



NONPROFIT COVID-19 IMPACT SURVEY: TOP-LINE REPORT

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Investors and Supporters

Allies for Good

Statewide

SC Arts Commission
SC Association of Habitat for Humanity
SC Association of YMCAs

Upstate

Duke Energy Foundation
Spartanburg Joint Funders
Greenville Partnership for Philanthropy
Com. Foundation of Greenville
The Jolley Foundation

Lowcountry

Gaylord and Dorothy Donnelley Found.
Trident United Way
Community Foundation of the Lowcountry
Frances P. Bunnelle Foundation

Pee Dee

Eastern Carolina Foundation

Midlands

United Way of the Midlands
Central Carolina Community Foundation
UW of Kershaw County
UW of Sumter, Lee and Clarendon Cts.

Plan of Presentation

- Background, Objectives, Method
- Sample Profile
- Financial Health
- Impact on People: Clients and Staff
- The Road Ahead
- *“Silver Linings”*
- Observations and Considerations

BACKGROUND

- Onset of COVID-19 pandemic in SC in March 2020.
- In September of 2020, Together SC and its allies for good partnered with the Riley Center at the College of Charleston to conduct a survey of non-profits.
 - Robert Kahle, PhD served as Principal Investigator.
 - Gloria Roderick, MPA served as Lead Analyst.
- These hard data helped frame the SC Legislative response to the pandemic
 - informed philanthropic decision makers and non-profit leaders
- In SC, since last March
 - nearly 9,000 have died
 - more than 500,000 cases have been recorded

OBJECTIVES

Assess **Financial Status/Well-Being**

By region and sub-sector

Assess Effectiveness of Financial Supports

Understand **Impact on People**

Provide Guidance for the **Road Ahead**

Seek to understand ***“Silver Linings”***

METHOD

- Lists provided by:
 - Investors and Supporters of their Grantees, Constituents
 - SC Cares Applicants and Grantees by the State of SC
 - Members of Together SC
- Augmentation of lists from Fall 2020 study

Deduplication,
Data Mgt. by
TSC and KSI

3,782 Unique,
Valid Email
Addresses of
Leaders of SC
Nonprofits

927
provide substantially complete and useable data.
24.5%
response rate.
Compares to 566/19% from Fall 2020 survey

Thirty-Five
Question
Survey.
Data Collected
March 1-12



SAMPLE PROFILE

ROLE OF RESPONDENT & RACE OF CEO/ED

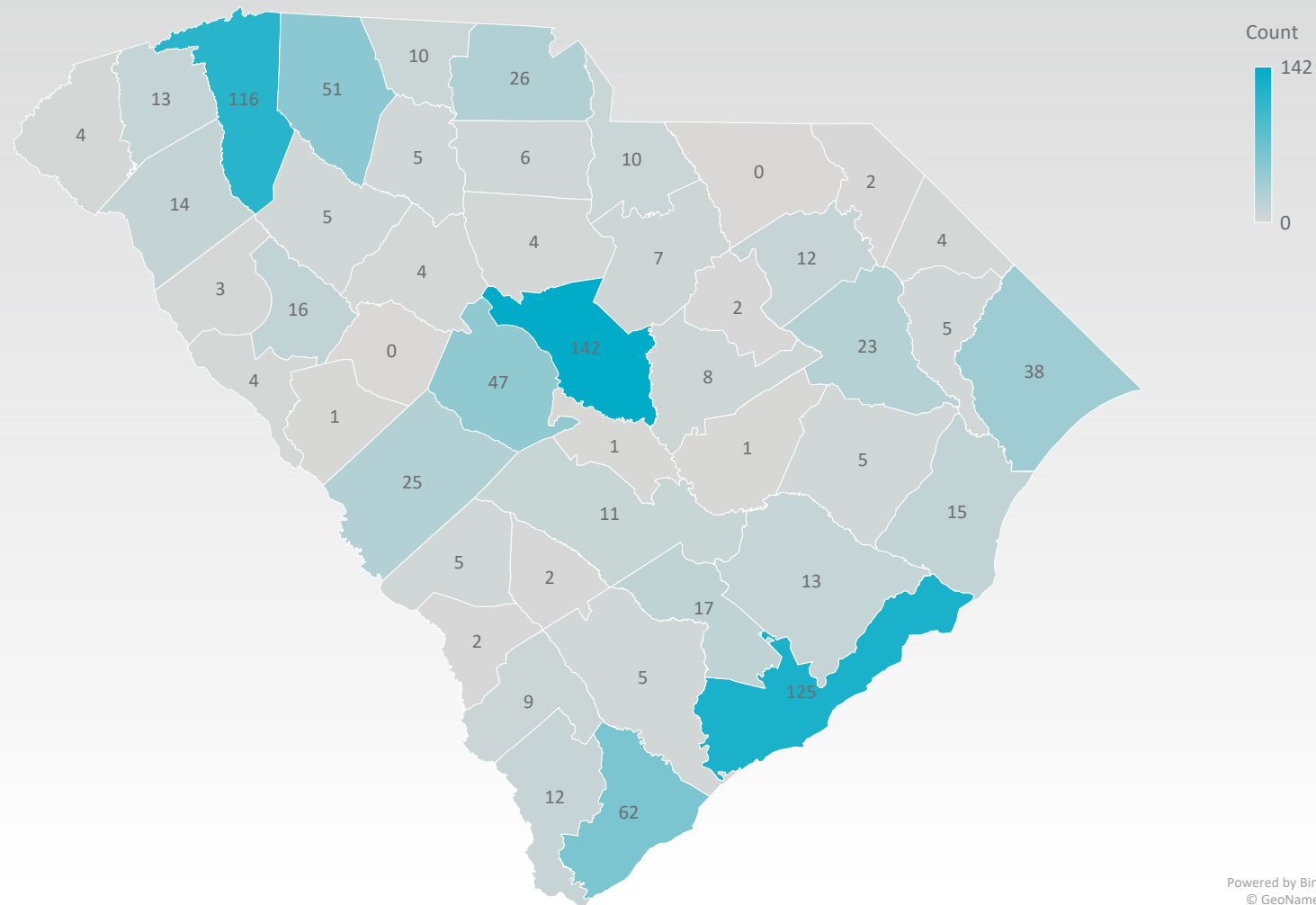
Role in Organization	Percent	Number
CEO/ED	78.8	706
Board or CFO/COO	14.8	133
Race of CEO/ED	Percent	Number
White	71.3	614
Black/African American	21.8	188
Other	6.9	97
Prefer not to answer	^	54

^ not included in percentage total

REGION SERVED

Region	Percent	Number
Statewide	16.5	147
Lowcountry	28.8	257
Upstate	25.7	229
Midlands	21.7	193
Pee Dee	7.3	65

Respondents per County



Respondents by Sector

Sector	Percent	Number
Human Services	32.6	291
Arts, Culture, Humanities	16.9	151
Education	16.3	146
Health	13.6	122
Public/Social Benefit	8.8	79
Religion Related	5.4	48
Environment/Animals	5.1	46
Other	1.2	11

Respondents by Annual Operating Budget

Budget	Percent	Number
< \$50K	23.1	206
\$51K-\$250K	26.6	237
\$251-\$500K	16.1	143
\$500L-\$1M	11.6	103
\$1.1M-\$5M	18.1	162
\$5.1M-\$10M	2.1	19
10.1M +	2.5	22

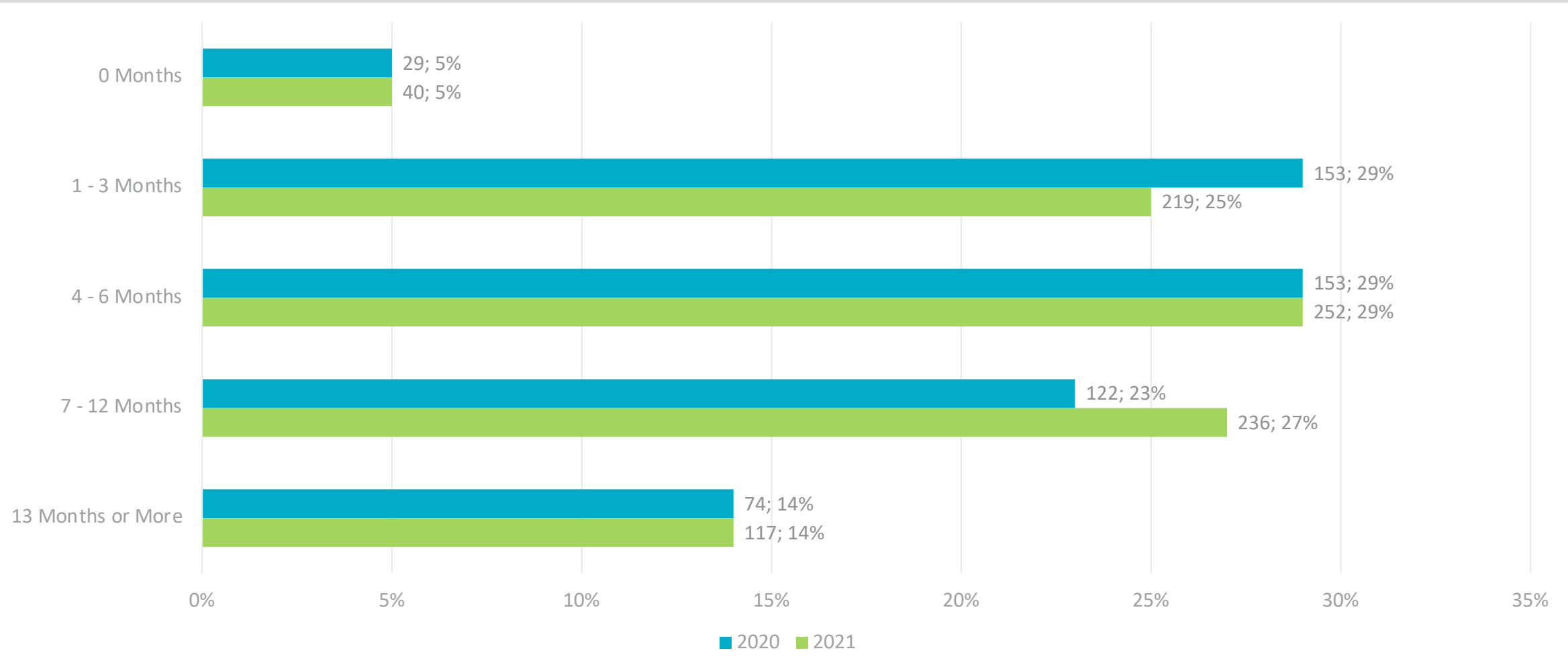
Sample Profile: Number of FTE's

FTE Range	Percent	Number
0	19.2	167
0.1 - 5	41.9	364
5 - 25	28.4	247
25 - 50	5.2	45
50 - 100	2.8	24
100 - 200	1.5	13
≥ 200	1.0	9

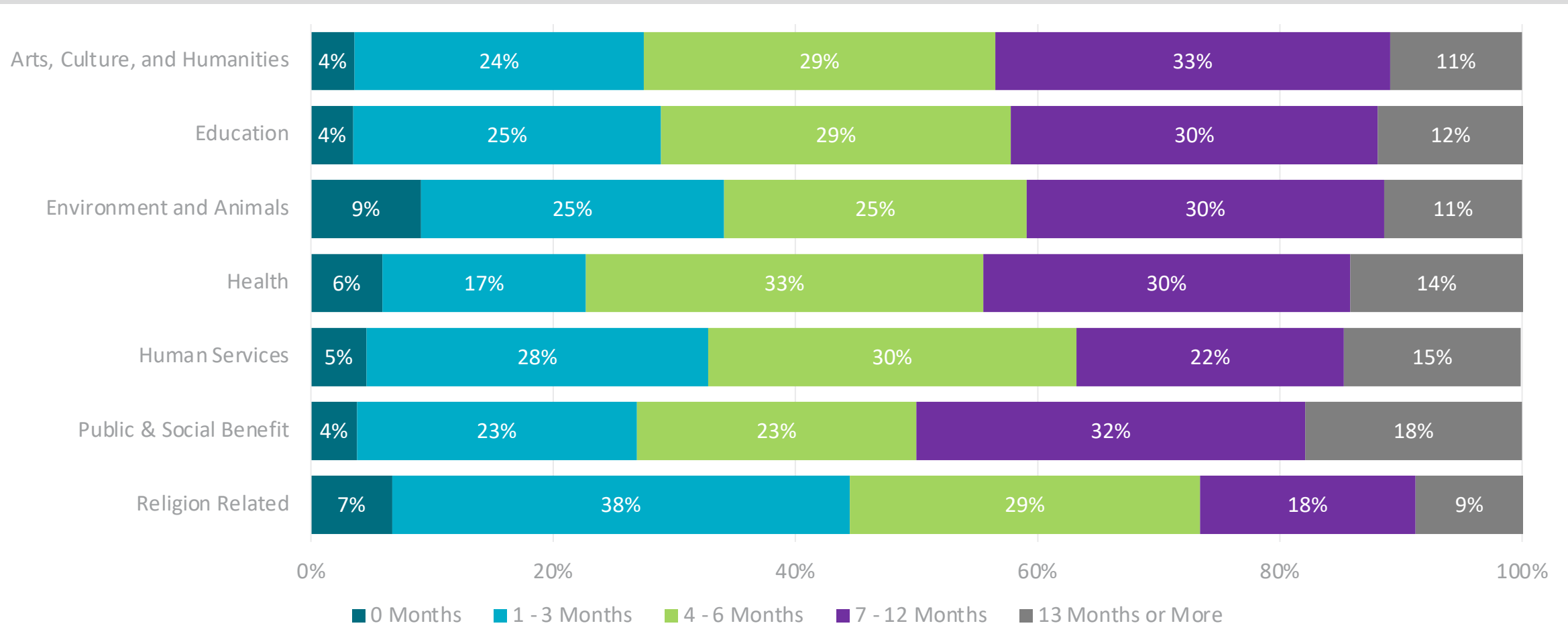


FINANCIAL HEALTH

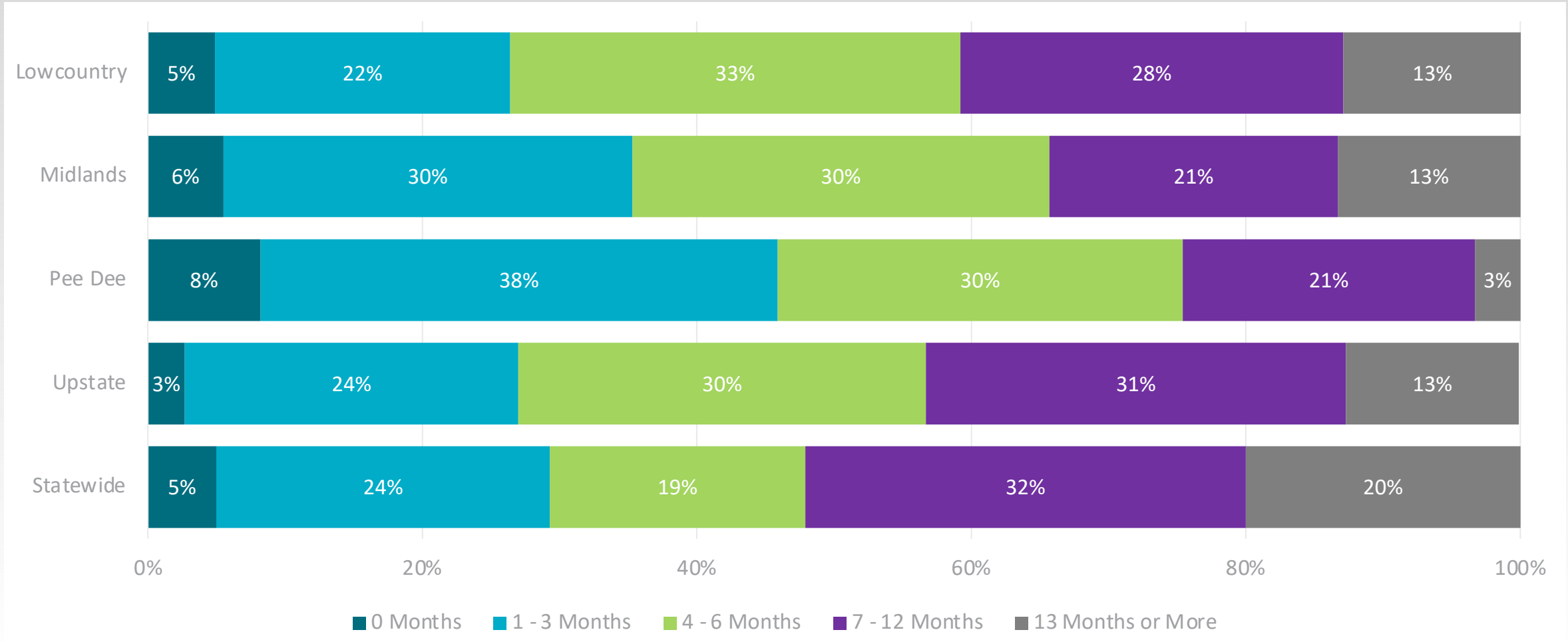
Months to Operate without Additional Revenue 2020 vs. 2021



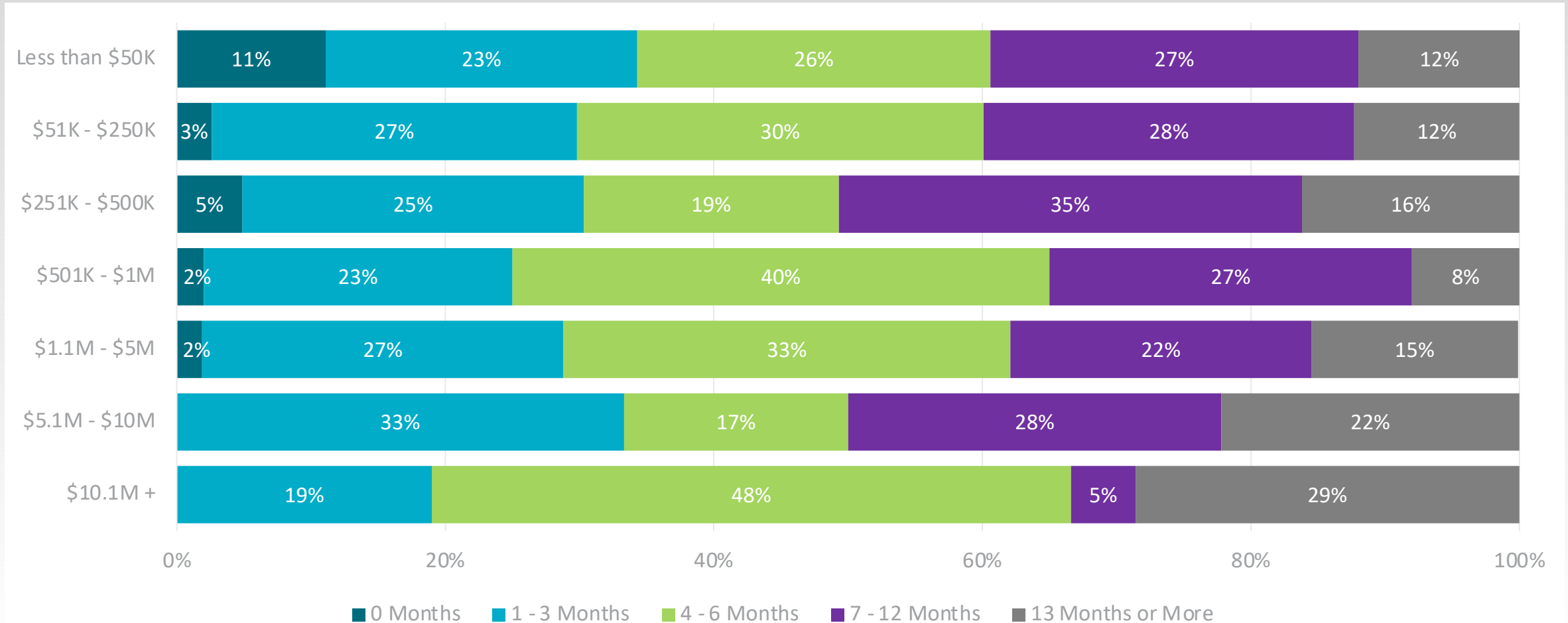
Months to Operate without Additional Revenue by Sector



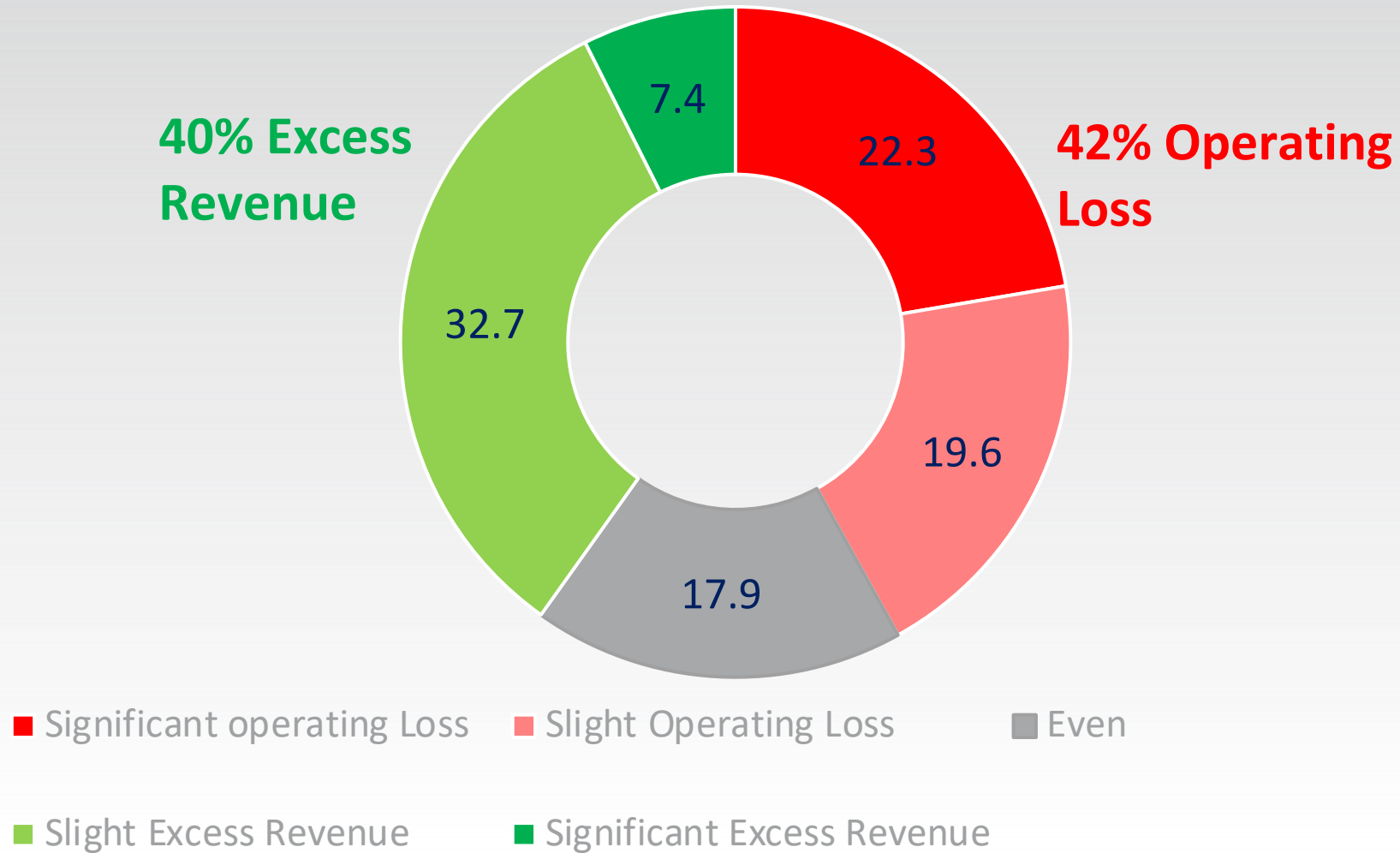
Months to Operate without Additional Revenue by Region



Months to Operate without Additional Revenue by Annual Operating Budget



Financial Status at End of Last Fiscal Year

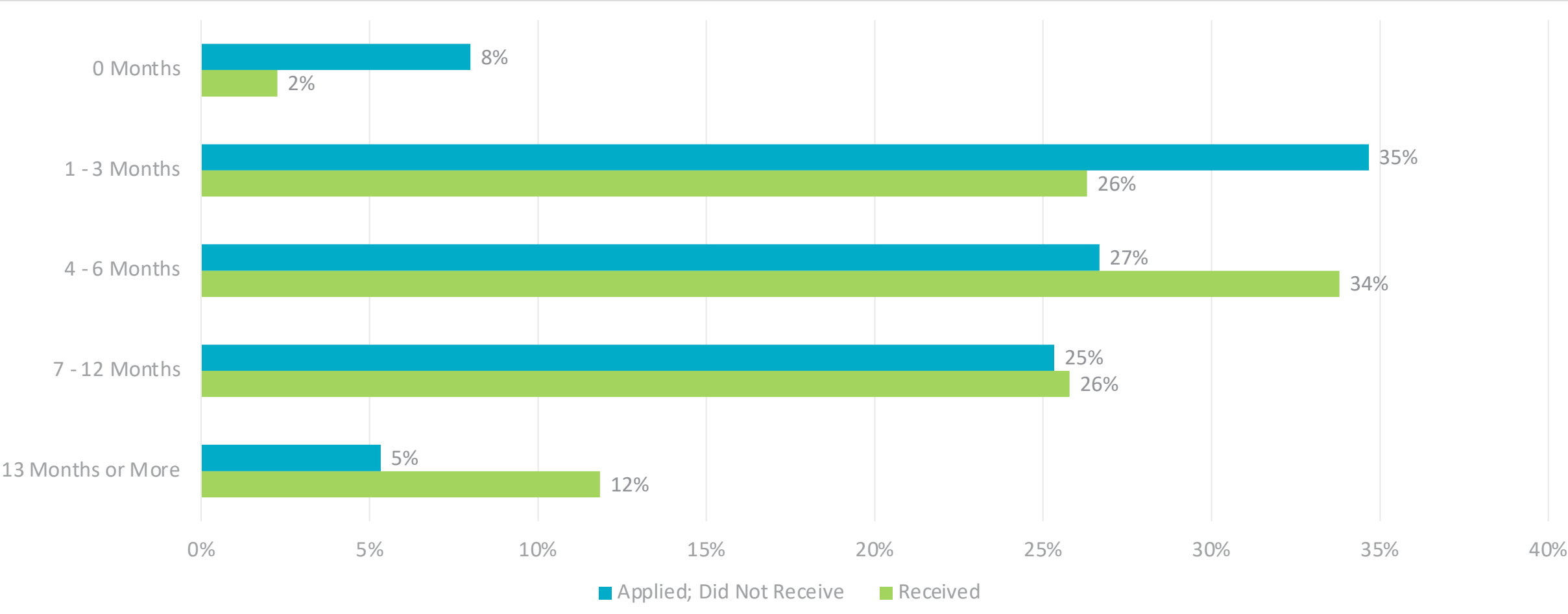


Source of Financial Support

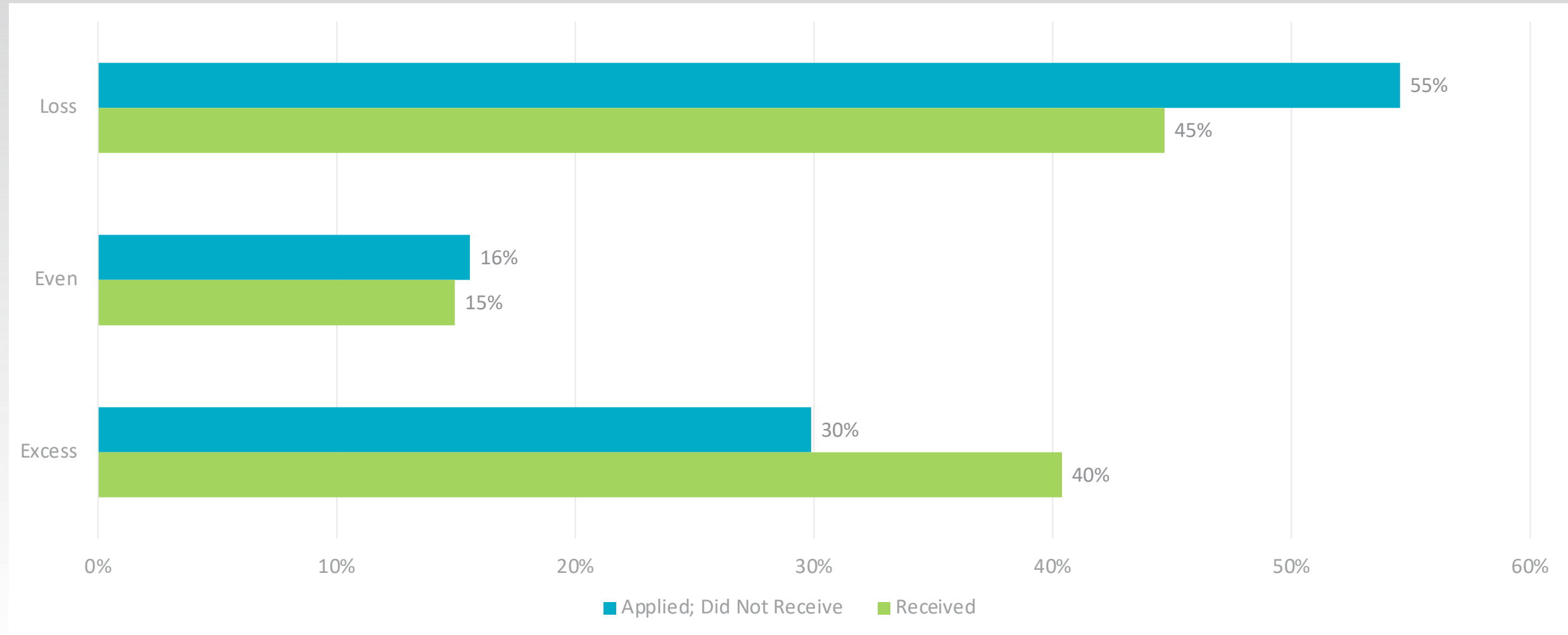
(multiple response)

Source	Percent	Number
Federal (PPP, EIDAL)	59.9	494
CARES Act Through State	40.8	337
Foundations	34.7	286
Individual Contributions	32.1	265
Corporation/Business	15.5	128
CARES ACT Through County.	12.7	105
United Way	12.4	102
One SC Fund	9.8	81
New Earned Revenue	7.3	60

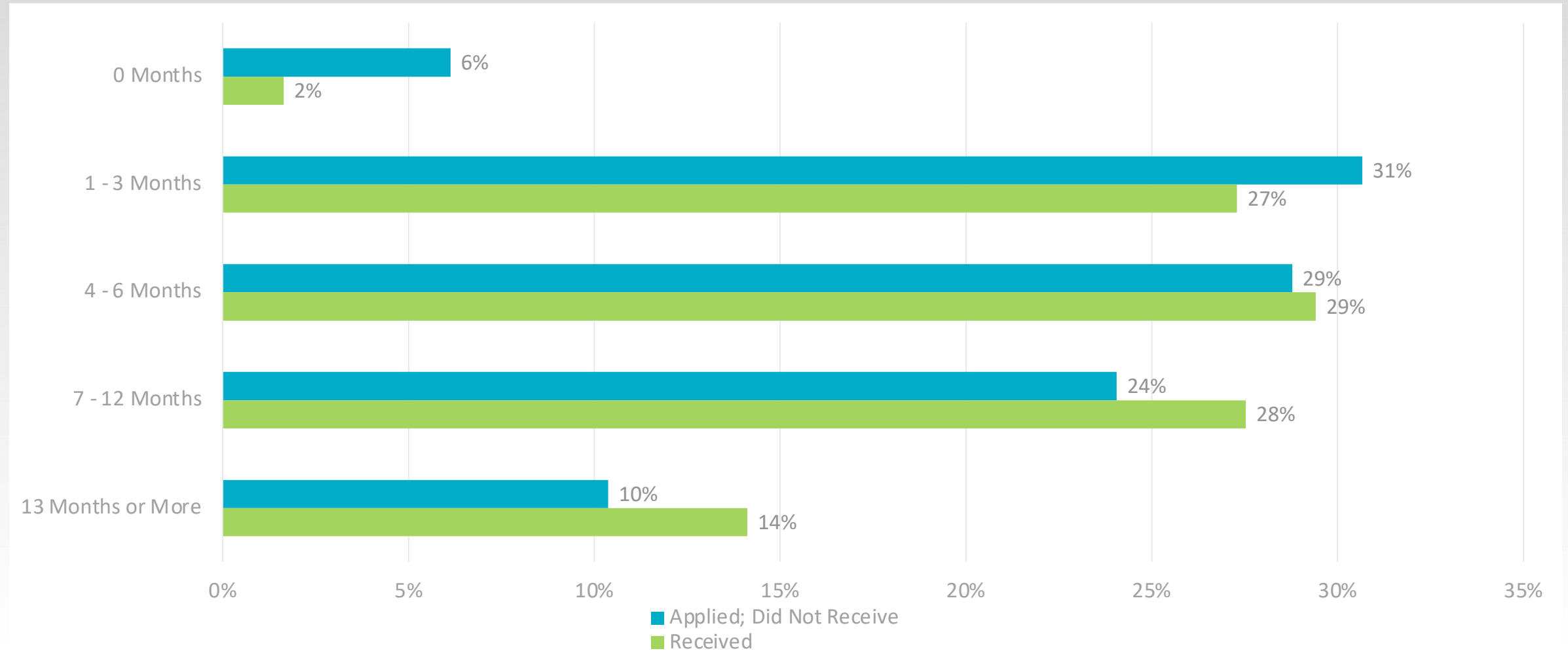
Payroll Protection Program Comparison of Months to Operate



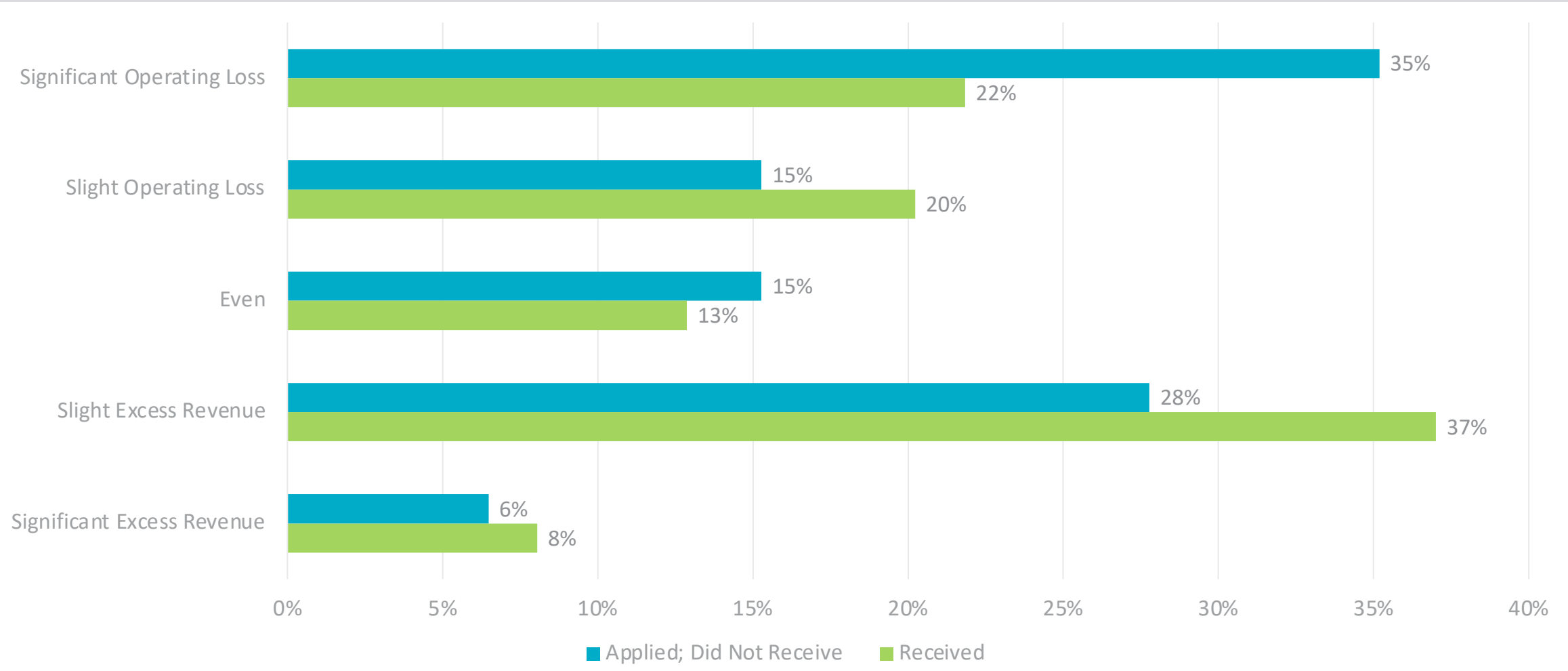
Receiving PPP - Impact on Last Fiscal Year Revenue



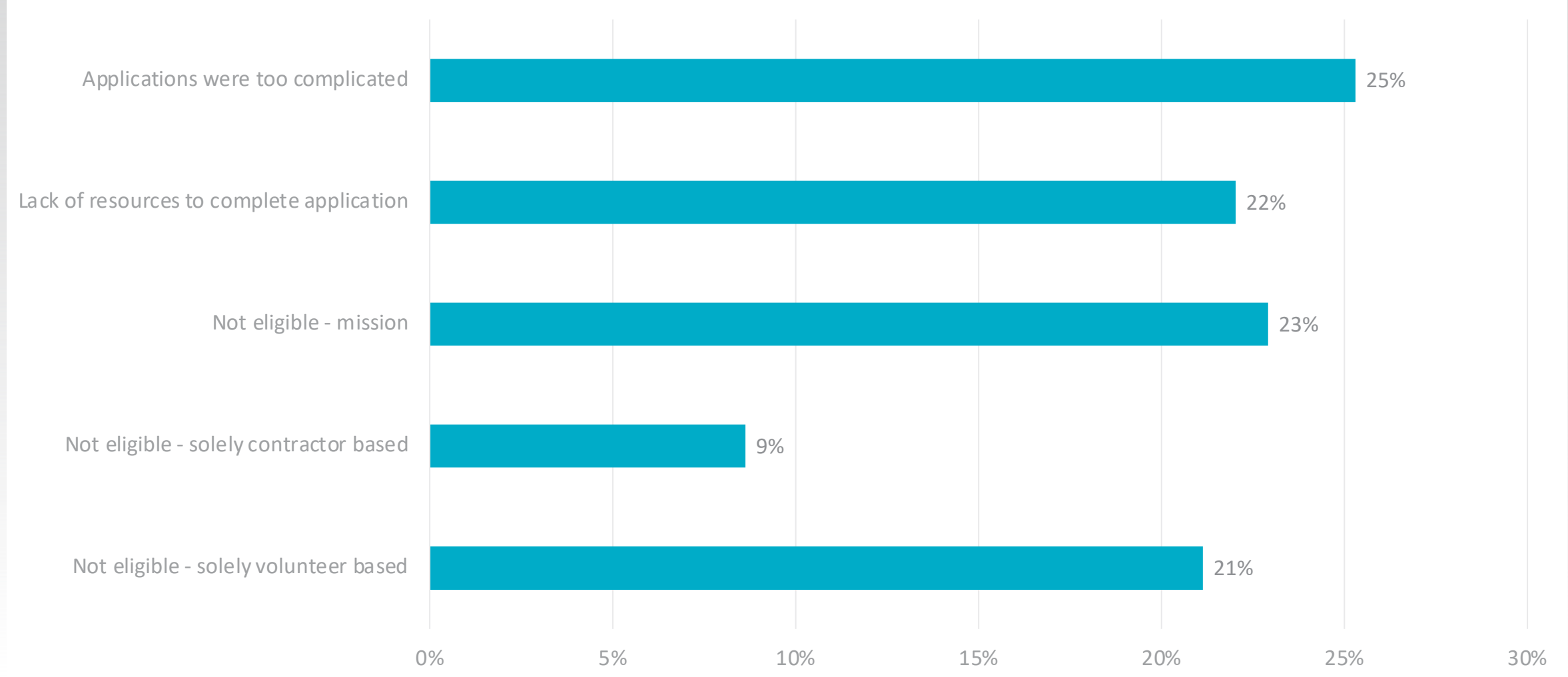
Cares Act Funding - Impact on Months to Operate



Cares Act Funds – Impact of Last Fiscal Year Revenue



Barriers to COVID Funding

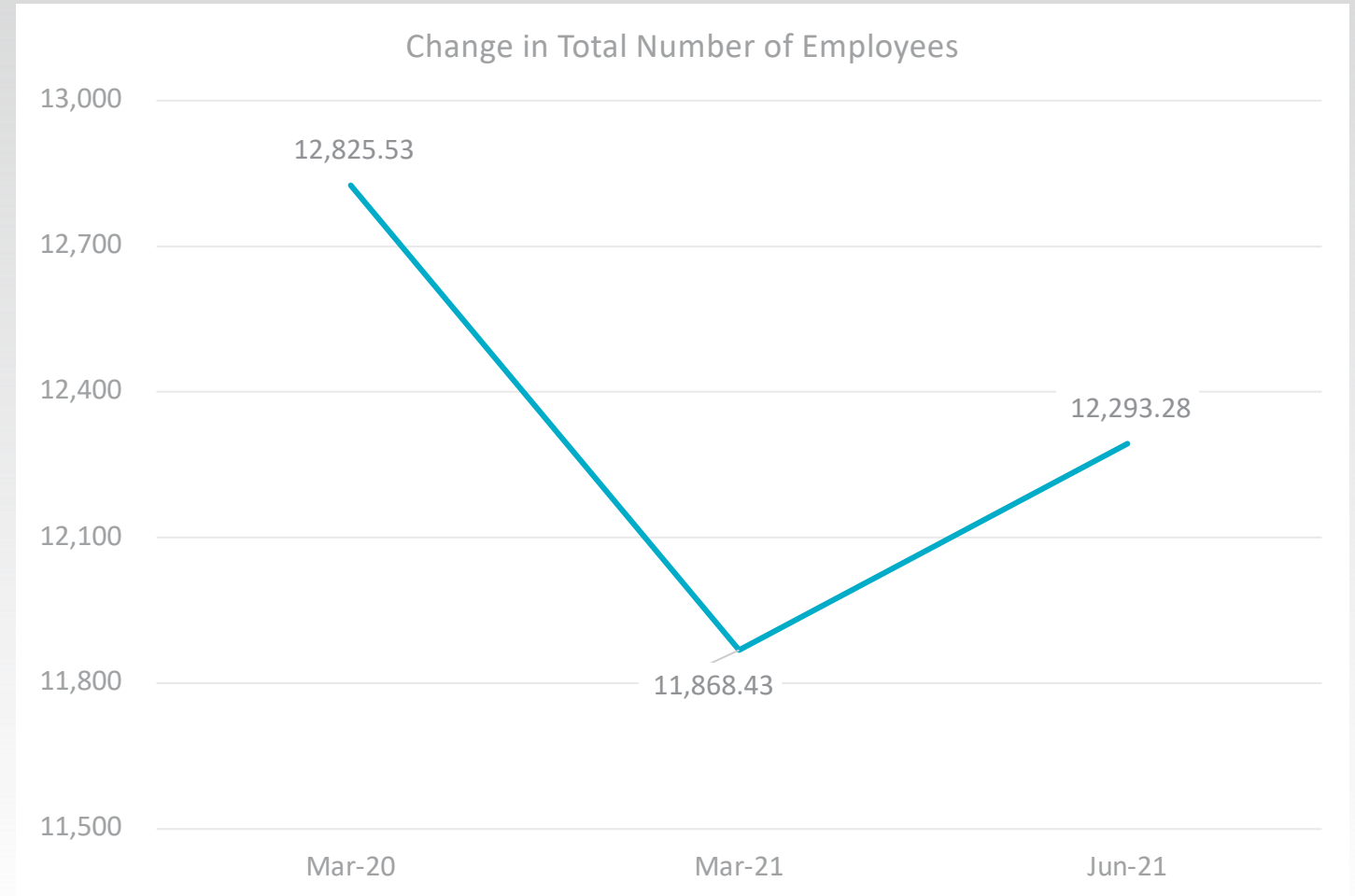




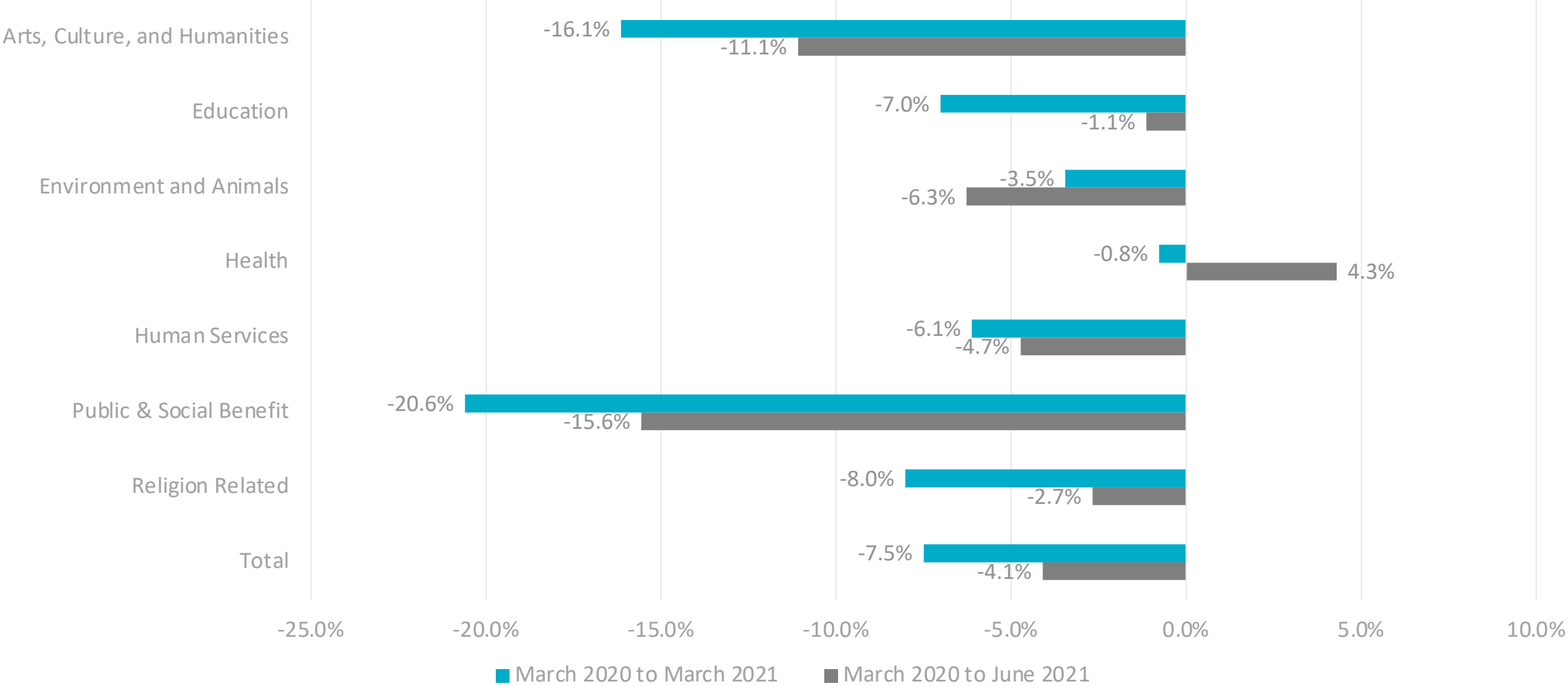
IMPACT ON PEOPLE: STAFF & CLIENTS

FTE Changes

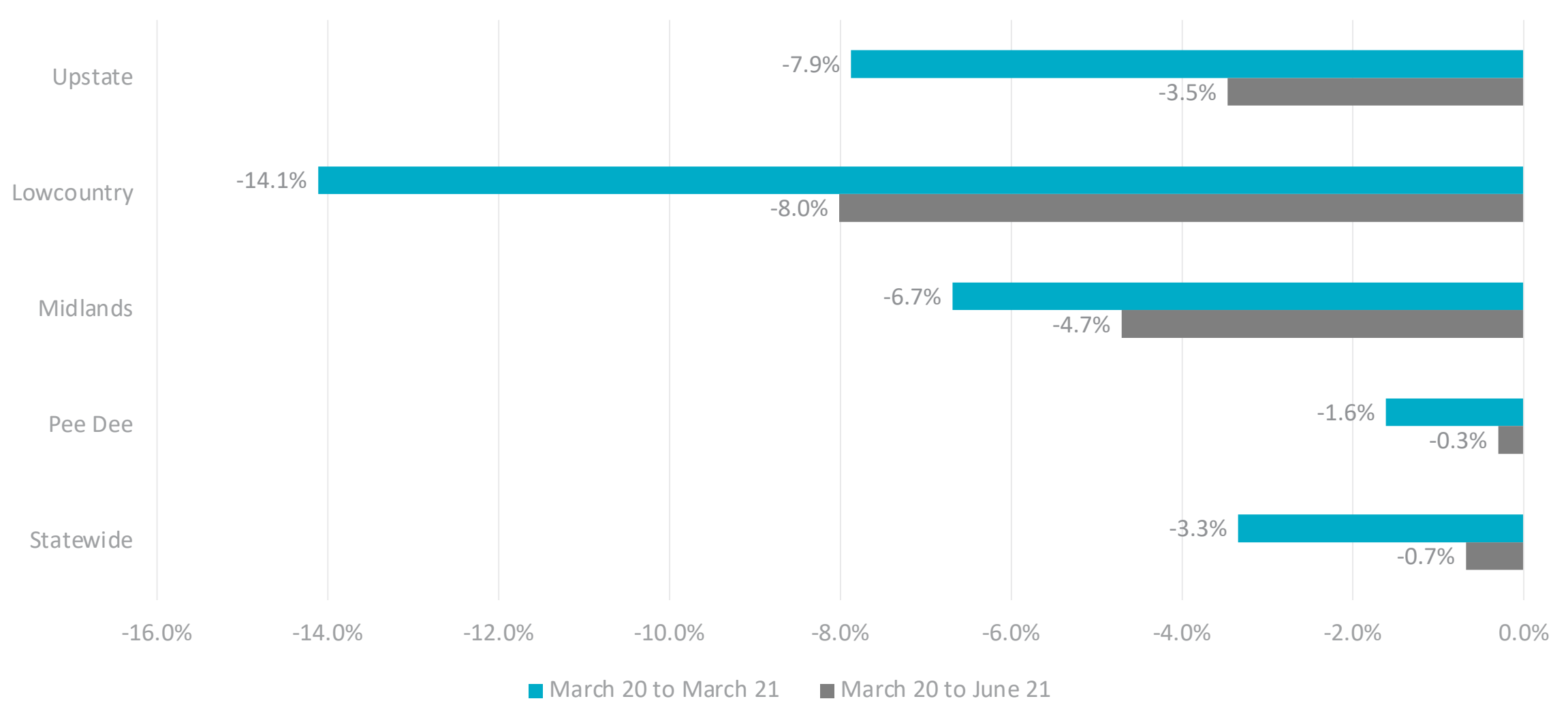
- Change from March 2020 to March 2021:
 - -7.5% (**975 jobs**)
- Expected change from March 2021 to June 2021:
 - 3.5% (**425 jobs**)
- Expected change from March of 2020 to June 2021:
 - -4.1% (**532 jobs**)



FTE Changes by Sector



FTE Changes by Region Served



Impact on **Mission Delivery** because of **Staff Absences** due to **close contact, quarantining or positive COVID-19**

Degree of Impact	Percent	Number
Severe	12.7	109
Moderate	22.5	193
Slight	28.5	245
No Impact	36.3	312

63.7% of organizations report an impact on mission delivery because of COVID effect on staff.

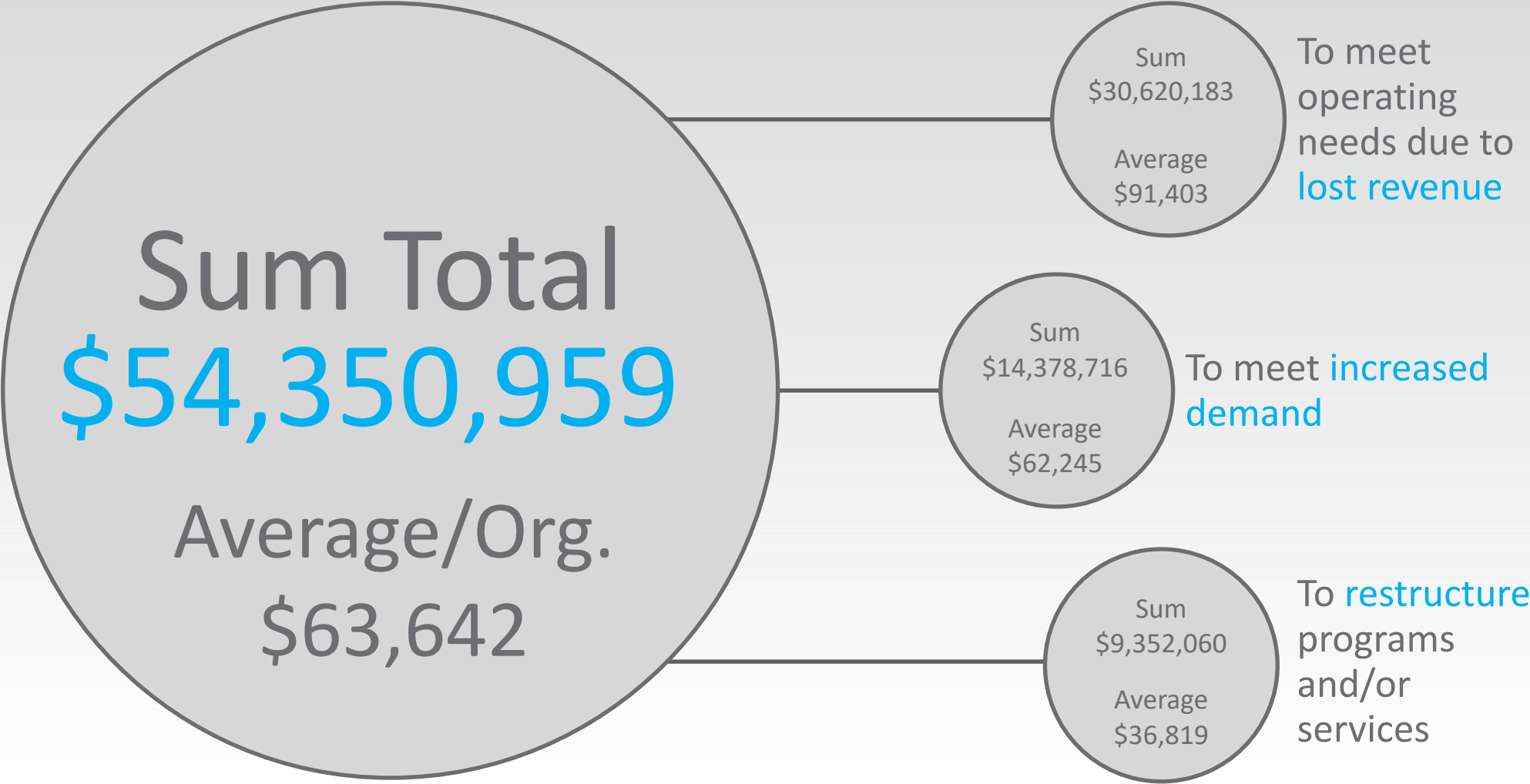
Percent Selecting Increases by Area of Need

Area of Need	Percent	Number
Food Assistance	31.8	255
Rent/Mortgage Assistance	23.8	191
Remote/Tech. Learning Support	23.4	188
Mental Health Services	22.1	172
Health Care Services (physical)	18.7	150
Utility Bill Help	16.2	130
Arts and Culture	14.3	115
Child Care	12.5	100
Job Training	9.9	79
Clothing Assistance	7.7	62
Domestic Violence/Child Advocacy	7.4	59

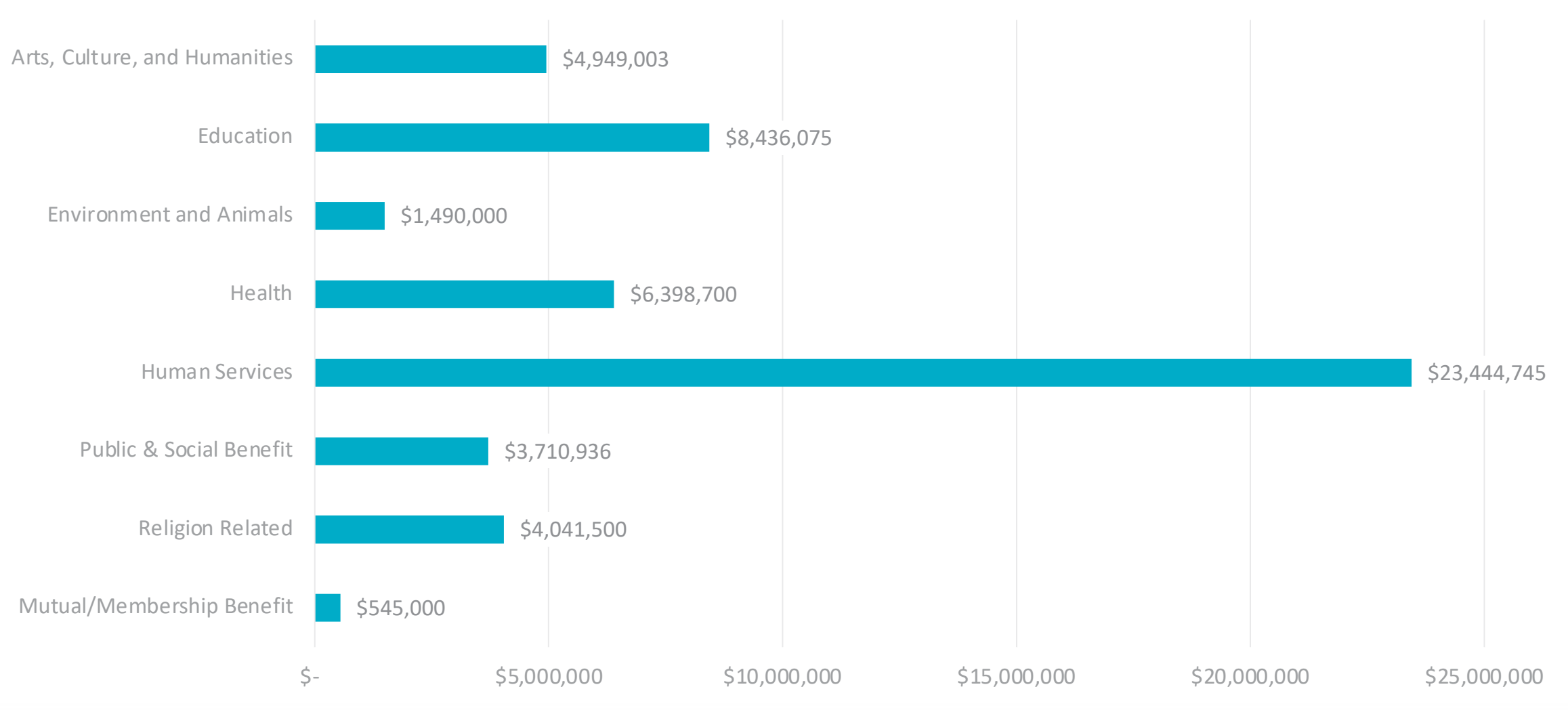


THE ROAD AHEAD

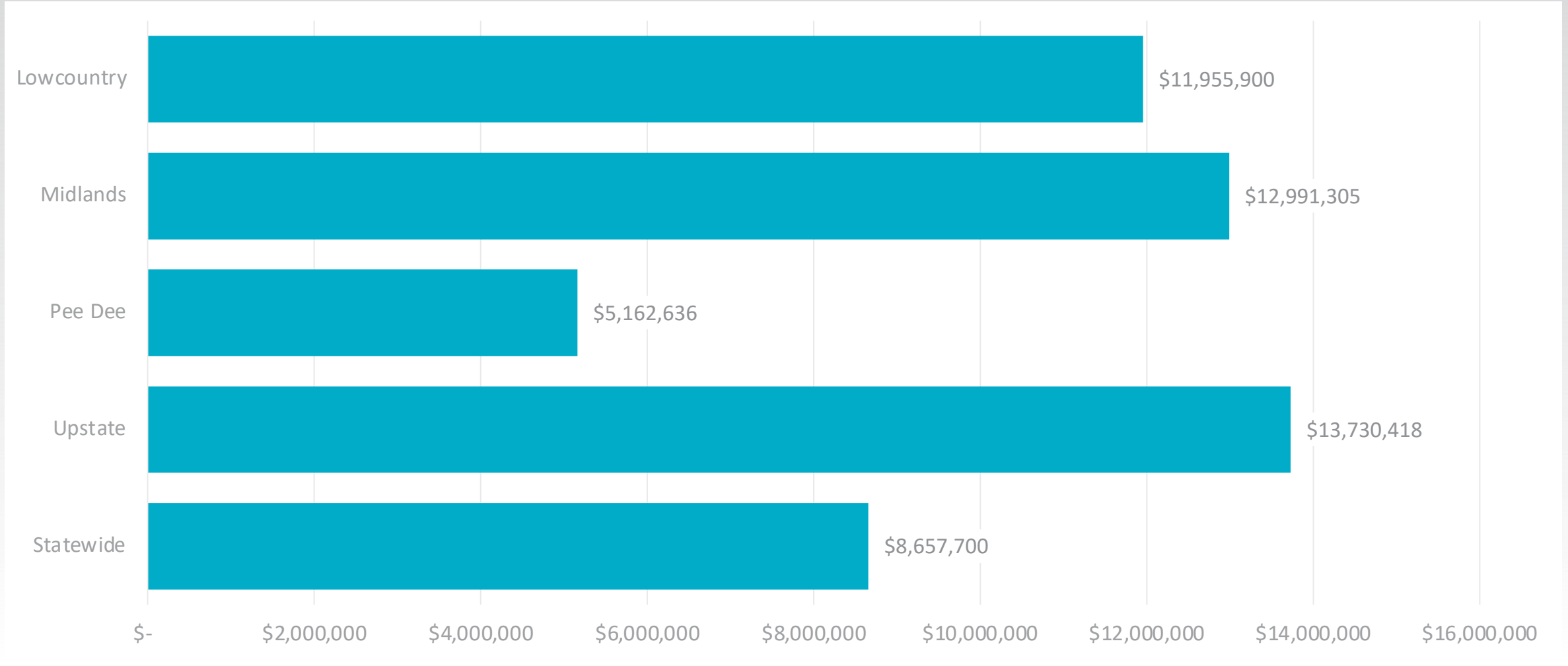
Cash Needs Through June 30, 2021



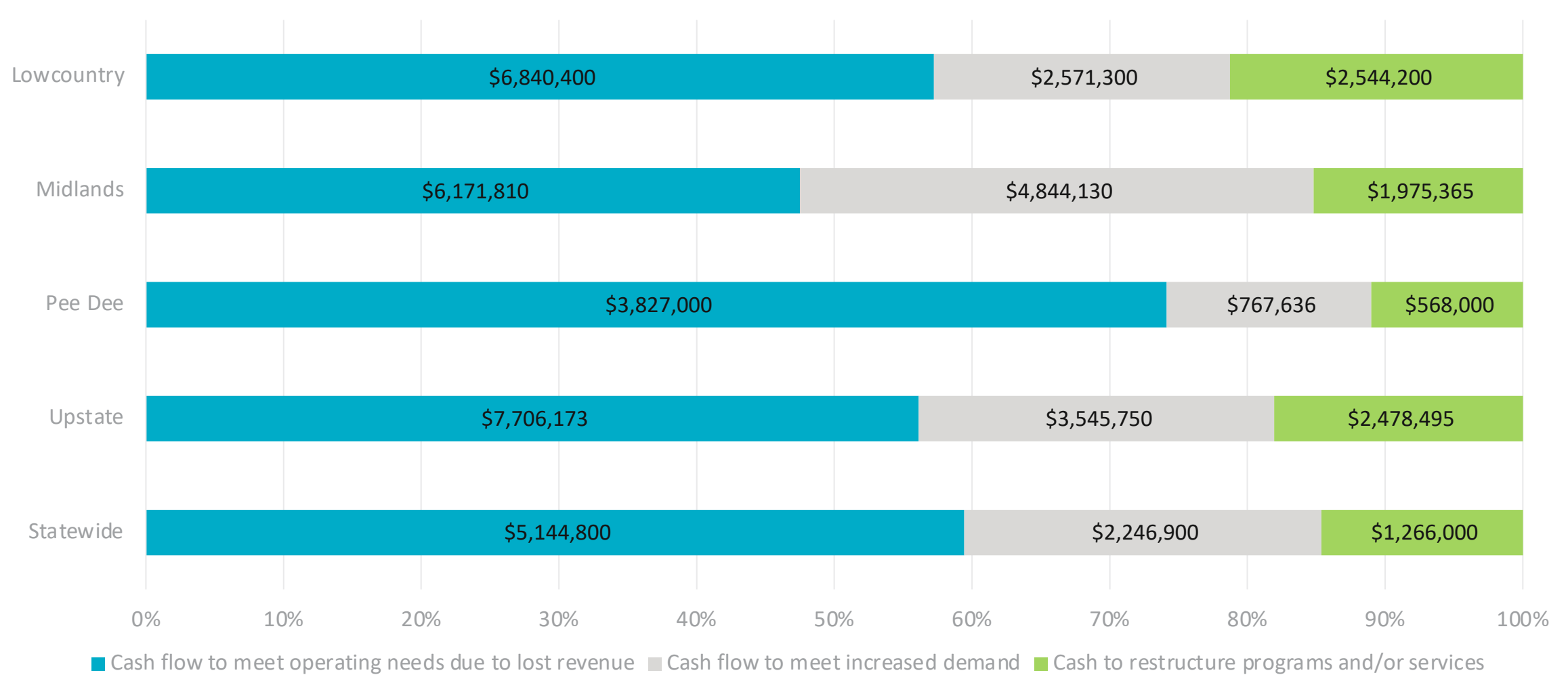
Total Cash Needs Through June 30, 2021 by Sector



Total Cash Needs Through June 30, 2021 by Region



Cash Needs Through June 30, 2021 by Region



Needs Going Forward

Area of Need	Percent	Number
Cash Flow/Help navigating special resources from philanthropy	59.0	470
Managing safe return to in-person service delivery	38.9	317
Supplies (cleaning, sanitizing, PPE)	26.1	208
Mental Health Supports (staff/clients)	20.3	162

Not all response categories shown.



“SILVER LININGS”

Can you see a sliver lining?

Yes 2021 68%

Yes 2020 60%

Positive Impact Area	Percent	Number
Expansion of Service with Virtual Programming	18.9	327
New Partnerships Formed	18.4	318
Improved Community Awareness of Our Organization	15.7	272
Expansion of Reach of Service via Virtual Programming	15.0	259
Strengthened Internal Communication	13.4	232
Reduction in Facility Expenses	6.8	117

Not all response categories shown.

Silver Linings in Their Words

“Telehealth has been life changing for people with disabilities.”

“Children see our dedication to serve them through our consistency even during the pandemic”

“Elimination of marginal programs and reinforcement of essential ones.”

“Receiving PPP funds, SC CARES funding and some unexpected major funding gifts; increased our focus, attention and commitment to racial and social equity; enhanced our attention and commitment to advocacy; developed new tools/platforms/opportunities for engaging/connecting people with our mission.”

“Made needed improvements to our building.”

“Took time to set priorities for our organization.”

“Increased engagement with our Board.”

“An increased atmosphere of teamwork.”

“Streamlined our services; found more innovative ways of doing things; many of the silos that existed before the pandemic have been eliminated; there is an increased confidence in the leadership of the organization surrounding the organizations' response to COVID; we have gained over 500 new donors.”

“Our staff has become more adept at using technology.”

“People are beginning to see the stigma surrounding mental health and opening up.”



SUMMARY: OBSERVATIONS & IMPLICATIONS

Summary: Observations and Implications

- The nonprofit sector is resilient, but government support has proven essential.
- It is not an easy road ahead and many more dollars/resources are needed.
- The sector will continue for the foreseeable future to be mostly about meeting basic human needs.
 - We will know we have made it when arts and culture come back to life.
- Navigating return to in-person service/work will be a challenge.
- We have experienced collective trauma...mental health of staff and clients needs attention now and will be an ongoing need, we anticipate.
- “*Silver Linings*” are profound, constructive and can be leveraged for more impactful future across the sector.



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THANK YOU!