



The State of Nonprofits in Santa Barbara County

2021 RESEARCH FINDINGS





About the Santa Barbara Foundation

The Santa Barbara Foundation, the largest community foundation in the region and the county's go-to resource for investment and capacity-building, strives to ensure that all residents can thrive. Nearly every Santa Barbara County nonprofit organization and essential community project has been supported by the Foundation during its almost 94-year history.

The Foundation is working to improve areas that affect quality of life in Santa Barbara County, including support for basic needs, and addressing the concerns of the working family, including child care, workforce development, and workforce housing. The Foundation connects those who give with those in need - and all who dream of stronger communities. To learn more, please visit SBFoundation.org.

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About The Nonprofit Institute at the University of San Diego

The Nonprofit Institute is housed in the School of Leadership and Education Sciences at the University of San Diego. The Nonprofit Institute provides education, training, and research to strengthen organizations that help meet critical community needs.

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Nonprofit Research

About DataLake, LLC

Nonprofits and philanthropies depend on research to make big decisions. DataLake Nonprofit Research helps organizations understand and serve their communities.

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INTRODUCTION

This report provides the most up to date and holistic picture of Santa Barbara County's nonprofit sector. After a turbulent and unpredictable global pandemic that shook the sector, the data reveal key insights to guide funders, practitioners, and government agencies in collaborating toward reopening and rebuilding. Additionally, these data serve as an important baseline for future research on the nonprofit sector in Santa Barbara County.

Methodology

The report draws from multiple data sources, including 1) IRS Tax Form 990 data on exempt nonprofits and California Employment Development Department Data compiled and analyzed by DataLake LLC, 2) a nonprofit leader survey designed, administered, and analyzed by The Nonprofit Institute (NPI) at the University of San Diego in collaboration with the Santa Barbara Foundation, and 3) focus group style breakout session discussions with nonprofit professionals at the 2021 Partnership for Excellence Conference designed and facilitated by The Nonprofit Institute at the University of San Diego in collaboration with the Santa Barbara Foundation and summarized by the Santa Barbara Foundation. Note that percentages in this report may not always total 100% due to rounding.

Data Sources

- 1. IRS Business Master File (BMF) of exempt organizations, circa 2021.** This data source was used to analyze data on the number of public charities and private foundations, classified by subsector based on groupings of National Taxonomy of Exempt Entities (NTEE).
- 2. IRS Form 990 and 990-EZ public charity returns, circa 2012-2019 (IRS e-File and GuideStar digitized datasets)¹.** This data source was used to analyze trends in nonprofit financials, including the sector's revenues, assets, and expenses.
- 3. Labor Market Information Division, California Economic Development Department (2020).** This data source was used to summarize nonprofit employment and wages.
- 4. 2021 Annual Nonprofit Leader Survey of Santa Barbara County.** This survey of 187 nonprofit leaders collected information on nonprofits' demand for services, financial outlook, organizational capacity, and sector trends in light of the COVID-19 pandemic. The survey was administered online in May 2021 and is a convenience sample of Santa Barbara County's nonprofit sector. The survey sample is slightly overrepresented in Human Services nonprofits and slightly underrepresented in Education nonprofits. In terms of budget size, the smallest organizations (budgets less than \$250,000) are underrepresented and larger organizations (budgets over \$10 million) are overrepresented.

The quantitative survey data analysis included descriptive statistics to summarize the data (i.e., frequencies, percentages, means, medians, etc.) and independent sample t-tests to compare the mean percent of two different groups of interest. Additionally, comparative analyses through cross-tabulations of variables are inserted intermittently. Qualitative or open-ended responses were analyzed for recurring themes and the top themes are reported. When appropriate, direct quotes are provided as evidence of themes. Quotes have been edited

¹ The majority of nonprofits are relatively small, therefore most of the analyses (unless otherwise noted) are presented without including a small number of dominant higher education institutions (5), hospitals (4), and the International Organization Direct Relief, that represent more than 41% of total revenues and 42% of total assets.

for readability. All quotes in the report are from survey respondents and are completely anonymous unless permission has been given by the organization to share identifying information. Survey demographics are included in Appendix A.

5. 2021 Partnership for Excellence Breakout Session Focus Groups. The breakout sessions, which functioned as focus group style engagements with nonprofit professionals from organizations across Santa Barbara County, were conducted at the Partnership for Excellence virtual conference in October 2021. There were five breakouts focusing on topic areas that NPI and SBF identified as gaps in the survey results or areas that needed further investigation. Thematic areas included: Workforce Retention and Hiring, Staff and Volunteer Wellness, Strategic Planning and Long-Term Recovery, Reopening and Hybrid Operations, and Diversity, Equity, Inclusion and Access (DEIA). Participants self-selected into a breakout topic area, where they were asked two open ended questions. Participants were offered the opportunity to write their responses to the questions as well as to engage in a discussion about their and other participants' responses

An overview of the compiled findings from the focus group breakouts can be found in Appendix B of this document. Findings from the breakout sessions are also integrated, where applicable, in the pop out reflection boxes composed by the Santa Barbara Foundation.



Report Flow

The Nonprofit Leader Survey was designed, administered, and analyzed by the Nonprofit Institute. The questions for the breakout session focus groups at PFE were designed by the Nonprofit Institute and facilitated by NPI and SBF staff. SBF staff also acted as note takers in all five breakout sessions and collated and wrote up the findings (included in Appendix B of this report). The secondary source quantitative data for this report was collected and analyzed by DataLake.

The majority of this report was drafted by The Nonprofit Institute. When possible, the report follows the order of the nonprofit leader survey. However, questions are sometimes out of order in favor of a logical flow of information. Data from the IRS is integrated into the financial section and data from the California Economic Development Department is integrated into the employment section. The report begins with an overview of the size and composition of the sector. In the spirit of transparency, the Santa Barbara Foundation has opted to release the findings from NPI's leader survey, the NPI/SBF breakout session focus group collaboration from PFE, and DataLake's secondary data analysis. The Santa Barbara Foundation looks forward to further conversations on the topic areas covered here and others, which stakeholders would want to see in the future as part of an annual assessment of the State of the Nonprofit Sector.

Throughout the report, readers can find yellow pop out boxes with reflections from the Santa Barbara Foundation. We've separated out the content in this way in order to clearly delineate what content was produced by third party consultants, and which was generated by the Santa Barbara Foundation.

How to use this report

- Educate donors, funders, public officials, nonprofit professionals and the communities they serve to develop a more comprehensive understanding of both the strength of the nonprofit sector and the challenges it faces
- Incorporate the findings into the development of programs to strengthen organizational leadership and management
- Advocate for additional and/or focused investments in the nonprofit sector
- Use the data to identify critical areas in need of further inquiry



SIZE OF SANTA BARBARA COUNTY'S NONPROFIT SECTOR

According to 2021 data from the IRS, Santa Barbara County's nonprofit sector is comprised of 2,029 nonprofits and 279 private foundations. There are 482 additional 501(c) tax-exempt organizations that are not classified as a nonprofit or private foundation and are not included in the analysis for this report.

Table 1: Santa Barbara County Domestic 501(c) Tax Exempt Organizations, June 2021

Tax Exempt Organizations	Count
All 501(c)(3) Organizations	2,308
501(c)(03) Nonprofits	2,029
501(c)(03) Private Foundations	279
All Other 501(c) Organizations	482
All 501(c) Organizations	2,790

Santa Barbara County is unique in that it saw a decrease in the number of registered nonprofits in 2021 while all comparison counties as well as the state and nation continued to experience growth. Although this decrease in the number of nonprofits is small and may be an anomaly, it is a trend to monitor in the future.

Table 2: Number of Registered 501(c)(3) Nonprofits in Select Counties, June 2021

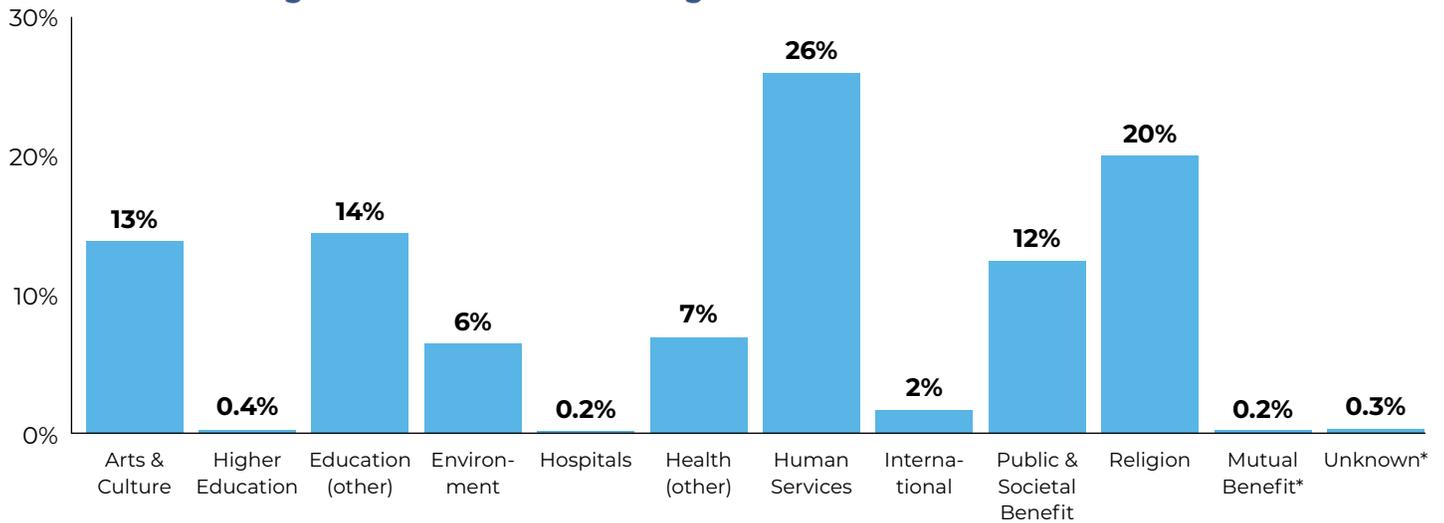
	2017	2018	2019	2020	2021	PCT Change 2020 to 2021
Santa Barbara County	1,919	1,968	2,017	2,056	2,029	-1.31%
Monterey County	1,257	1,300	1,343	1,376	1,378	0.15%
Sonoma County	2,067	2,112	2,155	2,197	2,231	1.55%
San Diego County	10,885	11,234	11,523	11,756	11,910	1.31%
California	129,112	133,521	137,037	141,042	142,105	0.75%
United States	1,159,133	1,202,420	1,240,571	1,281,986	1,298,214	1.27%

Human Services organizations account for the largest share of the sector followed by Religion, Education, and Arts and Culture respectively.

Table 3: Number & Percent of Registered 501(c)(3) Nonprofits in Santa Barbara County by Subsector, June 2021²

Description	Frequency	Percent
Arts and Culture	260	13%
Higher Education	9	0.4%
Education (other)	288	14%
Environment	130	6%
Hospitals	5	0.2%
Health (other)	135	7%
Human Services	519	26%
International	34	2%
Public and Societal Benefit	242	12%
Religion	396	20%
Mutual Benefit*	4	0.2%
Unknown*	7	0.3%
Total	2,029	100.0%

Figure 1: Subsector Percentage - Human Services Combined



² Note: Throughout the rest of the report, Mutual Benefit and Unknown subsectors are excluded from tables in which there is a subsector breakdown.

Across subsectors, only Environment and Religion experienced growth in the number of nonprofits between 2020 and 2021. Notably, Education, International, and Public and Societal Benefit subsectors experienced small decreases compared to five years ago

Table 4: Number of Registered 501(c)(3) Nonprofits in Santa Barbara County by Subsector, June 2021

	2017	2018	2019	2020	As of Oct. 2021	Pct Change 2020 to 2021	Pct Change 2017 to 2021
Santa Barbara County	1,919	1968	2,017	2,056	2,029	-1.31%	5.7%
Arts & Culture	240	254	260	268	260	-2.99%	8.3%
Higher Education	7	8	8	9	9	0.00%	28.6%
Education (other)	290	291	294	296	288	-2.70%	-0.7%
Environment	118	117	120	127	130	2.36%	10.2%
Hospitals	4	4	4	5	5	0.00%	25.0%
Health (other)	126	131	134	139	135	-2.88%	7.1%
Human Services	486	491	521	521	519	-0.38%	6.8%
International	40	40	39	39	34	-12.82%	-15.0%
Public & Societal Benefit	246	250	247	251	242	-3.59%	-1.6%
Religion	350	371	380	389	396	1.80%	13.1%

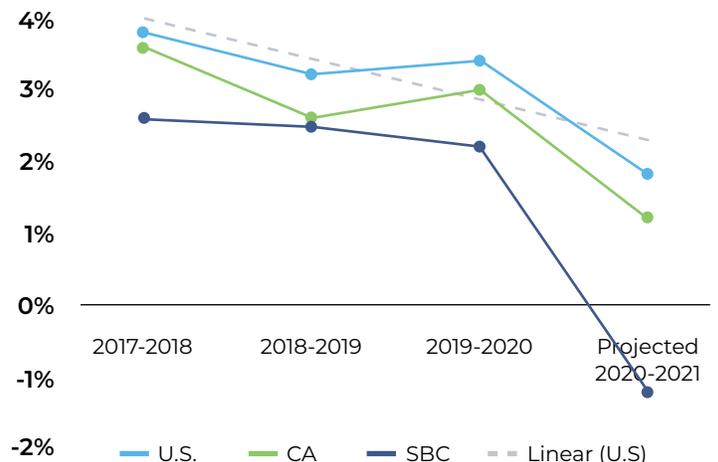


SBF Reflection

From 2017-2020, SB County nonprofit sector saw year over year growth, but that growth declined each year and was lower than the overall growth in CA and in the US.

If current trends continue, we will likely see a decline in the number of nonprofits from 2020 through the end of 2021.

Growth in the Number of Nonprofits (% Change)



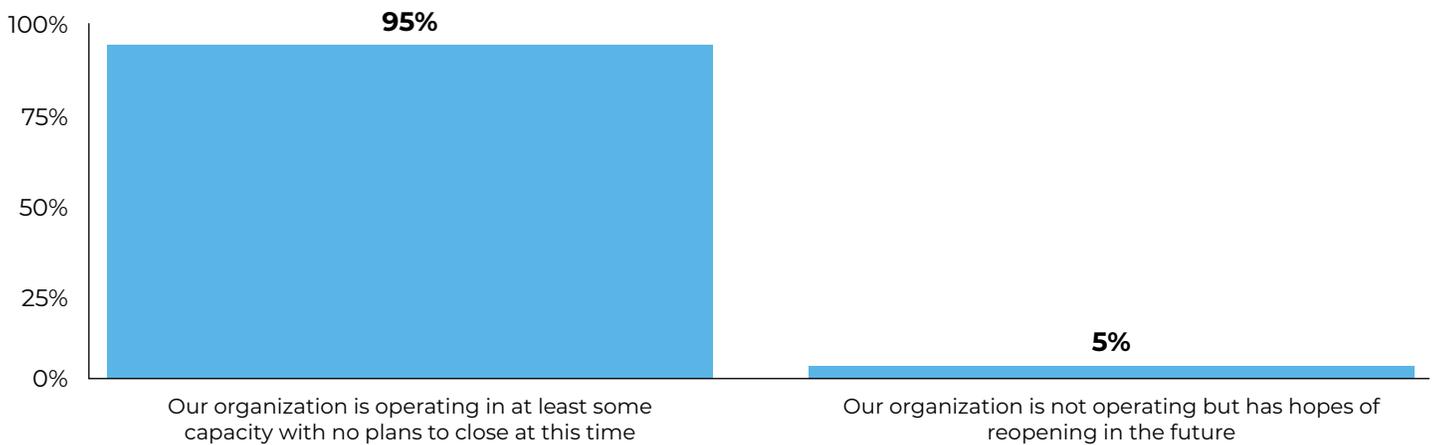
OPERATIONAL STATUS AND ABILITY TO DELIVER PROGRAMS

Ninety-five percent of leader survey respondents reported being able to operate programs and deliver services at the time of the survey in August 2021. However, their organization’s ability to operate programs at pre-pandemic levels varied considerably.

Table 5: What is the current status of your organization?

Description	Frequency	Percent
Our organization is operating in at least some capacity with no plans to close at this time	178	95.2%
Our organization is not operating but has hopes of reopening in the future	9	4.8%
Total	187	100.0%

Figure 2: Operational Status



Please tell us about why your organization is not operating currently, plans to cease operations, or has already ceased operations.

Only nine respondents indicated they had ceased operations, and of those respondents, all reported closing as a result of the pandemic. Organizations reported closing because they were unable to operate their programs during

the pandemic, they were financially vulnerable even before the pandemic, or their population was unable to participate because they were seniors and vulnerable to COVID-19.



SBF Reflection

Overall, while the pandemic has negatively impacted the nonprofit sector, there is some promising news. Most nonprofits (95%) are open, though many have altered their service structure or emphasis based on changing needs, comfort levels, and other pandemic factors.

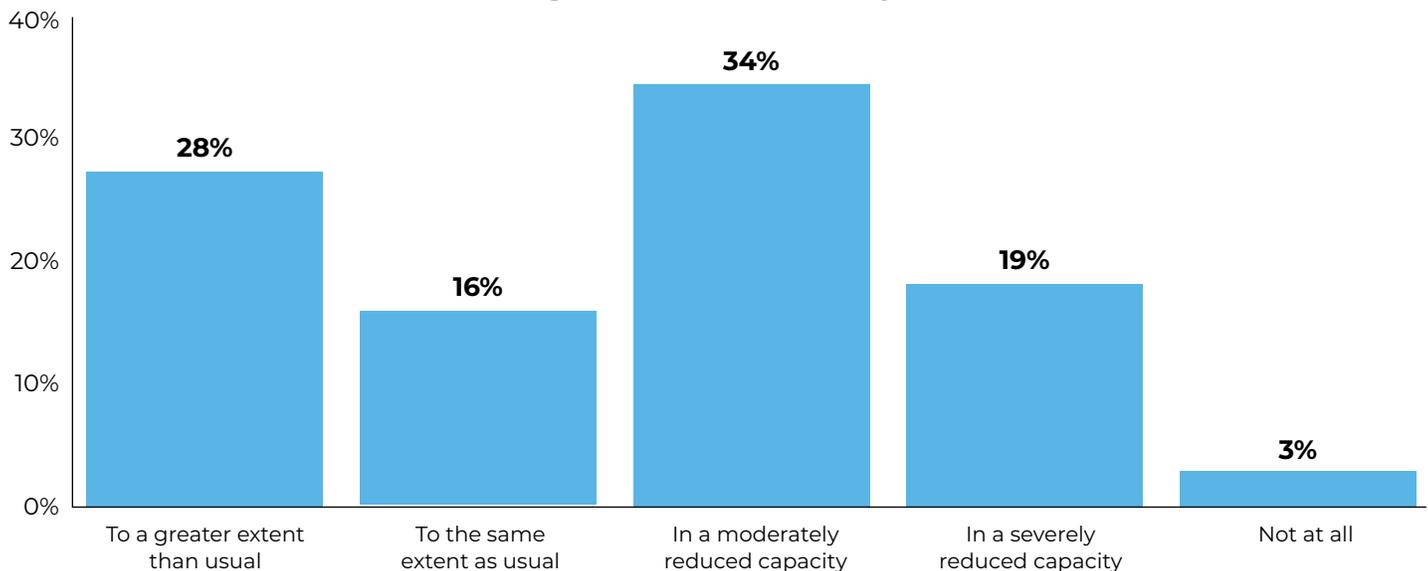
All told, 28% of non-profits responding to the survey increased their services during COVID-19, while 19% severely reduced operation. Only 3% have ceased operations.

Even though nearly 1/3 of nonprofits increased their services during the pandemic, demand increased at 58% of orgs. This means there likely was still a lot of unmet needs in the community due to an imbalance of supply and demand. Alongside, the strain of expansion and contraction on organizations should be monitored and supported with more flexible general operating support.

Table 6: To what extent are you currently delivering your normal programs and/or services during the COVID-19 pandemic?

Description	Frequency	Percent
To a greater extent than usual	52	28.3%
To the same extent as usual	30	16.3%
In a moderately reduced capacity	62	33.7%
In a severely reduced capacity	35	19.0%
Not at all	5	2.7%
Total	184	100.0%

Figure 3: Service Delivery



There were differences across subsector in the respondent organizations' ability to operate programs and deliver services (See Table below). Arts and Culture organizations were the most impacted with 77% reporting they were operating in a severely reduced capacity or not at all. In contrast, roughly 47% of Public and Societal Benefit and 40% of Grantmaking organizations reported operating to a greater extent than usual.



SBF Reflection

It is not surprising to see that one of the subsectors that relied heavily on earned income strategies through public event ticket purchases, Performing Arts and Cultural Venues, was significantly impacted. In response, during the reopening phase, the County Office of Arts & Culture collaborated with organizations to provide technical assistance on Strategic Communications, which resulted in a joint announcement by several of our arts venues on their common reopening policies.

Table 7: Subsector Differences in Ability to Provide Programs

Subsector	Not at all/ Severely reduced	Moderately Reduced	Same as usual	Greater extent than usual
Arts and Culture (n=26)	77%	19%	4%	0%
Environment (n=14)	14%	36%	14%	36%
Education (n=28)	21%	29%	25%	25%
Health, other than hospitals (n=19)	16%	37%	26%	21%
Human Services (n=68)	12%	35%	16%	37%
Public and Societal Benefit/ Grantmaking (n=20)	5%	45%	5%	45%



SBF Reflection

There has been a lot of need for medium sized organizations to stretch during the pandemic. They will need to increase capacity in order to maintain this increased service level. For example, in the senior food distribution sphere, many new clients were identified who needed prepared meals and organizations are now serving those folks with wrap around services as well. Our sector's smaller grassroots organizations are in need of capacity building investments to help them recover their programs.

Organizations with larger budget sizes were more likely to report operating at full capacity or greater. Notably, half of organizations with budgets over \$5 million reported delivering services at the same level or to a greater extent than usual while organizations with budgets less than \$1 million were more likely to report moderate or severely reduced services. Nearly two-thirds (63%) of the smallest organizations (budget size of \$50,000 or less) reported operating in a severely reduced capacity or not at all.

Table 8: Budget Size Differences in Ability to Provide Programs

Budget Size	Not at all/ Severely reduced	Moderately Reduced	Same as usual	Greater extent than usual
\$50,000 or less (n=16)	63%	13%	6%	19%
\$50,001- \$250,000 (n=44)	32%	48%	7%	14%
\$250,001- \$1 million (n=43)	9%	44%	14%	33%
\$1- \$5 million (n=54)	20%	20%	26%	33%
More than \$5 million (n=27)	6%	33%	22%	41%
Public and Societal Benefit/ Grantmaking (n=20)	5%	45%	5%	45%

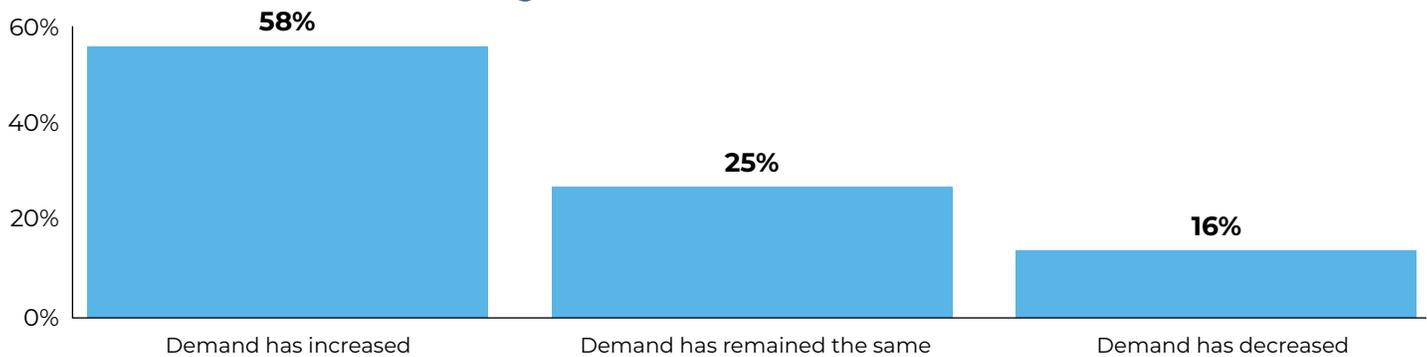
DEMAND FOR SERVICES

More than half (58%) of all respondents reported their organizations' demand for services had increased, and one-quarter reported the demand had remained the same.

Table 9: How has the demand for your organization's services changed in the last 12 months?

Description	Frequency	Percent
Demand has increased	103	58%
Demand has remained the same	45	25%
Demand has decreased	29	16%
Total	177	100.0%

Figure 4: Demand for Service



As the table below shows, changes in demand for services varied by subsector, with 41% of Arts and Culture organizations experiencing a decrease in demand while 79% of Environment, 65% of Education, and 62% of Human Services organizations reported an increase in demand.

Table 10: Subsector Differences in Demand for Services

Subsector	Demand increased	Demand remained the same	Demand decreased
Arts and Culture (n=22)	23%	36%	41%
Environment (n=14)	79%	14%	7%
Education (n=26)	65%	27%	8%
Health, other than hospitals (n=19)	58%	26%	16%
Human Services (n=68)	62%	24%	15%
Public and Societal Benefit (n=15)	47%	33%	20%

Nearly all survey respondents attributed the change in demand for services (increase or decrease) to COVID-19.

Table 11: To what extent do you attribute your increase in demand for services to COVID-19?

Description	Frequency	Percent
Not at all	3	3%
Little extent	7	6.9%
Some extent	25	24.8%
Great extent	44	43.6%
Very great extent	22	21.8%
Total	101	100.0%

Figure 5: Increase in Demand Due to COVID-19

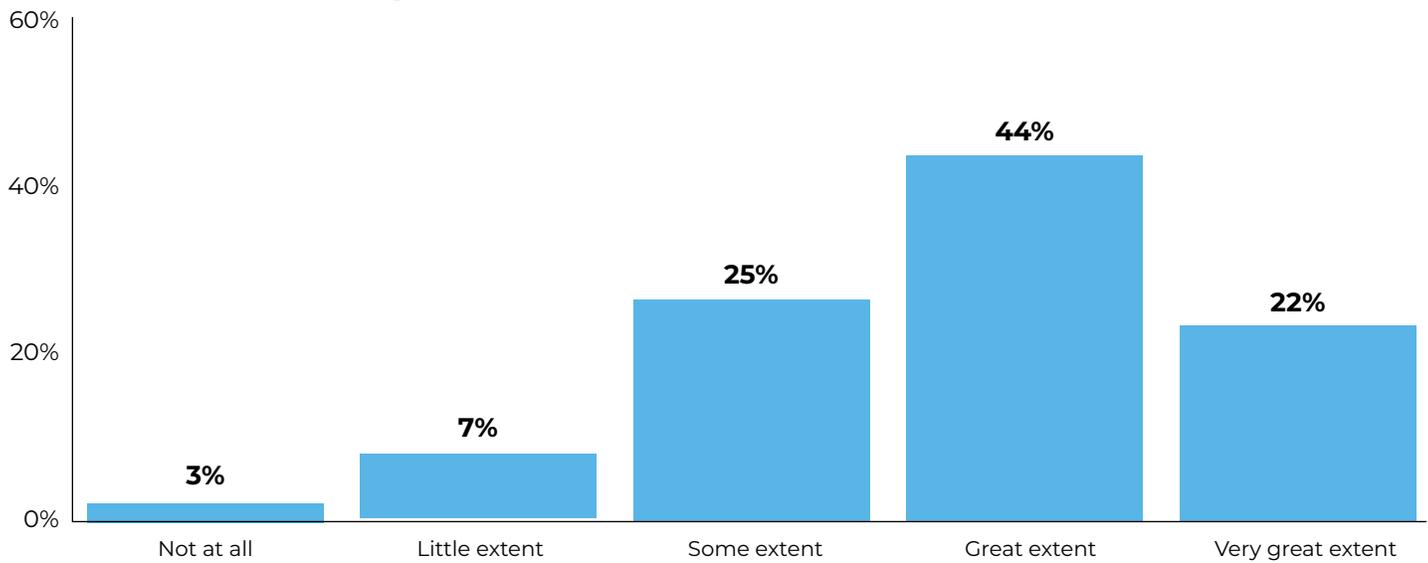
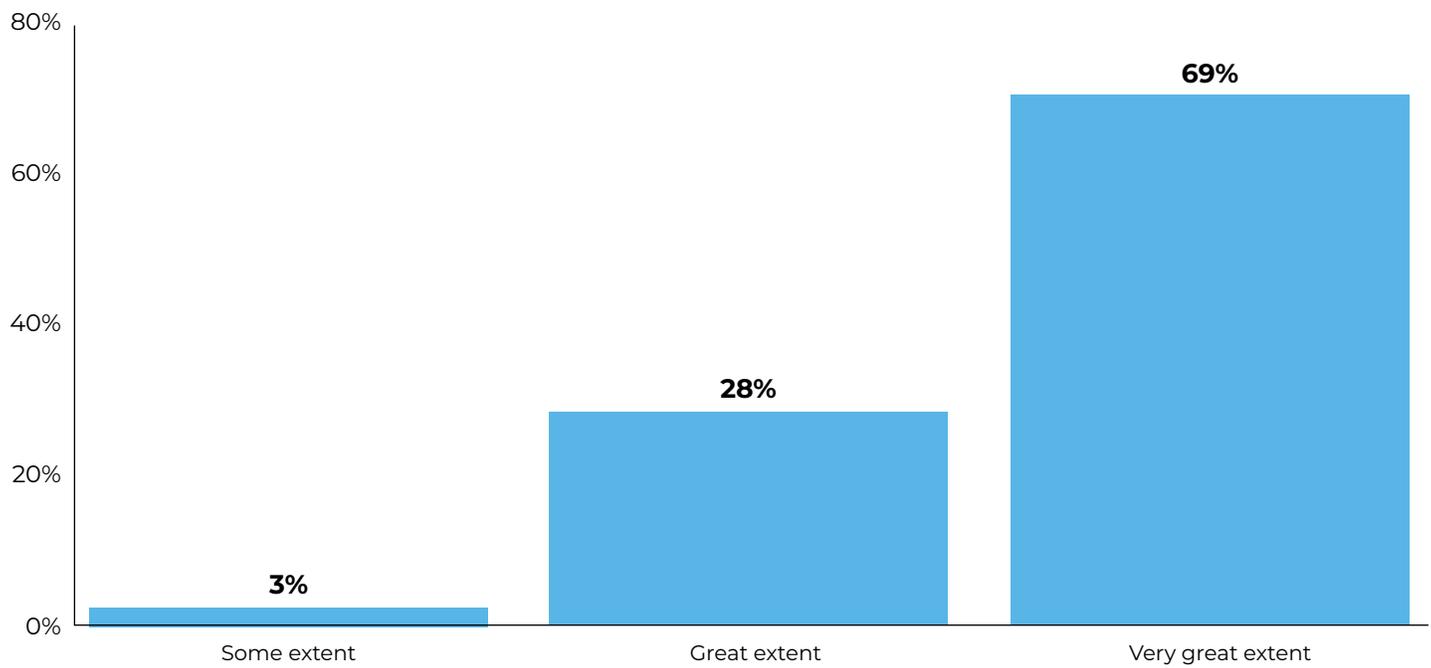


Table 12: To what extent do you attribute your decrease in demand for services to COVID-19?

Description	Frequency	Percent
Not at all	0	0%
Little extent	0	0%
Some extent	1	3%
Great extent	8	27.6%
Very great extent	20	69.0%
Total	29	100.0%

Figure 6: Decrease in Demand Due to COVID-19

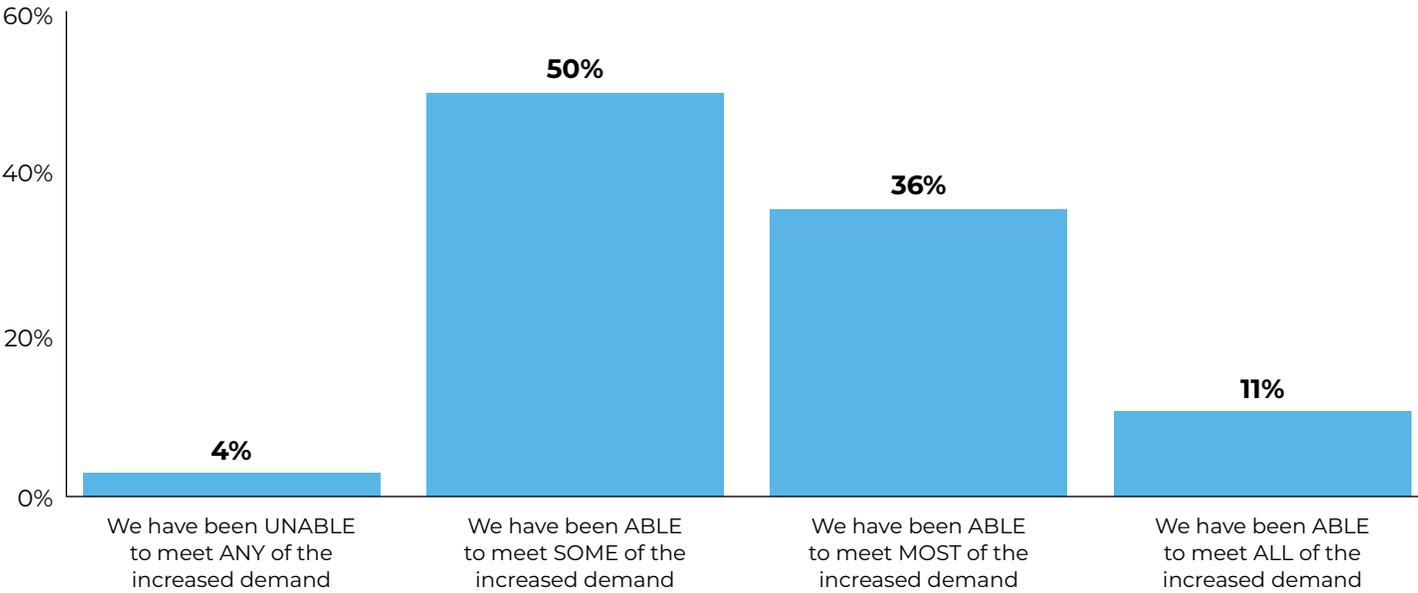


For organizations that experienced an increase in demand for their services, only 11% of respondents reported being able to meet all of the increased demand. This indicates that there is still a gap between need for services and organizational capacity to fulfill it.

Table 13: To what extent has your organization been able to meet the increase in demand for services?

Description	Frequency	Percent
We have been UNABLE to meet ANY of the increased demand	4	4%
We have been ABLE to meet SOME of the increased demand	50	49.5%
We have been ABLE to meet MOST of the increased demand	36	35.6%
We have been ABLE to meet ALL of the increased demand	11	10.9%
Total	29	100.0%

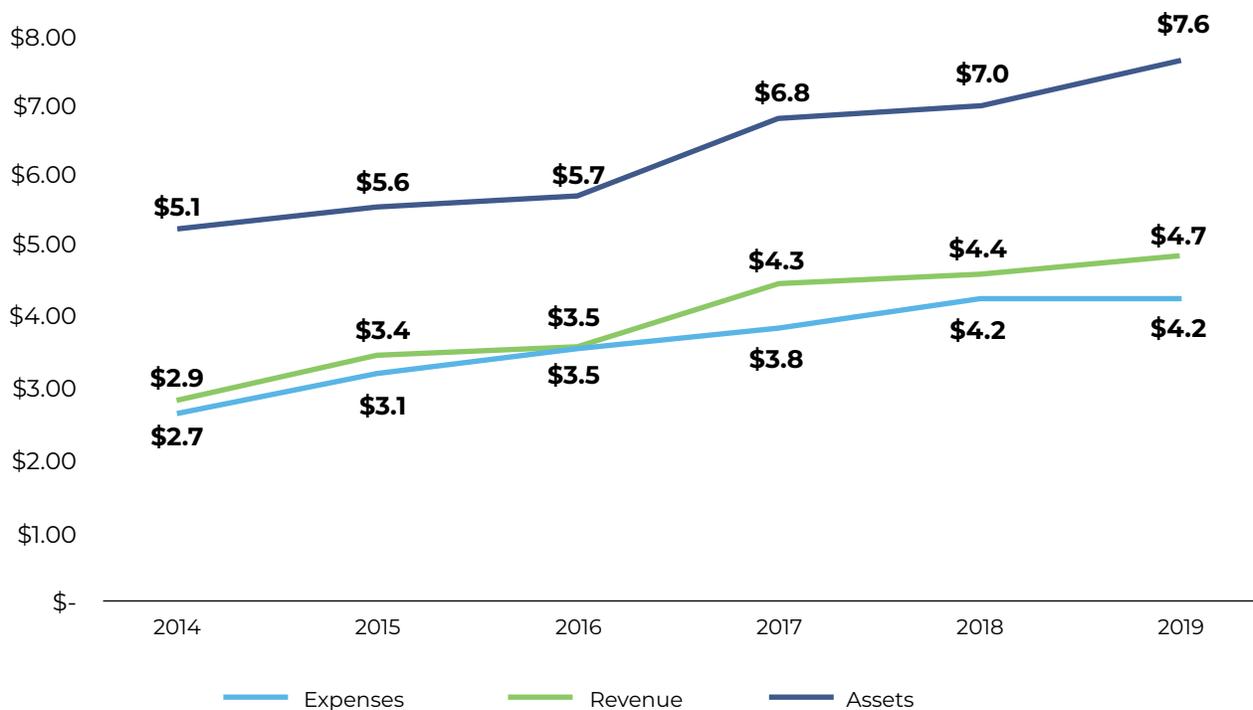
Figure 7: Ability to Meet Increased Demand



FINANCIAL HEALTH OF THE SECTOR

According to six years of the most recently available IRS tax data on nonprofit organizations, Santa Barbara County's nonprofit sector has experienced years of continuous growth in terms of revenue, expenses, and assets. In 2019, Santa Barbara County's nonprofit sector had \$7.6 billion in assets.

Figure 8: Santa Barbara County 6-year Trend in Revenue, Expenses, and Assets (in billions)³



³ Includes Hospitals, Higher Education, and Direct Relief.

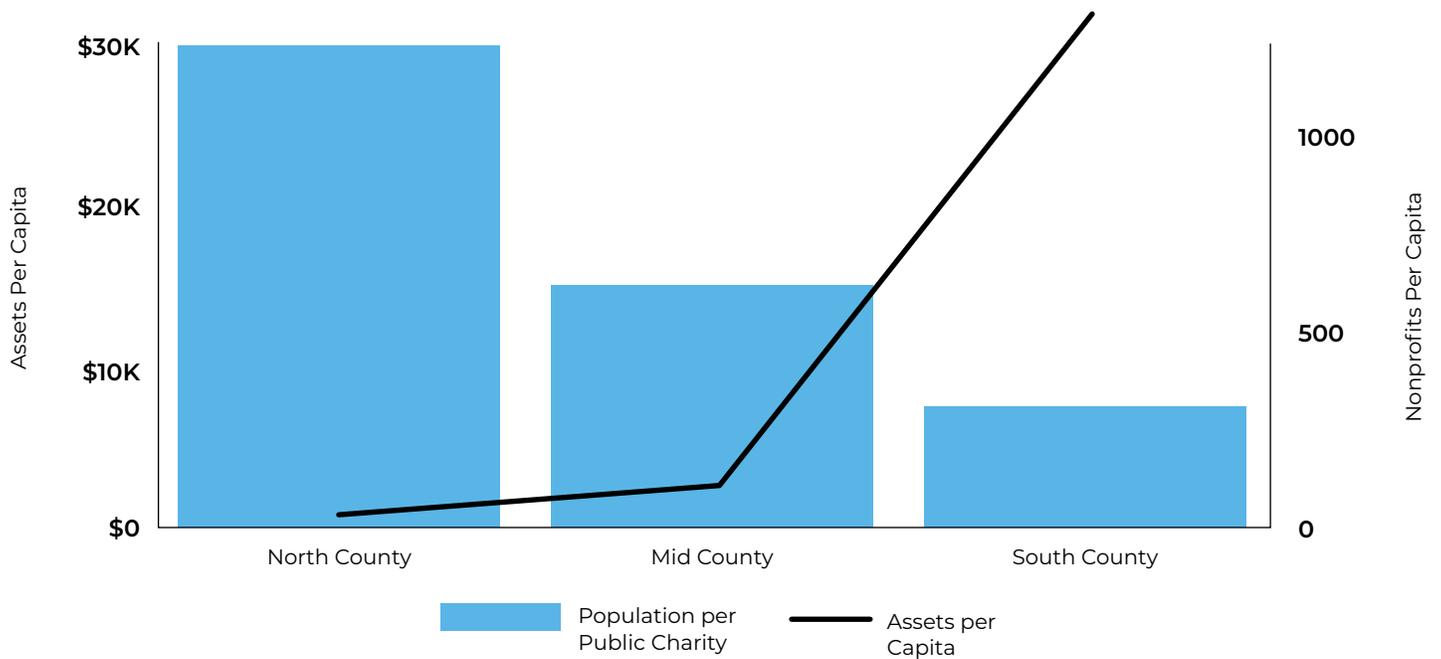
Distribution of Nonprofits and Assets by Region

Nonprofit services and financial assets are not distributed equally across the county. South County has more nonprofits and assets per capita than North or Mid County. In South County, there are 349 people per nonprofit compared to 1,233 per nonprofit in North County

Table 14: Number and Assets per capita of Nonprofits filing Form 990/990EZ, c. FY 2019

Region	Population per Nonprofit	Assets per Capita
North County	1233	\$1,244
Mid County	637	\$2,275
South County	349	\$32,047
Santa Barbara County Total	520	\$16,004

Figure 9: Number of Nonprofits and Assets per Capita



Data includes hospitals based on where they are headquartered (i.e. Cottage hospital is included in South County; Marian Regional is not included as their headquarters are outside the county). The data excludes Direct Relief. It also does not include higher education institutions, though it might include organizations directly related to the higher education systems, such as UC foundations and alumni associations.



SBF Reflection

Santa Barbara’s North County has more people living in the area, but fewer nonprofits serving those communities and much less money to spend. As funders, it is important to be conscientious of how money is distributed. Focusing not only on the distribution of nonprofits across the county, but also on the actual populations served by those nonprofits and how the funds can have the greatest impact. At SBF, we have heard about many South County organizations looking to expand into North County service areas, it will be important that they center the voices of the communities they plan to serve. New nonprofit organizations in mid- and north-county will need flexible funding suitable for growth.

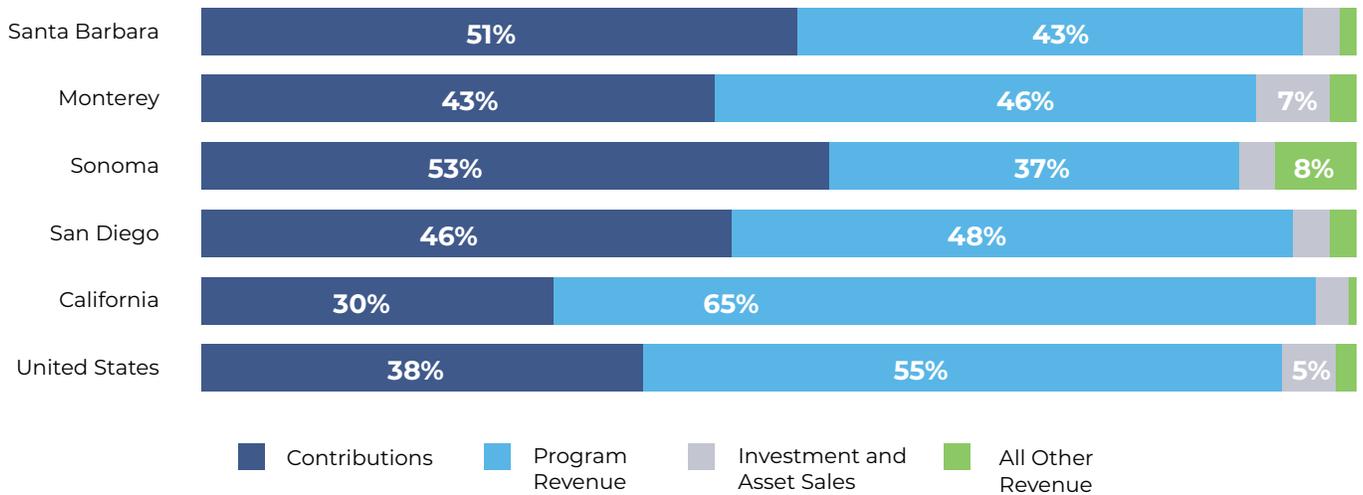
Nonprofit Revenue Sources

Half of Santa Barbara County’s nonprofit revenue comes from contributions, which includes individual donations, government grants, and foundation and corporate grants. Forty-three percent of revenue comes from program service revenue, which includes any revenue that comes from fees-for-service such as ticket sales, medical fees, club memberships, etc. Compared to California and the United States, Santa Barbara’s sector relies more heavily on contributions.

Table 15: Revenue by Primary Source, Select California Counties, Filing Form 990/EZc. 2019

	Contributions	Program Revenue	Investment and Asset Sales	All Other Revenue
Santa Barbara County	50.6%	43.2%	3.7%	2.4%
Monterey County	43.4%	46.3%	6.9%	3.4%
Sonoma County	52.8%	37.1%	2.7%	7.5%
San Diego County	45.8%	47.7%	3.9%	2.6%
California	30.5%	65.5%	2.6%	1.5%
United States	38.3%	54.6%	4.8%	2.3%

Figure 10: Nonprofit Revenue by Source



SBF Reflection

Due to Santa Barbara County Nonprofits' heavy reliance on contributions, and the impact COVID-19 has on those contributions, many area nonprofit organizations have had to change their revenue model, increasing the amount of income from government sources, and decreasing reliance on service fees, individual donations, events, and other sources. While this has helped many organizations survive the pandemic, the change in revenue stream has also necessitated other adjustments to their strategic plans or business models.

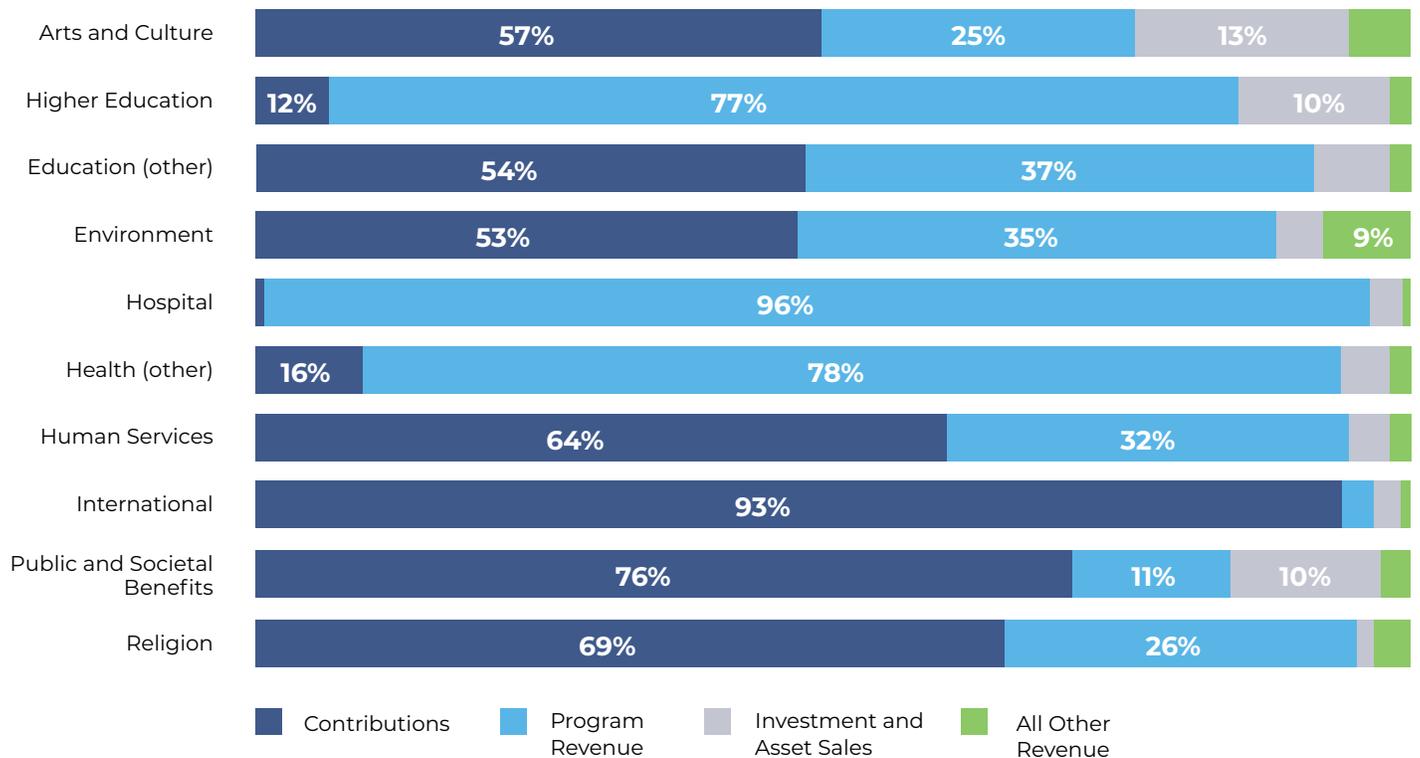
As the pandemic persists, regulations and available resources continue to shift, requiring the social sector to continuously adjust and adapt. Funders, donors, and public officials should be empathetic to these changes and should continue to modify expectations to avoid causing additional stress on already overburdened nonprofits. Organizations, especially the smaller to medium sized, will also need help to build capacity to manage different types of development portfolios.

Revenue sources vary considerably by subsector. While Hospitals and Higher Education earn most of their revenue from program service revenue (e.g., tuition and medical fees), Arts and Culture, Religion, and Human Services earn most of their revenue from contributions.

Table 16: Revenues by Primary Source of Nonprofits filing Form 990/990EZ, C. Fiscal Year 2019

	Contributions	Program Revenue	Investment and Asset Sales	All Other Revenue
Arts and Culture	57%	25%	13%	5%
Higher Education	12%	77%	10%	2%
Education (other)	54%	37%	6%	2%
Environment	53%	35%	4%	9%
Hospitals	1%	96%	2%	1%
Health (other)	16%	78%	4%	2%
Human Services	64%	32%	2%	2%
International	93%	3%	2%	1%
Public & Societal Benefit	76%	11%	10%	3%
Religion	69%	26%	2%	4%
SB County¹	51%	43%	4%	2%

Figure 11: Nonprofit Revenue Distribution by Subsector



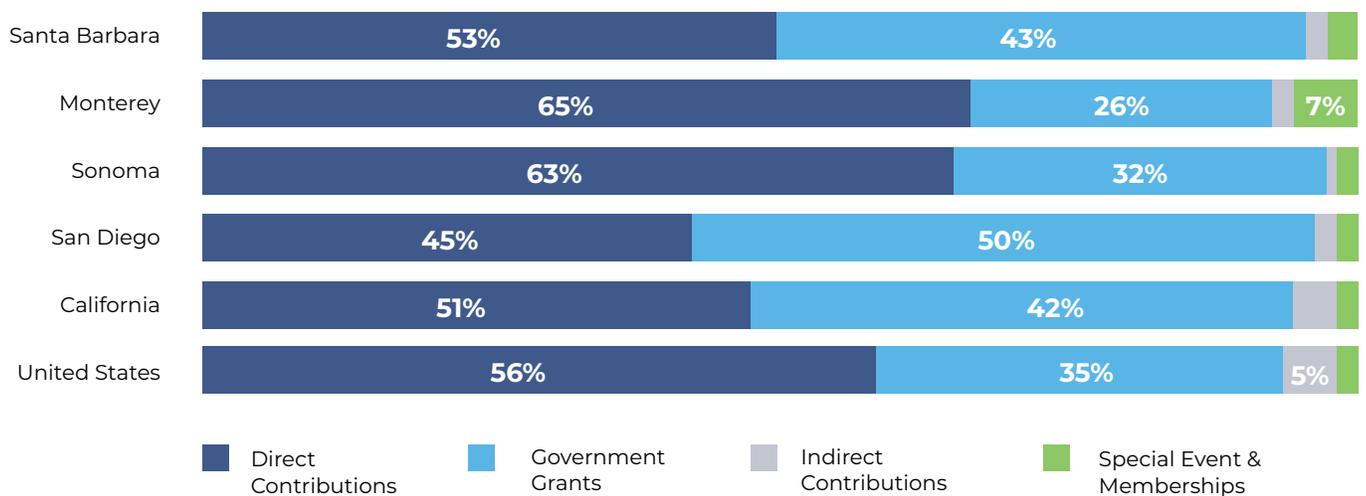
Nonprofit Contribution Sources

In Santa Barbara County in 2019, contributed revenue comprised 51% of total revenue. Donations (i.e., direct contributions) made up more than half of contributed revenue and government grants made up 43% of contributed revenue. Although many nonprofits hold fundraising events, they only make up 3% of nonprofit contributions overall.

Table 17: Santa Barbara County Contributions by Primary Source of Nonprofits filing Form 990/990EZ, c. Fiscal Year 2019

	Direct Contributions	Government Grants	Indirect Contributions	Special Events & Memberships
Santa Barbara	53%	43%	2%	3%
Monterey	65%	26%	2%	7%
Sonoma	63%	32%	1%	3%
San Diego	45%	50%	2%	2%
California	51%	42%	4%	3%
United States	56%	35%	5%	3%

Figure 12: Contribution Revenue by Source



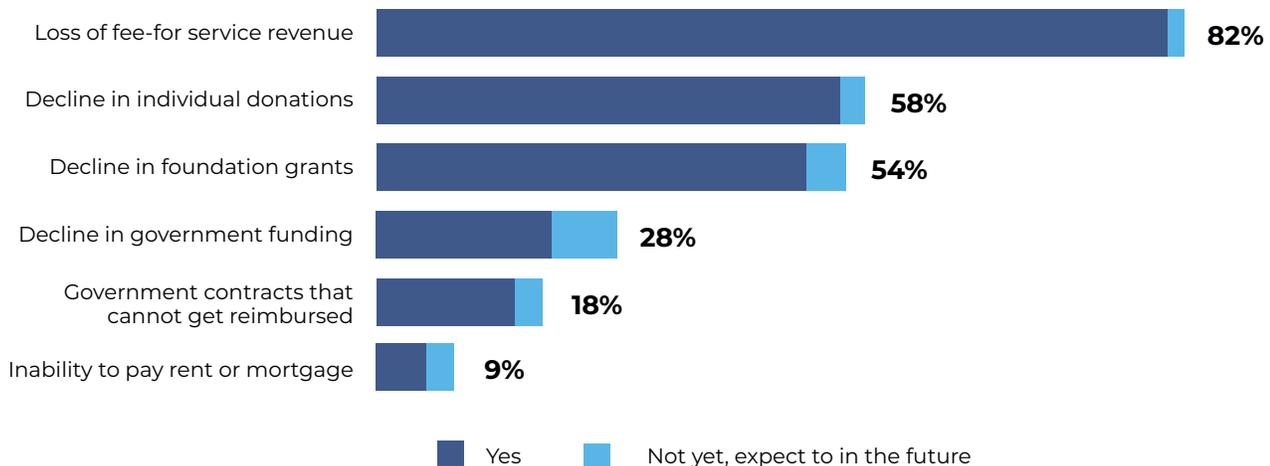
COVID-19 Pandemic Impact on Revenue

Based on findings from the leader survey, most organizations experienced declines in both program service revenue and contributions due to the COVID-19 pandemic. Eighty percent of respondents reported loss of fee-for-service revenue and more than half of respondents also experienced declines in individual donations.

Table 18: As a result of the COVID-19 pandemic, has your organization experienced any of the following? (Yes or Expect to in the future, Excludes Not Applicable)

	Yes	Not yet, expect to in the future	Yes/Not yet, expect to in the future
Loss of fee-for-service revenue (n=158)	80%	2%	82%
Decline in individual donations (n=174)	53%	5%	58%
Decline in foundation grants (n=175)	47%	7%	54%
Decline in government funding (n=124)	19%	9%	28%
Government contracts that cannot get reimbursed (n=88)	14%	4%	18%
Inability to pay rent or mortgage (n=130)	5%	4%	9%

Figure 13: COVID-19 Financial Impacts



There were differences in revenue loss by subsector. A disproportionate number of Arts and Culture and Education organizations reported loss of fee-for-services and decline in individual donations. This is not surprising given that many schools and arts organizations were not open for months. Unexpectedly, the majority of health organizations reported revenue losses in fee-for-service (61%), donations (61%), and foundation grants (78%).

Table 19: Subsector Differences in Financial Impacts of COVID-19

Subsector	Loss of Fee for Service	Decline in Donations	Decline in Foundation Grants
Arts and Culture (n=27)	93%	56%	58%
Environment (n=14)	79%	43%	36%
Education (n=27)	70%	60%	44%
Health, other than hospitals (n=18)	56%	61%	78%
Human Services (n=68)	62%	50%	40%
Public and Societal Benefit (n=15)	60%	67%	43%

Organizations with small budgets disproportionately reported a decline in individual donations. Ninety-three percent of organizations with a budget size of less than \$50,000 reported a decline in donations compared to 33% of organizations with budgets over \$5 million.

Table 20: Budget Size Differences in Financial Impacts of COVID-19

Budget Size	Decline in Donations
\$50,000 or less	93%
\$50,001- \$250,000	62%
\$250,001- \$1 million	58%
\$1- \$5 million	40%
More than \$5 million	33%

Nonprofit Leader Assessment of Financial Health

The majority of respondents reported relatively strong financial health. More than half of respondents reported somewhat or very strong financial health, and 84% predicted the same or stronger financial health in the next 12 months.

Table 21: From your perspective, how would you describe the general financial health of your organization today?

Description	Frequency	Percent
Very weak	10	5.6%
Somewhat weak	20	11.1%
Moderate	46	25.6%
Somewhat strong	56	31.1%
Very strong	48	26.7%
Total	180	100.0%

Figure 14: General Financial Health

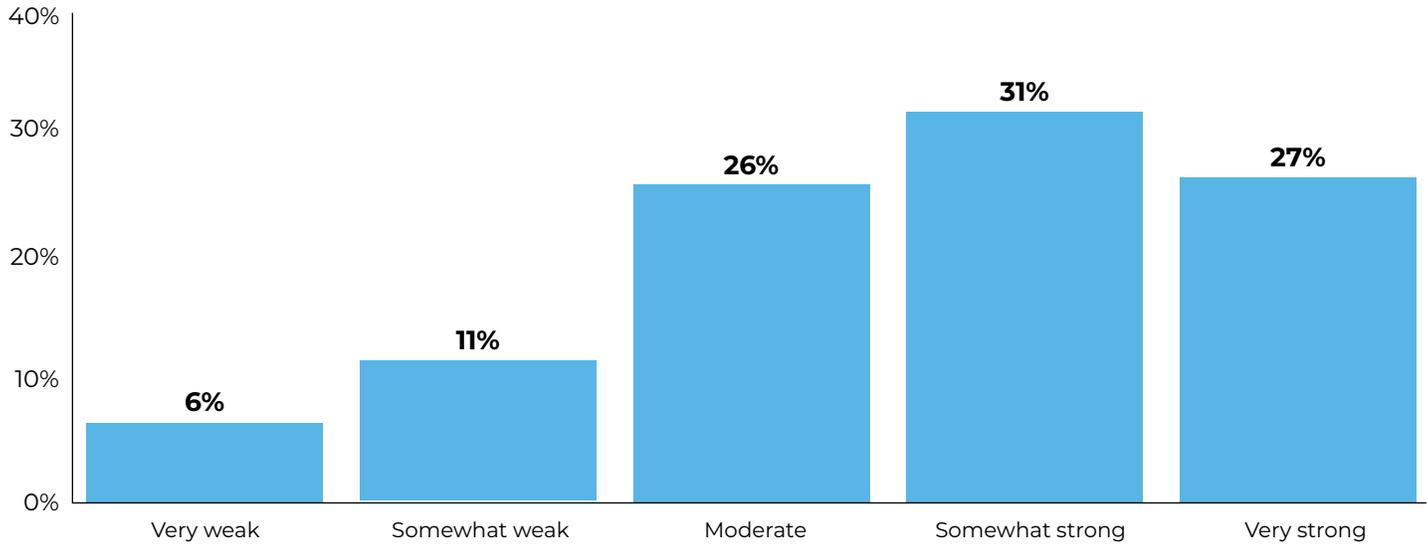
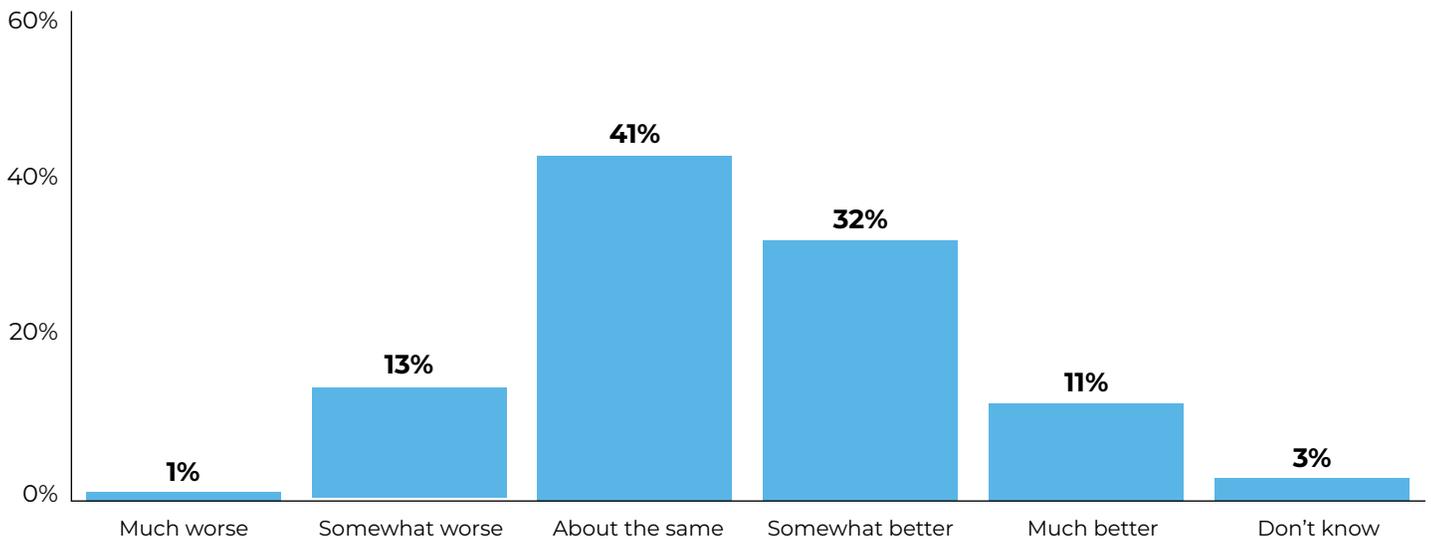


Table 22: Compared to today, what do you expect the general financial health of your organization to be in the next 12 months?

Description	Frequency	Percent
Much worse	1	0.6%
Somewhat worse	23	12.8%
About the same	74	41.1%
Somewhat better	57	31.7%
Much better	20	11.1%
Don't know	5	2.8%
Total	180	100%

Figure 15: General Financial Health - Next 12 Months



Another factor contributing to the financial outlook of the sector is the number of months of cash reserves each organization has on hand. Historically, it is typical for nonprofits to have less than three months of cash on hand. However, 65% of respondents reported having six or more months of cash reserves on hand at the time of this survey.

Table 23: How many months of cash does your organization have on hand? In other words, if your organization stopped generating revenue today, how many months could you operate?

Description	Frequency	Percent
Less than 3 months	26	15%
3 - 5 months	35	20%
6+ months	114	65%
Total	175	100.0%

Figure 16: Months of Cash Reserves

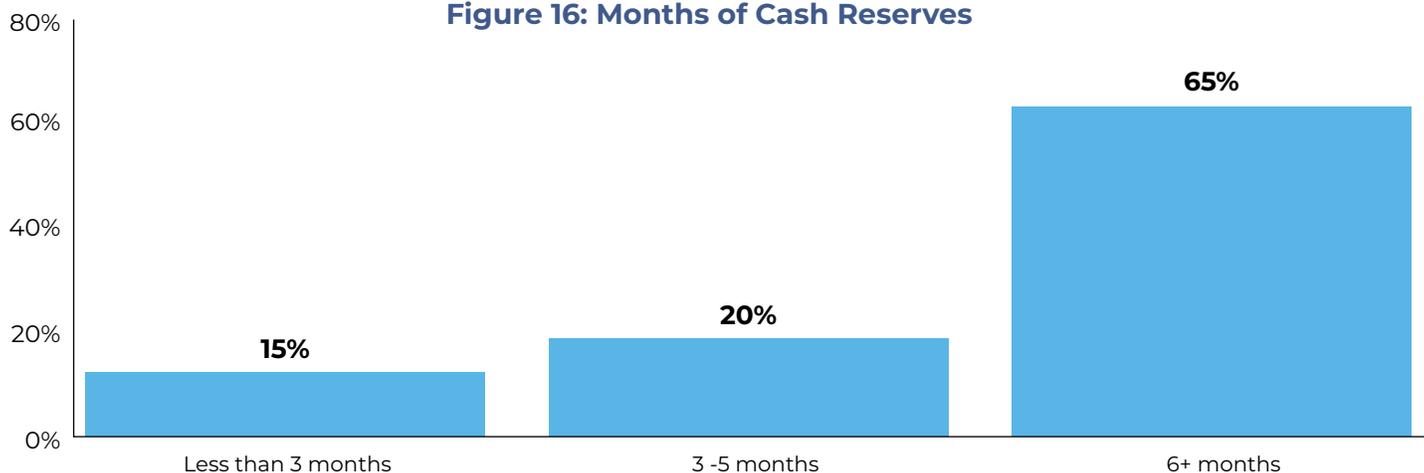


Table 24: Please estimate the total dollar amount of debt your organization has accumulated as a direct result of COVID-19

Description	Value
N (Number of Orgs)	107
Mean ⁴	\$33,440.19
Median	\$0
Minimum	\$0
Maximum	\$1,000,000
Sum	\$3,578,100

⁴ One large organization reported an accumulated debt of \$1 million. If they are excluded from the calculation, mean debt=\$24,321.70

Respondents were asked to estimate the percentage of the revenue their organization generates from common nonprofit revenue sources. Respondent estimates were very different from 2019 IRS tax data for Santa Barbara overall (reported earlier in this report). This discrepancy could be a result of comparing 2019 with 2021, differences between the survey sample and the total nonprofit sector, or misunderstandings about the terminology used on tax forms and in the survey. The largest discrepancy is with program service revenue. Survey respondents reported 16% of their revenue came from fees for goods and services, and 2019 IRS data indicate that 43% of nonprofit revenue came from program service revenue.

Table 25: Thinking about your revenue today, please estimate the percentage of revenue your organization generates from the following sources (n=139)

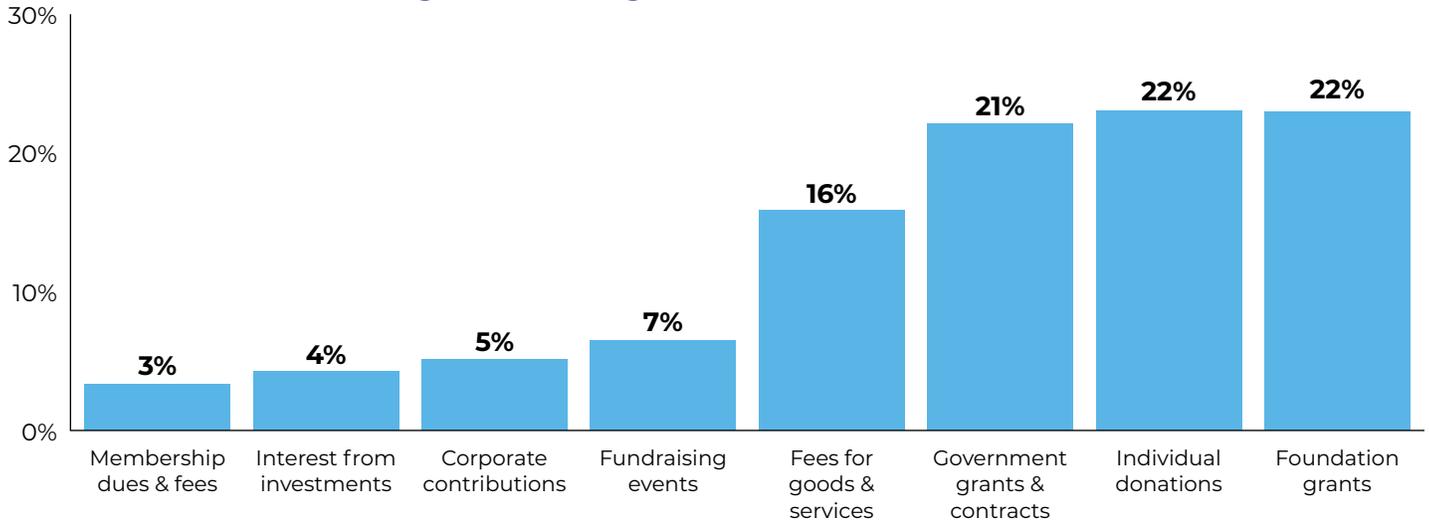
Description	Average Revenue Distribution %
Foundation grants	21.8%
Individual donations	21.5%
Government grants and contracts	20.6%
Fees for goods and services	15.70%
Fundraising events	6.7%
Corporate contributions	4.7%
Interest from investments	3.7%
Membership dues and fees	3.0%
Other	2.4%



SBF Reflection

The drop in revenue from fees for service from 43% in 2019 (as reported by the IRS data) to 16% in 2021 (as reported in the leadership survey), makes sense in light of the 80% of nonprofits who also reported a drop in revenue from program fees. This dramatic shift in revenue mix reaffirms the need nonprofits have for capacity building support to manage a newly shifting development portfolio. Organizations may also have need of capital support for hybrid events and fundraising, especially as government sources, which had been picking up the slack for other lost revenue, dry up or are not renewed.

Figure 17: Average Revenue Distribution %



Open-ended responses for those who responded “other”

- 5% from PPP2
- Don't know
- Churches
- In-kind

Has the distribution of your revenue changed as a result of COVID-19? If yes, please elaborate on how.

When respondents were asked about changes in their revenue distribution during the pandemic, several key themes emerged. Respondents identified a shift in revenue from three main sources:

- Events and programming
- Government grants
- Foundation support

Some said that fee-for-service revenue was severely impacted due to cancelled or reduced events and programming. In addition, organizations identified difficulty hosting fundraising events, which resulted in a decrease in individual donations. Some organizations indicated an increase in foundation grant support, but only if they were providing COVID-19 response related services; if not, then foundation grants were limited.

Some organizations identified that government grants such as PPP and CARES funds were increased and temporarily filled the void in revenue distribution changes.

Emergency Funding Filled an Essential Gap

“Program fees have been non-existent which is 40% of our income, individual donations and foundational giving is way, way down and we haven’t been able to have a live event...It’s pretty dire here...We would not have made it without loans and grants from the government at this point.”

— Human Services: Youth Development, Operation Budget: \$250,001- \$1 million

Loss of Fee-for-Service Revenue

“80% of our operating revenue normally comes from program fees. Since we have had NO programs since the pandemic, we have lost 80% of our revenue. We have cut staff, cut expenses, & reduced our rent. We continue to operate using savings and general donations.”

— Human Services, Budget: \$1- \$5 million

Foundation Support Primarily for COVID Response Services

“We have received many more individual donations targeted toward COVID emergency programs. We also received a number of unsolicited foundation donations to help with our COVID response.”

— Human Services: Youth Development, Budget: \$50,001- \$250,000

“We have received less private/individual donations. All foundation funding going to COVID-specific issues, now. Very little foundation funding available for general operations.”

— Human Services: Housing/shelter, Budget: \$50,001- \$250,000



SBF Reflection

A later section in this report, *COVID-19 Emergency Funding, Pg. 47*, highlights survey respondents’ responses to questions about the ease or difficult in accessing various funding types during the pandemic. It is important to bear in mind these changes to revenue mix as one reflects on the ease of access to various funding types, now that they are a larger proportion of many nonprofits’ funding.

NONPROFIT SECTOR EMPLOYMENT

Table 26: 2020 Santa Barbara County Nonprofit Employment, CA Employment Development Department (EDD)

According to the California Employment Development Department, 600 Santa Barbara County nonprofits had employees in 2020, representing approximately 30% of all registered nonprofits. There was some growth in employment in the nonprofit sector in 2020. Total wages increased 11% between 2019 and 2020. The majority of nonprofits in Santa Barbara County are small, with 64% employing fewer than 10 employees. Human Services employs the largest share of employees followed by Hospitals.

Annual 2020	Count	PCT Change 2019 to 2020
Average Number of Nonprofits (with employees)	600	3.4%
Average Total Employment	14,870	.1%
Total Wages	\$883,387,489	11%



SBF Reflection

Average wages in 2019 and 2020 for SB county nonprofit employees were lower (across firm size) than nonprofit wages in CA overall, but this varied by region within the county. Average wages in 2019 and 2020 in South County were equal to or higher than CA averages. North county average wages in 2019 and 2020, on the other hand, were lower than South County wages and the CA average overall. This difference held true across all organization types and sizes.

We are also happy to report, that average annual wages went up from 2019-2020 in both North and South County in almost all firm sizes. That said, please note that we acknowledge that higher wages than the CA average, and even increased wages over time, does not necessarily equate to enough money to constitute a living wage or for nonprofits to retain a strong workforce. Employee retention and recruitment is a significant challenge being experienced sector wide.

Table 27: Nonprofit Employment by Organization Size

Organization Size: Number of Paid Employees	Total Organizations	2020 Percent of Total Organizations with Paid Employees
0-4	273	46%
5-9	107	18%
10-19	95	16%
20-49	70	12%
50-99	28	5%
100-249	22	4%
250-499	5	1%
500-999	-	0%
1,000 or more	1	0.2%
	600	100%



SBF Reflection

In CA one in 14 employees work in the social sector. With this in mind, the Santa Barbara Foundation recently partnered with the Workforce Development Board to include nonprofit employers in their [COVID-19 Employment Impact Report](#). While this inclusion is certainly progress for the sector, there is a lot more uniformity needed on how the county approaches issues of workforce in this sector.

Table 28: Nonprofit Employment by Subsector

Nonprofit Subsector	2020 Percent of Total Organizations	Pct of Total Employment
Arts and Culture	11%	4%
Higher Education	1%	0%
Education	9%	8%
Hospitals	1%	25%
Environment	5%	3%
Health (Other)	17%	18%
Human Services	44%	36%
International	2%	1%
Public and Societal Benefit	7%	3%
Religion	4%	1%
	100%	100%



SBF Reflection

While SB County unemployment more than doubled from 2019-2020 (increasing from 3.7% to 8%), nonprofit employment numbers increased. Specifically, Nonprofit employment rose from 14,850 in 2019 to 14,870 in 2020, while overall employment dropped from 214,100 in 2019 to 200,200 in 2020.

This means that the share of workers in the county employed by a non-profit also increased, rising from 6.9% in 2019 to 7.4% in 2020.

Still early data from 2021 is showing us that while nonprofits continue to want to hire additional workers, they are having difficulty hiring, especially in jobs that require license.



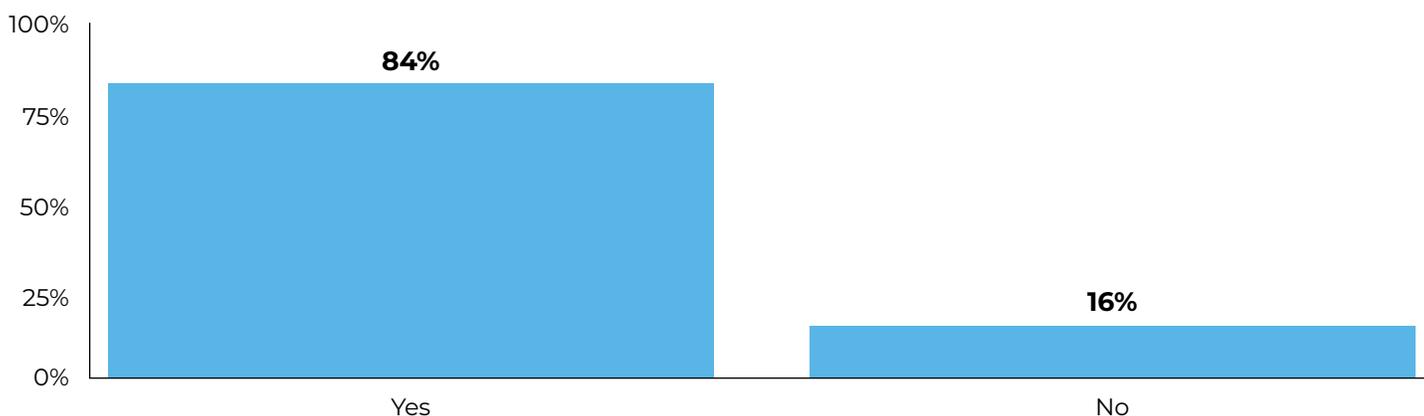
COVID-19 Impact on Employment

Despite significant disruptions for staff, survey respondents predicted growth in nonprofit employment to continue. The following sections document the pandemic’s disruptions to nonprofit employment as well as respondents’ predictions for hiring in the coming year.

Table 29: Prior to the COVID-19 pandemic, did your organization have paid employees (not independent contractors)?

Description	Frequency	Percent
Yes	144	84.2%
No	27	15.8%
Total	171	100.0%

Figure 18: Percent of Organizations with Paid Employees Prior to COVID-19



SBF Reflection

The Santa Barbara County nonprofit leaders survey had a disproportionate representation of leaders from organizations with paid employees. While overall in the county approximately 30% of nonprofits have employees, about 84% of survey respondents came from organizations with paid employees. We acknowledge that the issues facing organizations with an all-volunteer base are different challenges than those with employees. This section focuses predominately on the impact of COVID-19 on organizations with employees. You can read more about *Nonprofit Board and Volunteer Data* on page 38 of this report.

Table 30: Approximately how many paid employees did/does your organization have?

Description	Prior to Covid-19	May 2021
N (Number of Orgs)	143	143
Mean ⁵	43.75	43.9
Median	12	10
Minimum	1	1
Maximum	9700	9700
Sum	15909	15935

Table 31: What percent of organizations instituted the following?

Description	Frequency	Percent
Layoffs	35	24%
Furloughs	25	18%
Pay Cuts	14	10%

Figure 19: Percent of Organizations That Made Cuts to Payroll Expenses

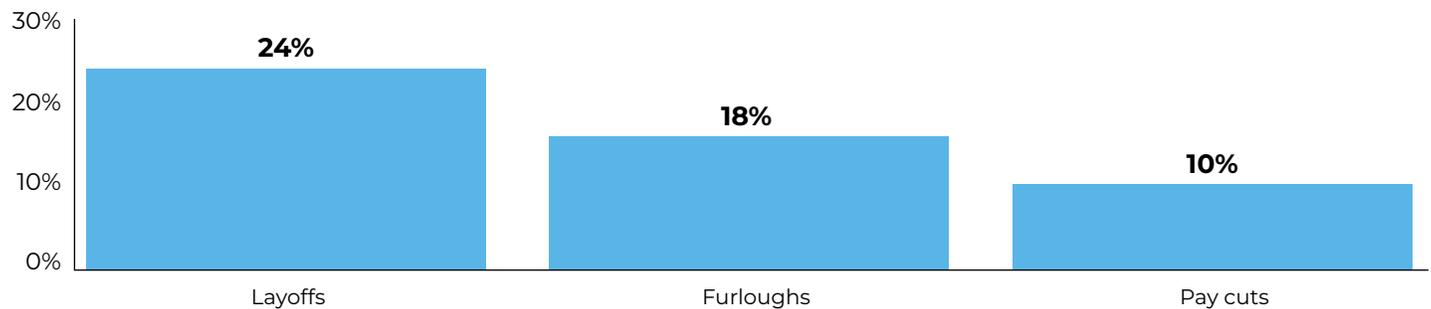


Table 32: Approximately how many employees have been permanently laid off as a result of COVID-19?

Description	Value
N (Number of Orgs)	143
Mean	7.6
Median	0
Minimum	0
Maximum	100
Sum	1088

Table 33: Approximately how many employees have been furloughed as a result of COVID-19?

Description	Frequency
N (Number of Orgs)	143
Mean	6.2
Median	0
Minimum	0
Maximum	100
Sum	879.9

⁵ Excludes one organization who reported 9,700 employees.

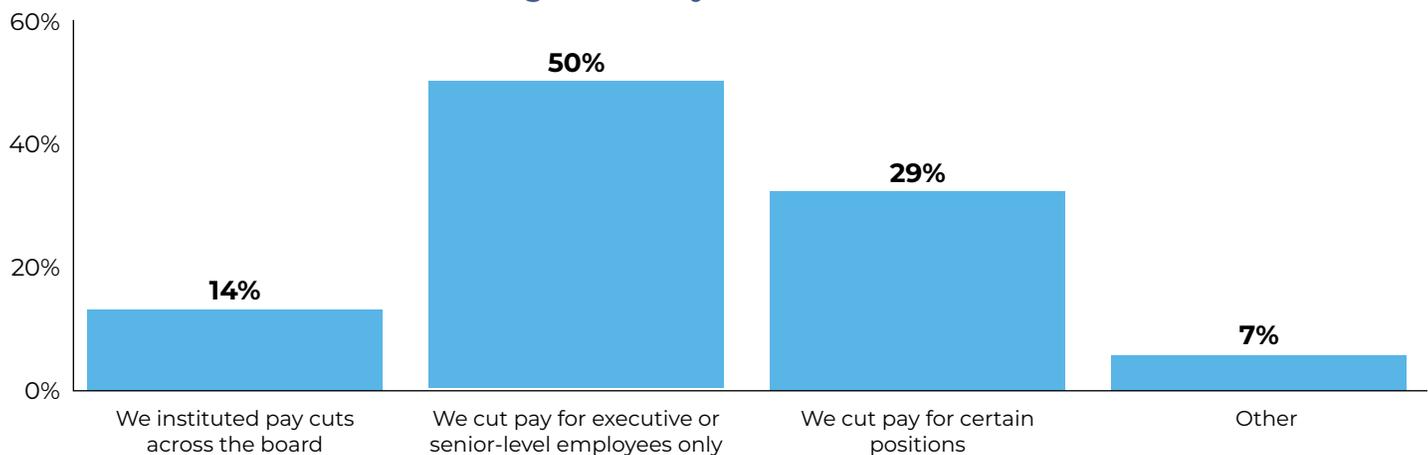
Table 34: How many of those furloughed employees have you brought back since the start of the COVID-19 Pandemic?

Description	Value
N (Number of Orgs)	25
Mean	56%
Median	67%
Minimum	0%
Maximum	100%

Table 35: How were pay cuts structured?

Description	Frequency	Percent
We instituted pay cuts across the board	2	14.3%
We cut pay for executive or senior-level employees only	7	50.0%
We cut pay for certain positions	4	28.6%
Other	1	7.1%
Total	14	100.0%

Figure 20: Pay Cut Structure



SBF Reflection

During the pandemic, Santa Barbara County nonprofits had to make difficult decisions about staffing. As described earlier in this report, many nonprofits saw an increase in demand, even as they saw drops in funding and capacity. The strain on finances led some organizations (24% in the survey sample) to lay off employees, while others resorted to furloughs (18%) or pay cuts (10%). Thankfully, the majority of furloughed workers have already been brought back (as of summer 2021), and most organizations that required pay cuts, did so strategically in order to avoid negatively impacting all of their workforce. This information will be a useful baseline as we continue to evaluate the state of the nonprofit in years to come.

If other, please specify

Decreased hours for part-time staff

We reduced benefits across the board

The next section outlines some of the positive measures organizations put into place during the pandemic and tells the story of resilience and recovery. The majority of organizations report that they predict their staff size will return to pre-pandemic levels (49.3%) or will increase (42.4%). We look forward to hearing more positive stories about reinstated workers in next year's report.

Predictions and Emerging Trends in Employment

Table 36: Looking toward recovery, how do you predict your pre-pandemic staff size of will change?

Description	Frequency	Percent
We predict our staff size will remain the same	71	49.3%
We predict our staff size will be larger	61	42.4%
We predict our staff size will be smaller	12	8.3%
Total	144	100.0%

Figure 21: Staff Size after Recovery %

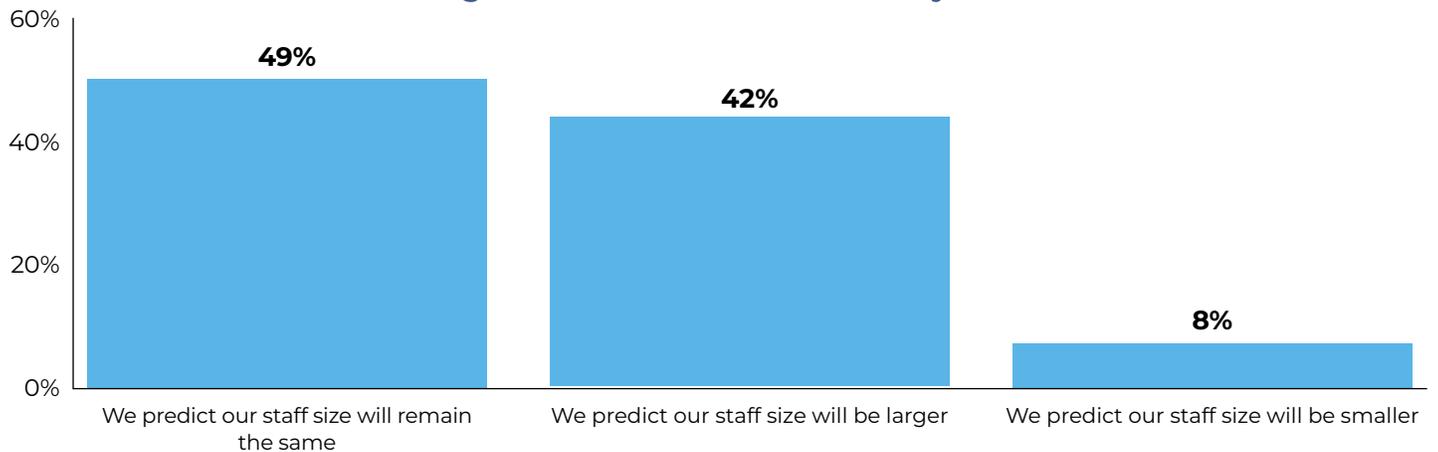


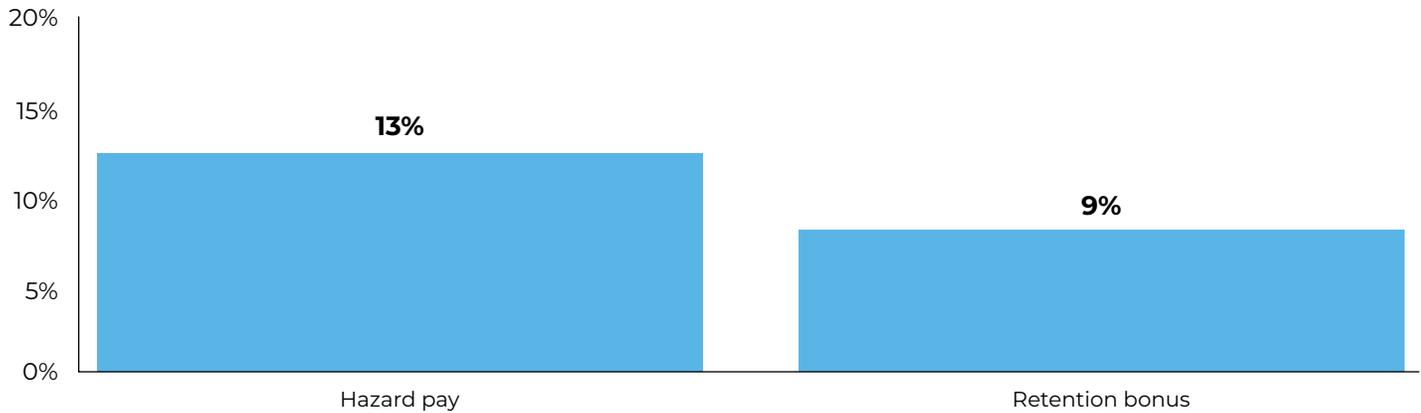
Table 37: Has your organization instituted hazard pay benefits as a result of COVID-19?

Description	Frequency	Percent
Yes	19	13.2%
No	125	86.8%
Total	144	100.0%

Table 38: Has your organization offered retention bonuses as a result of COVID-19?

Description	Frequency	Percent
Yes	13	9%
No	130	91%
Total	143	100.0%

Figure 22: Percent of Organizations Offering Additional Pay



Is there anything else you'd like to tell us about how Covid-19 affected your organization's employment?

Organizations reported hiring challenges, reduction in hours, and employee burnout. The conditions of the pandemic such as remote earning and government aid that extended unemployment and provided rent moratoriums made hiring staff difficult for organizations. Some organizations reported having to institute hiring freezes, and putting additional workloads and strain on existing staff, resulting in employee burnout and attrition.

Additionally, some organizations reported the stress of the conditions of the pandemic to be felt throughout all levels of the organization, from the board of directors to visitors and volunteers. Organizations also reported offering work incentives to compensate for continuing to work during the stressful time of the pandemic. These incentives included hazard pay for employees providing direct services, more flexible arrangements such as working from home options to boost employee morale, and paid meals for staff working in person.

Work Incentives Implemented During the Pandemic

"We have had to hire more staff to keep up the demand for our services, and to make up for the volunteers lost to people not being able to come in due to Covid. Our organization generally relies on 15,000 hours of volunteer help a year, which

has been decimated due to the pandemic, and our patient load increased by almost 20%. All staff was given extra vacation time as a bonus."
 — Animal Welfare, Budget: \$1- \$5 million

"Has allowed us to institute work from home practices that will continue after the pandemic. This strategy is proven to increase employee morale and we are hopeful that will also impact retention."
 — Health, Budget: \$250,001- \$1 million

"We are implementing a bonus program for all staff who have been with us throughout the crisis. This will be supported by stimulus funding. It is imperative that we retain staff. Hiring additional staff is proving very difficult."
 — Human Services: Youth development, Budget: Greater than \$10 million

"We paid for some meals and added snacks and coffee/tea for staff working in person. We delivered lunches to all sites once a month during the 12 months from March 2020 to March 2021."
 — Human Services: All other, Greater than \$10 million

"We remain committed to providing a living wage for all employees and reward staff who have gone above and beyond to ensure that programming remains relevant and offers support to the increasing needs of our constituency."
 — Human Services: Youth development, Budget: \$1- \$5 million

PPP Funding Minimized Employee Layoffs

“We survived because of the payroll protection plan funds that came from the government – otherwise, we would have had to severely cut our staff, either big reductions of hours or numbers of staff. We have actually increased staff because of some new programs, but we would not have been able to keep the existing ones without PPP. That is what saved us.”

— Health, Budget: \$1- \$5 million

“We have only been able to retain our employees because of the CARES related relief.”

— Arts and Culture, \$50,001- \$250,000

“Much of what our employees make is dependent on class attendance. We were able to use PPP funds to cover the losses of our hardest hit employees.”

— Arts and Culture, Budget: \$50,001- \$250,000

“We were fortunate to receive a PPP loan and increased local foundation support that enabled us to retain our staff.”

— Human Services: Housing/shelter, Budget: \$250,001- \$1 million

Employee Burnout

“I’ve watched our staff members be impacted by the anxiety and stress of COVID. Multiple staff members have had mental and physical impacts, leading to accommodations and resignations.”

— Human Services: All other, Budget: \$1- \$5 million

“The admin team is burnt out.”

— Human Services: Youth development, Operating Budget: \$1- \$5 million

“It has been very stressful and distracting for everyone concerned: employees, Board of Directors, volunteers, members and visitors. It has exacted a terrible toll at all levels of the organization.”

— Arts and Culture, Budget: \$250,001- \$1 million

Hiring Challenges

“We find it almost impossible to hire anyone because they are earning so much money to sit at home (or the beach as we’ve seen) and collect unemployment and have zero repercussions because they don’t have to pay rent either.”

— Education, Budget: \$1- \$5 million

“When we had voluntary quits, we held those positions as unfilled for longer than we would have otherwise.”

— Public and Societal Benefit, Budget: \$250,001- \$1 million

“Instituted a hiring freeze which resulted in staff reduction through attrition.”

— Health, Budget: Greater than \$10 million

“Our organization struggles with having more work added, triaging patients, and receiving less income. We did try to rehire anyone who was laid off or furloughed or even voluntarily left our organization. There is much challenge with turnover and the favorable unemployment compensation, of which we pay dollar for dollar, has made it very difficult to hire and retain employees. If any long-term hazard pay were to be required our organization would be in a very weak financial position.”

— Health, Budget: Greater than \$10 million

“Very challenging to hire staff- we believe impacted by the increased unemployment and federal benefits along with people taking care of family (kids out of school etc.)”

— Human Services: All other, Budget: Greater than \$10 million

Reduction in Hours

“Starting in 2021, the organization is closed one day every other week. Employees are expected to take that day off. It is NOT meant as a change in schedule to a 9-day / 80-hour two-week period.”

— Public and Societal Benefit, Budget: \$1- \$5 million

“We moved 3 employees from FT to PT”

— Health, Budget: \$1- \$5 million

“One full time staff member now does the job formerly done by two full time staff”

— Arts and Culture, Budget: \$50,001- \$250,000

“We had to reduce the number of hours for our part-time staff.”

— Education, Budget: \$50,001- \$250,000



SBF Reflection

There was so much going on in the responses to the question of the impact of COVID-19 in the Nonprofit Leader Survey, that the NPI and SBF agreed that these should be some of the central themes to explore in the PFE Breakout Session Focus Groups. Four of our five topic areas (workforce retention and hiring, staff and volunteer wellness, strategic planning and long-term recovery, and reopening and hybrid operation) were born from this question.

The additional data we collected in those sessions further reinforced some of the findings from the Nonprofits Leader Survey. Specifically, nonprofit staff reiterated the intense burnout employees and volunteers encountered while working through the pandemic, along with the hiring and retention challenges many organizations faced. The focus group findings delve deeper into the specific challenges these issues caused for organizations and the approaches they took to try to mitigate these trials (more on this in *Appendix B: Partnership for Excellence Breakout Session Focus Group Findings, pg 79*).

Nonprofit Board and Volunteer Data

In addition to paid employees, volunteers and board members play a critical role in supporting nonprofits to meet their missions. Across Santa Barbara County in 2019, 5,302 people served on nonprofit boards and 55,549 people volunteered with nonprofits.

Table 39: Board Members and Volunteers by Subsector Reported by Nonprofits filing Form 990, c. Fiscal Year 2019

	Nonprofits	Total Board Members	Average Board Members	Total Volunteers	Average Volunteers
Arts and Culture	65	785	12	4,827	89
Higher Education	4	59	15	46	23
Education (other)	79	1,004	13	6,334	96
Environment	40	313	9	6,935	210
Hospitals	4	64	16	889	222
Health (other)	52	624	12	3,136	67
Human Services	172	1,608	10	23,519	182
International	17	188	12	3,100	221
Public & Societal Benefit	57	571	10	5,794	116
Religion	20	86	4	942	72
Total	510	5,302	11	55,549	135

Table 40: Board Members and Volunteers by Budget Size Reported by Nonprofits filing Form 990, c. Fiscal Year 2019

	Nonprofits	Total Board Members	Average Board Members	Total Volunteers	Average Volunteers
\$50,000 and below	36	197	6	242	10
\$50,000 to \$250,000	122	1,066	9	3,936	46
\$250,000 to \$1M	177	1,559	9	17,642	121
\$1M to \$5M	112	1,352	12	20,847	217
\$5M to \$10M	29	457	16	4,078	151
\$10M to \$20M	16	275	17	4,684	312
Above \$20M	18	396	22	4,120	229
Total	510	5,302	11	55,549	135



SBF Reflection

Seventy percent of Santa Barbara County nonprofits have no employees and must therefore rely exclusively on volunteer labor. The other 30% with employees, often also utilize volunteer services to fulfill their missions. While we do not yet have data on volunteer participation since the pandemic, we know anecdotally from the Nonprofits Leader Survey that volunteer participation and engagement fell off dramatically in the past two years. Many volunteers were unable to continue to serve area nonprofits due to a combination of changes to services and to mobility and gathering restrictions as well as their own personal safety concerns. The 2019 baseline data will give us a better sense of the volunteer levels nonprofits will likely need to return to once pandemic restrictions are lifted. As we move into recover efforts, there could be an opportunity to work with private sector organizations to help bolster volunteer roles using some of their corporate responsibility efforts.

In the meantime, many organizations have already identified the need for capacity building and technical assistance support to help them better engage volunteers virtually or in a hybrid environment. Many nonprofits are finding creative ways to continue to show appreciation for their volunteers and are including them in their staff and volunteer wellness efforts (more on this in *Appendix B: Partnership for Excellence Breakout Session Focus Group Findings, Staff and Volunteer Wellness section. Pg 81*).

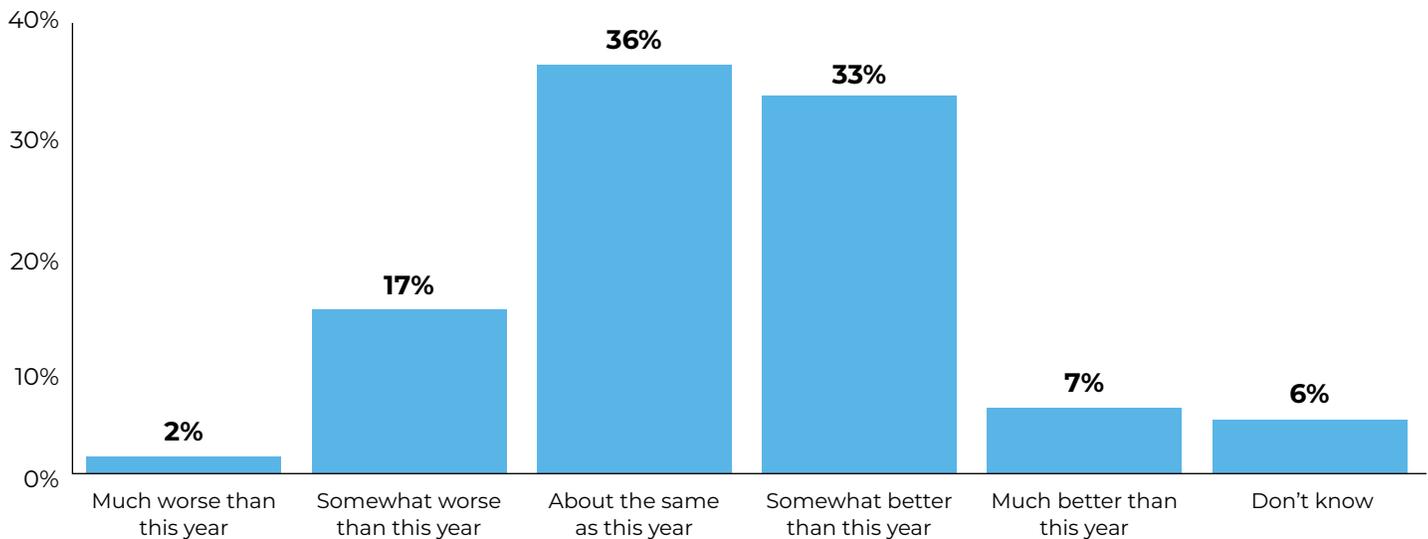
FUNDRAISING AND DONOR DEVELOPMENT

Seventy-five percent of survey respondents predicted their fundraising would be the same or better in the upcoming fiscal year. This section reports how donor relationships changed during the pandemic for survey respondents.

Table 41: How would you describe the fundraising outlook for your organization in your next fiscal year compared to this fiscal year?

Description	Frequency	Percent
Much worse than this year	4	2.4%
Somewhat worse than this year	28	17%
About the same as this year	59	35.5%
Somewhat better than this year	54	32.5%
Much better than this year	11	6.6%
Don't know	10	6%
Total	166	100.0%

Figure 23: Fundraising Outlook Next Fiscal Year Compared to this Fiscal Year

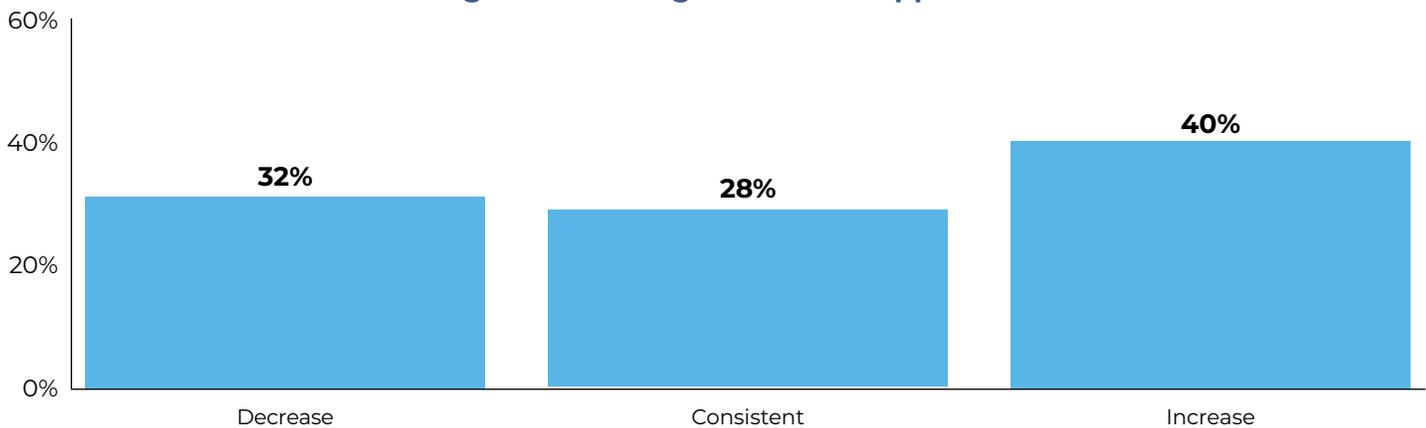


Qualitative responses about changes in donor relationships during the pandemic were analyzed and coded by whether the organization reported an increase, decrease, or consistent support over the past 12 months. Of the 89 responses to this question, 28 (31.5%) reported a decrease in donor support, 25 (28.1%) said support remained consistent, and 36 (40.4%) said that donor support increased.

Table 42: Please describe if and how your relationship with donors has changed in the last 12 months

Description	Frequency	Percent
Decrease in donor support	28	31.5%
Consistent donor support	25	28.1%
Increase in donor support	36	40.4%
Total	89	100.0%

Figure 24: Change in Donor Support



The tables that follow reveal how a change in donor support affected organizations during the COVID-19 pandemic in various capacities, such as program delivery, demand for services, financial health, and donor relations. Note, where table rows total 100%, donor support percentages represent parts of the whole sample for those questions and should be interpreted as such. For example: Of the respondents who say they are delivering programs to a greater extent than usual, 31% reported a decrease in donor support.



SBF Reflection

What follows are a lot of dense tables. Essentially, what they say are that in most cases, level of donor support is correlated with other factors, such as an organizations program delivery, their ability to meet changes in demand, and their predicted financial stability. What we can learn from this relates back to the earlier section on changes in income streams and is echoed again here in the tables related to organizations need for support with donor relations. The pandemic has resulted in changes in donor support that are impacting nonprofits' ability to fulfill their missions. They may need support to shift their donor relations to more online or hybrid models and/or in adapting to changes in revenue streams.

Table 43: Ability to Deliver Programs by Level of Donor Support

Description	N	Decreased	Consistent	Increased	Total
Delivering programs to a greater extent than usual	29	31%	17.2%	51.7%	100%
Delivering programs to the same extent as usual	12	33.3%	41.7%	25%	100%
Delivering programs in a moderately reduced capacity	27	33.3%	25.9%	40.7%	100%
Delivering programs in a severely reduced capacity	16	31.3%	31.3%	37.5%	100%
Not delivering programs at all	4	25%	75%	0%	100%

Table 44: Demand for Services by Level of Donor Support

Description	N	Decreased	Consistent	Increased	Total
Demand for services has increased	51	29.4%	17.6%	52.9%	100%
Demand for services has remained the same	22	40.9%	40.9%	18.2%	100%
Demand for services has decreased	12	33.3%	25%	41%	100%

Table 45: Ability to Meet Demand by Level of Donor Support

Description	N	Decreased	Consistent	Increased	Total
Unable to meet any of the in-creased demand	2	50%	0%	50%	100%
Able to meet some of the in-creased demand	22	40.9%	13.6%	45.5%	100%
Able to meet most of the in-creased demand	18	16.7%	22.2%	61.1%	100%
Able to meet all of the increased demand	9	22.2%	22.2%	55.6%	100%

Table 46: Financial Health by Level of Donor Support

Description	N	Decreased	Consistent	Increased	Total
Current financial health as somewhat or very strong	49	20%	35%	45%	100%
Predicting financial health in the next 12 months as somewhat or much better	41	32%	22%	46%	100%

Organizations who reported a change in donor support (increase or decrease) were more likely to report wanting help with donor relations.

Table 47: Need Help with Donor Relations by Level of Donor Support

Description	N	Decreased	Consistent	Increased	Total
Do you need help with donor relations? - Yes	49	42.9%	18.4%	38.8%	100%
Do you need help with donor relations? - No	39	17.9%	38.5%	43.6%	100%

Not surprisingly, average debt accumulated was higher for organizations that reported decreased donor support.

Table 48: Average Debt Accumulated by Level of Donor Support

Description	N	Decreased	Consistent	Increased
Average amount of debt accumulated because of COVID-19	63	\$42,750.00 ⁶	\$14,382.35	\$31,160.00

⁶ Excludes an organization that reported \$1,000,000 debt.

Organizations with more diverse leadership teams were more likely to report decreased donor support. As the table below shows, the average percent of the leadership team who identified as BIPOC was higher among those who reported decreased donor support (36%) than among those who reported consistent (31%) or increased donor support (28%).

Table 49: Diversity of Leadership by Level of Donor Support

Description	N	Average Pct of Leadership Team identified as BIPOC
Decreased Donor Support	22	36.4%
Consistent Donor Support	20	30.7%
Increased Donor Support	27	28.3%

Organizations that experienced a decrease in donor support commented on challenges engaging donors with virtual fundraising and stewardship. Respondents who reported consistent or increased donations focused on maintaining strong relationships with large and small donors to provide their services and programs. Fifty-nine percent of organizations that reported an increase in donor support also reported being able to meet most or all of the increased demand for their services.

Some respondents noted that they experienced a decrease in foundation support unless they were providing direct services that supported COVID-19 relief. The majority of respondents focused on fundraising strategies as restrictions were lifted and created plans for the upcoming year. Additionally, 46% of organizations predicting general financial health over the next 12 months as somewhat or much better than now also reported an increase in donor support, further indicating the effect donor support has on nonprofit leadership.

“For the most part, our relationship with donors has remained strong and we have done a good job keeping them abreast of all we have accomplished during the pandemic. We have also invited them to online ‘friendraisers’ which showcase a newer program. We have lost some

support from foundations due to changes in giving priorities and some major donors have scaled back their giving.”

— Human Services: Youth development, Budget: \$1- \$5 million

“As some of our funders have turned their energy and attention to strictly COVID related issues, we have had several wonderful out of the blue funders turn their attention towards [us]. We have built some new relationships. As a whole, our donors have been tremendous.”

— Human Services: All other, Budget: \$50,001- \$250,000

“Many foundations have pivoted their focus to COVID-19 relief, or other priorities that don’t include us. So the relationship may be strong but the circumstances have changed.”

– Education, Budget: \$1- \$5 million

“...Our foundation donors have kept us going and displayed a real trust in what we can do. Again, most donations were targeted to COVID relief. I believe that we are on a much more solid footing with foundation donors because they know that we will do whatever is needed to support our community.”

– Human Services: Youth Development, Budget: \$50,001- \$250,000

COVID-19 Emergency Funding

Many survey respondents indicated they had new sources of funding through the government and foundations. The survey findings on access to emergency funding indicated that federal funding and foundation funding were easier to access than state and local government funding.

Table 50: How difficult has it been to access COVID-19 emergency relief funding from each of the following sources? - Federal funding (e.g., PPP, EIDL)

Description	Frequency	Percent
Not at all difficult	56	40%
A little difficult	40	28.6%
Somewhat difficult	19	13.5%
Very difficult	7	5%
Extremely difficult	14	10%
Was not aware of this funding opportunity	4	2.9%
Total	140	100.0%

Table 51: How difficult has it been to access COVID-19 emergency relief funding from each of the following sources? - State funding (e.g., CA Small Business Relief Fund)

Description	Frequency	Percent
Not at all difficult	15	14.3%
A little difficult	25	23.8%
Somewhat difficult	20	19.1%
Very difficult	16	15.2%
Extremely difficult	25	23.8%
Was not aware of this funding opportunity	4	3.8%
Total	105	100.0%

Table 52: How difficult has it been to access COVID-19 emergency relief funding from each of the following sources? - County

Description	Frequency	Percent
Not at all difficult	20	18.5%
A little difficult	11	10.2%
Somewhat difficult	16	14.8%
Very difficult	14	13%
Extremely difficult	21	19.4%
Was not aware of this funding opportunity	26	24.1%
Total	108	100.0%

Table 53: How difficult has it been to access COVID-19 emergency relief funding from each of the following sources? - Foundations

Description	Frequency	Percent
Not at all difficult	53	36.1%
A little difficult	31	21.1%
Somewhat difficult	29	19.7%
Very difficult	17	11.6%
Extremely difficult	14	9.5%
Was not aware of this funding opportunity	3	2%
Total	147	100.0%

Figure 25: Very” or “Extremely” Difficult to access Emergency Relief

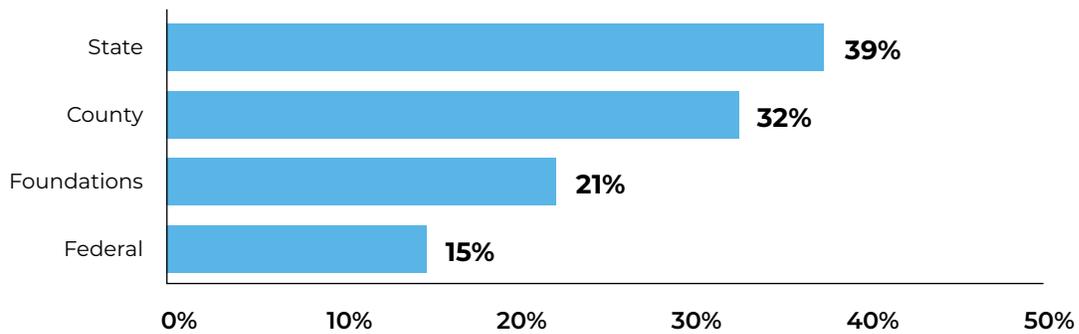
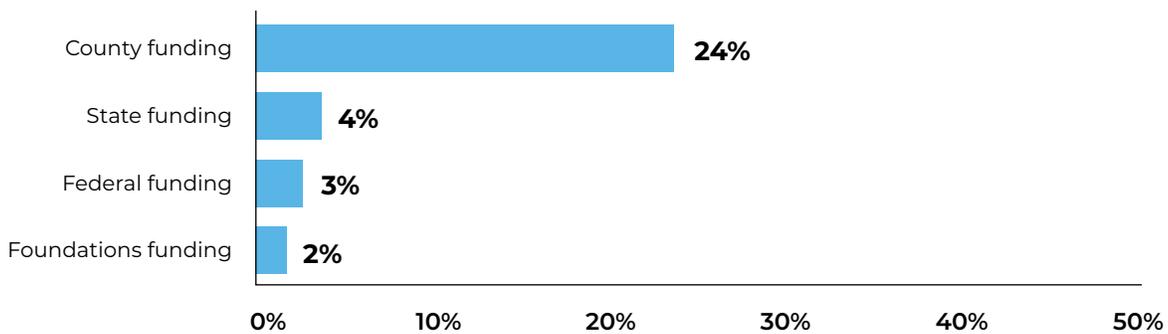


Figure 26: Percent of Respondents Unaware of Emergency Relief Funding Opportunity



Please tell us about any barriers to access you may have experienced in applying for COVID-19 emergency relief funding.

Santa Barbara County nonprofits expressed barriers to accessing COVID-19 emergency relief funding that centered heavily around three major themes. First, organizations stated that the process for applying and receiving funding was just too difficult, confusing, or delayed. Responses in this category ranged from objective critique to frustration and disappointment. Secondly, many expressed that they were considered low-priority organizations for funding and were therefore waitlisted or denied in many cases.

Often, arts and culture organizations stated that they were overlooked in receiving funding. Other organizations stated that since they did not have a physical venue or office space, they were not a priority for funding. The third main barrier expressed revolved around the size of the organization's revenue or operating budget, whether too large or too small.

Occurring less frequently but still trending were mentions of limited technical assistance available for applying, knowledge of available funding, not enough funding to go around, and a limited capacity for some banks to assist in securing funding. Another interesting theme causing barriers to access were the actions taken by foundations, including being focused on larger organizations "to the detriment of the smaller ones."

Delayed, Difficult, or Confusing Process

"The CA Small Business Relief Fund was oddly administered."

— Human Services: All other, Budget: \$250,001-\$1 million

"I think we all know about the difficulty of the first round of PPP funding. I never want to do that again." — Human Services: Youth development, Budget: \$1- \$5 million

Low Priority Organization

"Though we have been one of the hardest hit industries we are not seen as a priority or essential." — Arts and Culture, Budget: \$50,001-\$250,000

Size of Organization

"[Our revenues were] higher this year than last year and therefore we do not qualify for state funding..." — Education, Budget: \$1- \$5 million

"We are an all-volunteer organization, and we have no employees. Most opportunities are for paycheck protection."

— Animal welfare, Budget: \$50,001- \$250,000

Foundations' Actions

"[A barrier was] foundations closing their cycles indefinitely, foundations banning together (which was awesome) but also took away multiple streaming sources of funding for the community..." — Human Services: Youth development, Budget: \$250,001- \$1 million

"...as foundations increased their Covid relief funding they decreased (or stopped entirely) their ongoing core funding programs."

— Health, Budget: \$5 - \$10 million



SBF Reflection

Organizations reported they had the most difficulty accessing state funding, followed closely by county funding. They had the easiest time with federal funding but reported that foundation funding was also not too difficult to access. In their open ended responses, we learned that at the start of the pandemic, federal funding was not easy to access, but improved drastically over time. This might be attributed to the fact that Foundations and nonprofits helped administer some of these funds as the pandemic progressed.

Organizations also noted that among foundation funds, COVID specific funding was easier to access, while that same ease did not necessarily apply to standard foundation funds. Foundations and other funders should consider whether we could normalize and/or adopt some of the new grants administration practices developed for COVID funding for the rest of our work in the future.

Santa Barbara County nonprofits cited barriers to accessing emergency relief funding including arduous and confusing processes, competing priorities in the eyes of funders, and revenue sizes that disqualified them from funding. Respondents expressed barriers to accessing COVID-19 emergency relief funding that centered heavily around three major themes. First, organizations stated that the process for applying and receiving funding was just too difficult, confusing, or delayed. Responses in this category ranged from objective critique to frustration and disappointment. Secondly, many expressed that they were considered low-priority organizations for funding and were therefore waitlisted or denied in many cases. Some arts and culture organizations stated that they were overlooked in receiving funding. Other organizations stated that since they did not have a physical venue or office space, they were not a priority for funding. The third main barrier expressed revolved around the size of the organization's revenue or operating budget, whether too large or too small.

Occurring less frequently, but still trending, were mentions of limited technical assistance available for applying, knowledge of available funding, not enough funding to go around, and a limited capacity for some banks to assist in securing funding. Another interesting theme causing barriers to access were the actions taken by foundations, including being focused on larger organizations, "to the detriment of the smaller ones."

A quarter of organizations were unaware of county funding, many fewer were unaware of state (4%), federal (2%), and foundation (2%) funding opportunities. Kudos to the foundations for ease of access to emergency funding! SBF worked on getting the word out on funding sources, especially state and federal. Still there is a lot of need for capacity building around grant writing and access, especially for smaller nonprofits.



ADAPTATION AND INNOVATION

Survey respondents were asked to report how they adapted or innovated during the COVID-19 pandemic.

Please tell us about any innovative programs, partnerships, or strategies that we can highlight in our report.⁷

A common theme among organizations was having to pivot programming to adapt to social distancing mandates and shifting needs in the community. Respondents reported high levels of stress from staff but also mentioned successes brought on by the changing delivery of services. Some program adaptations came in the form of new services. Whether in the form of delivery, service rendered, or population focus, organizations pivoted to keep their doors open while continuing to serve their communities.

Partnerships were crucial in the adaptation of programs during COVID-19. Methods varied from leveraging partnerships based on need/resource scarcity to developing partnerships to tackle complex problems that were both exacerbated and/or created by the pandemic such as food scarcity and topics related to racial equity and inclusion.

The third primary area of adaptation was targeting disparities brought on by racial injustice. Organizations made it a priority to evaluate populations being impacted by the pandemic and used resources to develop services/funding to center the needs of historically excluded populations.

Adapted Existing Programs or Developed New Program

“We shifted quickly to online programming where possible, including tele-therapy, training, and social groups. We also decreased the number of in-person syringe exchange/Narcan distribution days and modified the in-person experience to be COVID safe/compliant.”
—Human Services: All other, Budget: \$1- \$5 million

“All of our changes were made as a reaction to CDC and Public Health guidelines and regulations, which we had to interpret on our own. It has been extremely stressful, and we have done a number of things to help protect the health and sanity of our staff.”
—Human Services: Housing/shelter, Budget: \$1- \$5 million

“During COVID the amount of excess food that would have gone to waste increased in the area of both fresh produce grown for sale to restaurants and restaurant supply companies, and packaged foods at restaurant supply companies not being sold. We added packaged food rescue to our previous focus on fresh produce, added a full-time staff to both be a driver and manage the increased volume as we grew pounds rescued by 275%, and added a 20 ft. refrigerated rental truck to our small fleet of three vehicles.”
— Human Services, Budget: \$250,000 - \$1 million

Developed/Leveraged Partnerships

“We continue to seek partnerships from the private sector, the public sector and foundations. We have collaborated with a number of organizations who have complimentary initiatives. And then leverage those relationships through events, public communications and support of mutual constituencies.”
—Human Services: Youth development, Budget: \$50,001- \$250,000

Cultural Diversity and Disparities

“We have shifted our focus to meeting with wealthy individuals who are plugged in because the foundation sector in SB lacks understanding of equity and justice, especially for populations that are most marginalized (Black/Brown youth in the criminal legal system).”

— Human Services: Youth development,
Operating Expense: \$50,001- \$250,000



SBF Reflection

There is no doubt that the pandemic has been a challenge for nonprofits in terms of fundraising and staffing, but amazingly, that did not stop them from finding ways to continue to provide their services. Throughout the pandemic Santa Barbara County Nonprofits have shown amazing ingenuity, innovation, and determination to continue to achieve their missions and serve the community. We have been amazed by the stories of collaboration, grit, and fortitude coming out of the social sector. Many organizations had or chose to get creative, resulting in numerous program innovations, partnerships, and strategies. Key among these innovations: adapting existing programs and developing or leveraging partnerships

We are particularly excited by the many ideas nonprofits shared in the Breakout Session Focus Groups on reopening and hybrid operations that highlight some of the long-term positive changes the pandemic inspired in how organizations approach programming (not to mention staffing flexibility and wellness). We very much look forward to continuing the conversation on what we all have learned from working under pandemic restrictions, what we're ready to leave behind about these challenging times, and what we're excited to carry forward.

ORGANIZATIONAL CAPACITY

Nonprofit leaders were asked to report their organizational capacity to monitor and evaluate their programs and operate in a remote/hybrid work environment.

Capacity to monitor and Evaluate Programs

While more than three quarters of respondents were confident monitoring program outputs, only 49% were confident in being able to measure program outcomes.

Table 54: Overall, how confident are you in your organization's ability to track program outputs?

Description	Frequency	Percent
Not at all confident	3	1.8%
Not so confident	8	4.7%
Somewhat confident	24	14.2%
Very confident	62	36.7%
Extremely confident	72	42.6%
Total	169	100.0%

Figure 27: Confidence in Ability to Track Program Outputs

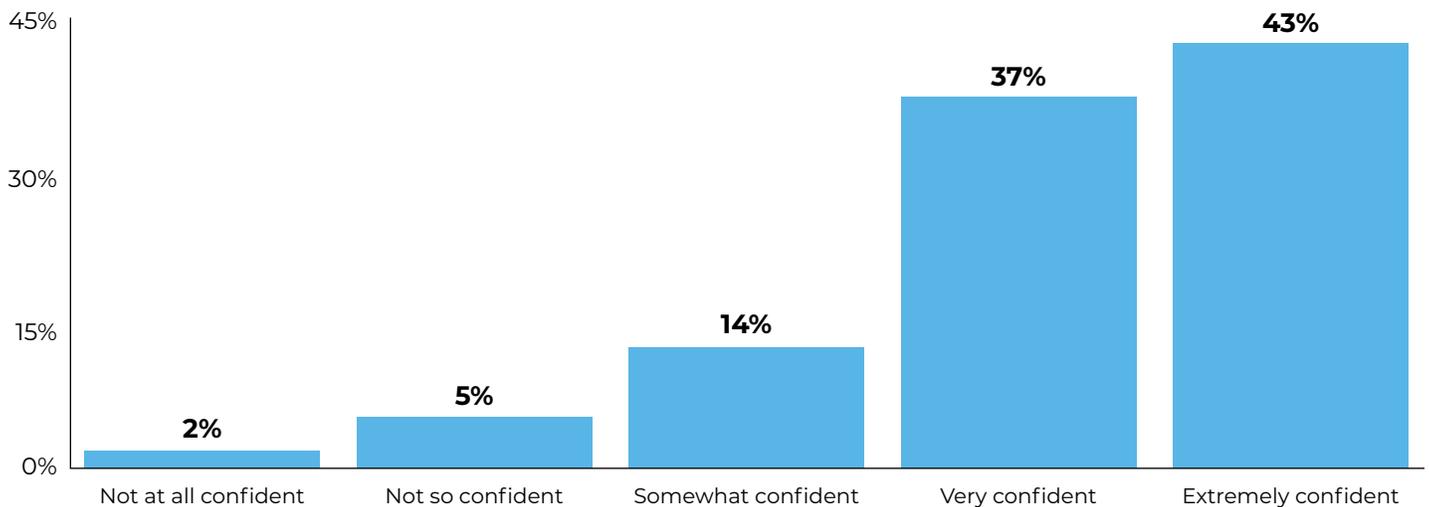
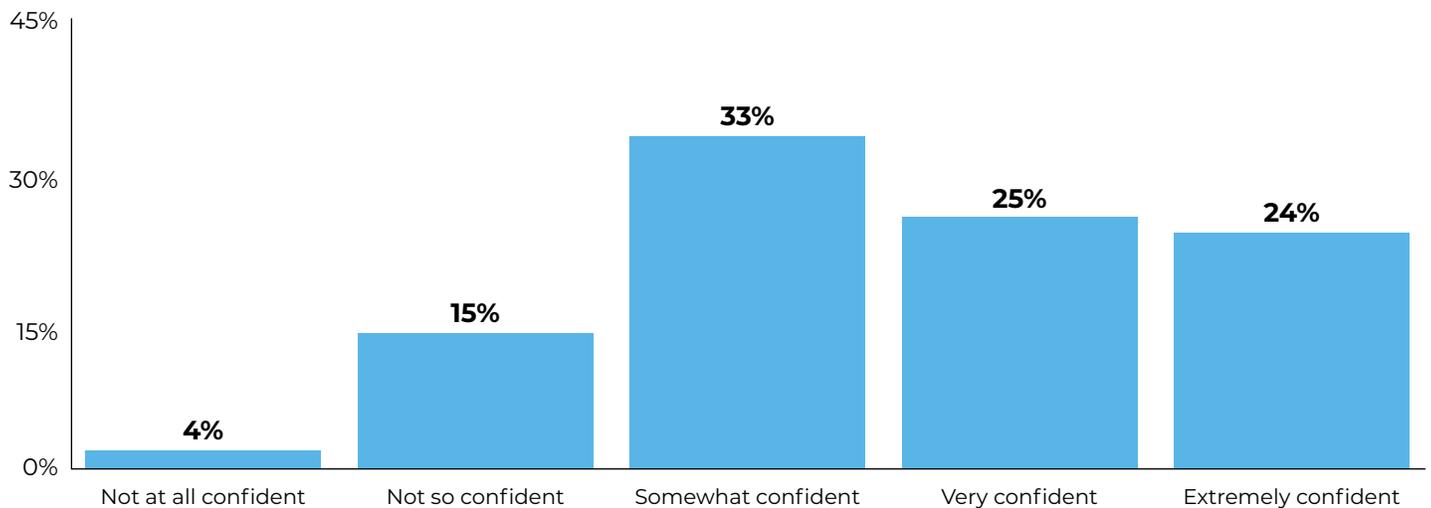


Table 55: Overall, how confident are you in your organization’s ability to accurately measure program outcomes that result from participating in your programs or services?

Description	Frequency	Percent
Not at all confident	6	3.6%
Not so confident	25	14.8%
Somewhat confident	55	32.5%
Very confident	43	25.4%
Extremely confident	40	23.7%
Total	169	100.0%

Figure 28: Confidence in Ability to Measure Program Outcomes



SBF Reflection

While 79.3% of organization leaders reported being very or extremely confident in their ability to track program output, they were a little less confident in measuring program outcomes. This likely points to a lack of tools and/or resources and highlights nonprofits need of both monetary and non-monetary support for evaluation efforts.

Capacity to Operate Effectively in a Remote/Hybrid Work Environment

The majority of respondents indicated they planned to operate in a hybrid work environment. Approximately 60% of respondents felt confident being an effective leader, managing staff, and engaging the board remotely.

Table 56: As of today, is your organization operating remotely or in-person?

Description	Frequency	Percent
100% remotely	33	19.5%
100% in-person	23	13.6%
A mix of remotely and in-person	113	66.96%
Total	169	100.0%

Figure 29: Organizations' In-Person/Remote Status

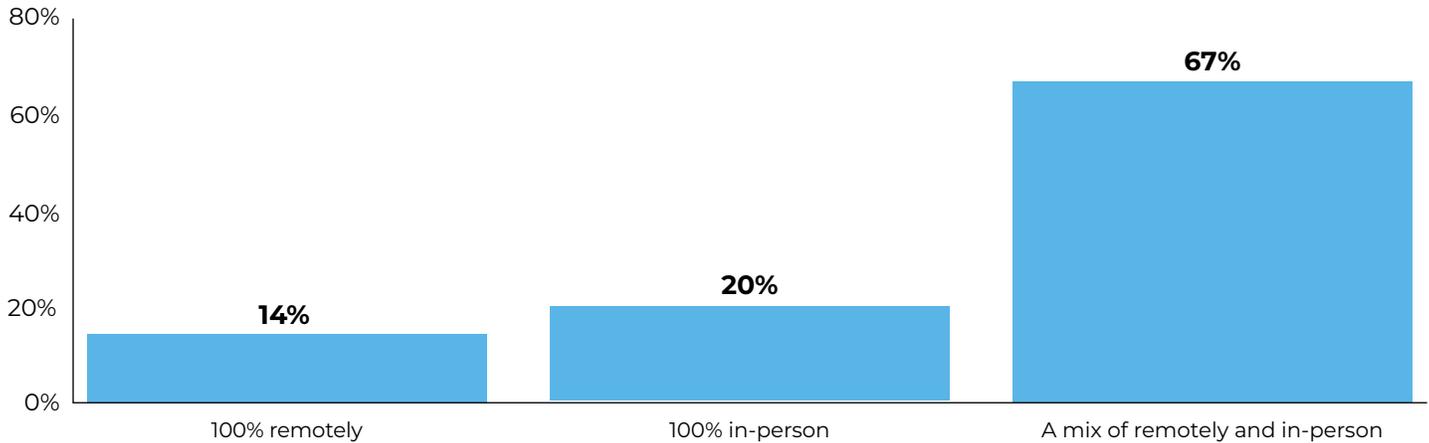


Table 57: How confident are you in being an effective leader remotely?

Description	Frequency	Percent
A Little confident	15	10.3%
Somewhat confident	46	31.7%
Very confident	60	41.4%
Extremely confident	24	16.6%
Total	145	100.0%

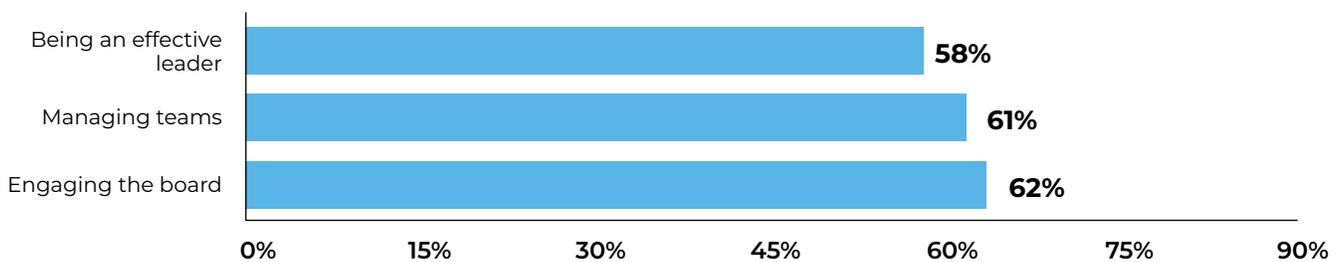
Table 58: How confident are you in managing your team in a remote work environment?

Description	Frequency	Percent
Not at all confident	1	0.7%
A Little confident	10	6.9%
Somewhat confident	45	31.3%
Very confident	65	45.1%
Extremely confident	23	16.0%
Total	144	100.0%

Table 59: How confident are you in engaging the board in a remote work environment?

Description	Frequency	Percent
Not at all confident	1	0.7%
A Little confident	12	8.3%
Somewhat confident	42	29.0%
Very confident	61	42.1%
Extremely confident	29	20.0%
Total	145	100.0%

Figure 30: “Very” or “Extremely” Confident in Remote Work Practices



Ninety percent of respondents rated their leadership team competent or very competent in using technology. While it is likely technology skills were strengthened as a result of the pandemic, only one-third of respondents felt confident in digital fundraising and engaging volunteers remotely.

Table 60: How would you rate your leadership team’s competence in using technology to manage a remote work environment?

Description	Frequency	Percent
Not at all competent	1	0.7%
A little competent	14	9.7%
Competent	70	48.6%
Very competent	59	41.0%
Total	144	100.0%

Figure 31: Leadership Competence in Technology

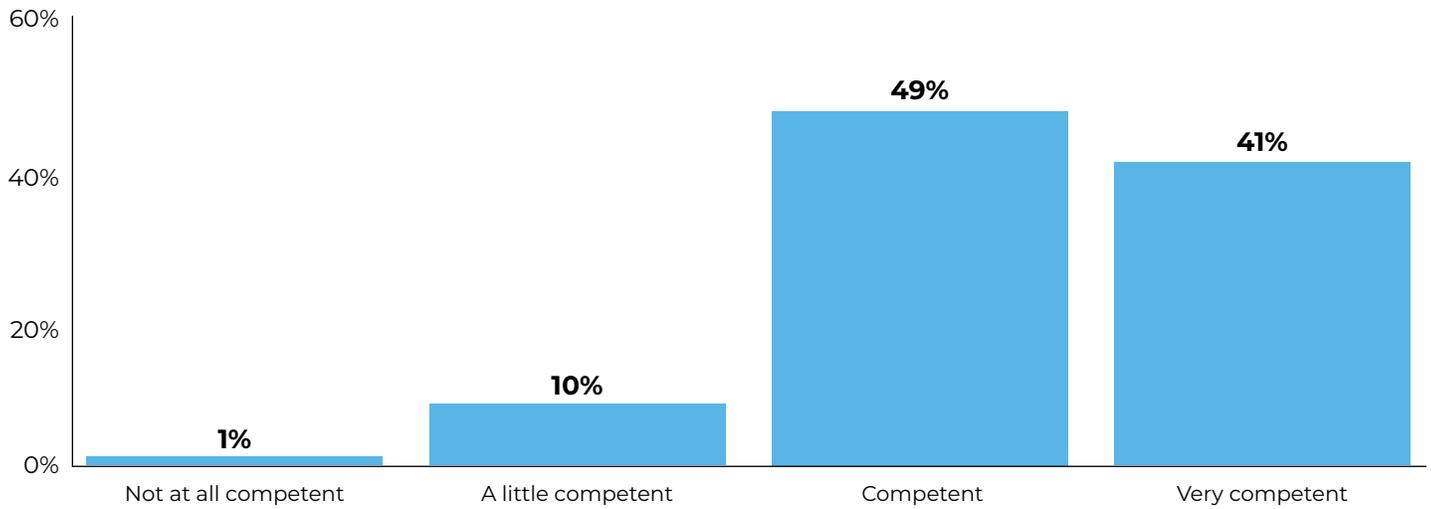


Table 61: How confident are you in your organization’s ability to do the following? - Digital fundraising

Description	Frequency	Percent
Not at all confident	25	16%
A little confident	34	22%
Somewhat confident	50	32%
Very confident	28	18%
Extremely confident	19	12%
Total	156	100.0%

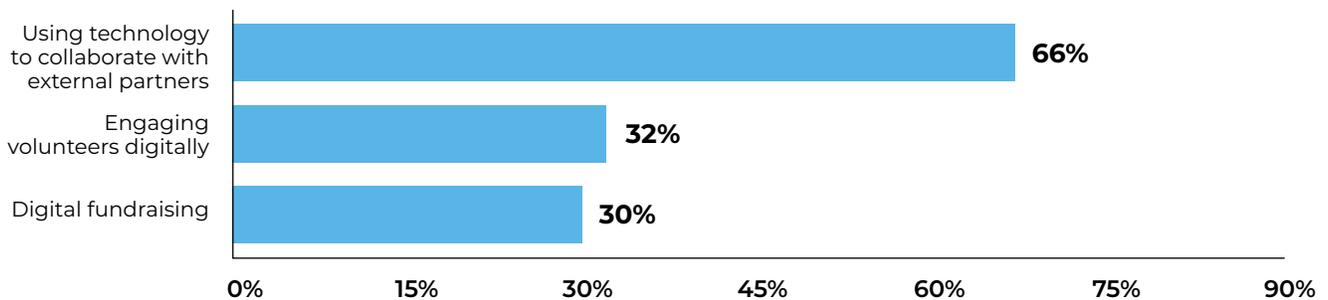
Table 62: How confident are you in your organization’s ability to do the following? - Engaging volunteers digitally

Description	Frequency	Percent
Not at all confident	28	19%
A little confident	33	23%
Somewhat confident	38	26%
Very confident	33	23%
Extremely confident	13	9%
Total	145	100.0%

Table 63: How confident are you in your organization’s ability to do the following? - Using technology to collaborate with external partners

Description	Frequency	Percent
Not at all confident	9	5%
A little confident	11	7%
Somewhat confident	36	22%
Very confident	68	42%
Extremely confident	40	24%
Total	164	100.0%

Figure 32: Confidence in Remote Work Practices (Very or Extremely Confident)



SBF SBF Reflection

With the majority of organizations (67%) operating hybrid programs, nonprofit organizations faced a lot of capacity and technological challenges. Many nonprofits, often with the support of SBF and many other funders, invested a lot of time and resources into improving technology infrastructure throughout the pandemic.

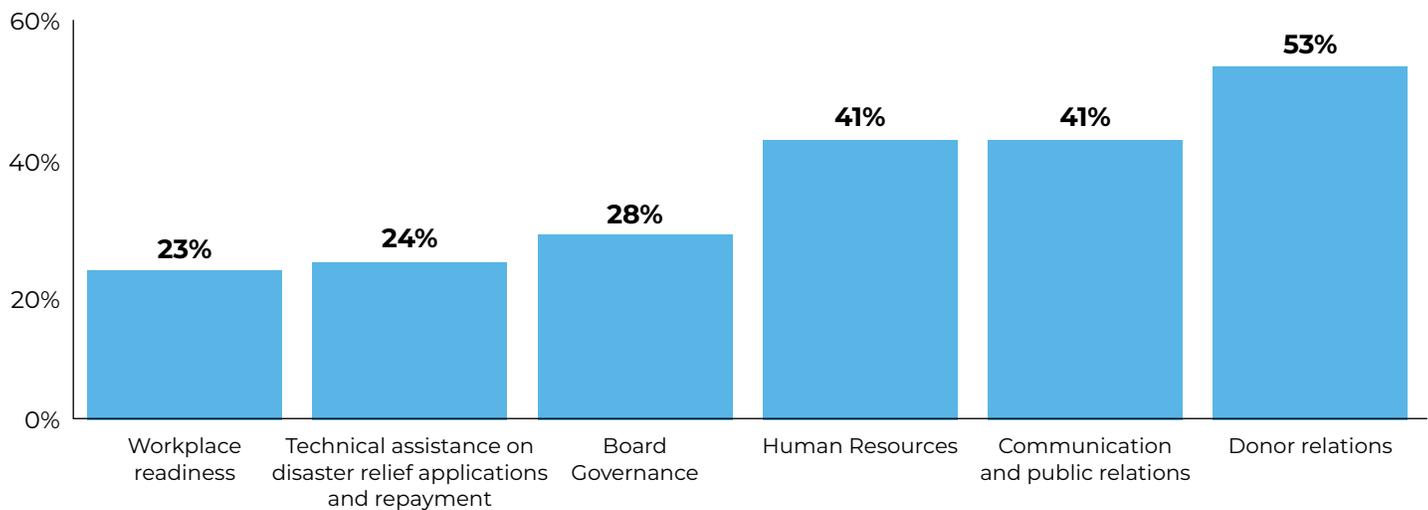
Even with this increased investment in technology on the parts of both the nonprofit and philanthropic arms of the social sector, there are still many opportunities for improvement. Many organizations highlighted the need for improved remote volunteer engagement, digital and other alternative event fundraising, and alternative funding source identification. For those of us focused on philanthropy, this also points to an opportunity for nonprofit capacity building support focused on hybrid operating models and pivoting business operations.

Organizational Capacity Needs

Table 64: As conditions of the pandemic change, do you need help with reopening in the following areas?

Description	Frequency	Percent
Workplace readiness	39	23%
Human Resources	68	41%
Board Governance	47	28%
Communication and public relations	67	41%
Donor relations	88	53%
Technical assistance on disaster relief applications and repayment	40	24%

Figure 33: Percent of organizations reporting needing help with reopening in the following areas



Santa Barbara Foundation wants to learn about your organization’s needs. What kind of non-monetary support do you need?

Organizations expressed a high need for support in transition to in-person work, convenings, and capacity building. Areas of high interest in capacity building included board development with a focus on how to transition to in-person meetings with the board and learning how to diversify the existing and future boards so that they are representative of the community’s demographics. Organizations also requested facilitated convenings to bring organizations

together to strategize, especially in a post-covid/quarantine world. There is recognition that the world is and will be different and there will be a need for collaboration to not only solve problems but to stretch resources.

Transition to In-Person Work

“Help navigating the changing funding environment. Help navigating the complexities of employee returns to some office and in-person work.”

— Human Services: All other, Budget: Greater than \$10 million

“It’s challenging to know how to adapt to the new post-Covid world. Our meetings, fundraisers and events were held in-person and so we are doing our best to invent more effective means of staying in touch and motivated.”

— Arts and Culture, Budget: \$50K or less

“A basic kind of support is having confidence in reopening – like, for example, the facilities we are allowed to use and their staff are using good practices. We are an older group of volunteers and while almost all are vaccinated, the safety in the community is essential.”

— Arts and Culture, Budget: \$50K or less

Convenings

“Spaces for peer discussions among executive leaders on nonprofits. More resources for policy advocacy.”

— Higher Education, Budget: Higher Education

“Opportunities to connect with other organizations. We are still a well-kept secret in Santa Barbara”

— Human Services: Housing/shelter, Budget: \$50,001- \$250,000

“Opportunities to form relationships with other nonprofit leaders and forums in which to discuss common issues and learn from other organizations. Virtual gatherings lack the ability to form and foster relationships. Panel discussions and presentations often lack the interactions with colleagues that bring about real learning.”

— Human Services: All other, Budget: \$5 - \$10 million

“More facilitated conversations with other nonprofits that can help generate new collaborations or just sharing of ideas, plus uplifting each other in these challenging times.”

— Arts and Culture, Budget: \$250,001- \$1 million

Nonprofit Capacity Building-Board Development

“Engaging the Board as we move out of virtual meetings. They are overly eager and impatient to get back to what we did pre-pandemic. The organization has cancelled events through 2021. Returning to “normal” will not happen this year.”

— Health, Budget: \$250,001- \$1 million

“Consulting about ways to diversify the board, ideas for capacity building, strategic planning and growth of organization, best practices.”

— Public and Societal Benefit, Budget: \$50K or less

“We need help in building a diverse board of directors. Making inroads into marginalized communities has been extremely difficult for us in Santa Barbara.”

— Arts and Culture, Budget: \$50,001- \$250,000

Nonprofit Capacity Building-Communications/Marketing

“The type of non-monetary support needed most is exposure to the public, office space, social media assistance, training for use of technology in order to present programs and services for the general public, website support, help with sending mass emails and Board development.”

— Public and Societal Benefit, \$50K or less



SBF Reflection

The pandemic forced many, if not most, organizations to pivot. For a sector that is historically lean on capacity, the resources weren’t necessarily available for most to efficiently do so. Our sector benefits tremendously from in-kind/non-monetary donations and volunteer hours, but when asked to pivot quickly per the pandemic, many organizations were too lean on capacity to do so quickly without disruption to services.

The sector is still in need of investments in capacity building support whether it be expertise in board development, communications/marketing, or assistance in convening around issues affecting each subsector or the sector as a whole. At SBF we encourage donors and funders to invest in an organization’s overall support whether it be general operating support, access to professional development opportunities for the staff/board, or in-kind expertise that will advance the organization’s development.

DIVERSITY, EQUITY, INCLUSION, AND ACCESS

Survey respondents were asked a number of questions about the diversity of their leadership teams and about any practices they have implemented to address racial/ethnic inequities within their organizations. This section reports all of the survey findings around diversity, equity, inclusion, and access (DEIA).

Respondent Demographics

Table 65: What is your race/ethnicity? - Selected Choice

Description	Frequency	Percent
White	130	80.8%
Hispanic/Latino/a/x	19	11.8%
Two or more races	5	3.1%
Prefer to self-describe	3	1.9%
African American/Black	2	1.2%
Asian	2	1.2%
Total	161	100.0%

Figure 34: What is your race/ethnicity?

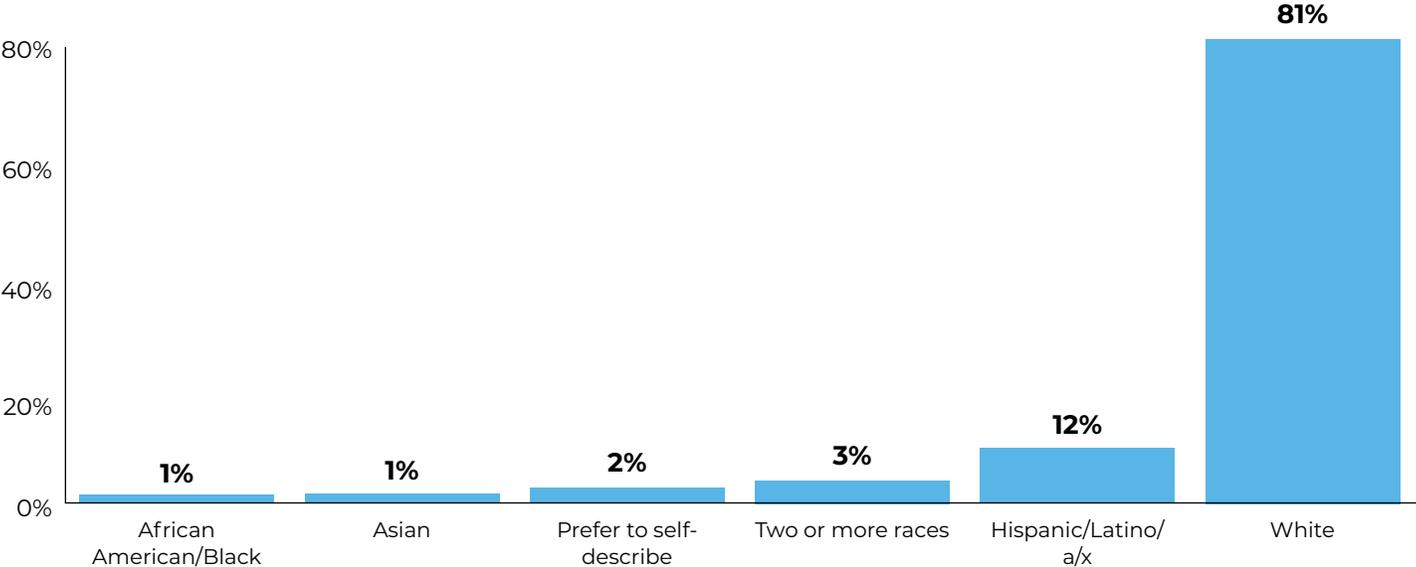
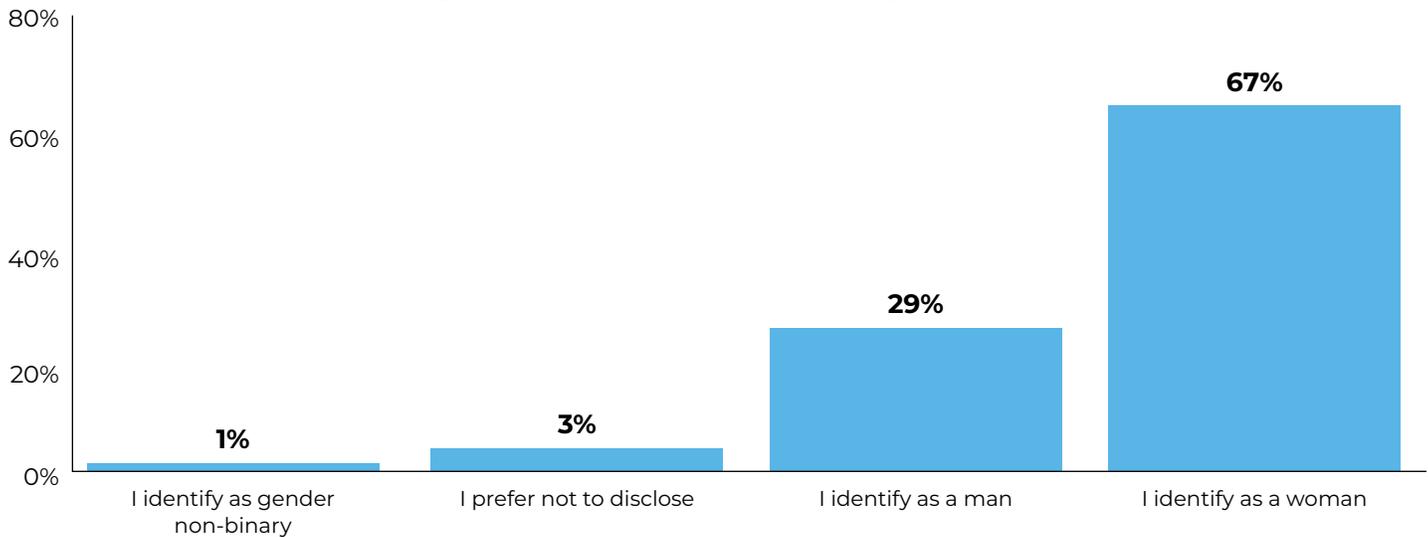


Table 66: What is your current gender? - Selected Choice

Description	Frequency	Percent
I identify as a woman	111	67.3%
I identify as a man	47	28.5%
I identify as gender non-binary	2	1.2%
I prefer not to disclose	5	3%
Total	165	100.0%

Figure 35: What is your current gender?



SBF Reflection

The data in this section provides insights into DEIA in leadership and programmatic initiatives in the Nonprofit sector in Santa Barbara County. We acknowledge that the leadership members who responded to the survey were predominately CEOs/EDs who identify as white and as cis gendered women. Because of this we sought additional feedback from nonprofit staff members at the PFE Breakout Session Focus Groups (See *Appendix B, pg 85* of this document for more details on the findings). The critical and never-ending work around the principles of DEIA needs to address not just education, but organizational commitment and culture/readiness as well as comprehensive implementation. SBF also acknowledges that each organization is unique and at different points in this work but is committed to engaging the sector in an ongoing more thorough dialogue.

DEIA Practices and Strategies

Table 67: As a leader in your organization, to what extent are you satisfied with the organization’s willingness to discuss concepts of diversity, equity, inclusion, and access?

Description	Frequency	Percent
Not at all satisfied	5	3%
Slightly satisfied	5	3%
Somewhat satisfied	36	22%
Very satisfied	68	41.5%
Completely satisfied	50	30.5%
Total	164	100.0%

Table 68: As a leader in your organization, to what extent are you satisfied with the organization’s ability to implement practices that increase diversity, equity, inclusion, and access?

Description	Frequency	Percent
Not at all satisfied	7	4.3%
Slightly satisfied	17	10.4%
Somewhat satisfied	45	27.6%
Very satisfied	48	29.5%
Completely satisfied	46	28.2%
Total	163	100.0%

Figure 36: Reporting being “Very” or “Completely” Satisfied with the Following DEIA Topics

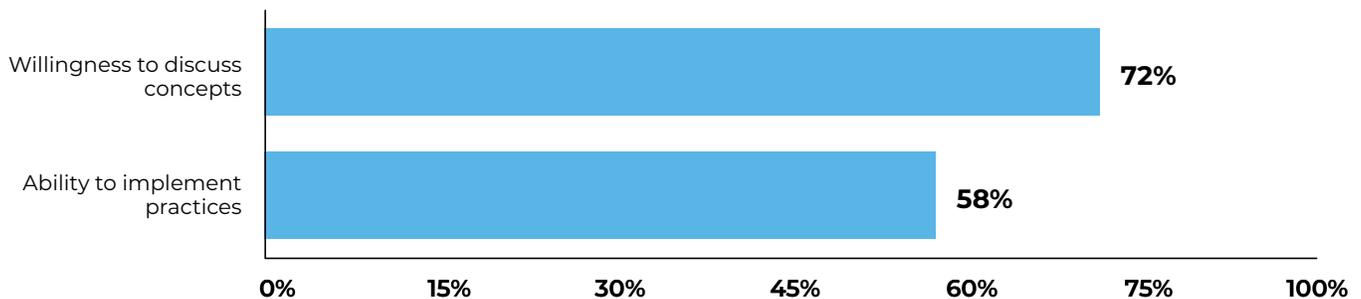
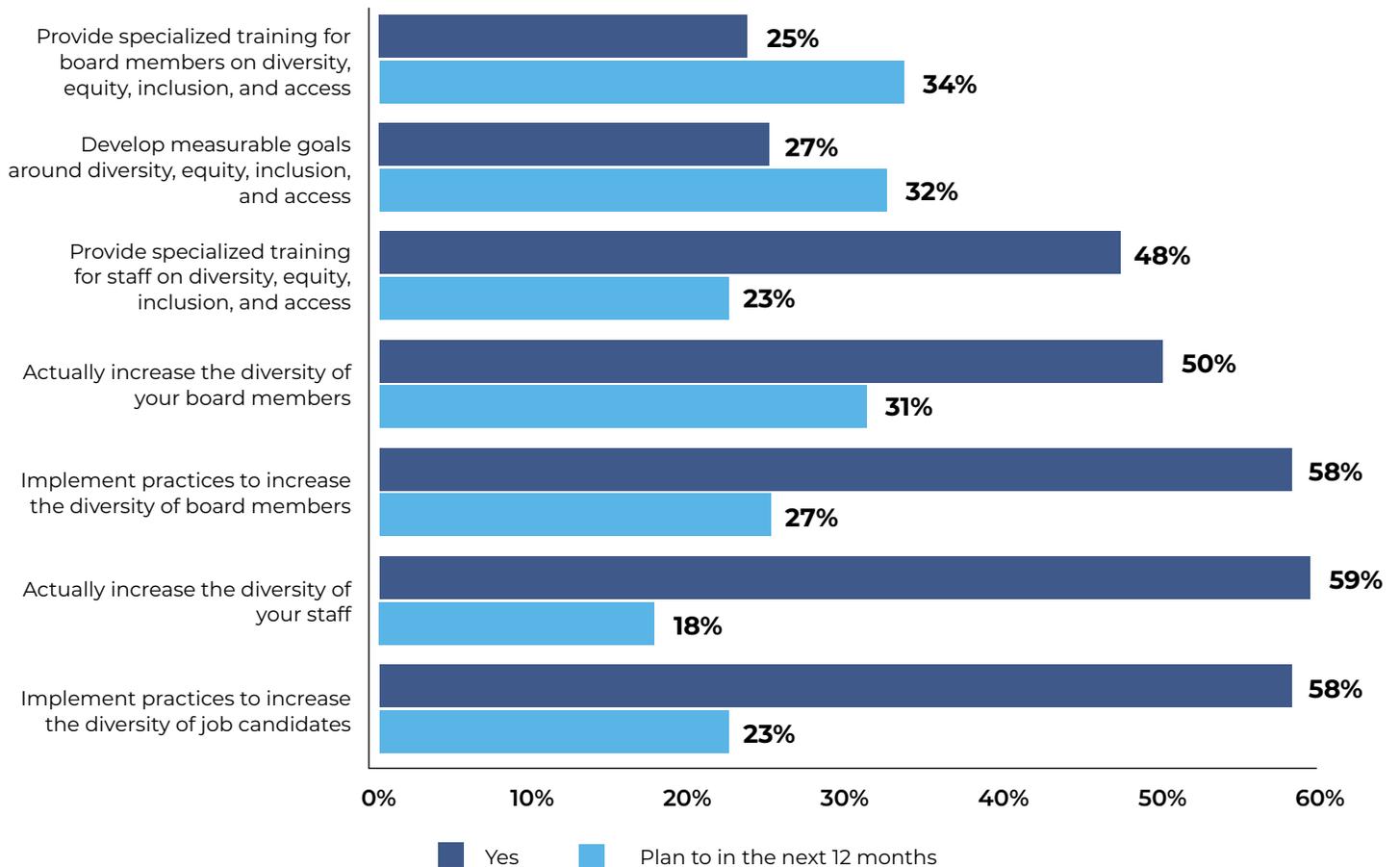


Table 69: Has your organization done any of the following actions to promote racial/ethnic diversity, equity, inclusion, and access?

Description	Yes	Plan to in the next 12 months
Provide specialized training for board members on diversity, equity, inclusion, and access	25.3%	33.5%
Develop measurable goals around diversity, equity, inclusion, and access	27.3%	32.3%
Provide specialized training for staff on diversity, equity, inclusion, and access	48.1%	22.8%
Actually increase the diversity of your board members	50%	31.3%
Implement practices to increase the diversity of board members	57.8%	27.3%
Actually increase the diversity of your staff	59.2%	17.8%
Implement practices to increase the diversity of job candidates	58.1%	22.5%

Figure 37: Actions Taken to Promote DEIA



Additional actions to promote racial/ethnic DEIA

There were 16 survey respondents who responded to this question and shared additional actions or thoughts about promoting racial/ethnic diversity, equity, inclusion, and access. Some of the actions included hiring consultants to train staff, hiring dedicated staff or developing internal DEIA action teams to lead efforts, and providing anti-racism support to other organizations. A few organizations also reported that they already have a diverse staff or have been doing this work for many years and thus have not changed their practices this year.



SBF Reflection

The most common DEIA practices organizations in the survey were currently implementing included actions to increase diversity of job candidates, increasing staff diversity, and efforts towards increasing board diversity. The least common actions, which then rated the highest on “planned actions for next year,” included training board members in DEIA and developing measurable DEIA goals. These are two opportunities for foundations and funders to support nonprofits with capacity development opportunities.

There seems to be some rapid movement in the area of DEIA. Importantly, many orgs have actions underway without having specific goals in place or ways of measuring success. This raises a lot of questions around retention, readiness, and best practices. This is one reason we chose to dive into this more during one of the PFE Breakout Session Focus Groups (see Appendix B). Findings from that engagement echoed some of the discussion here, with additions related to increasing access, increasing funding for equity initiatives, finding a common language between organizations, and ensuring BIPOC representation in conversations and problem solving.

We would also like to note that these findings align with our own capacity building grant trends, where more organizations are requesting financial support to hire DEIA consultants or to do DEIA work, training, and monitoring as well as requesting general DEIA resources. SBF’s CSI is also doing a lot of work with organizations in support of board development, diversification, and education.

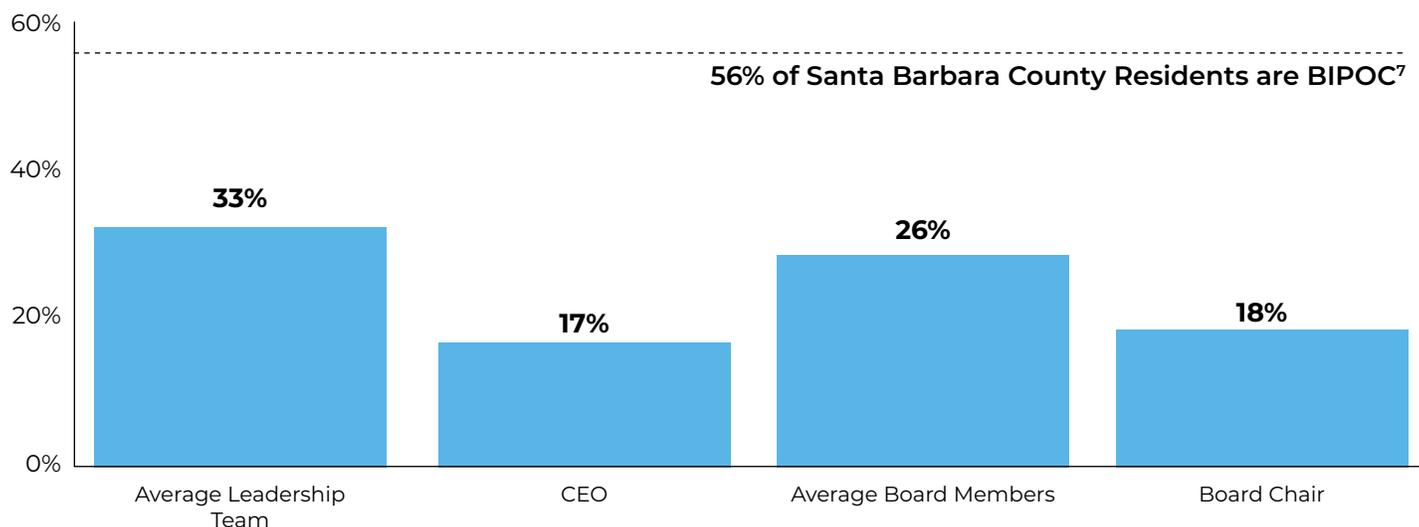
Finally, we would like to acknowledge that some organizations noted that they are not working to increase staff diversity, because they already have a diverse or representative staff.

Diversity in Leadership

Table 70: Percent of People who Identify as BIPOC in Leadership Positions

Description	Yes
Average Leadership Team (n=154)	33%
CEO (n=161)	17%
Average Board Members (n=155)	26%
Board Chair (n=159)	18%

Figure 38: Percent of People who Identify as BIPOC in Leadership Positions



Analysis of the composition of organizational leadership shows that the ethnicity of leadership equates to better diversity outcomes. Organizations in which the CEO identified as BIPOC had more ethnically diverse boards and leadership teams than organizations in which the CEO was white. These differences in leadership team composition were approaching statistical significance and in board composition were statistically significant.

Table 71: Average Percent of Leadership Teams and Boards Who Identify as BIPOC by Ethnicity of CEO

	Average Pct of Diversity of Leadership Team	Average Pct of Diversity of Board
CEO identifies as BIPOC	41.4%	41.2%
CEO identifies as White	26.5%	22.9%

⁷ U.S. Census. 2019. QuickFacts. <https://www.census.gov/quickfacts/santabarbaracountycalifornia>

Organizations in which the Board Chair identified as BIPOC had more ethnically diverse boards and leadership teams than organizations in which the Board Chair was white. These differences in leadership team composition and board composition were statistically significant.

Table 72: Average Percent of Leadership Teams and Boards Who Identify as BIPOC by Ethnicity of Board Chair

	Average Pct of Diversity of Leadership Team	Average Pct of Diversity of Board
Board Chair identifies as BIPOC	44.6%	42.4%
Board Chair identifies as White	28.6%	20.4%

SBF Reflection

Overall, the data from the nonprofit leadership survey supports research that suggests organizations with a BIPOC CEO or Board chair are more likely to have a racially/ethnically diverse leadership teams and board.

Our reason for sharing this data is not as a value judgement of leadership teams, rather to note that the composition of the leadership teams and leads is not reflective of the overall racial composition of the county.

Table 73: To the best of your knowledge, what race/ethnicity does the CEO/Executive Director of your organization identify as - selected choice?

Description	Frequency	Percent
African American/Black	2	1.24%
Asian	3	1.86%
Hispanic/Latino/a/x	16	9.94%
White	129	80.12%
Two or more races	5	3.11%
Prefer to self-describe	6	3.73%
Total	161	100.0%

Figure 39: Race/Ethnicity of CEO/ED

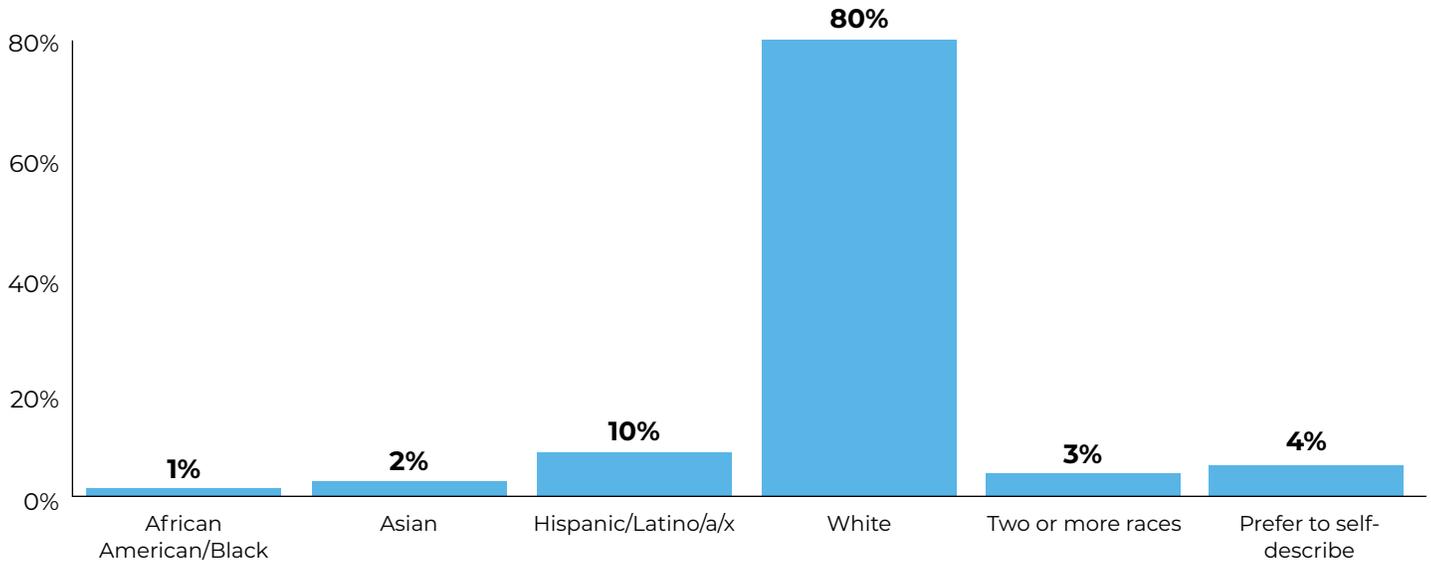


Table 74: To the best of your knowledge, what is the current gender of your CEO/ Executive Director? - Selected choice

Description	Frequency	Percent
They identify as a woman	100	61.35%
They identify as a man	55	33.74%
They identify as gender non-binary	1	0.61%
I prefer not to disclose or I do not know	7	4.3%
Total	163	100.0%

Figure 40: Current Gender of CEO/Executive Director

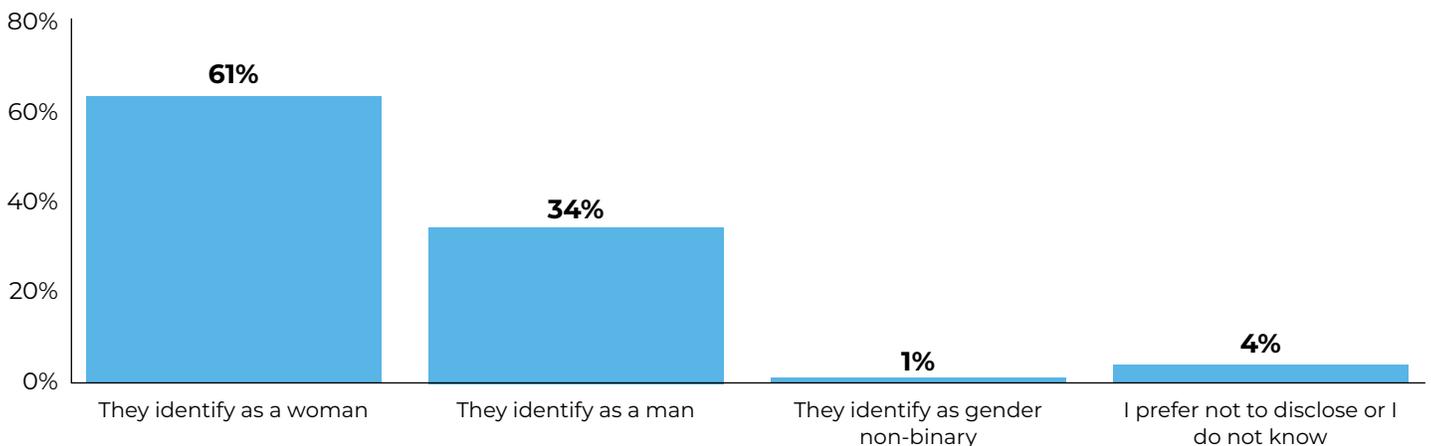


Table 75: To the best of your knowledge, does your CEO/Executive Director identify with any of these groups? Please select all that apply.

Description	Frequency	Percent
LGBTQ	19	10%
Person with Disabilities	13	7%
Immigrant	12	6%
Previously incarcerated	3	2%
History of housing instability	8	4%

Table 76: To the best of your knowledge, what race/ethnicity does the Board Chair of your organization identify as? - Selected Choice

Description	Frequency	Percent
African American/Black	5	3.1%
Asian	4	2.5%
Hispanic/Latino/a/x	14	8.8%
Native Hawaiian/Pacific Islander	1	0.6%
White	122	76.7%
Two or more races	2	1.3%
Don't know or prefer not to disclose	11	6.9%
Total	159	100.0%

Figure 41: Race/Ethnicity of Board Chair

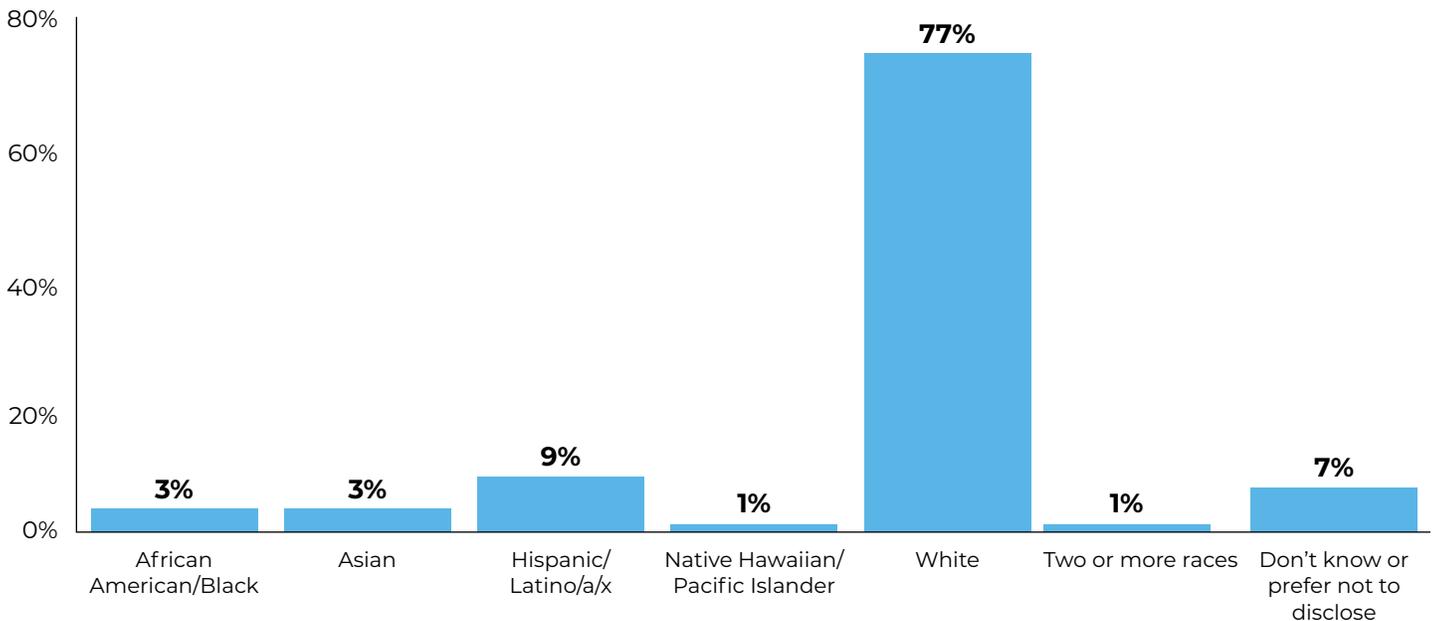


Table 77: To the best of your knowledge, what is the current gender of your Board Chair? - Selected Choice

Description	Frequency	Percent
They identify as a woman	86	53.7%
They identify as a man	67	41.9%
I prefer not to disclose or I do not know	7	4.4%
Total	160	100.0%

Figure 42: Current Gender of Board Chair

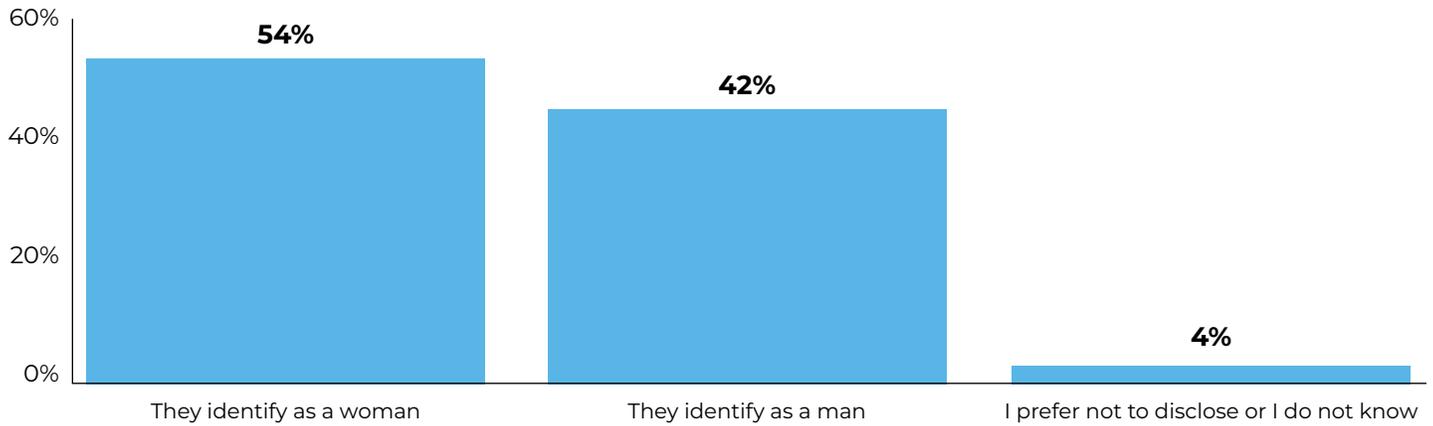


Table 78: To the best of your knowledge, does your Board Chair identify with any of these groups? Please select all that apply.

Description	Frequency	Percent
LGBTQ	5	3%
Person with Disabilities	6	3%
Immigrant	4	2%

SBF Recommendations

This report reflects the Santa Barbara Foundation’s best and most current understanding of the profound effect the COVID-19 pandemic has had on the health and well-being of the Santa Barbara County nonprofit sector. Although limitations in available data highlight the need for improved health metrics in the future, they cannot be the cause for inaction. In fact, a significant amount of data is available to begin informing decision-making and advocacy across the sector.

One of the most important results of producing this research has been a heightened sense of professional identity and respect for those who serve the nonprofit sector. As the saying goes, what gets measured matters.

Having this research provides legitimacy to an often overlooked and misunderstood element of regional economies. Focusing on the economic impact of nonprofits as job producers has distinguished this report from typical reports on nonprofit activity. SBF is also working with the Workforce Development board to include nonprofits in their COVID-19 workforce impact report – which will show the sector alongside other industries.

The following recommendations are based upon what trends SBF sees in the research and how we can use the information to improve individual organizations and sector health through effective practices, policy, and additional research. We hope these recommendations help to form the basis of sector-wide conversations in the months to come and that our communities work to translate the findings into timely and relevant action.

Prioritize Workforce Wellness:

With an exhausted workforce and increases in cost of living on the Central Coast – most notably wages not keeping pace with the

dramatic increase in housing costs– the nonprofit sector is finding it increasingly difficult to retain and recruit talent. To counter this, a focus on individual mental & physical wellness, fair wages, and innovative employee benefits and/or incentives is critical. And as organizations work towards fair and living wages in a competitive market, funders should expect and support increased program costs.

Codify Diversity, Equity, Inclusion, & Access:

Most nonprofits surveyed report their organizations have taken actions to engage DEIA principles. That said, when collecting DEIA data, the focus should include the entire organization, rather than solely leadership and governing bodies. The pandemic placed a spotlight on social inequities and structural racism in our county, generating significant buy-in across the sector to prioritize DEIA in our work. Studies like the recent [Central Coast Regional Equity Study](#) further highlight the need. Findings suggest that if racial gaps in income were eliminated, the estimated equity dividend for Santa Barbara County would be \$7.5B. This demonstrates an opportunity for all sectors – government, nonprofit and for profit alike to advance more equitable systems through comprehensive DEIA assessments and integrating DEIA principles into the core of organizations. This can be accomplished for nonprofits with a focus on organizational readiness, governing practices, internal culture, and programs. This critical work will require deep reflection with a focus on trust, patience, and a proactive and intentional practice

Cultivate Underrepresented Leadership & Volunteer Capacity:

Nonprofit services and financial assets are distributed unequally in our county (\$32,047 per capita in south county vs. \$2,275 in mid county and \$1,244 in north county). These findings suggest there is a critical need to fund and foster community-based organizations

in underrepresented mid and north county. The high need level in mid and north county coupled with recent pivots in program delivery models, have led organizations to express a desire to expand the reach of their programs. It is critical that those who are looking to do so include the communities they plan to serve in the planning and implementation process. Also considering 70% of our county's nonprofits are volunteer-based, we need to give special attention to recovering volunteer participation, which many nonprofits articulated is a significant challenge. Most notable is the need to engage the private and public sectors in helping recruit and cultivate board members, especially those who are representative of the communities being served. Investments should be made to help organizations engage volunteers in the new hybrid environment as well.

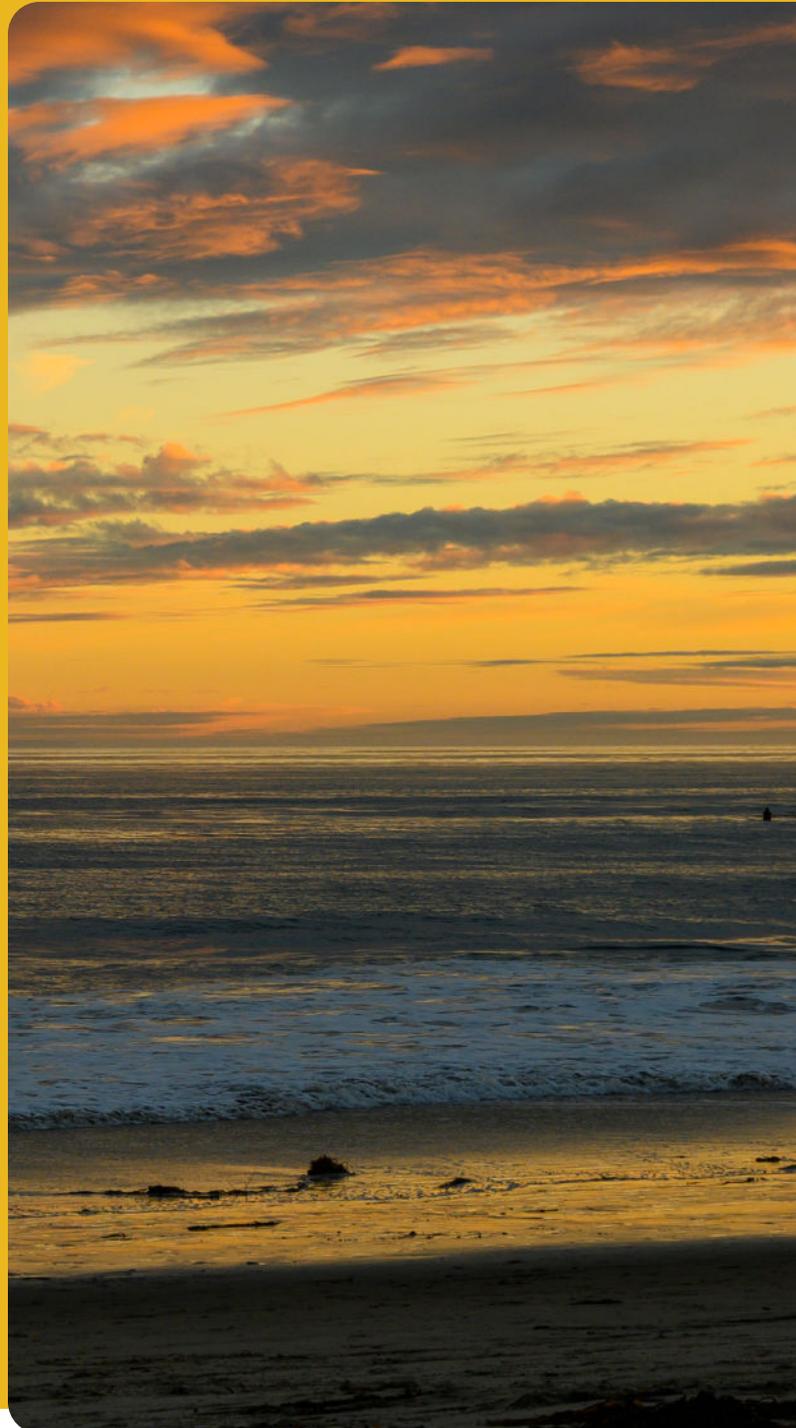
Prioritize Flexible Funding:

To the greatest extent possible, it is critical for all funders (donors, foundations, and government) to continue to provide flexible funding such as unrestricted gifts, multi-year and/or general operating support grants for nonprofits to help them not only regain their financial footing, but also to adapt operations to improve their resilience in preparation for future crises.

Continue to Build Capacity to Adapt:

As the pandemic persists, regulations and available resources continue to shift, requiring the social sector to continuously adjust and adapt their business models and programs. As a result, funders and supporters need to continue to be empathetic and modify expectations to avoid causing additional stress on already overburdened nonprofits. Nonprofits, with the support of funders, should continue to develop business model and scenario planning, business continuity/crisis planning, and alternative capacities to deliver programs. This will be especially important for the mid-size organizations that scaled to meet additional

needs during the COVID-19 pandemic. This also includes supporting financial management services for small to medium-sized nonprofits to help them retool their revenue/development models to reflect the fluctuating revenue streams they may be facing, such as new government funding, fee-for-service, private contracts, and other more complex financial management scenarios.



APPENDIX A: NONPROFIT LEADER SURVEY ORGANIZATIONAL DEMOGRAPHICS

Table 79: Please select the job title that most closely aligns with your job function.

Description	Frequency	Percent
Executive Director/Chief Executive Officer/President	155	83%
Management Team Member (e.g., Development Director, Pro-gram Director, etc.)	15	8%
Chief Operating Officer or Administrative Manager	9	5%
Board Chair	5	3%
Chief Financial Officer or Finance Director	3	2%
Total	160	100.0%

Figure 43: Respondent Job Title

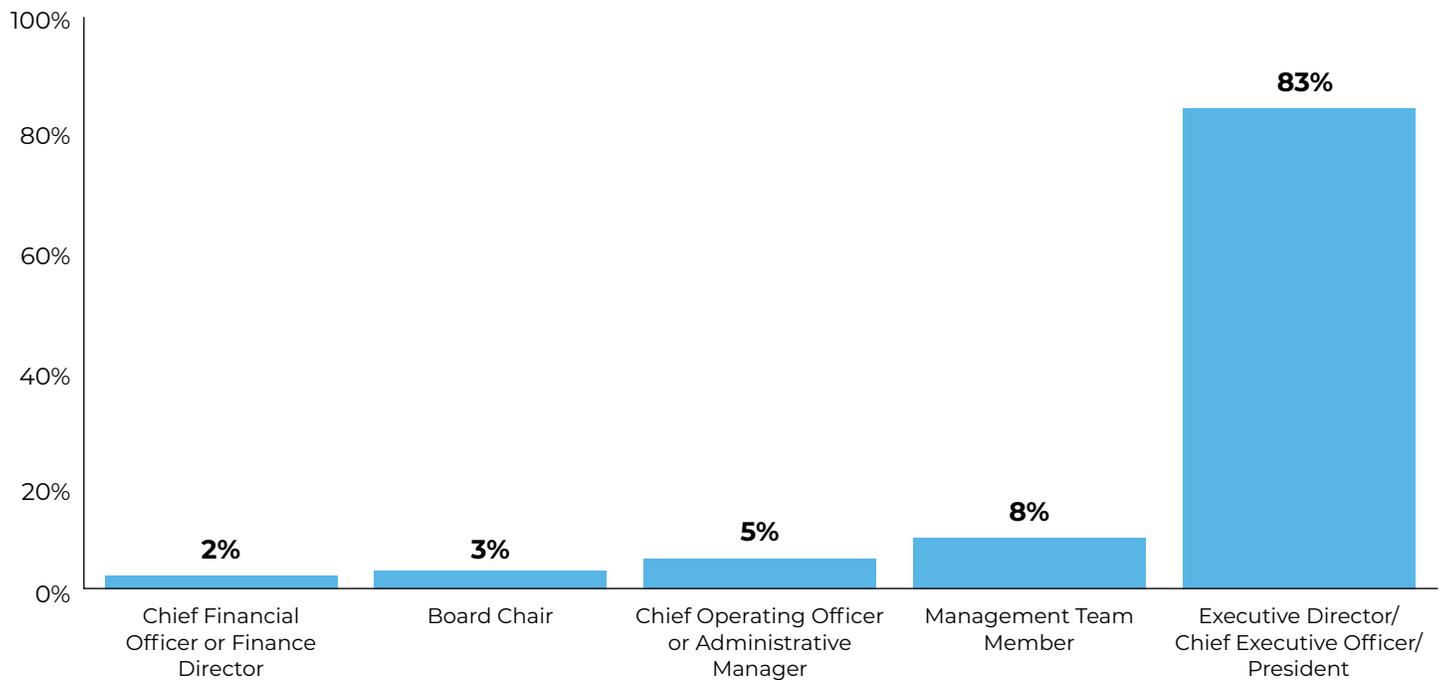


Table 80: Please select the job title that most closely aligns with your job function.

Description	Frequency	Percent
Animal welfare	4	2%
Arts and Culture	28	15.0%
Environment	14	7.5%
Education (i.e., in school and after-school)	28	15.0%
Higher Education	4	2.1%
Health (other than hospitals)	19	10.2%
Human Services: Housing/Shelter	11	5.9%
Human Services: Food Banks/Pantries	5	2.7%
Human Services: Employment/Workforce Development	2	1.1%
Human Services: Refugee and Immigrant Services	3	1.6%
Human Services: Youth Development	15	8.0%
Human Services: All Other	33	17.6%
International	1	0.5%
Public and Societal Benefit (i.e., civil rights, community development, advocacy, neighborhood associations, etc.)	15	8.0%
Philanthropy or Grantmaking	5	2.7%
Total	187	100.0%

Figure 44: Subsector Percentage

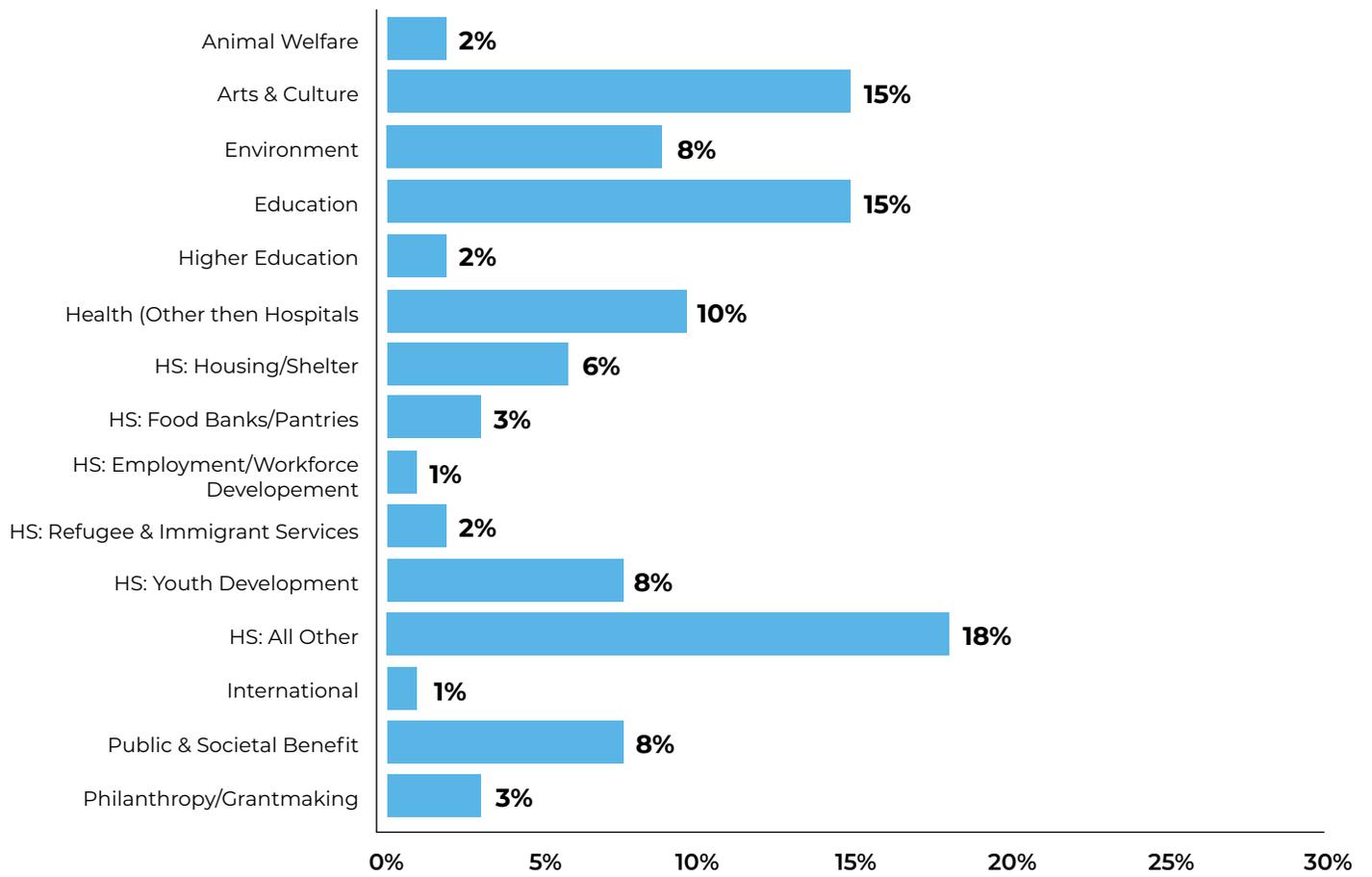


Table 81: Subsectors - Human Services Combined

Description	Frequency	Percent
Animal welfare	4	2%
Arts and Culture	28	15.0%
Environment	14	7.5%
Education (i.e., in school and after-school)	28	15.0%
Higher Education	4	2.1%
Health (other than hospitals)	19	10.2%
Human Services	69	36.9%
International	1	0.5%
Public and Societal Benefit (i.e., civil rights, community development, advocacy, neighborhood associations, etc.)	15	8.0%
Philanthropy or Grantmaking	5	2.7%
Total	187	100.0%

Figure 45: Subsector Percentage - Human Services Combined

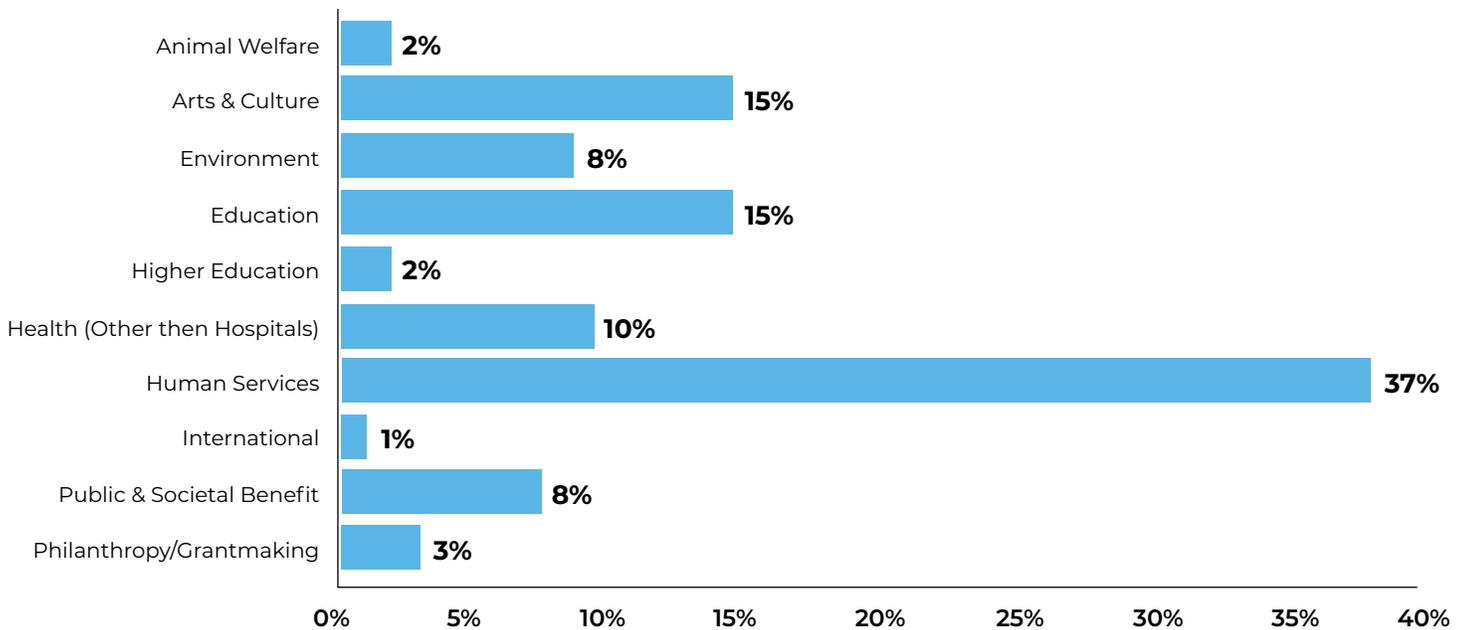


Table 82: Santa Barbara County Regions

Description	Frequency	Percent
North County	18	13.1%
Mid-County	14	10.1%
South County	106	76.8%
Total	138	100.0%

Figure 46: Respondents by Region

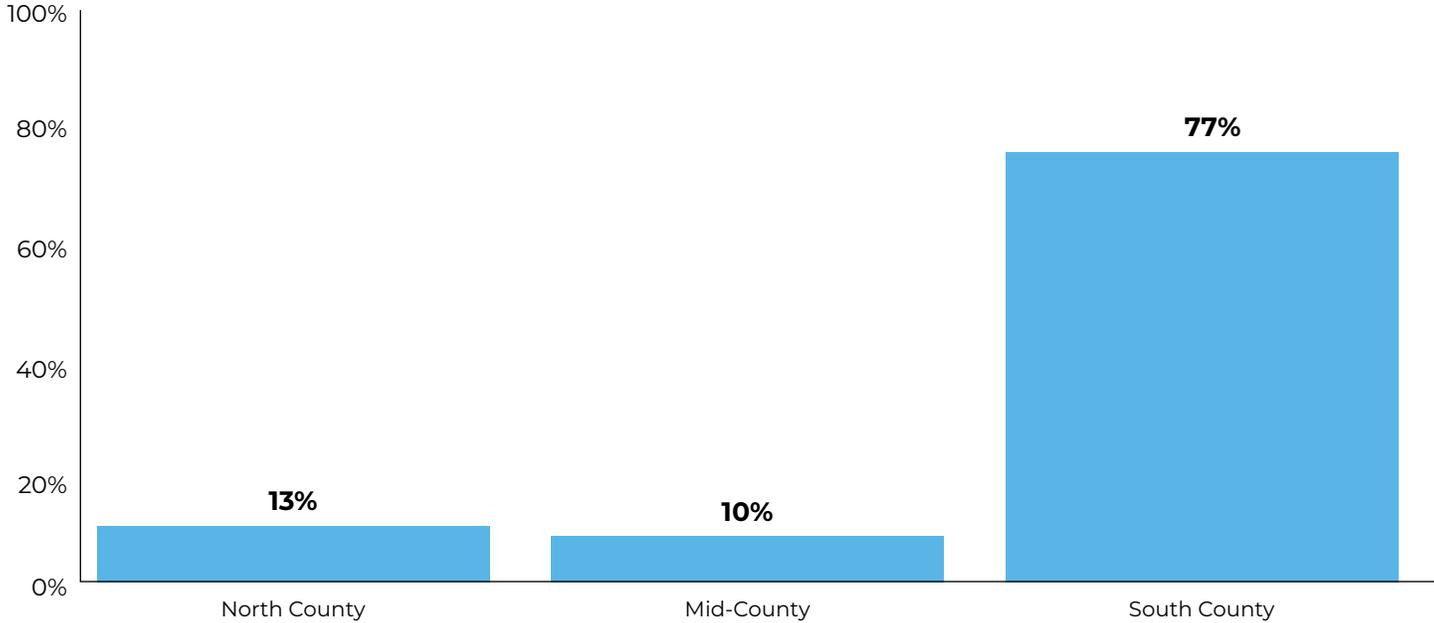
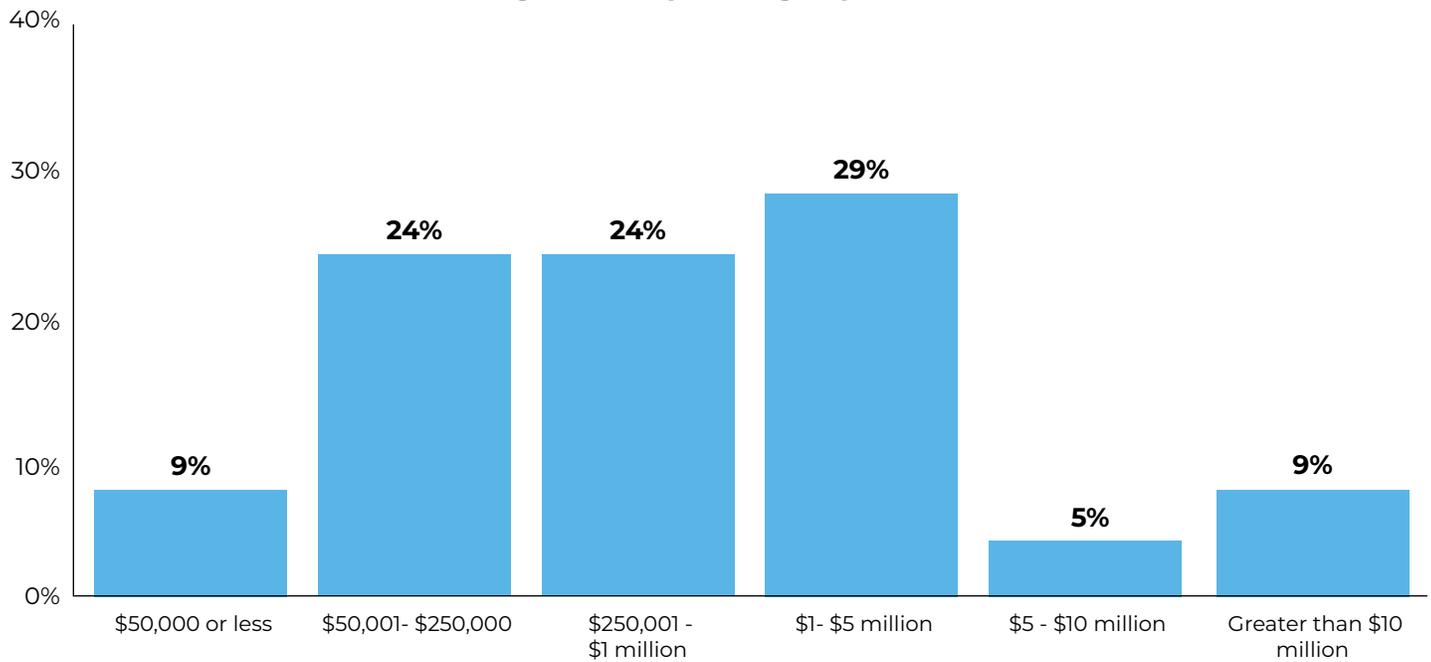


Table 83: What were your organization’s total operating expenses in your last fiscal year?

Description	Frequency	Percent
\$50,000 or less	16	9%
\$50,001- \$250,000	45	24.1%
\$250,001- \$1 million	44	23.5%
\$1- \$5 million	55	29.4%
\$5 - \$10 million	10	5.3%
Greater than \$10 million	17	9.1%
Total	187	100.0%

Figure 47: Operating Expense



APPENDIX B: PARTNERSHIP FOR EXCELLENCE BREAKOUT SESSION FOCUS GROUP FINDINGS

This section provides findings from the breakout sessions at the Partnership for Excellence virtual conference. The Nonprofit Institute (NPI), with support from staff at the Santa Barbara Foundation (SBF), ran five thematic breakout sessions covering issues that arose in the Nonprofit Leader Survey, which we thought would benefit from further exploration and input from various nonprofit staff and stakeholders. The sessions covered: workforce retention and hiring, staff and volunteer wellness, strategic planning and long-term recovery, reopening and hybrid operations, and Diversity, Equity, Inclusion, and Access.

Participants from nonprofits across Santa Barbara County self-selected into a discussion group, where facilitators posed two questions on their topic. First, “what are the most pressing needs in terms of [the breakout session topic area]” and then “what are your organizations currently doing to address [a problem related to the session topic].” Each session had 15-30 participants along with a facilitator and a note taker from NPI or SBF. Sessions lasted approximately 30 minutes and included a combination of written responses to the questions and discussion of the ideas. What follows is a summary of the findings from each of the sessions.

Workforce Retention and Hiring

What are the most pressing needs in terms of workforce retention and hiring?

There were a range of topic areas respondents addressed, which generally fell into four categories: financial concerns, regional issues, limited candidate pool, and work/life balance concerns.

Topic Areas	Specific Issues	Quotes
Financial	Salary, rising living wage, cost of benefits	“[We need] benefits that extend beyond medical and retirement, such as loan repayment, child-care, remote work, and other flexibility”
Regional	Affordable housing, high cost of living, childcare access and affordability	“The high cost of living is a huge issue [in Santa Barbara County]”
Candidates	Too few, not qualified, not bilingual, lack of training opportunities, high competition with other sectors	“There aren’t enough people who meet the qualifications and want to work in the sector”
Work/life balance	Desire for flexible schedules and/or hybrid options, burnout	“Our main priority is addressing burnout, and overstretched priorities”

What are your organizations currently doing to recruit people for open positions and retain your staff?

Many organizations shared great ideas and practices they're implementing to help improve recruitment and retention. Some of the themes that arose mirror trends in the national nonprofit community, such as posting salary ranges on job listings, increasing work flexibility, and aligning organizational policies with organizational values. The discuss around the impact of these tactics demonstrated a need to "wait and see." There is also still a question of whether the "great resignation" will have a net positive, negative, or neutral effect on local nonprofits.

Areas	Themes
Recruitment	<ul style="list-style-type: none"> • Better career paths for people • Increasing base pay, expanding loan forgiveness, reducing healthcare costs • Improving transparency: posted salary range, realistic education and experience requirement, explicit core values • Proactive recruitment techniques such as reaching out to previous strong candidates, upping linked in engagement, having a strong work culture and return to work statement posted • Promote from within • Adding a signing bonus and/or referral bonus for successful hires • Recruit from local colleges
Both	<ul style="list-style-type: none"> • Started offering/improved healthcare benefits • Investing in professional development/stipends for continued learning opportunities • Improved or added retirement benefits • Raising salaries and benefits • Providing hazard pay • Offering work flexibility where possible
Retention	<ul style="list-style-type: none"> • Increased paid holidays or making more flexible/floating holidays, vacation accrual, added mental health days • Increasing compensation across positions • Normalize hybrid scheduling/increased work flexibility • Alternative management and work approaches: increased self-management, switched to a holacracy, redistribution of power • Aligning benefits, policies, and strategies to organizational values

Staff and Volunteer Wellness

What are the most pressing needs in terms of Staff and Volunteer Wellness

Volunteer and Staff wellness needs clustered into four main categories that echoed themes from both recruitment and retention concerns and strategic recovery planning. The themes included: emotional and physical health, work/life balance, burnout, and navigating hybrid and/or virtual engagement.

“Reducing paralysis from hear/uncertainty of the unknown-keeping folks moving forward doing and being their BEST”

“Opportunity for time outside work, with their families and ease the work load.”

“Burnout and fatigue for those who never actually shut down or stopped working from the onset of the pandemic. No time to breathe, recover, and renew”

“Education: Admin team and entire staff has more to do navigating virtual and COVID safe systems”

What are your organizations currently doing to promote wellness?

Current solution tactics organizations are employing to promote wellness mostly centered on increased check-ins and encouraging staff towards self-care/mindfulness and taking their vacation time, but some organizations went further in adding more time off opportunities, as well as monetary incentives for wellness activities.

Group	Suggestions
Staff	Encouraging staff to take their PTO/vacation time, offering more holidays or adding mental health days, having a beach day instead of a training day, Create areas/spaces for employees, emphasize self-care and/or mindfulness, increase personal check-ins during meetings, funding wellness activities, in-creasing remote or hybrid work options
Both	Access to rapid COVID testing, appreciation event (sunset cruise), mindfulness incorporated into meetings and engagements
Volunteers	Increase appreciation opportunities (gifts, dinners, emotional connections)

Strategic Planning and Long-Term Recovery

What are the most pressing needs in terms of Strategic Planning and Long-Term Recovery?

There were a greater variety of themes organizations brought up related to longer term strategic planning and recovery compared to the other breakout subject areas. High priority items included getting back to in person, increased collaborations, staff retention and compensation, and finding sustainable funding sources. Also top of mind for many organizations were engagements with board and donors, succession planning, and more forward thinking planning.

What are your organizations currently doing around Strategic Planning and Long-Term Recovery?

Organizations listed a variety of approaches they're currently employing to address strategic planning and long-term recovery. Much of this work revolved around research and education. While there was some general commenting on the use of "Researching," other organizations mentioned undertaking more specific projects, which included compensation studies, DEIA audits, and community studies. In addition to research endeavors, some organizations were also working on education for board, staff or both. The main focus for these initiatives centered on diversity training.

Another main theme focused on revising goal setting and strategic planning processes. Some organizations retained consultants to support these activities, while others focused on board or staff lead approaches.

The final thematic area had to do with personnel. Some organizations emphasized "diversifying programs and partners to better meet current needs," while others spoke more generally about hiring.

Overall, the organizations in the discussion wrote and spoke extensively about ongoing processes. They all acknowledged that they were in the midst of rebuilding and recovery, none felt like they had accomplished all their goals or revisions quite yet. There was a lot of positive discussion around the processes, even while acknowledging the difficulty inherent in the task.

Reopening and Hybrid Operations

What are the most pressing needs in terms of reopening and hybrid operations?

The central themes in this group arose as health and safety concerns, a desire and need for flexibility and balance for work schedules, desire for return of in-person revenue sources, and a need for improved technology infrastructure.

Theme	Comments
Health and Safety	<ul style="list-style-type: none"> • Meeting the comfort level of each participant • Balancing the need for safety and the need for in-person connection/hybrid burnout • Transparency about vaccination status • In-person safety protocols that allow each person to feel comfortable and included, with equal opportunity to be engaged/involved • Knowledge of and adherence to current and constantly updating COVID guidelines as well as communicating in the ever changing environment • Navigating the contentious atmosphere around vaccinated/unvaccinated for in-person events
Flexibility and Balance for hybrid/virtual/in-person work	<ul style="list-style-type: none"> • Child care is a real problem for many people. There are not enough child care providers, there are a greater number of days of school missed by students due to COVID like symptoms and/or classroom closures • Changing attitudes and accepting the “new norm” to accommodate staff, programs, and organizational needs • Determining what positions can remain hybrid and which positions require in-person services • Ability to plan ahead, but also be flexible as things change rapidly • Open and honest communication between staff, stakeholders, and the community at large • Balancing the need for safety and the need for in-person connection/hybrid burnout
Revenue and funding	<ul style="list-style-type: none"> • In person events help [orgs] better achieve their mission • Reopen revenue streams that come from in-person events
Technology	<ul style="list-style-type: none"> • Lack of technology that supports a strong hybrid/streaming model for programming • Lack of constituents’ robust broadband connection in rural communities • Reaching people that aren’t computer savvy or don’t have computer access

What are your organizations currently doing to address reopening and hybrid operations?

Most of the approaches organizations are employing to address reopening include policy and procedure changes with an emphasis on health, safety, and comfort. Organizations are clearly prioritizing health and safety foremost but are also working to find ways to meet other needs such as human connection, reaching populations not able to employ technology, and the lack of childcare many people face right now. More broadly, organizations are also aware of the need for open and honest communication, inter-organizational collaboration, flexibility, and grace. There was also a robust conversation of the need to bring forward some of the hybrid and virtual solutions created for the pandemic into recovery and beyond.

Theme	Tactics
Health and Safety	<ul style="list-style-type: none"> • Proof of vaccination to attend in-person events • Vaccination or weekly testing requirements • Maintaining strict protocols to protect staff and other stakeholders • Collecting information on stakeholder comfort levels before planning for return to in-person • Staggering in-person schedules • Launching programs/events that can be done outdoors and/or in small groups
Flexibility and Balance for hybrid/virtual/in-person work	<ul style="list-style-type: none"> • Authorizing remote work • More frequent staff meetings when virtual (for alternate human connection) • Communicating and collaborating on possibilities and solutions • Working with staff to return to work, varying schedules by staff preference/roles/needs • Having occasional in-person, outdoor, whole team meetings/connection opportunities
Revenue and funding	<ul style="list-style-type: none"> • Exploring the benefits of virtual and remote opportunities as ways to reach more people
Technology	<ul style="list-style-type: none"> • Advocacy

Diversity, Equity, Inclusion and Access

What are the most pressing needs in terms of diversity, equity, inclusion, and access?

The discussion of DEIA concerns had the largest range of responses of any of the breakout sessions. There were many organizations who had stand-alone concerns other organizations did not initially identify. The area with the most consensus was board diversity. Occasionally this was paired with an interest in/need for diversifying organizational leadership and/or donor base as well. Another common theme centered on language, education, and understanding. Many folks expressed interest in seeking a common understanding and language around DEIA garnered through open dialogue within and between organizations.

Theme	Issue Areas
Board/ leadership diversity	<ul style="list-style-type: none"> • Diversifying admin/board (especially to reflect staff diversity and/or population served) • What diversity means in a board search • Greater diversity in donor base • Board chair & ED not being BIPOC
Language, education, and understanding	<ul style="list-style-type: none"> • Need for common DEIA language • Need for Communal dialogues, training • Expanding understanding of diversity (SES, age, area of county, etc.) • Deeper Understanding of DEIA • Ongoing training
Miscellaneous	<ul style="list-style-type: none"> • Funding for equity initiatives • Ensuring BIPOC representation in conversations and problem solving • Access: physical, timing, language, etc. • Culture Shift

What are your organizations currently doing to address diversity, equity, inclusion, and access?

Organizational approaches to addressing DEIA were as varied as the problems they confronted. Most respondents expressed a desire to address DEIA concerns, but many reiterated the need for a common language and understanding in order to most effectively move forward. Many of the current activities organizations are taking focus on diversifying staff and ensuring staff are well trained and well versed in DEIA, not necessarily addressing the concern about board diversity. That said, some organizations mentioned processes underway to work towards addressing that concern as well.

The majority of this discussion focused on internal DEIA issues and concerns, with much less emphasis on DEIA for program participants, etc. This might be an area where further conversation could be productive and useful.

Areas Addressed	Actions
Staff diversity/ actions for staff	<ul style="list-style-type: none"> • Current diverse staff • Rewriting job descriptions to include lived experience • Hiring health equity specific personnel • Ongoing anti-bias training and formation of a social justice committee • Staff led conversations on addressing DEIA • Ongoing anti-bias training; training on racialized trauma and implicit Bias • Formation of a social justice or DEI committee
Board diversity/ actions for board	<ul style="list-style-type: none"> • Building an intentional board matrix
Miscellaneous	<ul style="list-style-type: none"> • DEIA taskforce including trustees and staff • Supporting BIPOC businesses as vendors • Equity audit by external evaluator • Adding a DEI lens to all of our goals

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Table 79: Please select the job title that most closely aligns with your job function

Table 80: Please select the job title that most closely aligns with your job function.

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