

State of the Nonprofit Sector Survey 2018



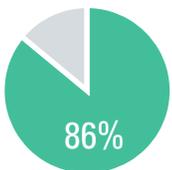
NONPROFIT LEADERS ARE

tackling familiar challenges plus deep concerns about real-time developments

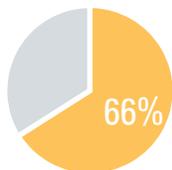
investing in staff, programs, and strategies

voicing intense worry on behalf of the people they serve

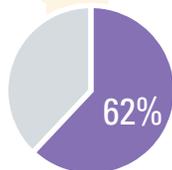
NFF's Survey raises voices from the nonprofits that support and enrich millions of lives across America. Nearly 3,400 leaders of nonprofits across all 50 states and a wide range of sizes and missions told us:



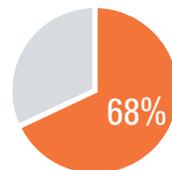
DEMAND FOR SERVICES KEEPS RISING



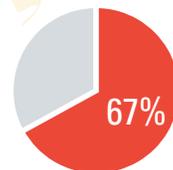
OFFERING COMPETITIVE PAY IS A TOP CHALLENGE



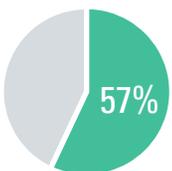
FINANCIAL SUSTAINABILITY IS A TOP CHALLENGE



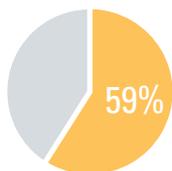
THEY ARE COLLABORATING WITH OTHER NONPROFITS



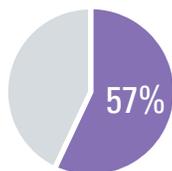
US GOVERNMENT MADE THEIR CLIENTS' LIVES HARDER



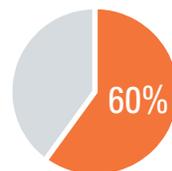
MOST CAN'T MEET IT



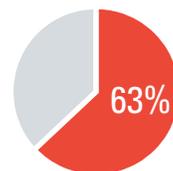
SO IS EMPLOYING ENOUGH HANDS



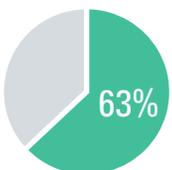
SO IS FULL-COST FUNDING



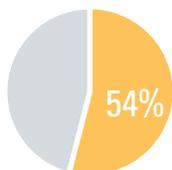
MANY PLAN TO INCREASE ORG DIVERSITY



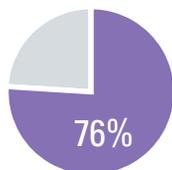
MANY ORGANIZATIONS SERVE LOW-INCOME PEOPLE



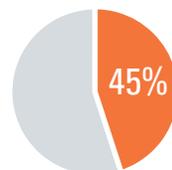
MANY PLAN TO INCREASE SERVICES



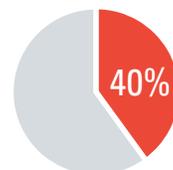
MORE THAN HALF INCREASED STAFF AND PAY IN 2017



MOST BROKE EVEN OR BETTER IN 2017

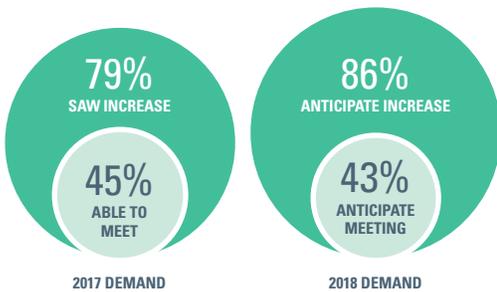


MANY WILL DEVELOP A SUCCESSION PLAN



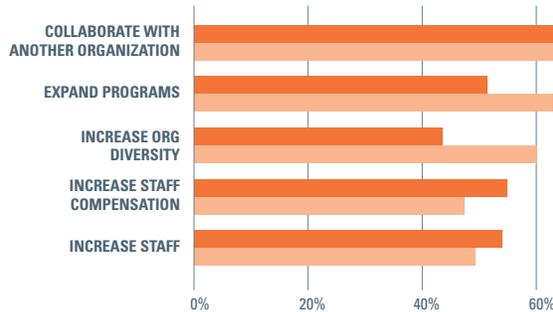
AFFORDABLE HOUSING IS A TOP 3 COMMUNITY NEED

Courage, Creativity, Challenges Chronic and New



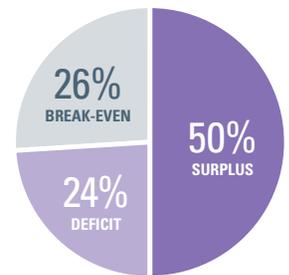
MEETING DEMAND

Demand for nonprofit services continues to rise and organizations still struggle to keep up.



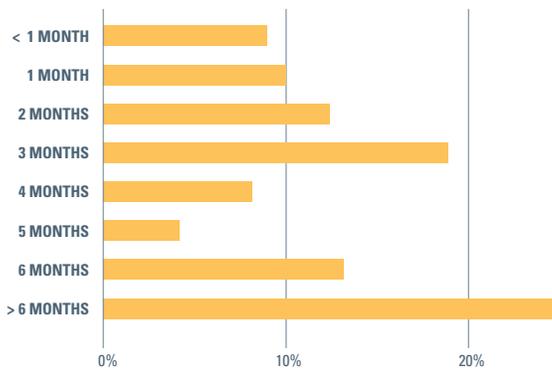
FORWARD MOTION

Demand is rising, policy and funding outlooks are uncertain, but nonprofits are absolutely not retrenching.



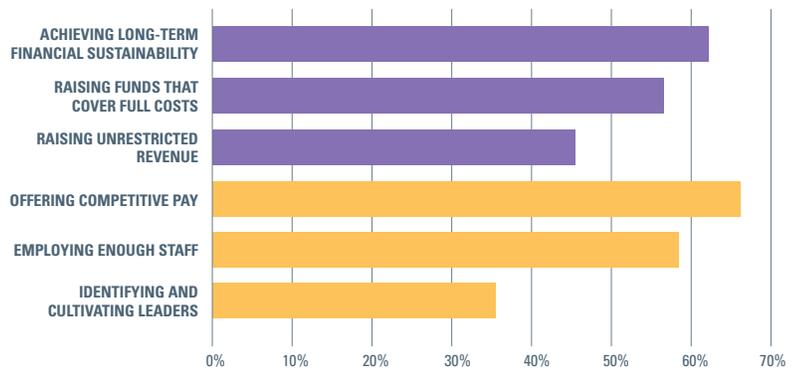
MAKING IT WORK

Nonprofit leaders found ways to make the finances work.



CASH ON HAND

Of nonprofits with more than 6 months of cash on hand: 33% planned for a 2017 surplus, and 64% achieved one.



HEADLINE CHALLENGES

Funding restrictions continue to constrain nonprofits' ability to attract and retain the staff they need to serve their clients and keep the lights on.

Weathering a Tumultuous 2017

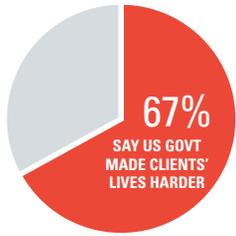
We are resilient, and we are not subpar to for-profit organizations. In fact, we are typically more complex and harder to manage than a for-profit entity and we should be sought after for our best practices rather than being subjected to 'bizsplaining.'

Leader of a human services nonprofit in Washington

The instability of so many policies ... is making it difficult for people to know what to expect for next month let alone longer into the future.

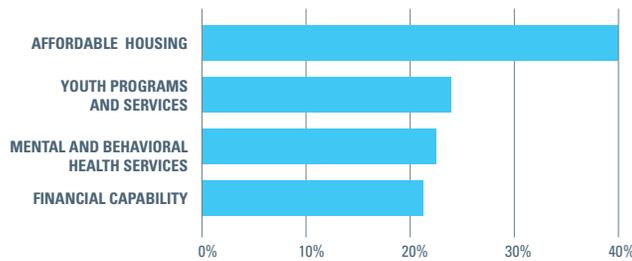
Leader of a food nonprofit in Missouri

Intense Concern for the People We Serve



WASHINGTON IMPACT

Many voiced concerns about the impact of the federal government's policies and positions on people who are immigrants, LGBTQ+, of color, poor.



MOST CRITICAL COMMUNITY NEEDS

Affordable housing was cited as a top community need by nonprofit leaders whose organizations serve both urban and rural communities in 48 states.



STEPPING UP

In 2017, many nonprofits increased their focus on racial inequity.

The uncertainty and lack of leadership, coupled with policies that tend to blame being poor on the poor, make our job increasingly more difficult.

Leader of a health nonprofit in North Carolina

Changes to the eligibility and criteria made for more clients to be marginalized and phased out ... left out of services they previously had access to through our agency.

Leader of a human services nonprofit in New York

Actions and attitudes also have put much fear in the populations we serve who are of color and/or immigrants, adding additional burden to their efforts toward safety and healing.

Leader of a human services nonprofit in Oklahoma

Dividing Lines

The rhetoric being continually spewed from the top down is placing the blame for many of society's ills on so-called 'illegals' (undocumented) and they are being targeted more and more as this rhetoric grows stronger.

Leader of a human services nonprofit in Kansas

We have heard the impact from people in our community who identify as people of color, LGBTQ+ including transgender individuals, youth, individuals with disabilities, women, people who are not US citizens, immigrants, and countless other disenfranchised groups. ... In the schools we work in, prejudiced, stereotypical and discriminatory attitudes and behaviors have been emboldened, and we hear from our young people that they are suffering as a result.

Leader of a diversity education nonprofit in Florida

Data for change: How you can use the survey

CONTEXT

- Compare your nonprofit (or your grantee) to peer organizations across key work areas, sizes, geographies
- Inform brainstorming and planning around strategy, budgeting, prioritizing, collaborating
- Support open discussions about community needs and the full costs of meeting them

ALIGNMENT

- Email survey@nff.org for a copy of the Survey questions to share with your board members and staff; compare and discuss your responses

INSPIRATION

- Nonprofit work can feel daunting. Dig into the data to be inspired by the spirit and examples of others across the sector

ADVOCACY

- Cite real-time data in your campaigns and testimonies as well as your grant proposals

COMMUNICATION

- Use the Survey to open discussions on sometimes difficult topics
- Make it visual: go to nff.org/surveydata to customize and download ready-to-use charts



ABOUT THE 2018 SURVEY

Results reflect responses by 3,369 nonprofit leaders whose organizations work in 20+ focus areas and all 50 states, and range in size from \$50K to \$20M+. Data was collected online in January and February. This Survey, NFF's eighth, again asked about nonprofits' financial and operational health, and also introduced questions to capture the impact of real-time developments and concerns. For example, in a year when events tore open the country's racial divides, we asked about nonprofits' leadership diversity and their focus on racial inequity. NFF is deeply grateful to the thousands of people and organizations who helped to build this critically needed dataset, and shares both data and analyses widely to support the nonprofit sector.

Visit nff.org/survey, and email survey@nff.org if you're looking for historical data or other analyses.

Nonprofit Finance Fund® (NFF®) advances missions and social progress in underserved communities through financing, consulting, partnerships, and knowledge-sharing that empower leaders, organizations, and ideas. Learn more at nff.org.

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