





College of Business and Economics

Institute for Nonprofit Management Studies

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Preface

Over the past year, nonprofit and community organizations throughout Wisconsin received significant blows to their overall sustainability and operational productivity. Due to COVID-19 related closures and shelter-in-place regulations, nonprofit leaders faced an increasing lack of accessibility to the communities they serve and struggled to correct their organizations' financial path.

While comparing data from surveys in both spring and summer of 2020, we find positive and negative trends as well as continuing challenges. As we completed this report, we asked several nonprofit leaders around the state in a variety of sectors to reflect on the challenges they've faced over the past year and share their perspectives on gradual re-openings and re-engagement with their constituents. We hope you find their words insightful.

Finances

Here at United Way of Jefferson & North Walworth Counties, we are doing okay. We were so proud to have been in a position to provide crucial support to our communities and nonprofit partners during the difficulties folks were facing last year. Those struggles have not disappeared, and we are still honored to be in a position to serve. There is still so much uncertainly plaguing our nonprofit community this year, but I feel grateful that we get to exist in that uncertain environment surrounded by incredibly supportive communities, which will allow us to keep fighting for everyone who needs us.

Megan Hartwick, Executive Director, United Way of Jefferson & North Walworth Counties

Programs and Services

With gracious and kind support from so many organizations, volunteers, and donors, we were able to actively help our community throughout 2020 and distributed historic amounts of emergency food. We added new and innovative programs to meet the unprecedented levels of need for food.

As early as March 2020, thousands of additional families directly affected by the COVID-19 crisis were counting on us. We faced a 300% increase in families served in the summer as new families entered our network of food pantries. Many of our neighbors became unemployed and relied on emergency food to get them through until they could get back on their feet.

During this time, we not only lost out on substantial revenue from fundraising events, but also missed out on tens of thousands of pounds of food drive donations that we normally depend on each year. The community quickly became aware of our challenges and, thanks to their enduring generosity, we were able to keep up with the heightened demand. We will never forget the compassion our community gave to our hungry neighbors – it was incredibly inspiring, and we are very grateful for the support. Demand has decreased in 2021 due to the additional government benefits and stimulus programs. We expect demand for emergency food to increase again in September.

Patrick Boyle, Executive Director, Sheboygan Food Bank

Our community has really struggled in the last year. Here at Jake's, our biggest work is our diaper bank program, an essential service. In the first six months of 2020, we more than doubled our impact over 2019. On the volunteer side, our volunteers have historically been retired- a high risk category. This meant our volunteer force all but disappeared. A year later, we are slowly seeing an uptick in volunteers, however we are still drastically reduced over 2019. Some corporations are starting to send volunteers again, others remain remote.

Stephanie Bowers, Executive Director, Jake's Network of Hope

There has been an upside for our organization due to COVID. Once schools closed, parents became the teachers. As parents sat beside their children completing assignments they learned that the reading/spelling and/or math struggles their child was having were more severe than they thought. What used to be visible to parents only 20-30 minutes per evening (homework) became a 6-8 hour per day struggle. In March 2020 we were serving 100 families, now we are serving almost 120. We've experienced nearly a 20% growth in one year during a pandemic. This is fabulous growth, but it has also brought challenges because we can't keep up with the demand. Finding passionate, qualified tutors to support the students we serve is difficult.

Dyslexia Reading Connection, Inc.

In the Fox Valley area, we have seen a resilience of nonprofits who serve our community in many ways. At the start of COVID 19, the community rallied around organizations serving basic needs with an unexpected abundance of financial support. And then as things progressed, they stepped up once again to include the arts, environment, mental health, and many more. So many of our leaders were prepared to lead with agility and creativity, while also tapping into their network of peers for support. The road to full recovery for our nonprofits is still steep. We will never be able to thank enough those that stepped up to support them through financial gifts, training, advocacy, board service and volunteering. All of those gifts will be their legacy to the community.

→ Kim O'Brien, Executive Director, Nonprofit Leadership Initiative

Human Resources

Over the past year, Catholic Charities has adapted to the needs of those in our community especially with the Pandemic and maintained open doors. With several of our programs suspending in person volunteering, we took this as an opportunity to assess the ways that we could help. The agency set up a Senior Hotline, Food Drive and Food delivery as well as went virtual with many of our programs. We utilized volunteers for packing and delivery of items to our neighbors and local parishes. Our Refugee Program went virtual which gave us the opportunity to engage individuals from across the US! We were able to support youth during virtual learning as well as assist their parents in English or Citizenship. This was a great way to gain volunteers with different backgrounds and experiences.

Jessica Brandt, Catholic Charities, Volunteer Coordinator

In March 2020, Discovery World closed its doors, in response to the COVID-19 Pandemic, for the health and safety of its staff, volunteers and guests. Though the museum re-opened in July 2020, Discovery World closed once again in November in accordance with Milwaukee Health Department guidelines. As a hands-on science and technology center, the majority of the museum's volunteer roles during a standard year, work directly with the public, such as aboard Discovery World's tall ship, the S/V Denis Sullivan, in classrooms, exhibit areas and at activity carts. Any volunteer roles that do not allow for proper physical distancing have been suspended since March 2020 but select on-site volunteer roles have been able to continue, such as Volunteer Divers, Aquarist Assistants, and Touch Tank Attendants.

Despite the suspension of most of Discovery World's volunteer opportunities in 2020, 160 volunteers and interns donated nearly 4,000 hours in 2020, as exhibit docents, divers, tall ship maintenance volunteers, administrative assistants, event hands, and more. Volunteers also donated their time remotely sewing face coverings for staff and fellow volunteers, compiling exhibit research, and designing coloring sheets for virtual education programming. In a year of uncertainty, the commitment of Discovery World's talented and generous volunteer community has remained a constant.

In 2021, the museum is seeing a resurgence of volunteers who did not feel comfortable resuming volunteer service previously, many of which who have received the COVID-19 Vaccine. Discovery World is still facing a number of limitations in welcoming back our dedicated volunteers, including the continued suspension of many public-facing volunteer roles, and a reduction in supervising staff members due to layoffs, with availability to oversee volunteer projects and facilitate training. We are endlessly thankful to have the support of our volunteer community, whether through their continued service at the museum or through their words of support from afar.

Kelly Christman, Volunteer and Training Manager, Discovery World

Starting around December 2020 volunteers started looking for opportunities in greater numbers – including in January 2021, Get Connected (our online resource) responses were at pre-pandemic levels.

Based on requests and account signups, there is a pool of new volunteers – this matches a national trend (From the Points of Light survey in October) that people feel they need to volunteer in order to help the country recover and rebuild.

Ages of volunteers are becoming more diverse – Families are now looking for more opportunities to do together, Millennials are getting more involved as ever before – and skilled work volunteering is becoming more popular.

The average age of our pool of 329 Retired & Senior Volunteer 55+ Program volunteers is 74, the population most at-risk for the virus. So, when the pandemic hit northeast Wisconsin in March 2020, this volunteer pool decreased to 24 and two-thirds of RSVP stations closed. In late summer and early fall, more RSVP volunteers returned to modified service at nonprofits focusing on basic needs, with safety guidelines in place. Many nonprofits offered virtual volunteer opportunities, but many of our RSVP volunteers face a technology barrier because they do not have the technical knowledge to communicate using electronic devices. As a result, many volunteers cannot take advantage of virtual volunteer opportunities, other than the telephone. So, this population of volunteers are having a difficult time socializing, which has the potential to affect them negatively, both mentally and physically.

In 2021, we are seeing more interest in volunteering, as community members consider it their civic duty to volunteer, which is an upside. Many are missing the rewards of volunteering and feeling a sense of accomplishment.

→ Volunteer Fox Cities, Appleton WI

Project Overview

To understand the impact of the COVID-19 pandemic on Wisconsin nonprofits' ability to meet their community's needs, the <u>Helen Bader Institute for Nonprofit Management</u> at the UW-Milwaukee, in partnership with the <u>Institute for Nonprofit Management Studies</u> at the UW-Whitewater and our affiliate faculty throughout the UW-System, initiated a longitudinal study in April 2020 in a series of surveys to nonprofit leaders.

This study aims to provide real-time data to government officials, foundations, and other decision-makers about the current economic conditions facing nonprofits and the need for immediate and long-term support to ensure the ongoing provision of critical services throughout Wisconsin. The hope is that, by understanding the effect of the pandemic, we can also better understand the required actions to aid the recovery process.

Our highest priority is to learn directly from Wisconsin nonprofit leaders by connecting with a broad range of nonprofits with a broad array of missions. Based on an established online survey developed by the <u>University of San Diego</u>, data collection efforts focused on a variety of nonprofit capacities potentially affected by the ongoing pandemic, including:

- Human resources, including staffing and payroll
- Finance & revenue, including access to federal stimulus funding
- Effect on programs & service delivery

The survey also collected information on needed resources to understand better ways academic and community partners can assist Wisconsin's nonprofit sector through these developing challenges and beyond.

Research Team

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Layout and design by Mallory VanMeeter at the UW-Madison Center for Community and Nonprofit Studies.



The Helen Bader Institute for Nonprofit Management at the University of Wisconsin – Milwaukee, joined by the Institute for Nonprofit Management Studies at the University of Wisconsin – Whitewater and affiliated faculty throughout the state, is conducting a longitudinal study of challenges facing Wisconsin nonprofits impacted by the COVID-19 pandemic and the resultant economic crisis.

Our highest priority is to hear directly from nonprofit leaders, their challenges in light of quarantine orders and their ability to offer services in what has become known as "the new normal." The study focuses on the impact of the ongoing pandemic on nonprofit capacities, including the effect on:

- Finance and Revenue, including access to federal stimulus funding and payroll
- Programs and Service Delivery
- Human Resources

Our findings are a sobering reality check, uncovering the brittle infrastructure supporting Wisconsin's nonprofit sector. The findings are enlightening and highlight the creativity, strength, and resiliency of this vital workforce that contributes so much to our communities.

Findings from the First Survey

Polled during April 2020, nonprofit leaders presented a story of uncertainty and abundant caution. As you might expect, many Wisconsin nonprofits experienced increased demands for food, shelter, and other necessities. At the same time, school closures, stay-at-home orders, and social distancing challenged their abilities to provide timely responses to community needs.

Our findings are a sobering reality check, uncovering the brittle infrastructure supporting Wisconsin's nonprofit sector.

Nonprofit leaders reported a variety of management concerns and capacity needs:

- Disruption of fundraising and revenue-generating activities; related budget adjustments and overall financial sustainability concerns
- Need for flexibility from funders
- Need for technology support and resources to be able to deliver virtual programming and reach constituents equitably
- Concerns over how to create a safe work environment for staff, volunteers, and clients that promoted engagement and safety

Findings from the Second Survey

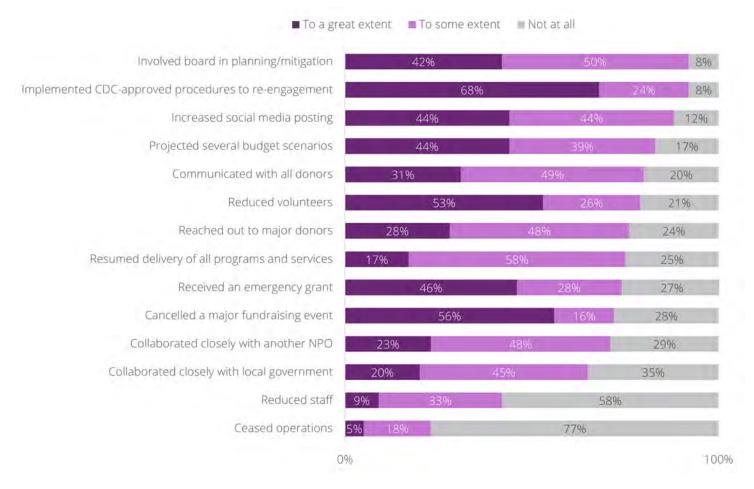
In contrast, the second survey in July 2020 produced some surprising results. Overall, there is a clear indication of increased confidence and stability compared to what we saw in the first survey completed in spring 2020.

Nonprofit leaders are generally far more confident in providing services for their clients and in their ability to meet payroll expenses for the next quarter. Over 91% of nonprofits implemented a moderate to a significant degree of CDC-approved re-engagement procedures, a signal perhaps of greater confidence in the navigation of social distancing as part of their community connection and the integration of safety measures in staff support and program delivery.

However, despite this overall uptick in confidence, over 5% of Wisconsin nonprofits ceased operations. An additional 18% offer services in a severely reduced capacity, suggesting that closure may not be far off for those additional organizations.

Sixty-five percent (65%) of Wisconsin nonprofits applied for and received Payroll Protection Program (PPP) funding, and 12% received federal Small Business Administration (SBA) loans. However, a significant number of nonprofit leaders believed they were ineligible for federal assistance and did not apply for any form of federal support.

Figure 1: Extent of nonprofit responses to COVID-19



Wisconsin nonprofits face a considerable dent in fundraising initiatives and significant losses in program-derived revenue due to an inability to maintain traditional fundraising initiatives and connections to a broader community who face their own financial uncertainties.

Financial shortfalls remain a primary concern sector-wide. The disruption of an entire fiscal year of revenue (both philanthropic and program-derived) has had a devastating effect on future budgetary stability as nonprofit leaders look to plan beyond the immediate future while facing uncertain revenues and financial support.

Three-quarters (75%) of nonprofits received some form of emergency grant and recognized the philanthropic sector's responsiveness. However, significant concern remains in communicating their immediate needs to government and philanthropic leaders. Early fears of the unknown are surpassed by a growing degree of stability as nonprofit leaders utilize creativity and adaptability to sustain their services. But it is clear that a return to "business as usual" is still very far off, and the nonprofit sector is far from immune to the economic challenges brought about by quarantine and isolation.



Finance and Revenue

Nonprofit organizations are confronting unprecedented financial challenges due to COVID-19. Immediate and significant disruptions in operational and programmatic budgets led to a significant fiscal shock, threatening nonprofits' capacity to continue services and meet financial obligations. By late summer 2020, nonprofit organizations note significant threats to revenue streams as nearly three-quarters (72%) of organizations have canceled major fundraising events to some extent.



We canceled our main fundraiser that pays our rent for the year. We have canceled all art classes. Membership the year. We have canceled all art classes. Membership has dropped."

Arts, culture, and humanities organization

Two leading indicators of financial stability are the ability to 1) adequately provide services for the clients and 2) fund payroll for the next twelve weeks. Nonprofits did not report a significant improvement in financial stability compared to the previous survey period.

Figure 2 provides a detailed overview of the two financial stability indicators. Eighty-two percent (82%) of nonprofits are "somewhat to very likely" to fully fund payroll for the next 12 weeks, only 7% higher compared to the results reported in the first survey. Examining the operational capacity of nonprofit organizations, 80% of organizations report they are "somewhat to very likely" to fully fund operations for 12 weeks. The improved capacity is evident in comparison to 62% of respondents in survey one who were "very to somewhat likely" to fully fund operations over a shorter time period of the next eight weeks.

100% 10% 12% 1196 6% 19% 26% Very unlikely Somewhat unlikely 50% Somewhat likely Very likely 63% 54% 0% Operational capacity Payroll capacity

Figure 2: Ability to cover operational and payroll costs over the next 12 weeks

Financial Concerns

Many respondents express concerns about their organizations' inability to fulfill their financial obligations due to significant disruption in revenue streams that leave organizations with sizable budgetary deficits.

66

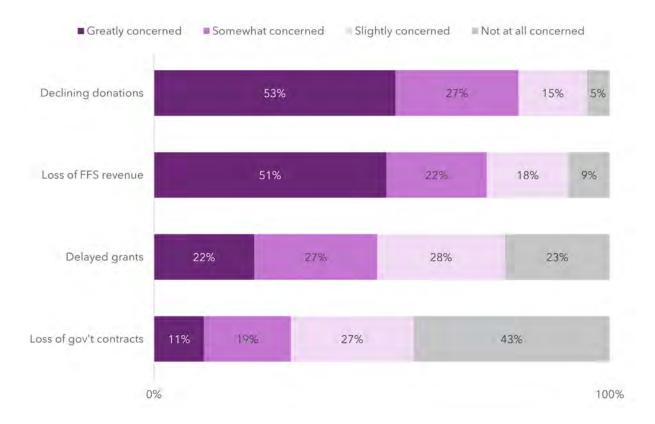
If donations continue to decline and this is combined with no gala revenue, I am concerned about having to change our staffing structure or how we serve our clients. We provide such basic things for them, I'm not sure what we could even cut."

Human services organization

Revenue Shortfall

Figure 3 highlights concerns over declines in nonprofit revenue. Eighty percent (80%) of respondents are "somewhat or greatly concerned" about declines in donations, 73% about the loss of fee-for-service (FFS) revenues, nearly half of respondents report being "somewhat to greatly concerned" with delays in grant processing time, and 30% concerned with lost government contracts.

Figure 3: Revenue Shortfall Concerns





[I am] concerned about the long-term health of our organization. [We] have reduced major services and will have a large deficit this year."

Arts, culture, and humanities organization

Service sustainability

Figure 4 highlights concerns about the impacts of revenue shortfalls. Over three-quarters of respondents (79%) are "somewhat or greatly concerned" about services to their most vulnerable clients, and 58% are concerned about the potential of discontinuing non-core services. While 44% reported being "somewhat or greatly concerned" about the prospect of employee lay-offs, only one in five respondents worry about meeting rental payments.

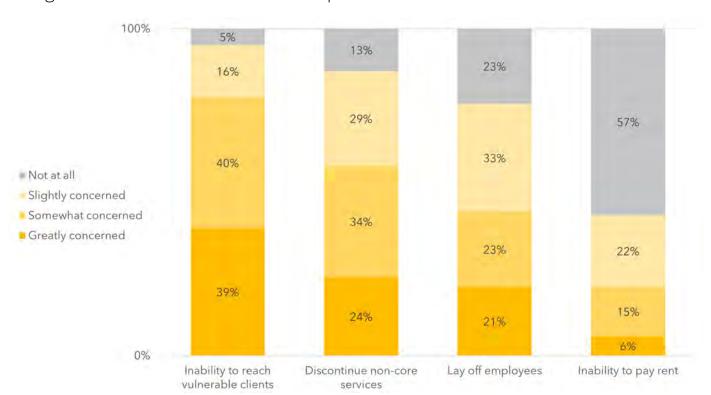


Figure 4: Concern Over Revenue Impacts

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[Our] earned revenue streams [...] are near \$0. It is difficult, if not impossible, to continue to keep our costs reduced by this reduction in revenue. This risk may lead to the massive shrinking in the states arts and culture industry."

Arts, culture, and humanities organization

Financial Strategies

Cost Reduction

Figure 5 shows the strategies respondents took in the summer months to reduce expenses and ensure financial sustainability. To some or greater extent, most organizations reached major donors and implemented budget scenarios, 76%, and 83%, respectively. Even if 74% of respondents had received some emergency grant funding, and 76% had reached out to major donors, reducing staff is the major cost-cutting category (42% to some or greater extend), followed by the ceased operations category (23% to some or greater extent).

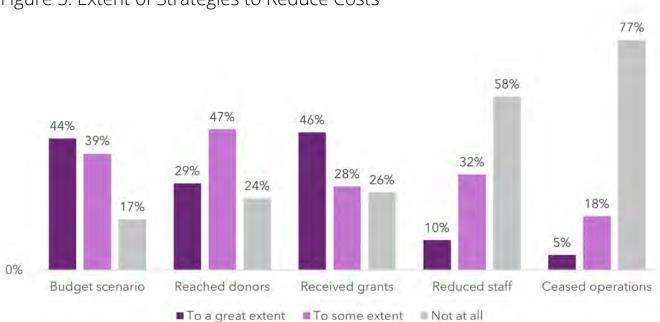


Figure 5: Extent of Strategies to Reduce Costs

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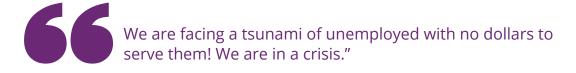
[I am concerned with] a loss of employees who do not want to come back, \$1 million loss at the end of the year 2020, and how to predict a balanced budget for 2021."

Education organization

Grant Assistance

Respondents reported seeking financial assistance from other sources. Among the three federal grant programs, the Paycheck Protection Program (PPP) was the most popular. Two-thirds of the respondents had received PPP funding.

The respondents mentioned why their organizations did not receive grants or applied for the PPP: 61 % did not qualify, 14% had sufficient funds, and 25% were unsure how to apply. There was minimal participation in other federal programs. Only 18% of respondents reported that their organizations applied for Economic Injury Disaster Loans (EIDL), and 2% applied to the Midsize Loan programs. The low participation in these programs was explained by the ineligibility (40%) and a lack of knowledge about the program (26%), while 34% stated that their organizations had sufficient funds to continue operations.



Human services organization

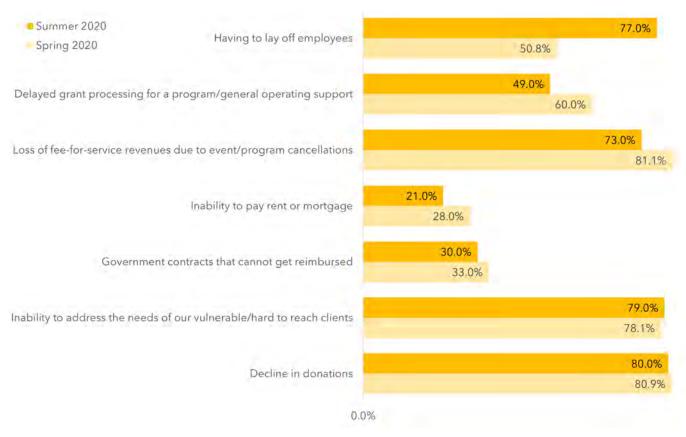
Overall, there are signs that Wisconsin nonprofit organizations are experiencing financial stress and are applying for financial assistance to deal with the current and future financial difficulties. Nonprofits attempted to mitigate these revenue shortfalls primarily through cost reduction strategies and applying to various grant programs. Whether nonprofits can continue to find methods to sustain their operations remains to be seen.

Programs and Services

When examining the challenges surrounding program delivery in pandemic conditions, we find that the percentage of nonprofits offering regular programs and services in a moderately to severely reduced capacity has fallen slightly from 46.9% to 44.8%. This can be interpreted as somewhat good news, indicating less stress in program delivery. Reportedly, programs and services continue to be delivered, but in a very different way, by 19.7% of nonprofits, up from 17.4% in the first survey, a finding that possibly indicates a greater comfort level navigating pandemic regulations. Meanwhile, the percentage of nonprofits indicating they are "somewhat likely" to "very likely" able to provide adequate services over the summer increased from 62.5% to 75.6%, indicating greater stability.

Figure 6 (below) compares the level of activity among Wisconsin nonprofits to alleviate organizational challenges brought about by the pandemic and the resulting closures. As time passed, nonprofits have felt the impact of the resulting closures on overall operations.

Figure 6: Organizations at Least Somewhat Concerned by Sustainability Challenges, Spring and Summer 2020



In response to several questions that weren't asked in the first survey, the percentage of nonprofits indicating they have implemented CDC-approved procedures for re-engagement is 91.6%. Accordingly, the percentage of nonprofits that resumed delivery of all programs and services by summer 2020 stands at 74.8%. However, from a more sobering perspective, by summer 2020, the percentage of nonprofits indicating they had ceased operations altogether rose 23%, resulting in a cumulative 5% of all Wisconsin nonprofits responding to these surveys shuttering their doors.

In Figure 7 (next page), respondents address administrative and sustainability challenges since the pandemic's beginning. While opinions indicate only minor shifts since the early pandemic, the areas of growing concern are noteworthy. In comparison, while there is less concern about a decline in donations due to more robust donor communications, we note an increase in concern regarding other types of revenue. Specifically, nonprofit leaders voice concern over potential declines in government contracts and fee-for-service revenue — the result of this being a more significant concern for staffing impacts and the potential staff lay-offs that could result from these changes.

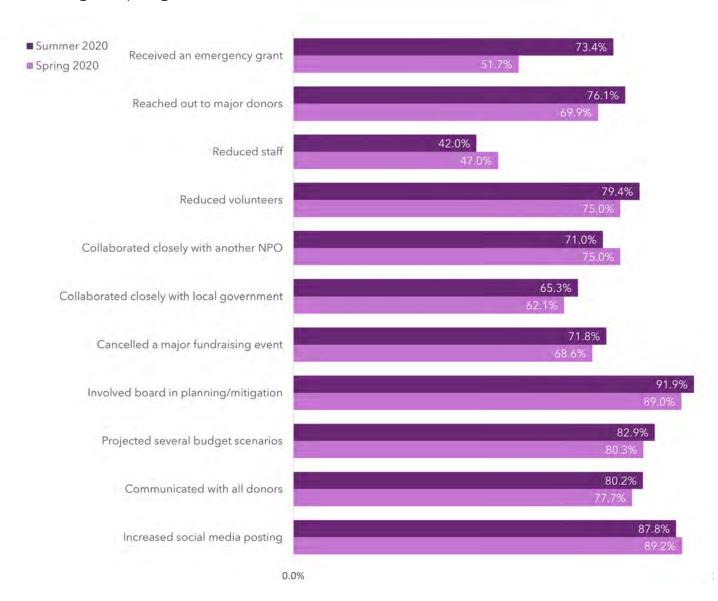
Additionally, we found that by summer 2020, 53% of nonprofits responded they are "slightly to greatly concerned" about discontinuing some non-core services. In an attempt to guard against further damage, a significant number of nonprofits upped their communications efforts to donors at all levels, with a significant focus on major donors.

The Need for Assistance

In both surveys, we asked, "What could the academic and community partners around the state assist you with most?" The number one and number two responses remain the same. Nonprofit organizations continue to seek assistance with 'Financial Scenario Planning' and 'Sharing of Real-Time Data' to funders, government agencies, and the broader community.

Wisconsin nonprofits have continued to evaluate their needs in the face of challenges delivered by the COVID-19 related closures, noting some significant increases in areas of assistance. Organizations seeking guidance and support for their board of directors increased by 37%, and organizations seeking 'Technology Support' increased by 28%. Finally, while 'Reevaluating Fundraising Strategies' was not a significant portion of the overall responses in Summer 2020 (5.32%), this shows a 77% increase from Spring 2020 (.03%).

Figure 7: Organizations at Least Somewhat Concerned by Sustainability Challenges, Spring and Summer 2020



Human Resources

Nonprofit leaders are extremely concerned about short and long-term impacts on both staff and volunteers. Leaders face many human resource challenges, including fear of potential staff layoffs, rising healthcare premium costs, reduction in staff and volunteer numbers, lack of Board support, and health and safety concerns for staff, volunteers, and clients.

The second survey has some good news, as 58% of nonprofit organizations experienced no staff layoffs. However, there is cautious optimism as two-thirds (77%) of nonprofit leaders remain concerned about the potential for staff layoffs in the future, a rate consistent with results from survey one. Layoff fears continue to be just as strong as the early days of the pandemic. As expressed by one nonprofit leader,

"Longer-term into the fall and winter months, we are concerned about having to shut down our retail second-hand store which is our largest source of unrestricted revenue. If this happens due to another outbreak or mandated shutdown, it would be another company-wide layoff."

Human services organization

Another challenge facing NPO leaders is the high costs of staff healthcare. Nonprofit leaders acknowledge that increased premium rates may require reductions in expenses elsewhere in the organization, such as management/staff hours. A common refrain is that,

"Health insurance renewals for staff are skyrocketed. This is extremely burdensome."

Human services organization

Management recognizes that staff and volunteers are the backbones of nonprofit organizations. There are fears that some employees will not return to work because of personal choices brought on by the pandemic or their skills no longer match the post-COVID needs of their organizations.

NPO leaders highlight the challenges facing organizations that are dependent on volunteers to keep their doors open.



"We have lost a large number of our volunteer base that is aged 60+ due to their fear of coming into contact with people that may be carrying COVID. This has placed an increased load on our very small staff who are forced to work too many hours, and this then causes us financial concerns and the added stress to our small staff."

Human services organization

The loss of volunteers ripples throughout organizations placing additional stress on already reduced staffing numbers struggling to provide services.

Nonprofit leaders continue to report Board and governance challenges, some of which are exacerbated by the pandemic. Factors such as Boards that are not constituted as fundraising boards, overwhelmed by policy issues, or 'personal anxieties' of Board members have, in combination, contributed to challenges to developing donor relations and fundraising activities. Reportedly, the lack of organizational support and assistance from Boards has placed additional burdens on employees at all levels who must pick up the slack.

Finally, health and safety concerns exist and continue to impact organizational operations. The fears expressed early in the pandemic of COVID exposure among staff and clients has become only too real for some organizations,



A top concern is the health and safety of our clients and workforce. Since reopening our program on a limited basis in summer, we have already had experiences of serving individuals with suspected and confirmed cases of COVID-19 in our buildings despite enhanced screening procedures. As community spread increases, we are aware of the increasing risk that we may need to partially or fully close our programs due to additional exposure."

Human services organization

Survey Respondents

There were some noticeable changes in the mission focus of respondents from spring 2020 to summer 2020.

In spring 2020, the primary respondents were in (1) Human Services, (2) Arts, Cultures and Humanities, and (3) Environmental organizations. By summer 2020, however, the representation by each of these three groups had decreased as a percentage of overall participation. While Human Services and Arts, Culture & Humanities organizations remained the predominant respondents, they were joined by Health-focused organizations to make up the most significant portion of responses (50.6%). We should note that this difference can be attributed to increased response numbers from Animal Welfare, Health, and Higher Education organizations. Meanwhile, respondents listing their service area as "Other" showed the highest increase in response rate overall (45%).

Nonprofit organizations throughout Wisconsin serve a broad range of needs and communities. While most nonprofit organizations target their services and programs to a mixed community demographic, some nonprofits serve specific community needs. In terms of service areas, for example, 7.3% of the respondents serve a completely adult community, 9.6% serve a community entirely comprised of children and youth, and 5.3% exclusively serve low-income individuals and families. Organizations that exclusively serve immigrant or LGBTQ communities do not appear in the second survey results.

Respondent organizations serve a diverse racial population. Somewhat reflective of the overall Wisconsin population, 74.5% of respondents serve a predominantly white population. Meanwhile, 19.6% of the respondents serve a predominantly Black or African American population, and 8.5% serve a predominantly Hispanic or Latino population.

In terms of leadership and staffing, approximately 74% of nonprofit organizations indicate that their board composition mirrors the communities they serve. Additionally, approximately 70% of nonprofits indicate that their executive director/senior leadership reflects the population they serve. Finally, 82% of nonprofits indicate their staff reflects the population served. Based on the survey sample, the leadership and staff of a majority of nonprofit organizations in Wisconsin are representative of the populations they serve.







College of Business and Economics

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The COVID-19 Effect on Wisconsin's Nonprofit Sector

Understand the problem. Find a solution. https://uwm.edu/hbi/research/survey/