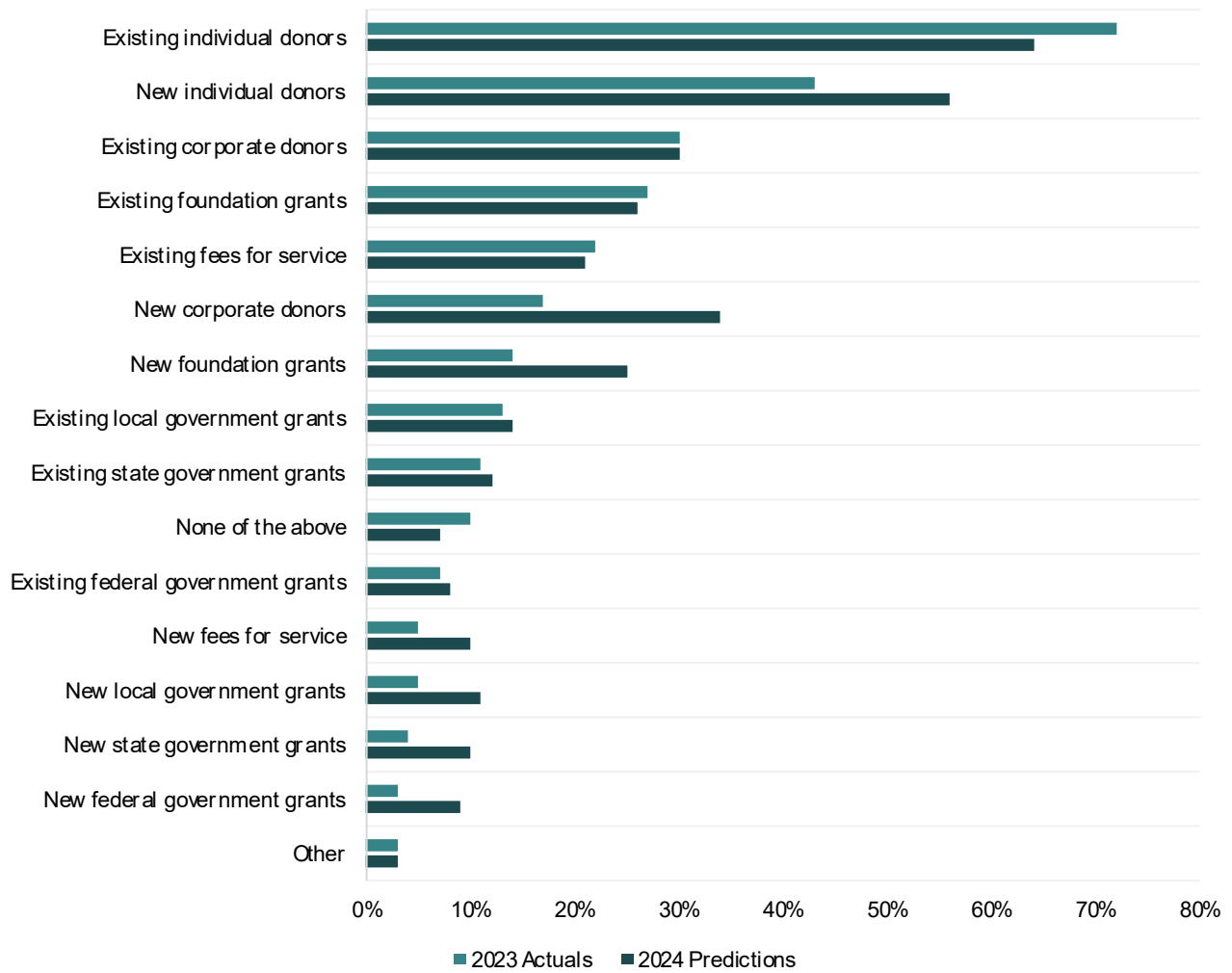
Q 19

Where do you expect significant sources of funding to come from in 2024?

Select all that apply. (NOTE: individual donors includes memberships, events, online donations, etc.)



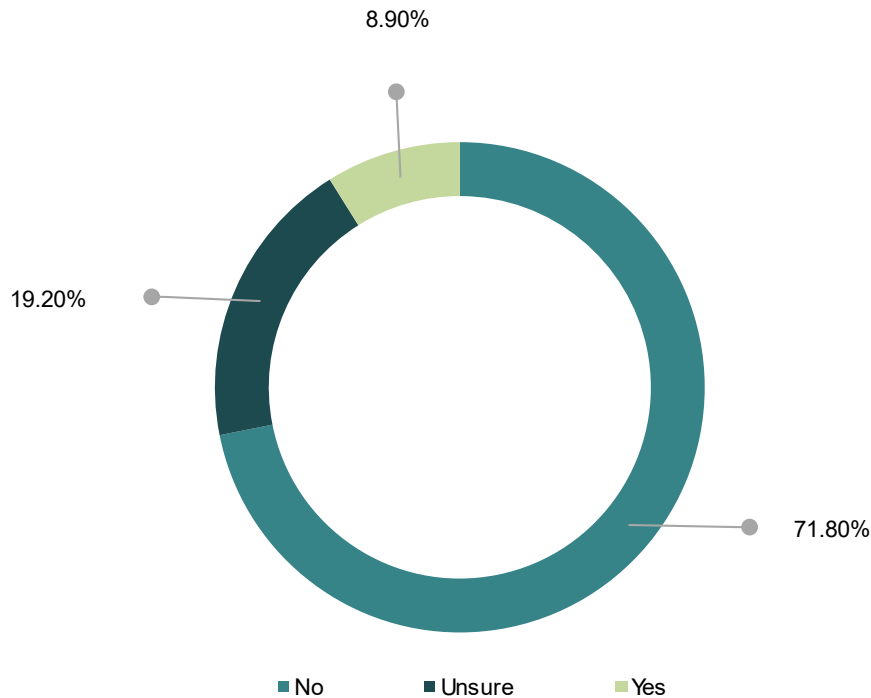
COMPARISON: 2023 ACTUALS VS. 2024 PREDICTIONS



VII THE EFFECT OF STATE LEGISLATION

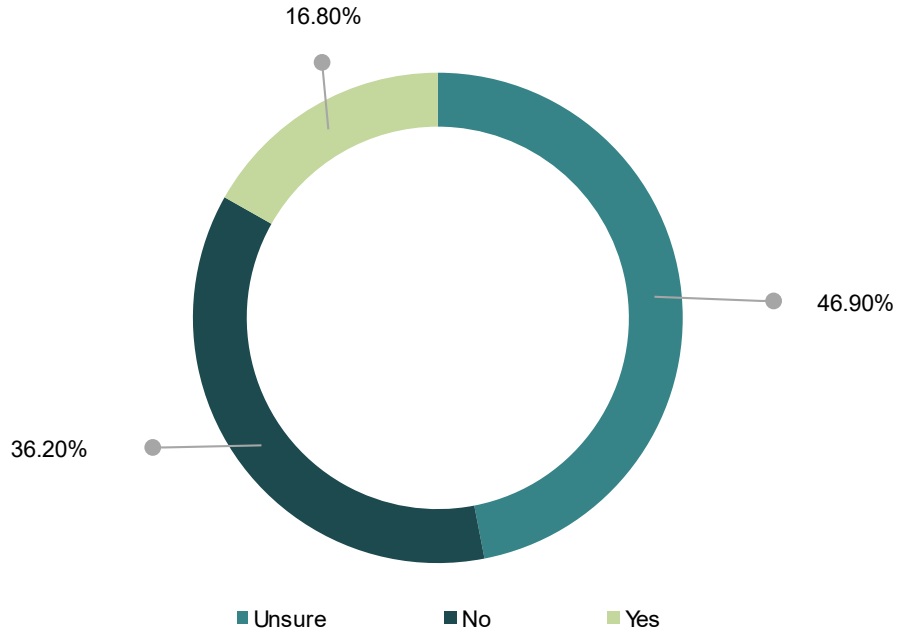
Only a small number of nonprofit organizations say that recent state legislation has affected their ability to provide programs and services. However, of those affected, 17% said they currently need assistance in complying with the new legislation, and 18% say they need assistance in challenging new legislation or self-protection from legislation.

Q 20 Has recent state legislation impeded your organization's ability to provide your regular programs and services?



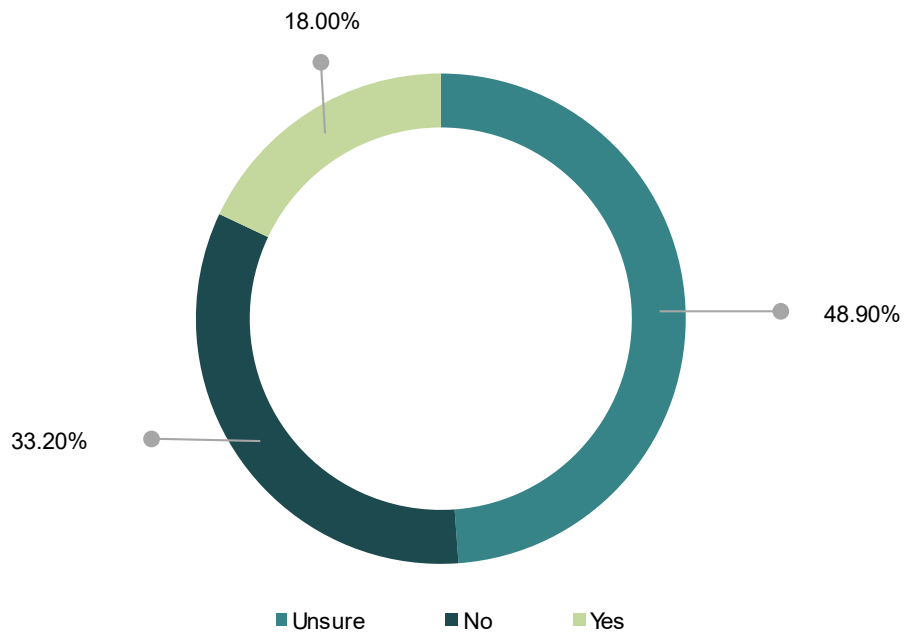
Q 21 If yes, does your organization need funding support to aid in compliance with new state legislation? Examples could include legal advice, staff training, advocacy to state agencies, etc.

N=814



Q 22 If yes, does your organization need funding support to aid in challenging new legislation or protecting yourself from how new legislation is being implemented? Examples could include legal counsel, other professional expertise, staff training, etc.

N=829



VIII BARRIERS FOR NONPROFIT ORGANIZATIONS

Florida's nonprofit organizations are clear and consistent in describing their major challenges – they are funding and human resources.

42% said fundraising was their biggest challenge (23% operations funding and 19% program funding), and 12% said human resources of staff and volunteers. 9% were challenged by meeting community demand for services. For those organizations who chose to write in a challenge, the most common responses were access to facilities, advocacy issues, hurricane effects, and increased costs.

In comparing to past years, 2023 saw an increase in funding and fundraising as a challenge. 2023 was the highest response rate ever – including 6% higher than in 2020. Human resources also saw an increase in the biggest challenge to a record 12% (compared to 8% in 2021 and 2022).

2023 went mostly to the expectations of Florida's nonprofits. The two areas that were most often described as better than expectations were program delivery and staff/volunteer morale. The areas that were most often described as worse than expectations were fundraising activities, access to funds, filling available staff positions, and access to volunteers.

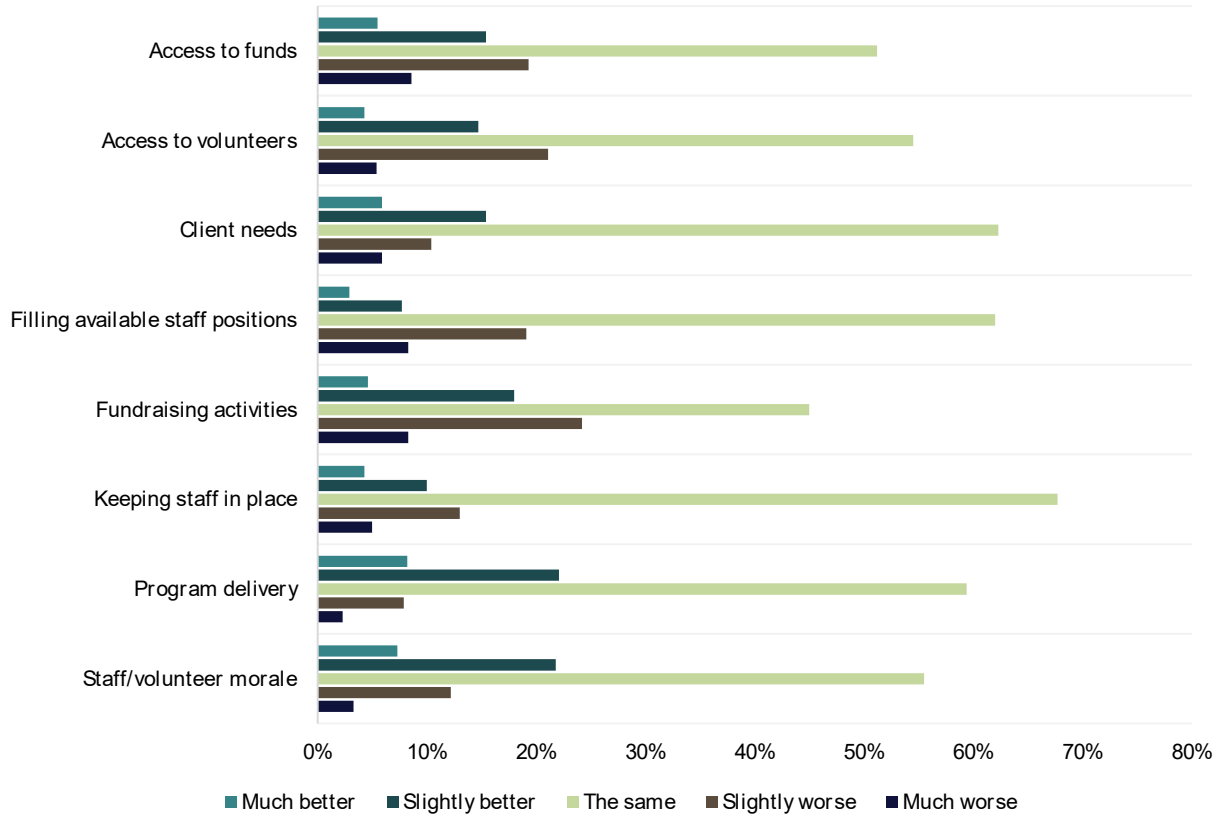
When asked what their biggest concerns are for 2024, the top responses are, in order, increased expenses, cash flow, increased need for services, reduced future funding, and loss of income/revenue. Nonprofits are least likely to be concerned about closing, merging, laying off staff, and reduced ability to provide programming, and even less concerned about them for 2024 than they were for 2023.

Nonprofits are slightly less concerned about cash flow and loss of income/revenue than they were in 2021 and 2022. Increased need for services concern continues to decline. Filling available staff positions and workforce shortage concern declines for the second year.

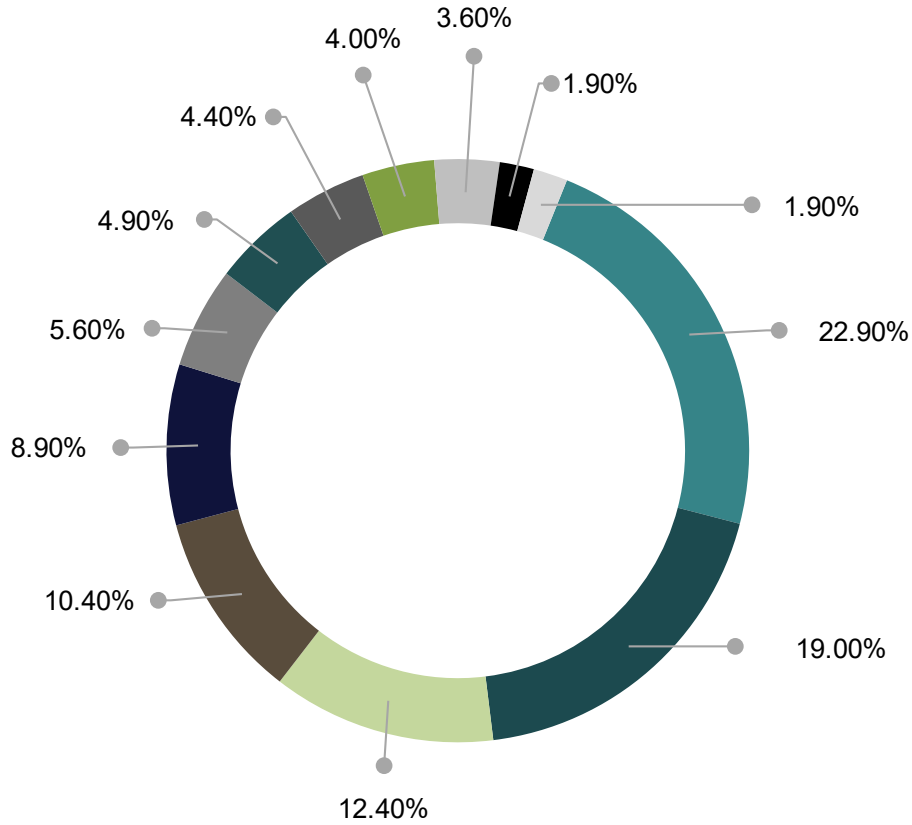
Nonprofits are looking for resources on funding (62%), fundraising assistance (45%), volunteers (42%), and Board engagement and/or mobilization (33%). Board mobilization had a 13% jump from 20% in 2022 to 33% in 2023. Capacity for effective community engagement, collaborations, funding, and support to build partnerships all increased slightly from the previous year.

Q 23

Think about what you expected to happen this year. Would you say the follow are now better or worse than your expectations?

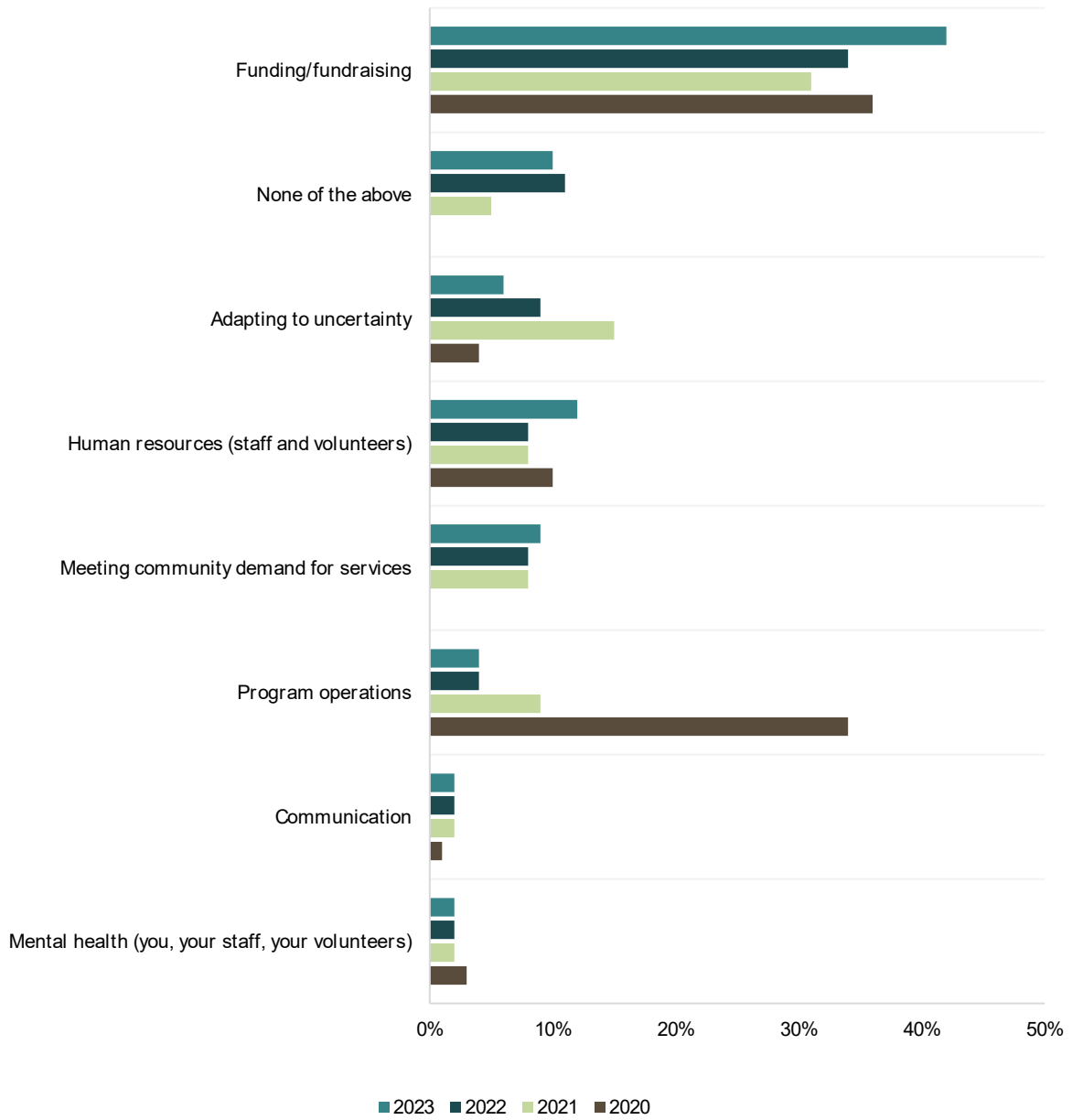


Q 24 What is the biggest challenge you have faced this year?



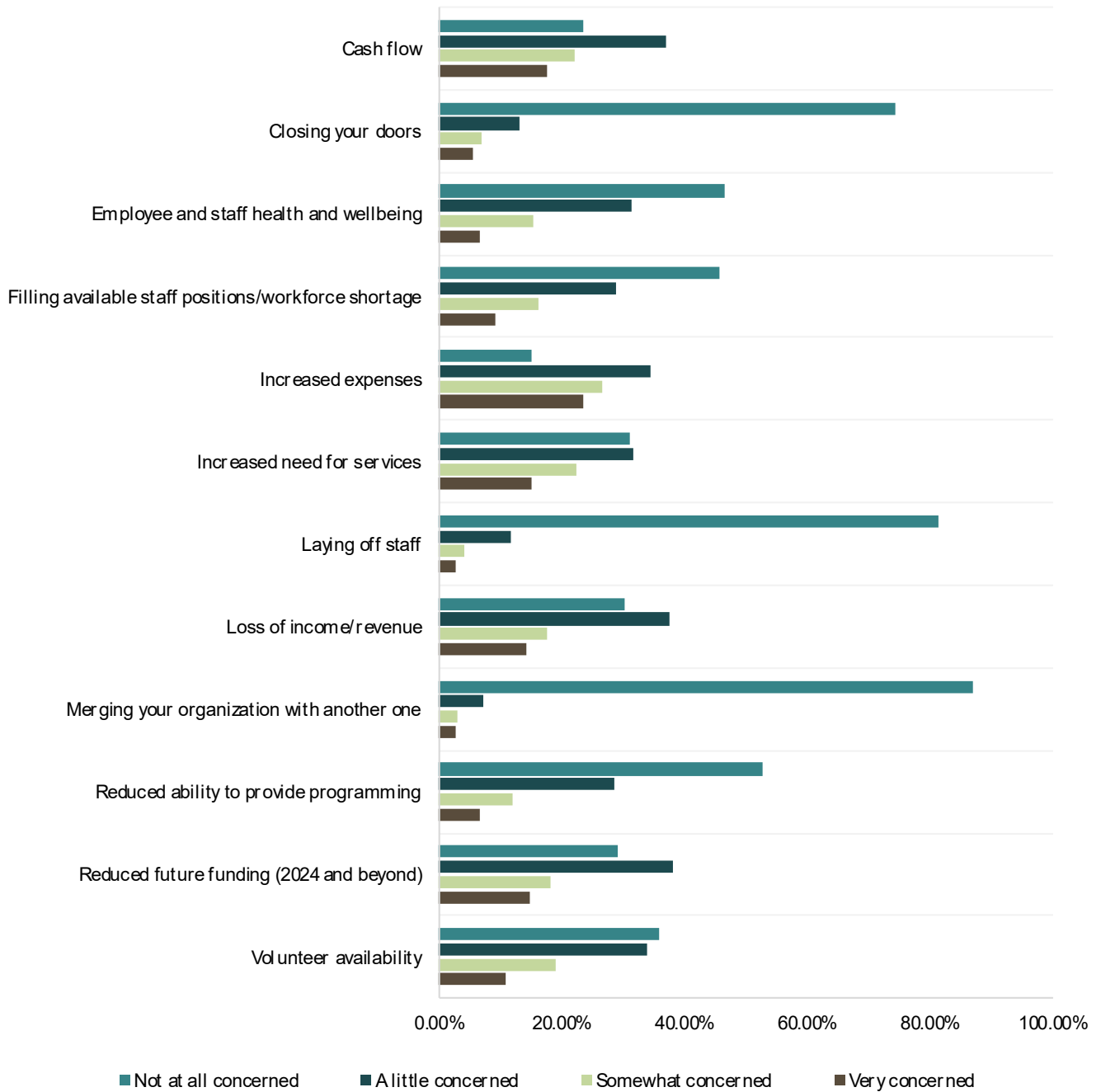
- Funding/fundraising for operations
- Human resources (staff and volunteers)
- Meeting community demand for services
- Technology needs/updates
- Other
- Mental health (you, your staff, your volunteers)
- Funding/fundraising for programs
- None of the above
- Adapting to uncertainty
- Workforce shortage
- Program operations
- Communication

YEAR TO YEAR COMPARISON

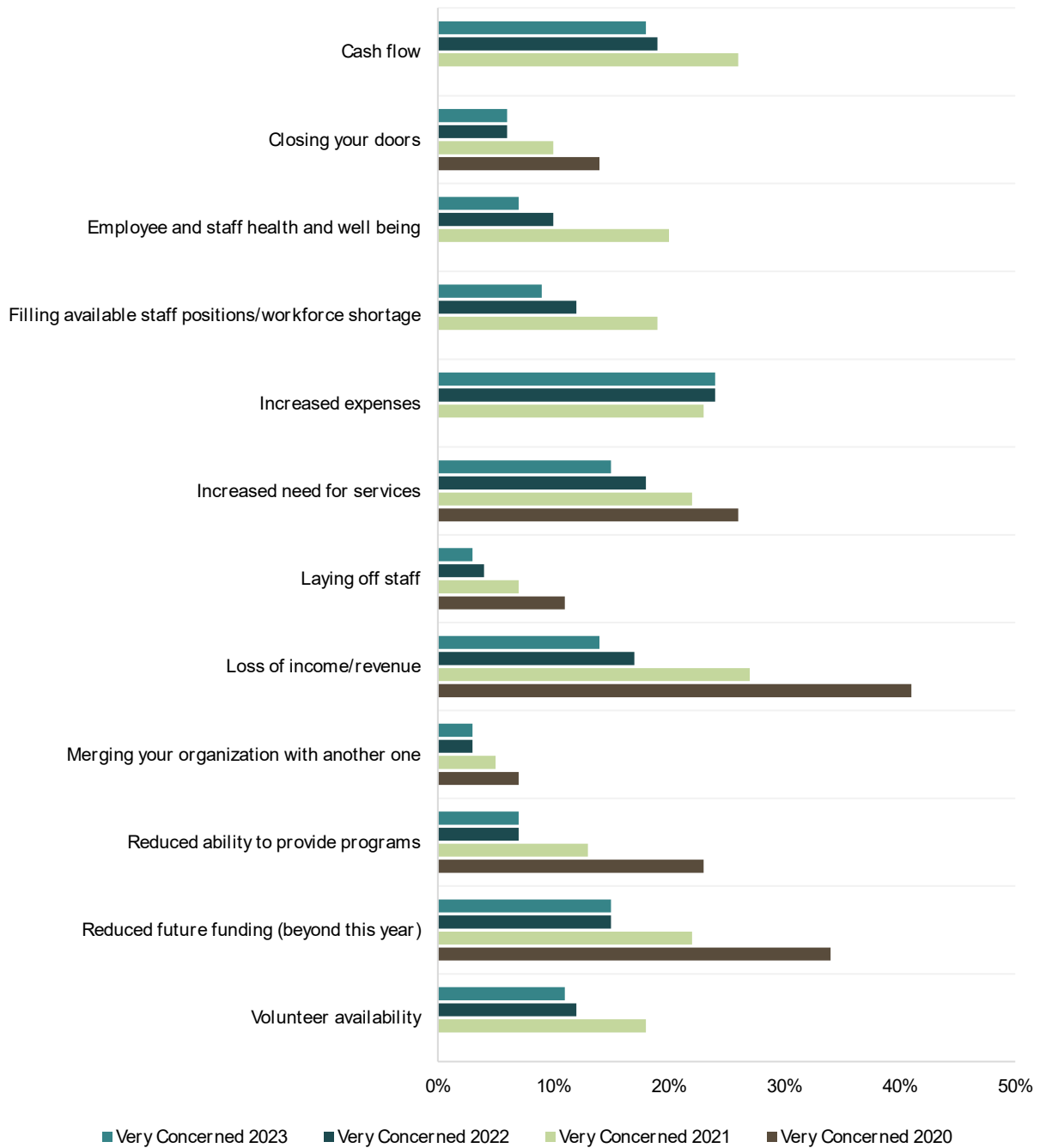


Q 25

How concerned are you about the following issues in the next 12 months?



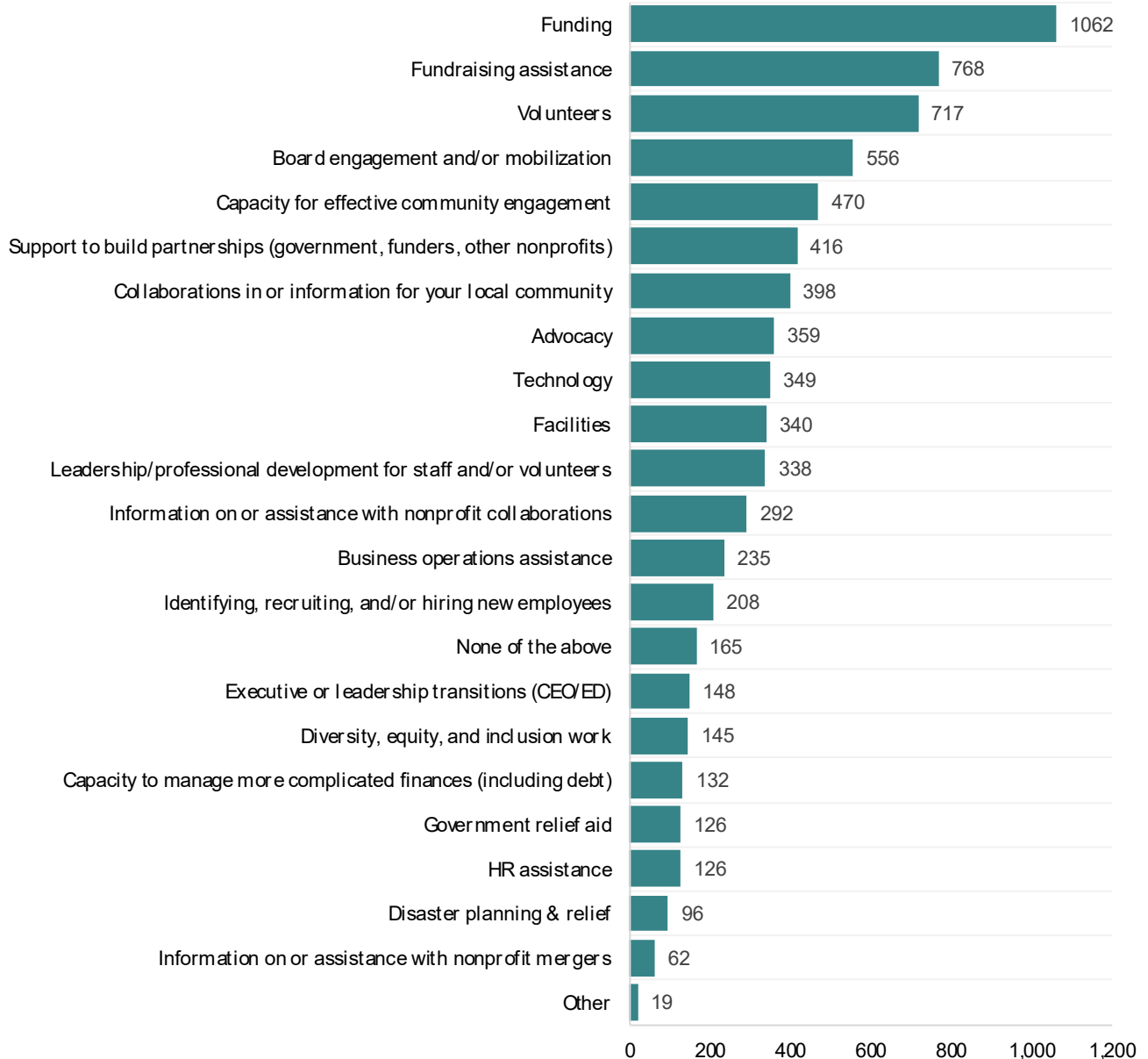
YEAR TO YEAR COMPARISON: VERY CONCERNED RESPONSES



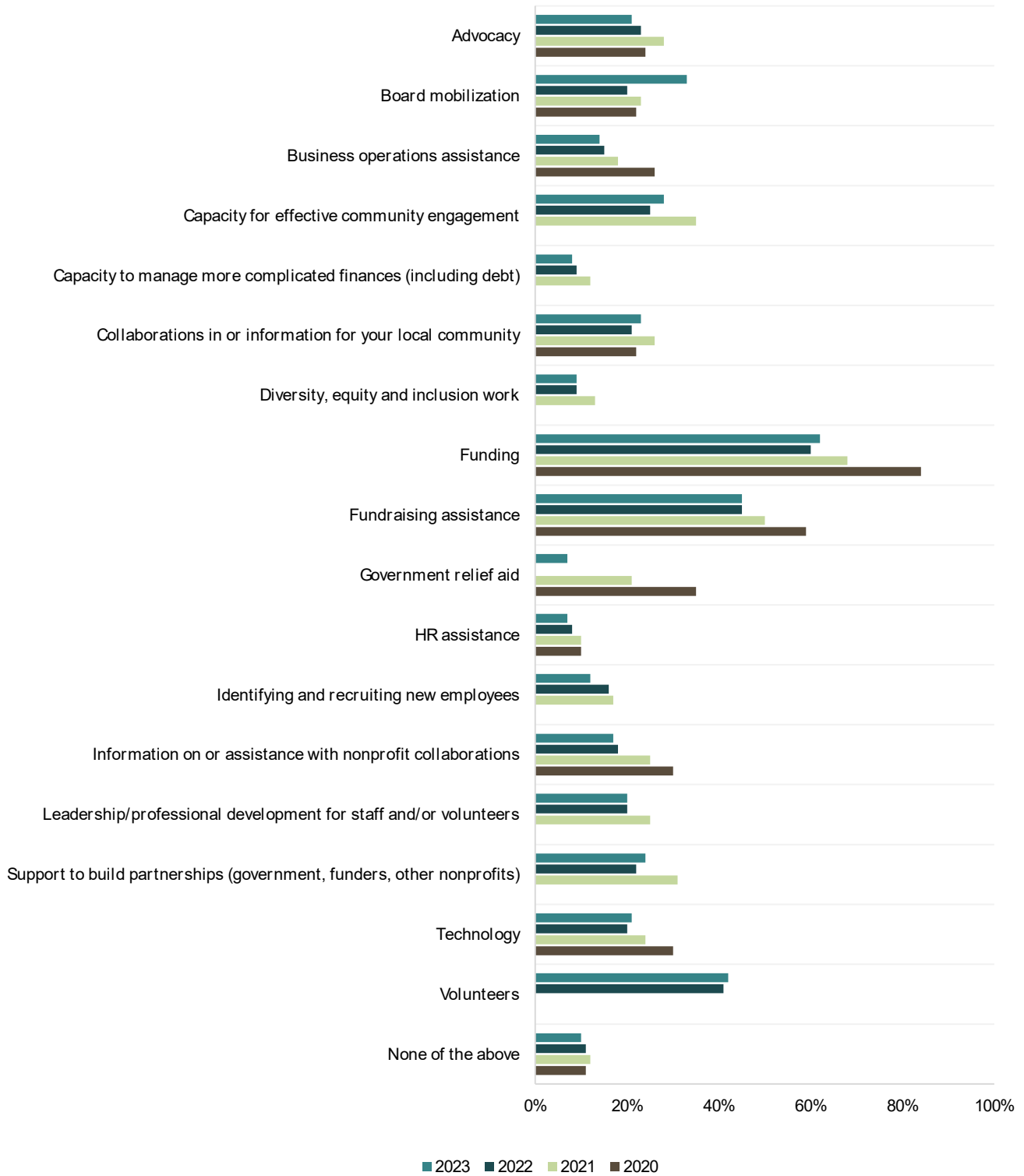
Q 26

What resources does your organization need going forward?

Select all that apply.



YEAR TO YEAR COMPARISON



IX KEY TAKEAWAYS AND NEXT STEPS

Florida's nonprofits are clear that their top two needs are funding and people – staff and especially volunteers. We also know from our [individual giving research](#) that Floridians are generous. 68% in our state give to charitable organizations, over half of Floridians volunteer, and 87% of Floridians participate in informal philanthropy – giving items or money directly to people in need. The spirit of generosity exists across our state, and nonprofits have a unique opportunity to ensure that generosity is shared with nonprofit organizations.

With that in mind, here are some ideas of how Floridians can use this research going forward.

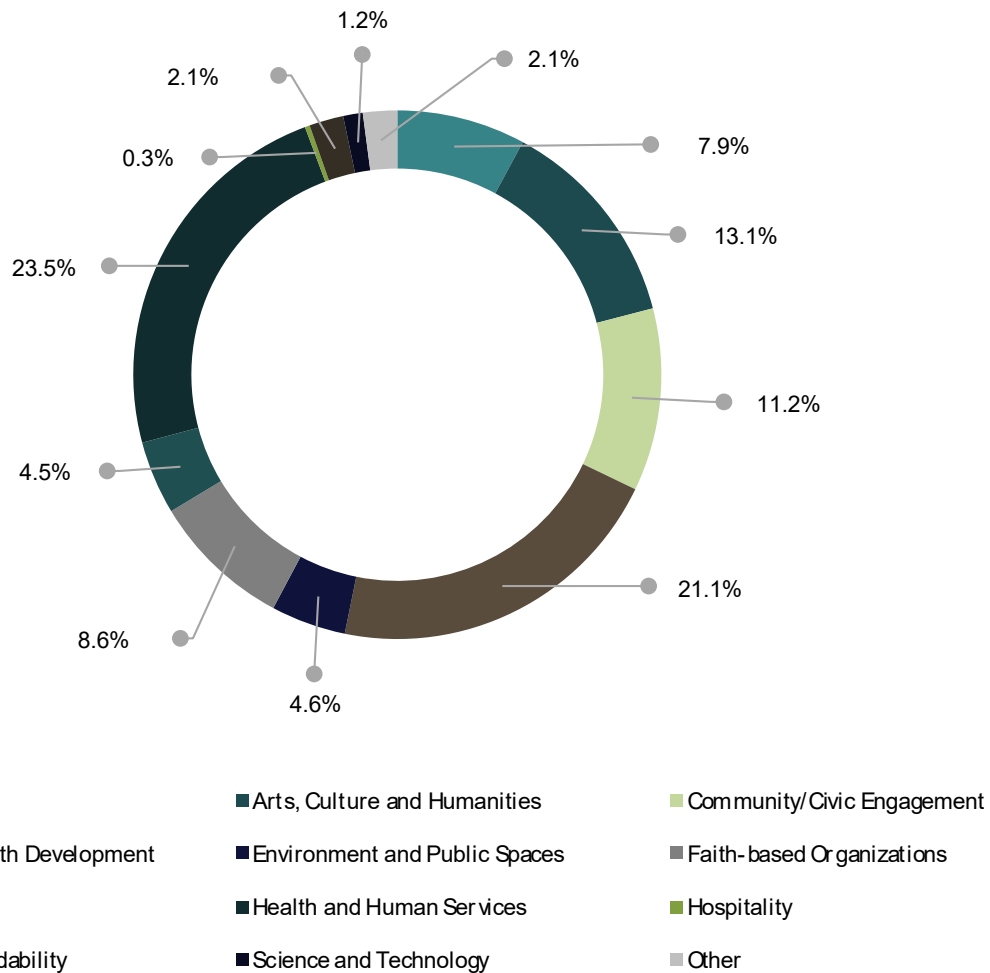
- ▲ Support nonprofit organizations with unrestricted gifts, or increase your current philanthropic giving. That way, nonprofits have the most flexibility to respond to their biggest challenges and can cover their increased costs.
- ▲ If you already donate, ask your friends, colleagues, and others in your network to donate as well.
- ▲ Support professional development of nonprofit staff, so that there is a robust pool of applicants for the available CEO positions.
- ▲ Consider helping a nonprofit in one of the following ways:
 - Provide access to facilities – if you have business space, allow nonprofits to use it to provide services, or to have Board or membership meetings. If you have event space, allow nonprofits to use it for performances or fundraising events.
 - Volunteer for Board service – nonprofits need all kinds of volunteers, including Board members who are responsible for governance, planning, policy and fundraising work. If those areas are in your skillset, reach out to a nonprofit organization to offer your Board service.
 - Offer pro bono services to a nonprofit in your geographic area or in a mission area you care about, especially in marketing and communications or technology.
 - Advocate for nonprofit organizations to legislative bodies. The voice of the voters of Florida will always carry a lot of weight in protecting the nonprofit sector from legislation that impedes their ability to do their mission work.

For positive change to happen, the nonprofit sector will need support – from the funding community, from volunteers, from community leaders, and from government. There is always something an individual or institution can do with their unique talents and resources. We encourage all Floridians to find a way to use their talents to support the nonprofit sector so that nonprofits can continue to support every neighborhood, city, county, and region of our state.

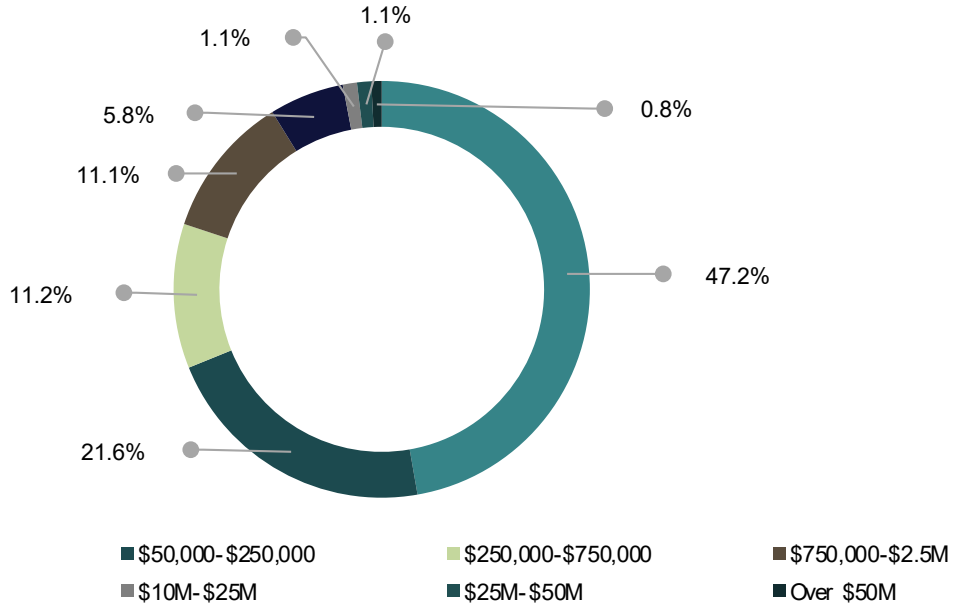
X DEMOGRAPHICS OF SURVEY RESPONDENTS

1,704 nonprofit organizations located in and serving Florida responded to this survey. They represent a cross section of mission areas, budget sizes, and communities served within our state. Approximately half of the nonprofits in Florida are run by volunteers. Overall, the profile of responding organizations remains consistent across all of our nonprofit survey reports, which include the COVID Effects surveys in 2020 and 2021 and the 2022 Nonprofits Survey.

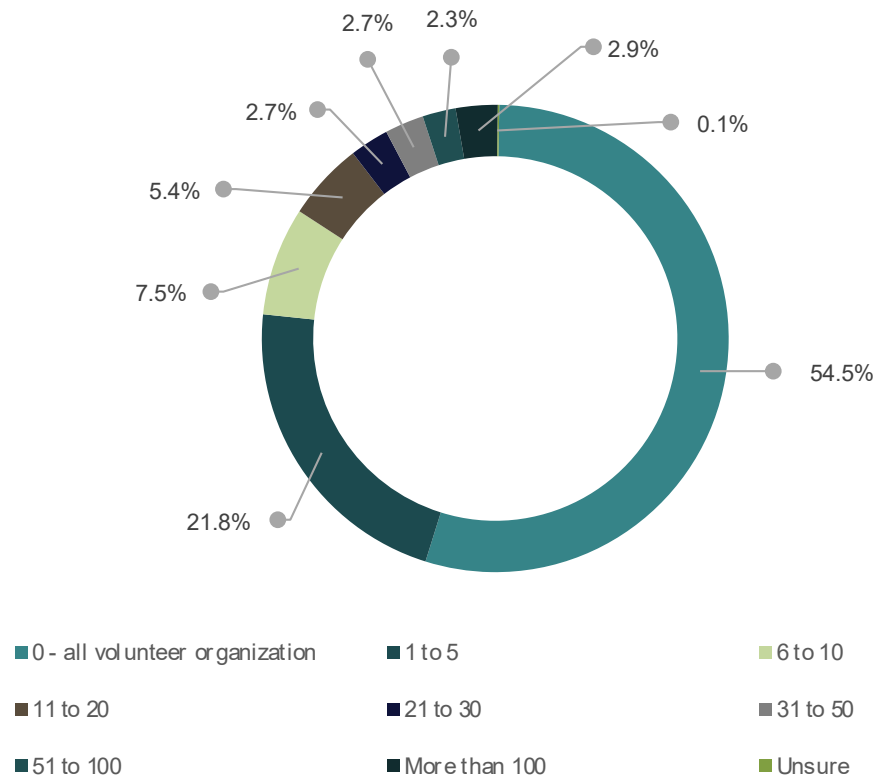
Q 27 What area best describes your mission work?



Q 28 What is the budget range for your organization?

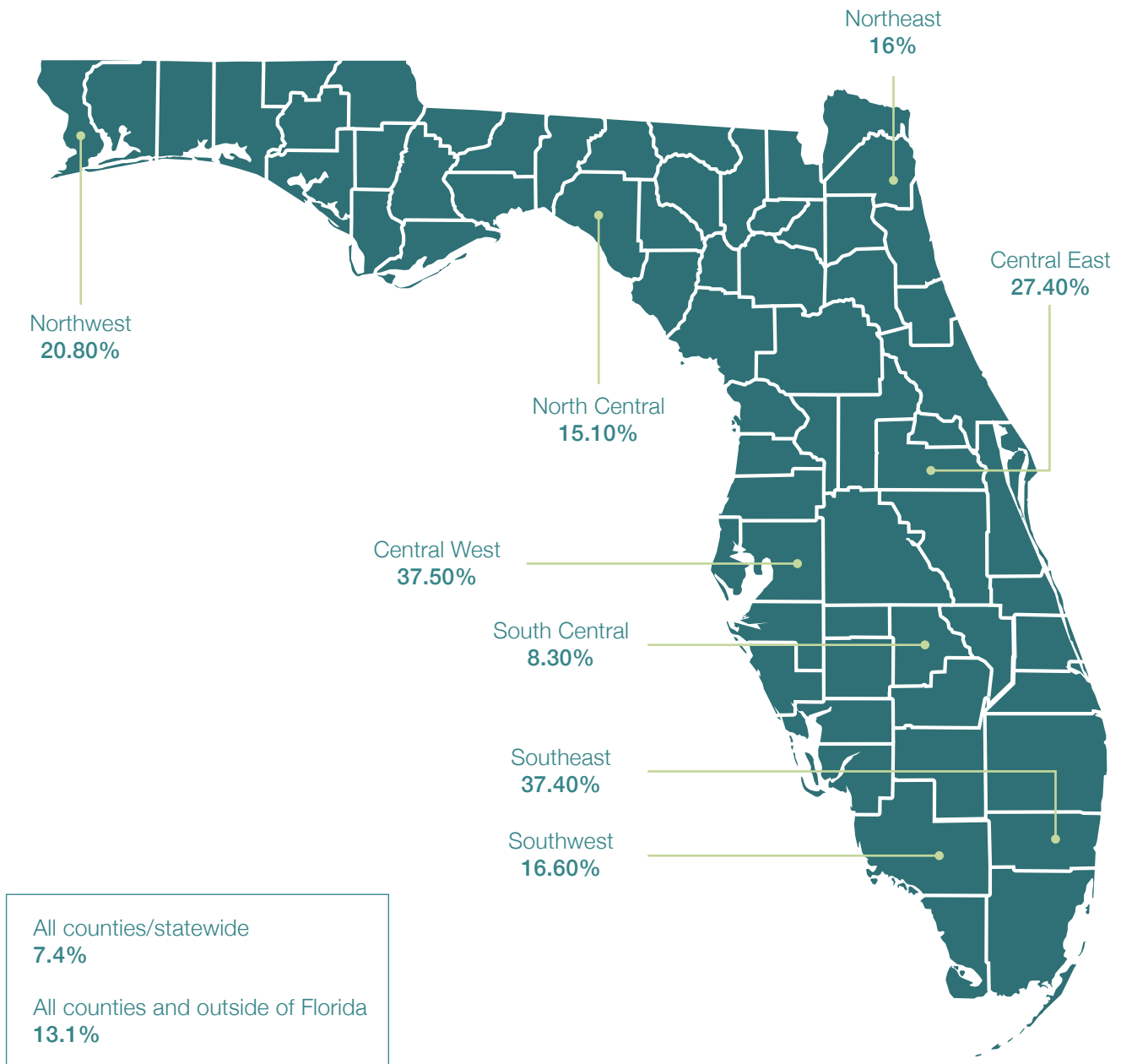


Q 29 How many total paid staff members (full and part time combined) does your organization have?



Q 30 What counties do you serve?
Select all that apply.

Answers to this question have been condensed into regions. Because respondents could select more than one county, responses add up to more than 100%. Responding organizations provided services in an average of 2.3 counties (excluding those who serve statewide and outside of Florida). Number of responses by county is available upon request.





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