2022 FLORIDA NONPROFITS SURVEY

www.flnonprofits.org
ABOUT THE FLORIDA NONPROFIT ALLIANCE

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

We focus in five major areas:

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

FNA is a membership organization that both represents and draws support from nonprofits across the state.

For more information, visit us at:

www.flnonprofits.org  FLNonprofits  Florida Nonprofit Alliance  Florida Nonprofit Alliance
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I. EXECUTIVE SUMMARY

This edition of the 2022 Florida Nonprofits Survey gives our state insights into what the wins and challenges were for Florida’s nonprofits in 2022. While many organizations have either moved away from pandemic-related ways of operating or adapted them into their regular operations, challenges still exist for the sector. Funding and human resources – staff and volunteer – top the issues that nonprofits are facing. The sector is not immune to the struggles of other sectors, like inflation and a workforce shortage. In addition, Hurricanes Ian and Nicole hit Florida in 2022, a harsh reminder of the roles natural disasters play in our state.

Through all of the challenges, nonprofits across the state have continued to provide vital programs and services to our communities and those who need them. Every resident of Florida can support our sector by listening to what their needs are and helping them fill those needs.

Key findings in this survey include:

The ongoing challenges:

• 34% of nonprofits say funding is their biggest challenge. That includes decreased funding for programs, access to funds, and unrestricted funding. In addition, nonprofits are not able to find or leverage new sources of funding – they are heavily reliant on those who already know and invest in them.

• Volunteers are another major challenge – 41% of organizations say it is a resource of which they need more. Avoiding burnout of current volunteers and finding new ones, while also providing different types of volunteer experiences, is something nonprofits struggle with.

• The nonprofit sector is also experiencing staffing challenges. 27% are having trouble filling open staff positions, 25% are experiencing voluntary staff turnover, and the mental health effects on staff remains high. Some organizations have raised salaries and/or increased benefits, but not all organizations have the resources to do so.

• The pipeline for leadership in the sector needs attention – approximately 1/3 of current CEOs will have left their jobs by 2025.

• Although nonprofit budgets are growing, unrestricted revenue and cash reserves are not. This means that nonprofits are finding short term revenue sources for programming but may not be investing enough into the infrastructure and long term sustainability of their organizations. It also demonstrates the effect Inflation and rising costs are having on nonprofit organizations. They increase both the financial strain and the fundraising burden on nonprofit organizations.
• Hurricane Ian affected a quarter of the nonprofits in Florida, in ways ranging from property damage to inability to provide services due to resource loss to staff being unavailable.

The bright side:

• Providing programs and services is a bright spot for nonprofits. 46% of organizations are providing services fully in-person, and 45% served more people in 2022 than they did in 2021. Nonprofits have not had to make additional changes to the way they provide services in 2022 like they did during the pandemic.

• In addition, 60% of nonprofits are serving the same number or more clients now than they did in 2019.

• Some human resource wins: burnout of staff, Board members, and volunteers is about half of the level it was in 2021 and about a third of nonprofits have been able to add staff members.

• Individual donors are the largest source of nonprofit fundraising, which confirms what the Giving in Florida research told us – that Floridians are generous.

• Overall, nonprofits are much less concerned with effects from the pandemic in 2022 than they were the previous two years. Half of survey respondents say they have returned to pre-pandemic conditions of working, 30% of nonprofits are confident in their ability to stay in existence for more than 2 years, and the number of challenges and concerns that nonprofits have has been steadily decreasing.
II. METHODOLOGY

This survey, designed for 501(c)(3) charitable organizations located in and serving the state of Florida, was conducted from October 7 to November 15, 2022 and released in February of 2023. The 30-question online survey was distributed electronically (email, social media, and website posting) to FNA members and newsletter subscribers. It was also shared by other management support organizations (MSOs) and community foundations across the state. In addition, the Florida Department of Agriculture and Consumer Services shared the survey with all registered nonprofits in the state.

FNA received 2,300 responses – our highest response ever. Unless noted otherwise under the tables in the report, that was the number of responses to each question. Many of the questions allowed respondents to select all that applied, so percentages on those questions will total more than 100%.

If you have any questions about this research, contact Florida Nonprofit Alliance at info@flnonprofits.org.
III. PROGRAMS AND SERVICES

Compared to 2020 and 2021, nonprofits did not see as many outside impacts on their programs in 2022, including disruptions to programs and demand for pandemic-related services. Change in method of service delivery dropped from 53% in 2021 to 9% in 2022, potentially demonstrating that the adjustments made over the past two years are either still working or no longer needed. 41% of nonprofits reported no programmatic impacts at all, up from 11% the prior year.

The most common impact reported was decreased fundraising for programs (33% of respondents). Although increased demand for services (27% of respondents) was the second most common impact, it is slightly lower than in 2020 and 2021.

Almost half of all nonprofits are providing services fully in-person, a jump from 34% in 2021. Virtual and hybrid program operations are both down from 2021, although about 1/3 of nonprofits are still providing services and programs in a hybrid manner, with both virtual and in-person options.

Programs are showing healthy signs in the number of people served as well. In 2022, 45% of organizations reported serving more clients than the year prior, an increase of 9% over 2021. 72% of organizations served the same amount or more clients in 2022 than they did in 2021. 60% of nonprofits report serving as many or more clients as they did in 2019, showing a return to pre-pandemic levels. The number of organizations that said they served fewer clients in the current year than in 2019 dropped from 49% to 24%.

Q1 Which of the following programmatic impacts is your organization currently experiencing?  
(Select all that apply.)

- Change in method of service delivery
- Decreased fundraising for program expenses
- Demand for services as a result of Hurricane IAN
- Demand for services you did not provide pre-COVID
- Disruption of (cancelled or reduced) services to clients and communities
- Disruption of supplies or services provided by partners
- Increased demand for services/support from clients and communities
- None of the above
Q2 How are you currently operating your programs?

- FULLY IN-PERSON: 46% (994)
- FULLY VIRTUALLY: 7% (149)
- HYBRID OF IN-PERSON & VIRTUAL: 31% (679)
- WE ARE NOT CURRENTLY OPERATING ANY PROGRAMS: 12% (262)
- OTHER: 4% (79)

N=2169
Q3 Compared to 2021, how many clients have you served in 2022?

- **Approximately the same as in 2021**: 27% (629)
- **More than in 2021**: 45% (1040)
- **Fewer than in 2021**: 14% (331)
- **Not operational in either 2021 or 2022**: 3% (44)
- **Do not serve clients**: 9% (204)
- **Unsure**: 3% (44)
Q4  Compared to 2019, how many clients have you served in 2022?

- 43% (989) APPROXIMATELY THE SAME AS IN 2019
- 24% (542) FEWER THAN IN 2019
- 17% (380) APPROXIMATELY THE SAME AS IN 2019
- 9% (232) FEWER THAN IN 2019
- 4% (103) MORE THAN IN 2019
- 2% (35) NOT OPERATIONAL SOMETIME IN 2019-2021
- 2% (35) NOT OPERATIONAL SOMETIME IN 2019-2021
- 1% (12) UNSURE
- 2% (35) DO NOT SERVE CLIENTS
- 1% (12) N/A

**Comparison**

- APPROXIMATELY THE SAME AS IN 2019
- FEWER THAN IN 2019
- MORE THAN IN 2019
- UNSURE

**PERCENTAGE**

- 2022
- 2021
IV. STAFF AND VOLUNTEERS

Although nonprofits are seeing positive trends in program delivery, they are not seeing the same as it relates to human resources, both staff and volunteers, for the sector.

Two-thirds of nonprofits in Florida report changes to paid and volunteer staffing in 2022. 31% of nonprofits are still experiencing changing work arrangements for staff and volunteers. On the staff side, 27% report workforce shortages or trouble filling staff positions, and a quarter of nonprofits have had voluntary staff turnover. Because of these factors, eliminating staff positions or cutting salaries and benefits is very rare.

In addition, nonprofits are decreasing the work accommodations they put into place during the height of the pandemic. 60% of nonprofits did not make any accommodations for employees in 2022. Fewer nonprofits are providing full and part-time remote working opportunities. Some nonprofits are offering other types of accommodations, like flexible work schedules, either by number of days worked or number of hours worked in a week; increased compensation and benefits; and a focus on employee health and morale.

On the bright side, most of the negative changes to staffing have improved over the last 2 years. Burnout of staff, volunteers, and Board members is about half of what it was in 2020, although still high enough to continue to be addressed. Paid staff are the most likely human resource to be feeling effects on their mental health (13% of organizations are experiencing it), which is concerning, especially during a workforce shortage. 12% of nonprofits had a CEO change in 2022, and 17% expect one in the next two years, meaning about 1/3 of existing CEO leadership will turn over by 2025.

When it comes to volunteers, nonprofits are experiencing several challenges. Volunteer absences (36%) and volunteer burnout (30%) were the first and third most common human resource changes, and a quarter of organizations are experiencing Board burnout.

43% of nonprofits are using volunteers at the same level they did in 2019, and 30% are using fewer. 65% of nonprofits have not changed the process or type of volunteer experience since the pandemic began, which is another factor that may be contributing to the volunteer challenges of finding and engaging volunteers.

Nonprofits have also stopped making accommodations for the volunteer experience type or process. 65% have not made any changes, compared to 36% in 2021. Organizations say they don’t have alternatives to offer volunteers, or they know they need to develop alternatives but aren’t sure how.

Although numbers have improved since 2021, volunteering is still significantly lower than in 2019. 30% of nonprofits are still using fewer volunteers as compared to before the pandemic. 18% of organizations are not using volunteers at all, for reasons including not having staff to manage volunteers or not being able to find volunteers.
Q5 What changes to your staffing (paid and volunteer) have you experienced in 2022? (Select all that apply.)

- Volunteer absences
- Changing work arrangements for staff & volunteers
- Volunteer burnout
- Workforce shortages/trouble filling open positions
- Board burnout
- Staff voluntary turnover/resignations
- Staff burnout
- Staff positions added
- Staff feeling effects on mental health
- Staff absences
- Volunteers feeling effects on mental health
- Board feeling effects on their mental health
- Staff positions eliminated
- Staff layoffs or cuts
- Staff pay cuts
- Staff benefits reductions
- None of the above

N=1531 (excludes answers of "none of the above")
COMPARISON (changes to staffing)

- BOARD BURNOUT
- BOARD FEELING EFFECTS ON THEIR MENTAL HEALTH
- CHANGING WORK ARRANGEMENTS FOR STAFF AND VOLUNTEERS
- STAFF ABSENCES
- STAFF BENEFITS REDUCTIONS
- STAFF BURN OUT
- STAFF FEELING EFFECTS ON THEIR MENTAL HEALTH
- STAFF LAYOFFS OR CUTS
- STAFF PAY CUTS
- STAFF POSITIONS ADDED
- STAFF POSITIONS ELIMINATED
- STAFF VOLUNTARY TURNOVER/RESIGNATIONS
- VOLUNTEER ABSENCES
- VOLUNTEER BURNOUT
- VOLUNTEERS FEELING EFFECTS ON THEIR MENTAL HEALTH

PERCENTAGE
Q6 Have you had a change in CEO leadership at your organization in the last year?

87.4% (2011)

Q7 Do you anticipate a turnover in the CEO/ED position at your organization?

83.4%
Q8 What work options are you currently offering to employees?
(Select all that apply.)

- ACCOMMODATIONS FOR CHILD CARE
- ALLOWING EMPLOYEES TO WORK REMOTELY FULL-TIME
- DOWNSIZING THE PHYSICAL FOOTPRINT OF YOUR ORGANIZATION
- FOUR-DAY WORK WEEK
- IMPLEMENTING HYBRID WORK IN OFFICE/HOME MODEL
- INCREASED TIME OFF FOR ANY REASON
- SHARING SPACE WITH OTHER ORGANIZATIONS
- SIX-HOUR WORK SHIFTS
- TIME OFF FOR MENTAL HEALTH
- TIME OFF FOR VACCINES
- NO EMPLOYEES
- OTHER
- NONE OF THE ABOVE

COMPARISON

- ACCOMMODATIONS FOR CHILD CARE
- ALLOWING EMPLOYEES TO WORK REMOTELY FULL-TIME
- DOWNSIZING THE PHYSICAL FOOTPRINT OF YOUR ORGANIZATION
- FOUR-DAY WORK WEEK
- IMPLEMENTING HYBRID WORK IN OFFICE/HOME MODEL
- INCREASED TIME OFF FOR ANY REASON
- SHARING SPACE WITH OTHER ORGANIZATIONS
- SIX-HOUR WORK SHIFTS
- TIME OFF FOR MENTAL HEALTH
- TIME OFF FOR VACCINES
- NO EMPLOYEES
- OTHER
- NONE OF THE ABOVE
Q9 Are you currently using volunteers at your organization, excluding your Board members?

**Comparison**

- **Yes, at the same level as 2019**
  - 30% in 2022
  - 30% in 2021

- **Yes, but in decreased numbers compared to 2019**
  - 18% in 2022
  - 18% in 2021

- **Yes, at increased numbers compared to 2019**
  - 43% in 2022
  - 43% in 2021

- **No**
  - 2% in 2022
  - 2% in 2021

- **Unsure how to use them**
  - 3% in 2022
  - 3% in 2021

- **Other**
  - 2% in 2022
  - 2% in 2021

- **N/A**
  - 2% in 2022
  - 2% in 2021
Q10 Have you altered the type of or process in which you provide volunteer experiences compared to before the pandemic?

- **Yes**: 25%
- **No**: 64.5%
- **Other**: 8.2%
- **DID, BUT NO LONGER**: .3%
- **N/A**: 1.8%
- **Unsure**: .2%

**Comparison**

- **Yes** (2022): 25%
- **No** (2022): 64.5%
- **Unsure** (2022): .2%
- **DID, BUT NO LONGER** (2022): .3%
- **N/A** (2022): 1.8%
- **Unsure** (2021): .2%
- **DID, BUT NO LONGER** (2021): .3%
- **N/A** (2021): 1.8%

**PERCENTAGE**
V. FINANCIAL HEALTH

To evaluate the financial health of Florida nonprofits, we look at three indicators – level of unrestricted revenue, budget size, and level of reserve funds. These indicators, while not perfect, can give us a picture of whether a nonprofit has appropriate financial resources to run its business and meet its mission. We see nonprofit budgets are growing, but unrestricted revenue and cash reserves are not, meaning that nonprofits are finding short term revenue sources for programming, but may not be investing enough into the infrastructure and long term sustainability of their organizations.

68% of organizations report their 2022 budget was the same as or more than their 2019 budget. While this seems positive, inflation and rising costs in 2022 also increased expenses, and therefore budgets, and didn’t necessarily increase programs and services. 66% of nonprofit organizations in Florida had no increase in unrestricted revenue in 2022; 23% did.

30% of organizations have used some or all of their reserves over the past three years. Another 35% do not have any reserves at all, up from 26% in 2021. Even nonprofits with reserves are seeing financial losses without using their reserve dollars due to the volatility of the stock market in 2022.

Nonprofits are more confident in their ability to stay in existence for more than two years (33% in 2022 vs. 18% in 2020), although 1/3 of organizations find it difficult to predict at this point.

Q11 Has your unrestricted revenue in 2022:
Q12 Compared to your 2019 budget, did your 2022 budget:

- Increased, with a corresponding increase in services: 33%
- Increased, with services staying constant: 20%
- Decrease, with a corresponding decrease in services: 13%
- Decrease, with services staying constant: 12%
- Decrease, with services increasing: 9%
- Stayed the same as in 2019: 5%
- N/A: 5%
- Other: 1%
COMPARISON (budget compared to 2019)

- Increase, with a corresponding increase in services
- Increase, with services staying constant
- Increase, with services decreasing
- Decrease, with a corresponding decrease in services
- Decrease, with services staying constant
- Decrease, with services increasing
- Stayed the same as in 2019
- N/A
Q13  How have you used reserve funds since the start of the pandemic?

HAVE DEPLETED THEM & NOT REPLACED THEM
HAVE DEPLETED THEM & REPLACED THEM
HAVE NOT USED THEM & THEY ARE THE SAME AS BEFORE THE PANDEMIC
HAVE NOT USED THEM & THEY CONTINUE TO GROW
HAVE USED PART OF THEM & NOT REPLACED THEM
HAVE USED PART OF THEM & REPLACED PART OF THEM
HAVE USED PART OF THEM & REPLACED THEM
WE DO NOT HAVE ANY RESERVE FUNDS
HAVE NOT USED THEM BUT THEY HAVE DECREASED
N/A
OTHER

COMPARISON

HAVE DEPLETED THEM & NOT REPLACED THEM
HAVE DEPLETED THEM & REPLACED THEM
HAVE NOT USED THEM & THEY ARE THE SAME AS BEFORE THE PANDEMIC
HAVE NOT USED THEM & THEY CONTINUE TO GROW
HAVE USED PART OF THEM & NOT REPLACED THEM
HAVE USED PART OF THEM & REPLACED PART OF THEM
HAVE USED PART OF THEM & REPLACED THEM
WE DO NOT HAVE ANY RESERVE FUNDS

2022 Florida Nonprofits Survey
Q14 With your current cash flow and fundraising plans, how long can you continue to operate your programs and services?

**Comparison**
Q15  Compared to your 2022 budget, do you expect your 2023 budget to:

- **Increase, with a corresponding increase in services**: 36%
- **Increase, with services staying constant**: 20%
- **Decrease, with services increasing**: 19%
- **Decrease, with services staying constant**: 12%
- **Decrease, with a corresponding decrease in services**: 3%
- **Stayed the same as the previous year**: 3%
- **Difficult to predict right now**: 1%
- **Other**: 1%
VI. FUNDRAISING

Fundraising is of the utmost importance to just about every nonprofit in the country, including those in our state. Florida nonprofits tell us that fundraising is still a major concern, with some signs that fundraising efforts are improving. For the first time since the pandemic, the number of nonprofits reporting that their fundraising activities generated more income than the previous year was equal to those reporting less income generated. In fact, those reporting more fundraising income from 2021 to 2022 increased by 56%, and those reporting less income from 2021 to 2022 decreased by 44%.

The top sources of nonprofit fundraising in 2022 are existing and new individual donors, followed by existing corporate donors, existing foundation grants, and existing fees for service. New government grants from any level of government are the smallest sources of funding. Nonprofits expected to be more successful in securing new sources of revenue from foundations, corporations, and individuals than they were, which means nonprofits are relying heavily on those who already invest in their work and finding new sources of revenue remains difficult.

Even though the actual fundraising sources for 2022 leaned heavily on existing funding streams, nonprofits remain optimistic that new sources will be available to them in 2023. Nonprofits report that they expect new individuals, new corporate dollars, and new foundation grants, and to a lesser extent, new state and local government grants and new fees for service to contribute to their fundraising totals in 2023, even though that did not prove to be the case in 2022.

Of note: about 4% of the survey respondents were not in existence in 2019, showing that the sector is growing. This is good news for communities receiving services but can also add more stress to the fundraising efforts of all nonprofits.
Q16  How do your fundraising activities in 2022 compare to your fundraising activities in 2021?

- They have generated approximately the same amount of income in 2022: 28%
- They have generated more income in 2022: 27%
- They have generated less income in 2022: 28%
- Unsure: 16%

### Comparison

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<th>Category</th>
<th>2022</th>
<th>2021</th>
<th>2020</th>
</tr>
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<tbody>
<tr>
<td>More income this year than last</td>
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<td></td>
<td></td>
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<tr>
<td>Less income this year than last</td>
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<td></td>
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<tr>
<td>Approximately the same amount of income this year than last</td>
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</tr>
<tr>
<td>Unsure</td>
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</tbody>
</table>
Q17  What are the significant sources of your current fundraising dollars?  
(Select all that apply. NOTE: individual donors includes memberships, events, online donations, etc.)

<table>
<thead>
<tr>
<th>Funding Sources 2022 Actual vs. 2021 Predictions</th>
<th>2022 ACTUAL</th>
<th>2021 PREDICTIONS</th>
<th>CHANGE</th>
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<tbody>
<tr>
<td>EXISTING INDIVIDUAL DONORS</td>
<td>69%</td>
<td>61%</td>
<td>+8%</td>
</tr>
<tr>
<td>NEW INDIVIDUAL DONORS</td>
<td>43%</td>
<td>55%</td>
<td>-12%</td>
</tr>
<tr>
<td>NEW CORPORATE DONORS</td>
<td>18%</td>
<td>32%</td>
<td>-14%</td>
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<tr>
<td>EXISTING CORPORATE DONORS</td>
<td>30%</td>
<td>30%</td>
<td>0%</td>
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<tr>
<td>EXISTING FOUNDATION GRANTS</td>
<td>27%</td>
<td>30%</td>
<td>-3%</td>
</tr>
<tr>
<td>NEW FOUNDATION GRANTS</td>
<td>15%</td>
<td>29%</td>
<td>-14%</td>
</tr>
<tr>
<td>EXISTING FEES FOR SERVICE</td>
<td>21%</td>
<td>25%</td>
<td>-4%</td>
</tr>
<tr>
<td>EXISTING LOCAL GOVERNMENT GRANTS</td>
<td>16%</td>
<td>17%</td>
<td>-1%</td>
</tr>
<tr>
<td>NEW LOCAL GOVERNMENT GRANTS</td>
<td>5%</td>
<td>14%</td>
<td>-9%</td>
</tr>
<tr>
<td>EXISTING STATE GOVERNMENT GRANTS</td>
<td>11%</td>
<td>13%</td>
<td>-2%</td>
</tr>
<tr>
<td>NEW FEDERAL GOVERNMENT GRANTS</td>
<td>4%</td>
<td>13%</td>
<td>-8%</td>
</tr>
<tr>
<td>NEW FEES FOR SERVICE</td>
<td>7%</td>
<td>13%</td>
<td>-6%</td>
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<tr>
<td>NEW STATE GOVERNMENT GRANTS</td>
<td>3%</td>
<td>11%</td>
<td>-8%</td>
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<tr>
<td>EXISTING FEDERAL GOVERNMENT GRANTS</td>
<td>8%</td>
<td>10%</td>
<td>-2%</td>
</tr>
<tr>
<td>NONE OF THE ABOVE</td>
<td>9%</td>
<td>8%</td>
<td>+1%</td>
</tr>
</tbody>
</table>
Q18  Where do you expect your significant sources of funding to come from in 2023?
(Select all that apply. NOTE: individual donors includes memberships, events, online donations, etc.)

<table>
<thead>
<tr>
<th>Source</th>
<th>2023 Predictions</th>
<th>2022 Actuals</th>
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</thead>
<tbody>
<tr>
<td>EXISTING INDIVIDUAL DONORS</td>
<td>60%</td>
<td>69%</td>
</tr>
<tr>
<td>NEW INDIVIDUAL DONORS</td>
<td>59%</td>
<td>43%</td>
</tr>
<tr>
<td>NEW CORPORATE DONORS</td>
<td>32%</td>
<td>18%</td>
</tr>
<tr>
<td>EXISTING CORPORATE DONORS</td>
<td>28%</td>
<td>30%</td>
</tr>
<tr>
<td>NEW FOUNDATION GRANTS</td>
<td>25%</td>
<td>27%</td>
</tr>
<tr>
<td>EXISTING FOUNDATION GRANTS</td>
<td>26%</td>
<td>15%</td>
</tr>
<tr>
<td>EXISTING FEES FOR SERVICE</td>
<td>21%</td>
<td>21%</td>
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<tr>
<td>EXISTING LOCAL GOVERNMENT GRANTS</td>
<td>15%</td>
<td>16%</td>
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<tr>
<td>NEW LOCAL GOVERNMENT GRANTS</td>
<td>11%</td>
<td>5%</td>
</tr>
<tr>
<td>EXISTING STATE GOVERNMENT GRANTS</td>
<td>11%</td>
<td>11%</td>
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<tr>
<td>NEW STATE GOVERNMENT GRANTS</td>
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<td>4%</td>
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<tr>
<td>NEW FEDERAL GOVERNMENT GRANTS</td>
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<td>7%</td>
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<tr>
<td>NEW CORPORATE DONORS</td>
<td>9%</td>
<td>3%</td>
</tr>
<tr>
<td>EXISTING CORPORATE DONORS</td>
<td>7%</td>
<td>8%</td>
</tr>
<tr>
<td>NONE OF THE ABOVE</td>
<td>7%</td>
<td>9%</td>
</tr>
</tbody>
</table>

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VII. HURRICANE EFFECTS

On September 28, 2022, Hurricane Ian made landfall in Cayo Costa in Southwest Florida as a category 4 hurricane, then worked its way across the state. It caused extreme destruction, especially in Southwest and Central Florida, becoming the third costliest weather disaster in the world and the worst to hit Florida since 1935. Nonprofit organizations always play a vital role in disaster preparation, response and recovery, and Hurricane Ian proved no different. One quarter of all nonprofits in Florida were affected by the hurricane.

While providing vital services to those suffering from hurricane effects, nonprofit organizations themselves experienced loss and destruction. Of those nonprofits affected by Hurricane Ian, 30% had to reduce operations because staff were unavailable, and 26% had to reduce operations because of limitations to their infrastructure. 25% suffered wind-related facility damage, and 21% were unable to provide their programs and services due to lost resources and supplies. This demonstrates the importance of nonprofit disaster preparedness well ahead of a storm, as well as the need for a recovery plan.

Note: Hurricane Nicole hit Florida in early November after this survey was released, and is therefore not included in the questions.

Q19 Were you impacted by Hurricane Ian?

- Yes: 24%
- No: 76%

Q20 If impacted by Hurricane Ian, please describe how. (Select all that apply.)

- Building damage due to flooding but still habitable
- Building damage due to hurricane winds but still habitable
- Reduced ability to conduct operations due to staff unavailability
- Reduced ability to conduct programming due to limited infrastructure
- Unable to access our offices due to permanent damage
- Unable to conduct programming due to loss of resources and supplies
VIII. PLANNING FOR THE FUTURE

For the second year, nonprofits report that the year (in this case, 2022) went largely to their expectations. Access to funds and fundraising, access to volunteers, and keeping staff in place were more likely to be slightly worse than expectations. Funding and fundraising were also the biggest challenge facing the sector, both for programs and operations.

On the positive side, program delivery, re-opening and re-engagement, staff morale and client needs were more likely to be slightly better than expectations.

Half of survey respondents believe they have already returned to pre-COVID-19 conditions, which explains why nonprofits are less concerned than in previous years about pandemic-related issues, like safety, health and well-being of staff and volunteers, shutting their organization down or merging, laying off staff, and adapting to uncertainty. They also are less likely to be implementing increased cleaning practices, allowing remote working, and cutting programs than in previous years, and 30% of organizations did not make any changes this year that they viewed to be permanent.

Organizations are now thinking instead about workforce shortages, disaster response, technology needs, facility needs, inflation, and volunteers, among others. They are most concerned about cash flow (41%) and increased costs (50%). Nonprofits permanently changed fundraising activities (29%), added programs or staff (29%), increased their online presence (25%), and/or began new collaborations that will remain in place (27%).

When asked what resources they need going forward, nonprofits prioritized funding (60%), fundraising assistance (45%), and volunteers (41%). Also near the top of the list were capacity for effective community engagement (25%), advocacy (23%), and support to build partnerships (22%).

Q21  Think about what you expected to happen this year. Would you say the following are now better or worse than your expectations?

<table>
<thead>
<tr>
<th></th>
<th>MUCH BETTER</th>
<th>SLIGHTLY BETTER</th>
<th>SAME</th>
<th>SLIGHTLY WORSE</th>
<th>MUCH WORSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACCESS TO FUNDS</td>
<td>7%</td>
<td>18%</td>
<td>47%</td>
<td>19%</td>
<td>10%</td>
</tr>
<tr>
<td>ACCESS TO VOLUNTEERS</td>
<td>5%</td>
<td>14%</td>
<td>49%</td>
<td>24%</td>
<td>8%</td>
</tr>
<tr>
<td>CLIENT NEEDS</td>
<td>6%</td>
<td>15%</td>
<td>58%</td>
<td>13%</td>
<td>8%</td>
</tr>
<tr>
<td>FUNDRAISING ACTIVITIES</td>
<td>5%</td>
<td>18%</td>
<td>45%</td>
<td>23%</td>
<td>10%</td>
</tr>
<tr>
<td>KEEPING STAFF IN PLACE</td>
<td>5%</td>
<td>11%</td>
<td>59%</td>
<td>18%</td>
<td>7%</td>
</tr>
<tr>
<td>PROGRAM DELIVERY</td>
<td>9%</td>
<td>20%</td>
<td>58%</td>
<td>9%</td>
<td>4%</td>
</tr>
<tr>
<td>RE-OPENING &amp; RE-ENGAGEMENT</td>
<td>8%</td>
<td>18%</td>
<td>60%</td>
<td>9%</td>
<td>4%</td>
</tr>
<tr>
<td>STAFF/VOLUNTEER MORALE</td>
<td>9%</td>
<td>19%</td>
<td>53%</td>
<td>15%</td>
<td>4%</td>
</tr>
</tbody>
</table>
Q22  What is the biggest challenge you have faced this year?  Please select one, or write your answer in “other.”

- FUNDING/FUNDRAISING FOR OPERATIONS
- FUNDING/FUNDRAISING FOR PROGRAMS
- NONE OF THE ABOVE
- ADAPTING TO UNCERTAINTY
- HUMAN RESOURCES (STAFF & VOLUNTEERS)
- MEETING COMMUNITY DEMAND FOR SERVICES
- WORKFORCE SHORTAGE
- OTHER
- PROGRAM OPERATIONS
- TECHNOLOGY NEEDS/UPDATES
- KEEPING YOUR DOORS OPEN IN THE LONG TERM
- HURRICANE IAN & RESULTING DESTRUCTION
- MENTAL HEALTH (YOU, YOUR STAFF, YOUR VOLUNTEERS)
- COMMUNICATION
- SHUT DOWNS
- SAFETY/HEALTH/WELL-BEING

COMPARISON

- FUNDING/FUNDRAISING
- OTHER (INCLUDES ITEMS ONLY ASKED ABOUT IN 2022)
- NONE OF THE ABOVE
- ADAPTING TO UNCERTAINTY
- HUMAN RESOURCES (STAFF & VOLUNTEERS)
- MEETING COMMUNITY DEMAND FOR SERVICES
- PROGRAM OPERATIONS
- KEEPING YOUR DOORS OPEN IN THE LONG TERM
- COMMUNICATION
- MENTAL HEALTH (YOU, YOUR STAFF, YOUR VOLUNTEERS)
- SHUT DOWNS
- SAFETY/HEALTH/WELL-BEING
Q23 Have you made any changes that you anticipate being permanent? (Select all that apply.)

- Adding programs and/or staff
- Began new collaborations that will remain in existence
- Changed fundraising efforts/activities
- Changed program delivery tactics
- Cut programs and corresponding expenses
- Disaster planning
- Downsized physical location of organization
- Increased cleaning practices
- Increased online presence
- No
- Permanently closing or merging your organization
- Reduced services or programs to increase employee or client safety
- Remote working or a hybrid of remote & in-person working
- Other

**Comparison**

![Comparison Chart](chart.png)
Q24  How concerned are you about the following issues in the next 12 months?

<table>
<thead>
<tr>
<th>Issue</th>
<th>NOT AT ALL CONCERNED</th>
<th>A LITTLE CONCERNED</th>
<th>SOMEWHAT CONCERNED</th>
<th>VERY CONCERNED</th>
</tr>
</thead>
<tbody>
<tr>
<td>CASH FLOW</td>
<td>23%</td>
<td>37%</td>
<td>22%</td>
<td>19%</td>
</tr>
<tr>
<td>CLOSING YOUR DOORS</td>
<td>71%</td>
<td>15%</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>EMPLOYEE AND STAFF HEALTH AND WELL BEING</td>
<td>41%</td>
<td>33%</td>
<td>17%</td>
<td>10%</td>
</tr>
<tr>
<td>DISASTER PLANNING AND RELIEF</td>
<td>56%</td>
<td>27%</td>
<td>12%</td>
<td>5%</td>
</tr>
<tr>
<td>FILLING AVAILABLE STAFF POSITIONS/WORKFORCE SHORTAGES</td>
<td>44%</td>
<td>28%</td>
<td>17%</td>
<td>12%</td>
</tr>
<tr>
<td>INCREASED EXPENSES</td>
<td>16%</td>
<td>33%</td>
<td>27%</td>
<td>24%</td>
</tr>
<tr>
<td>INCREASED NEED FOR SERVICES</td>
<td>30%</td>
<td>32%</td>
<td>20%</td>
<td>18%</td>
</tr>
<tr>
<td>LAYING OFF STAFF</td>
<td>80%</td>
<td>11%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>LOSS OF INCOME/REVENUE</td>
<td>27%</td>
<td>38%</td>
<td>19%</td>
<td>17%</td>
</tr>
<tr>
<td>MERGING YOUR ORGANIZATION WITH ANOTHER ONE</td>
<td>85%</td>
<td>8%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>REBUILDING</td>
<td>72%</td>
<td>16%</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>REDUCED ABILITY TO PROVIDE PROGRAMS</td>
<td>53%</td>
<td>28%</td>
<td>13%</td>
<td>7%</td>
</tr>
<tr>
<td>REDUCED FUTURE FUNDING (2022 AND BEYOND)</td>
<td>32%</td>
<td>33%</td>
<td>20%</td>
<td>15%</td>
</tr>
<tr>
<td>VOLUNTEER AVAILABILITY</td>
<td>36%</td>
<td>32%</td>
<td>19%</td>
<td>12%</td>
</tr>
</tbody>
</table>

**COMPARISON (very concerned)**

![Comparison Graph](chart.png)

PERCENTAGE
Q25  What resources does your organization need going forward?  (Select all that apply.)

- FUNDING
- FUNDRAISING ASSISTANCE
- VOLUNTEERS
- CAPACITY FOR EFFECTIVE COMMUNITY ENGAGEMENT
- ADVOCACY
- SUPPORT TO BUILD PARTNERSHIPS (GOVERNMENT, FUNDERS, OTHER NONPROFITS)
- COLLABORATIONS IN OR INFORMATION FOR YOUR LOCAL COMMUNITY
- TECHNOLOGY
- BOARD MOBILIZATION
- LEADERSHIP/PROFESSIONAL DEVELOPMENT FOR STAFF AND/OR VOLUNTEERS
- INFORMATION ON OR ASSISTANCE WITH NONPROFIT COLLABORATIONS
- FACILITIES
- IDENTIFYING, RECRUITING, AND/OR HIRING NEW EMPLOYEES
- BUSINESS OPERATIONS ASSISTANCE
- NONE OF THE ABOVE
- EXECUTIVE OR LEADERSHIP TRANSITIONS
- ASSISTANCE KEEPING STAFF, VOLUNTEERS, AND CLIENTS SAFE
- CAPACITY TO MANAGE MORE COMPLICATED FINANCES (INCLUDING DEBT)
- DIVERSITY, EQUITY, AND INCLUSION WORK
- GOVERNMENT RELIEF AID
- HR ASSISTANCE
- DISASTER PLANNING & RELIEF
- INFORMATION ON OR ASSISTANCE WITH NONPROFIT MERGERS
- OTHER
Q26 How long do you think it will take your organization to return to pre-COVID-19 conditions?

- **49%** have already returned to pre-COVID-19 conditions.
- **13%** think it will take one to three years.
- **16%** think it will take six months to a year.
- **10%** think it will take four years or more.
- **3%** think it will take less than six months.
- **1%** think they may never return to pre-COVID-19 conditions.
- **13%** are unsure.
IX. TAKEAWAYS AND NEXT STEPS

As nonprofits look towards 2023 and beyond, they will be focusing on areas vitally important to their mission success, including:

• **Volunteers.** Nonprofits need to find ways to avoid the burnout of current volunteers and recruit new ones, while also providing different options for volunteer experiences that engage all Floridians.
  
  - **How you can help:** find a cause that you are passionate about and volunteer your time. If you already volunteer, recruit some friends to volunteer with you. Talk about what your volunteer experience means to you.

• **Funding.** Nonprofits are in need of reliable and new sources of funding, especially unrestricted dollars that will help to insure their sustainability and impact. Inflation and increased costs are affecting the nonprofit sector, just as they are other sectors.
  
  - **How you can help:** If you are an institutional funder, consider increasing the unrestricted dollars that you grant. If you are an individual, consider a charitable donation, increasing your gift, or asking your friends to give as well.

• **Staffing.** Programs do not run themselves, and nonprofit staff are not optional for many organizations. Nonprofits need financial resources to increase salaries and benefits and must continue to protect staff mental health and avoid burnout. Otherwise, the workforce shortage will get worse and nonprofit programs will suffer.
  
  - **How you can help:** Believe that nonprofit staff deserve a livable wage for the work that they do and use your dollars and words to support investing in staff.

• **Succession planning.** With one-third of CEOs likely to turn over in the next 2 years, the sector needs to invest in succession planning and leadership development. Boards need to understand the plans of their CEO and how they will identify potential leadership to fill the roles, along with best practices for recruiting, hiring, and onboarding candidates.
  
  - **How you can help:** If you are Board member, learn about succession planning and executive transitions. If you are a nonprofit staff member, take your professional and leadership development seriously. If you are a funder or donor, consider investing in leadership development for nonprofit staff.

• **Disaster preparedness.** Natural disasters, like hurricanes, will always be a threat to Florida. Nonprofits will be affected when disaster hits and need to prepare themselves for disaster response and recovery, both for themselves and for their communities.
  
  - **How you can help:** Nonprofits should use existing resources and dedicate time to disaster planning before the disaster hits.

For positive change to happen, the nonprofit sector will need support — from the funding community, from volunteers, from community leaders, and from government. We encourage all Floridians to find a way to use their talents to support the nonprofit sector so that nonprofits can continue to support every neighborhood, city, county, and region of our state.
X. DEMOGRAPHICS OF SURVEY RESPONDENTS

2,300 nonprofit organizations located in and serving Florida responded to this survey. They represent a cross section of mission areas, budget sizes, and communities served within our state. Approximately half of the nonprofits in Florida are run by volunteers. Overall, the profile of responding organizations remains consistent across all of our nonprofit survey reports, which include the COVID Effects surveys in 2020 and 2021.

Q27 What area best describes your mission work?
Q28  What is the budget range for your organization?

- UNDER $50,000: 47%
- $50,000-$250,000: 22%
- $250,000-$750,000: 12%
- $750,000-$2.5M: 10%
- $2.5M-$10M: 6%
- $10M-$25M: 2%
- $25M-$50M: 1%
- OVER $50M: 1%

Q29  How many total paid staff members (full and part time combined) does your organization have?

- 0 - ALL VOLUNTEER ORGANIZATION: 53%
- 1 TO 5: 23%
- 6 TO 10: 6%
- 11 TO 20: 3%
- 21 TO 30: 3%
- 31 TO 50: 6%
- 51 TO 100: 3%
- MORE THAN 100: 2%
- UNSURE: 1%
Q30  What counties do you serve?

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