

Ohio Nonprofit COVID-19 Survey

A Report of Wave 2 Results



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Ohio Nonprofit COVID-19 Survey Project

The Ohio Nonprofit COVID-19 Survey Project was undertaken to identify the greatest needs of the state’s nonprofit sector during this public health crisis. It began in April 2020 with an initial wave of the survey. Over 7,500 public charities in the state responded to the survey, expressing their need for greater resources (Beaton, 2020). In August 2020, the project partners, including the Ohio Attorney General’s Charitable Law Section, Philanthropy Ohio, the Ohio Association for Nonprofit Organizations, and the authors who are affiliated with The Ohio State University, embarked on a second wave of the survey hoping to check in again on the welfare of Ohio’s nonprofit sector. The results of the second wave of the survey are contained in this report, along with ways to best support the sector during this time.

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Acknowledgments

The partners are indebted to the nonprofit leaders who took the time to complete the survey. We thank them for their participation, and the work they do to provide a social safety net for the state. We wish to also thank The Ohio State University Office of Outreach and Engagement for funding this project, and gratefully acknowledge the valuable input and support from the members of the Ohio Attorney General’s Charitable Advisory Council.

Ohio’s Nonprofit Sector

According to federal tax data, there are 40,521 charitable organizations in the state of Ohio, most of which are public charities (Hand, Scott, Shehadi, & Walsh, 2020).

These organizations provide a variety of services including arts, health, education, and human services, among others. The nonprofit sector contributes to the economy by providing jobs, strengthening communities by building social capital, providing democratic representation for the disenfranchised, and providing services that the market and/or government do not. As such, the nonprofit sector comprises a social safety net for the state and for the country.

We should be concerned about supporting Ohio’s nonprofit sector during the pandemic for many reasons. The nonprofit sector is a major employer – the third largest industry behind manufacturing and retail – so layoffs will have a significant impact on state unemployment. Nonprofits also provide services that are especially necessary during this time, including health, education, the arts, and activities that connect us to one another. Issues like food insecurity, homelessness, youth development, and domestic violence are of increased concern during the pandemic and are under the purview of nonprofits. Further, many of Ohio’s hospitals, which are on the frontlines of the pandemic response, are nonprofit organizations.

Nonprofits rely on donations and volunteerism from individuals, as well as government support to survive (LeRoux & Feeney, 2015).

Executive Summary

In August 2020, the Ohio Nonprofit COVID-19 Survey Project fielded a second wave of the survey to public charities in the state. The results bare both good and bad news for the sector. Overall, the situation seems to be improving, at least slightly, for some nonprofits. Many organizations are resuming service provision. Of those that responded to both waves of the survey, more than half have increased their service levels since April. However, many are still operating at levels below that prior to the pandemic. Nonprofits are doing their best to provide services, which often means offering services through different methods than they did previously. More than half of the organizations currently providing services are doing so differently than they had in the past (e.g., remotely) in order to best support their clients and beneficiaries during this difficult and socially distanced time.

Nonprofits are taking the necessary actions to maintain their operations, which often involves cutting expenses or seeking new sources of income. One way to cut expenses has been through layoffs and furloughs. The data show that the largest cuts have been to part-time employees. For some nonprofits, one important source of funding has come from the Payroll Protection Program (PPP). Nearly a quarter of the responding organizations applied for a PPP loan and the vast majority of those that applied have received a loan. The average loan size was just over \$280,000. Most of the recipients do not yet know whether their loan will be forgiven or not. Another action that some organizations are taking involves programmatic changes. Many organizations are making the hard choice to discontinue programs or are putting in great effort to add new programs that respond to the changing needs of the same or new populations.

Overall, more concerns are decreasing than increasing among nonprofits. One concern that many nonprofits share is that they will have to shut down operations indefinitely, with some reporting that they have already done so. However, between April and August, more organizations have decreased their level of concern than increased their level of concern regarding the possibility of shutting down. In the previous wave of the survey the top concern was loss of revenue. That level of concern has largely stayed the same. The pandemic has impacted nonprofit revenue

differentially with some nonprofits minimally impacted and others severely impacted. While some nonprofits expect to receive 90 percent or more of the previous year's revenue, and some even expect growth, there are still nonprofits that expect to be down 90-100 percent compared to the previous year. The data indicate that the source of revenue most fundamental to the nonprofit sector – individual donations – has been the most impacted by the pandemic. About half of nonprofits have experienced declines in donations. Corporate donations and earned income sources have also been hit hard. The source of revenue showing the least impact, so far, is government grants and contracts. In light of concerns surrounding declining revenue, nonprofits say that they are most in need of help reevaluating their fundraising strategies. They also report that they could use help with volunteer recruitment and management.

Ways to Help:

As a result of the pandemic, organizations have added new programs and services and discontinued existing programs and services; however, most of these organizations plan to keep their new offerings and bring back discontinued offerings in the long term (within three years). This means that Ohio will have many more programs and services being offered by its nonprofits, but Ohioans may not be able to provide the reciprocal support that these organizations need to offer services at this capacity. For this reason, we have compiled several ways that donors, grantmakers, government officials, and nonprofit consultants can help nonprofits at this time.

- **Donors & Grantmakers:** Find ways to give more. Take advantage of the CARES Act tax incentives for charitable giving and lift any restrictions on previous donations. Make grant applications accessible, easy to complete, and more widely applicable to small nonprofits.
- **Government Officials:** Pass relief programs that target nonprofit organizations for funding, and ensure nonprofits are included in relief programs for businesses.
- **Nonprofit Consultants:** Offer pro bono services to nonprofits to assist with fundraising and volunteer management strategies.

Summary of the Wave 1 Report

The Ohio Nonprofit COVID-19 Survey Project Wave 1 report was compiled and released in May 2020, about a month following the outbreak of the COVID-19 pandemic in the United States and the statewide stay-at-home order in Ohio (Beaton, 2020). The report summarizes and analyzes survey data collected in April 2020 to capture the extent of the pandemic's immediate impact on Ohio's nonprofit sector. The survey was sent to all public charities registered with the Ohio Attorney General's Office and received 7,723 usable responses (about 19 percent of the population) from a diverse range of Ohio nonprofit leaders.

The report underscores the level of service provision, actions taken, critical concerns, and essential needs of the Ohio nonprofit sector. The results suggest alarming impacts of the pandemic on the nonprofit sector. In terms of service provision during the stay-at-home order, 28 percent of the nonprofit respondents were not providing any services, and 50 percent were providing services in a reduced capacity. Coping with the pandemic, nonprofits were making admirable efforts. The most common actions taken included conducting board meetings virtually (51 percent), restricting travel (37 percent), cutting other administrative expenses (25 percent), and restricting professional development of staff (23 percent). The most common concerns among nonprofits were loss of revenue (49 percent), disruption of services to clients or communities (47 percent) and decline in donations (45 percent).

Results of the Wave 1 report reveal immediate challenges and concerns of the Ohio nonprofit sector as a result of the unexpected pandemic. Perhaps the most worrisome finding was a shared sense of uncertainty, as more than half of the nonprofit respondents were worried about the prospect of having to shut down operations indefinitely. These findings motivated the project partners to further examine whether nonprofits' concerns have been ameliorated or intensified as the pandemic has progressed, and how nonprofits are planning to cope with the new normal.

“Money that was being saved for gear and equipment is going to have to be used for everyday expenses... Projects that we’ve been saving on for years might get used up.”

- Leader of a volunteer fire department responding to the Wave 1 Survey

Service Provision During the Pandemic

Nonprofits provide many types of services to residents of Ohio, including health, education, and human services. In the midst of the pandemic, these services are needed now more than ever. As during Wave 1 of the survey, **Figure 1** shows that some organizations are still unable to provide services (14 percent), including many arts organizations that utilize indoor theatre or museum spaces.

Many of these organizations and others, reported that they are waiting for more instruction on

reopening guidelines that coincide with COVID-19 safety regulations.

Most organizations, however, reported that they are offering services in a reduced capacity - either moderately reduced (28 percent) or severely reduced (33 percent). Some organizations reported good news that they are operating at the same capacity (15 percent) or at an increased capacity (8 percent). Of the organizations that are providing services, 65 percent are delivering services differently than they normally would (e.g. remotely), which suggests that nonprofits are working hard to serve their beneficiaries in any way that they can.

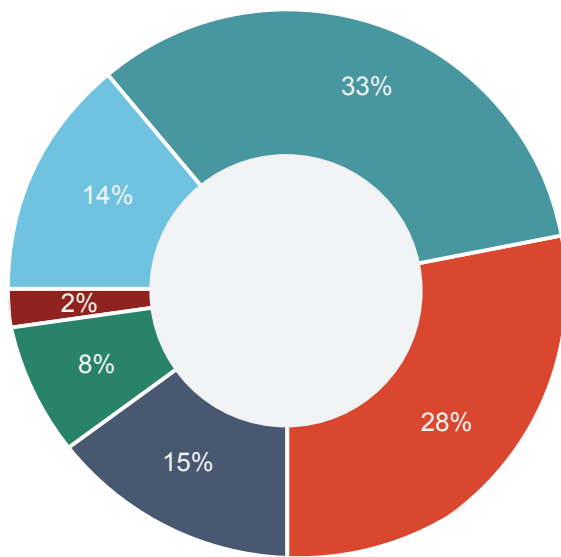


Figure 1: To what extent are you currently delivering your normal programs and/or services during the COVID-19 pandemic?

- Not at all
- In a severely reduced capacity
- In a moderately reduced capacity
- Same as we always do
- To a greater extent than usual
- Not Applicable

Many organizations have altered their service level since April when Wave 1 of the survey was administered (such as increasing their service level from a moderately reduced capacity to the same as always, or decreasing their service level from a greater extent than usual to the same as always). **Figure 2** shows that 62 percent of organizations have increased their service level since April, 13 percent have maintained the same service level, and 24 percent have decreased their service level.

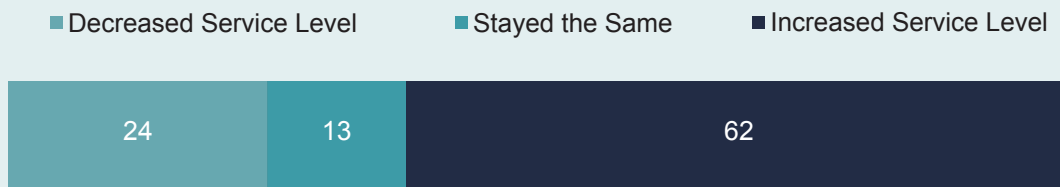


Figure 2: Percent of nonprofits that increased, decreased, or kept service levels the same since April.

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Our organization has been a performing arts presenter for 55 years. Our flagship event, an annual six-week summer festival of music, concerts, and theater (which is presented admission free to an annual audience of approx. 80,000) was cancelled in mid-May a month prior to beginning. This cancellation, along with being unable to present performances for groups larger than 15% capacity of our performance spaces, means that events in the near to foreseeable future will not break even and will incur expenses far beyond our normal non-profit limits. While we are hopeful to ride this out, our limited financial resources such as endowments and credit lines will not sustain more than another 12-18 months, and we anticipate recovery (even after a vaccine etc.) will be slow and ongoing. Our traditional funders, donors and sponsors are all experiencing hardships due to the COVID situation, and we anticipate reduction in support from all of our traditional resources.”

-Leader of a performing arts nonprofit

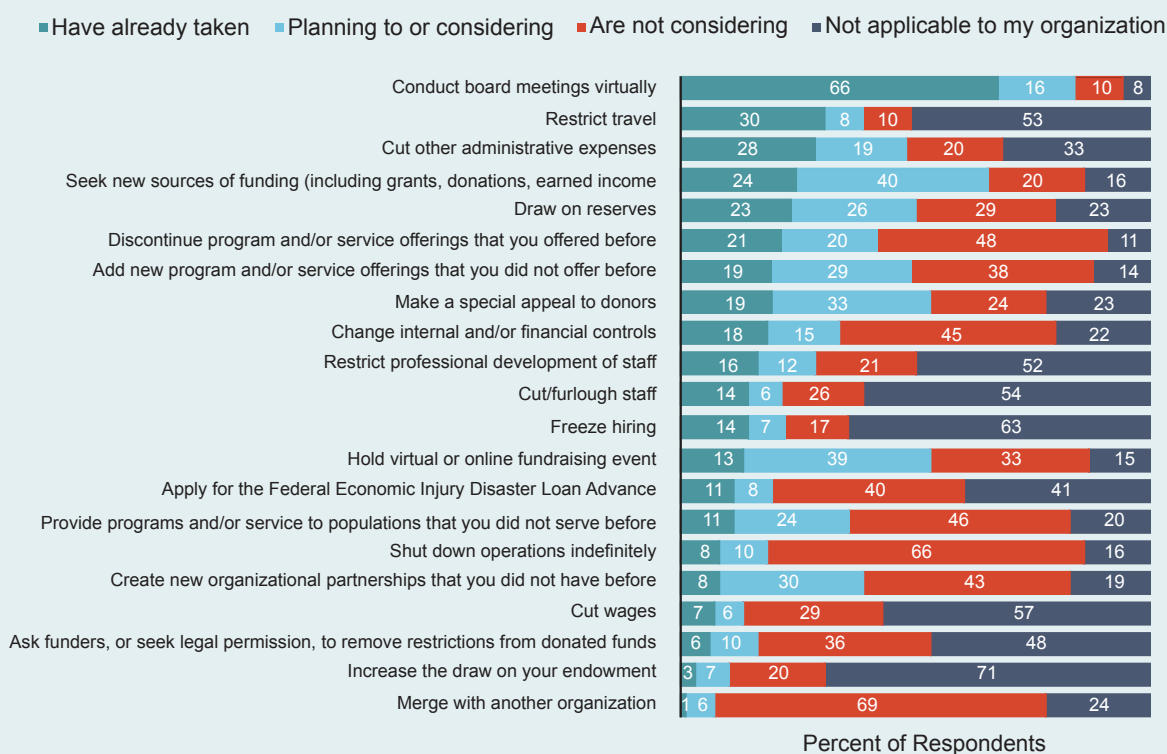
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Actions & Changes Made as Result of the Pandemic

Nonprofits are taking many actions as a result of the pandemic, as shown in **Figure 3**. Consistent with results from Wave 1, the top three actions taken by nonprofits, as a result of the pandemic, were conducting board meetings virtually, restricting travel, and cutting administrative expenses. We saw the most significant increase in the number of organizations conducting board meetings online, making a special appeal to donors, and drawing on reserves. In terms of plans going forward, many are (considering) seeking new sources of funding and (considering) holding virtual fundraising events.

Notably, 287 organizations (8 percent of the sample) responded that they have shut down operations indefinitely and another 10 percent said that they are planning or considering it. These organizations appear to be primarily very small ones (207 have under \$50,000 in annual revenue) and are predominately human services and arts organizations. For instance, the list of shut down nonprofits includes several historical societies. Related, 7 percent of the sample has already, is planning, or is considering a merger with another organization.

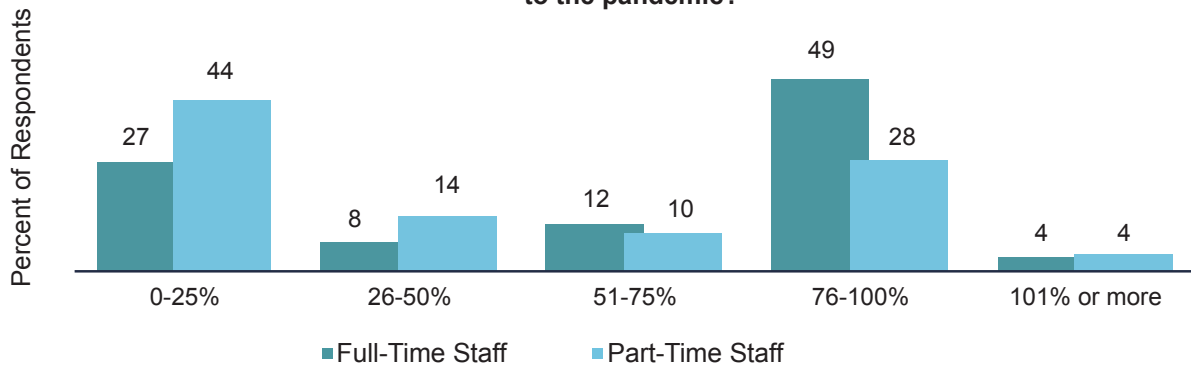
Figure 3: As a result of the COVID-19 pandemic, which actions have you or will you take?



Programmatic changes were common for the sampled organizations, including changes like the discontinuation of programs or the addition of new programs. When asked about these programs, 67 percent of the nonprofits that had begun offering a new program responded that they thought the program would still be operating three years from now. Those that discontinued programs were less confident that this would be a permanent change, with 82 percent reporting that they plan to bring these programs back. If these results hold true, the nonprofit sector will be offering far more programs in the future by adding new programs and bringing back discontinued programs. Without commensurate funding, these nonprofits may become spread even more thin than they are currently.

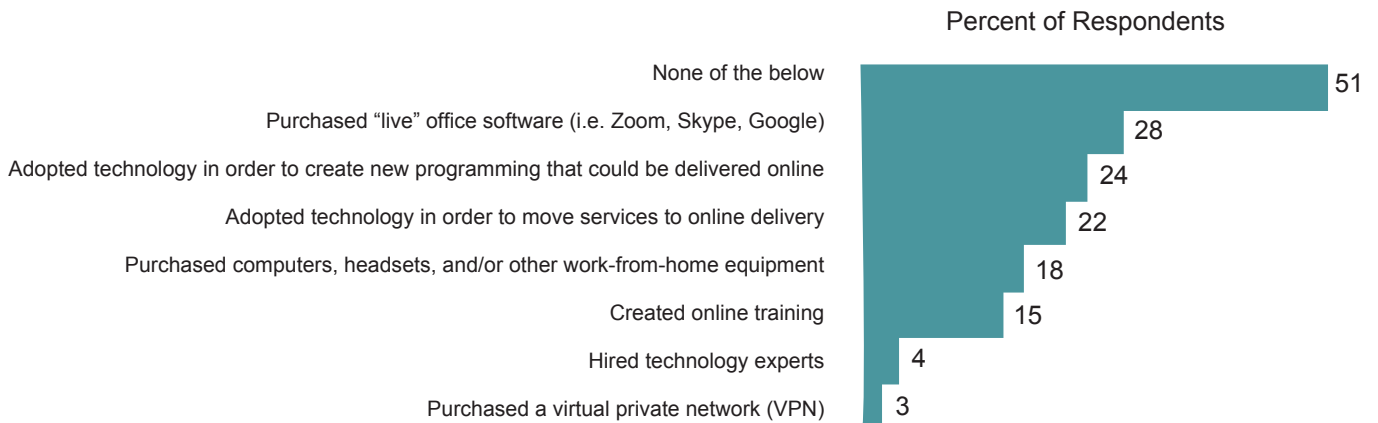
Approximately 14 percent of nonprofits responded that they have cut or furloughed staff. We followed up to better understand the extent of these cuts across both full-time and part-time employees. Shown in **Figure 4**, we found that more part-time staff were cut than full-time staff. For instance, 27 percent of the responding organizations had 0-25% of their full-time staff remaining at the time of the survey, and 44 percent of the responding organizations had 0-25% of their part-time staff remaining at the time of the survey. Conversely, 49 percent had 76-100% of their full-time staff remaining, and 28 percent had 76-100% of their part-time staff remaining. Only a small number of organizations were able to grow their staff since the beginning of the pandemic. This tells us that nonprofit employers are either doing quite well, with minor cuts, or are doing very poorly, having to lay off a significant proportion of their staff.

Figure 4: Approximately what percent of the organization’s headcount remains from prior to the pandemic?



Per **Figure 5**, our results show that most respondents (51 percent) did not need to make technological changes due to the pandemic. Of those that did make technological changes, the most common change was purchasing “live” office software (28 percent of the sample), with the next most common change being the adoption of technology to assist with new programming and to assist with moving current services online (24 and 22 percent respectively). Predictably, it was larger organizations that were most likely to make technological changes. For instance, 83 percent of nonprofits with an annual revenue of \$500,000 or more made at least one of these changes.

Figure 5: What technological changes did your organization have to make due to the pandemic?



“

We normally have a [large event] to raise funds while honoring our survivors and those going through treatment. This year our live event was cancelled but we made it into a virtual event that raised \$51,000.... normally we raise around \$57,000 so we didn't do too bad with all things considered.

-Leader of a cancer treatment nonprofit

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Payroll Protection Program Loans

According to the survey results displayed in **Figure 6**, 23 percent of responding nonprofits applied for a Payroll Protection Program (PPP) Loan. The remainder did not apply because the organization was either ineligible (48 percent) or made the choice not to (29 percent). Approximately 22 PPP loan, furthermore, out of the 22 percent

the responding nonprofits received a respondents who applied for a PPP loan, 96 percent received one and 4 percent did not. This suggests that, for those organizations who did apply, most of them did eventually receive a loan, however far more organizations were not eligible to apply to begin with.

Figure 6: Did your organization apply and/or receive a Payroll Protection Program (PPP) loan?

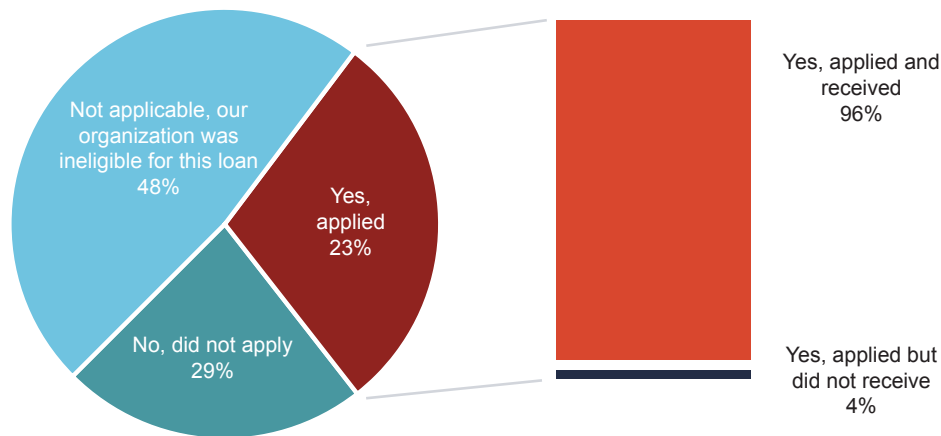


Figure 7 shows perceived difficulty of the PPP application process. Of the 22 percent of respondents that applied for a PPP loan, the majority found the application process to be challenging. Approximately 16 percent suggested that the process was very challenging, and 40 percent suggested that it was somewhat challenging. Finally, a mere 22 percent found the process to be easy (14 percent somewhat easy and 8 percent very easy).

Figure 7: Did you find the PPP application process to be:

■ Very Challenging ■ Somewhat Challenging ■ Neither Challenging or Easy ■ Somewhat Easy ■ Very Easy

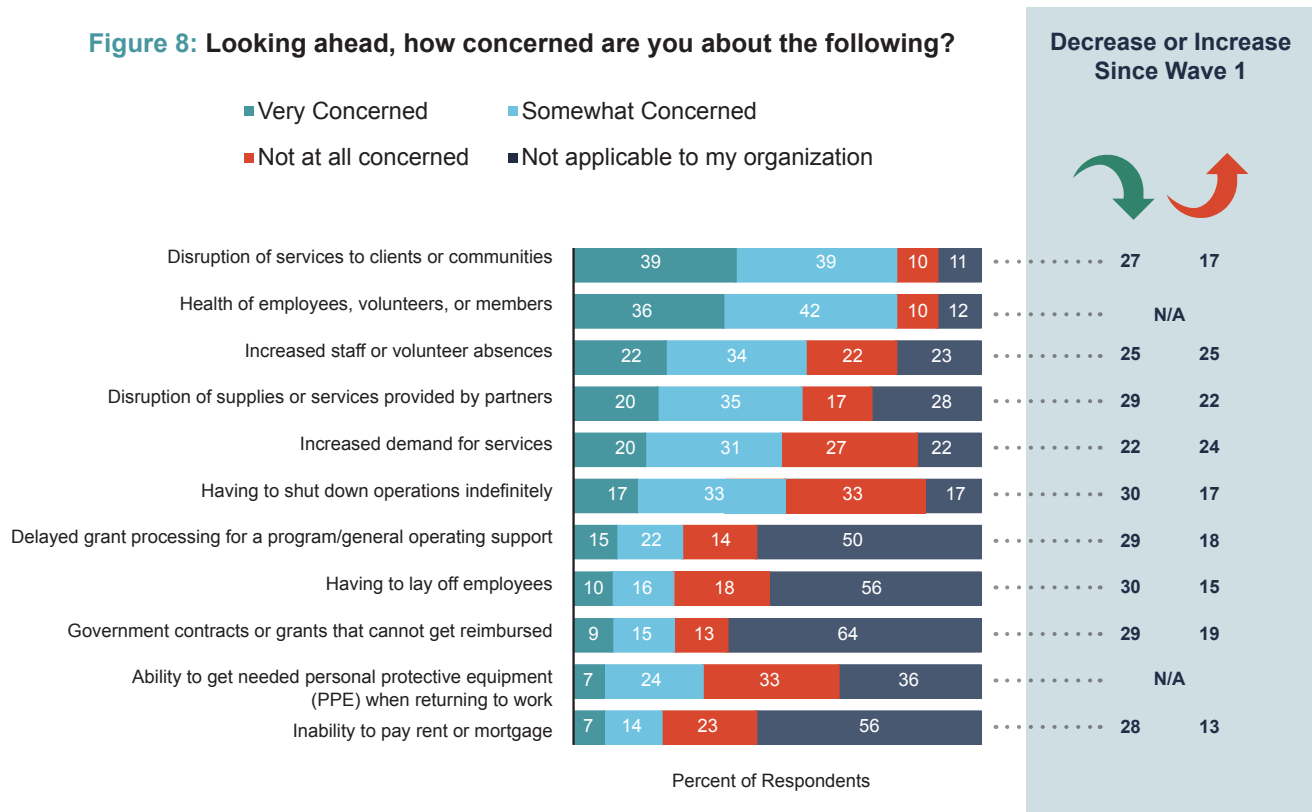


Our data show that the average PPP loan size among Ohio nonprofits was \$281,045.35, with the maximum loan size being \$8,000,000. The two most common banks serving nonprofits were Huntington National Bank and PNC Bank, but there was a dispersion of banks used amongst nonprofits. Most nonprofits do not yet know whether their loan will be forgiven (90 percent), but a small proportion (3 percent of those receiving a loan) have had the loan forgiven thus far.

Concerns Among Nonprofits

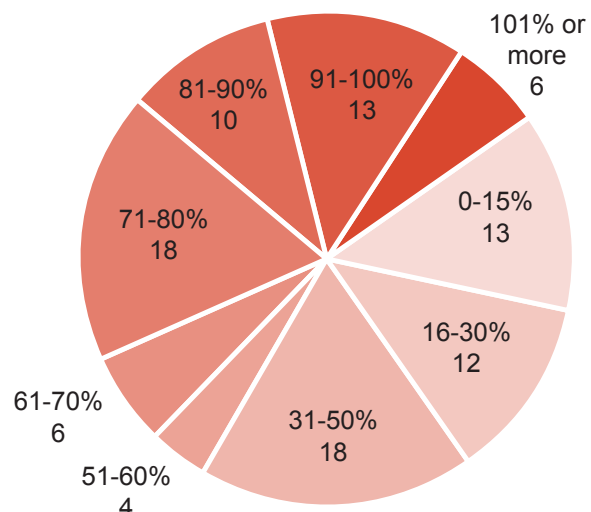
On average, concerns among nonprofits have remained the same or decreased since Wave 1. As **Figure 8** shows, disruption of services to clients and communities remains a top concern. However, this concern has decreased more than it has increased among nonprofits since Wave 1. Of those that responded in both waves, 27 percent have decreased their concern while 17 percent have increased their concern about the disruption of services. People’s health is nonprofits’ second most common concern.

Figure 8: Looking ahead, how concerned are you about the following?



In Wave 1 of the survey, the primary concern among nonprofits was loss of revenue, and that remains a concern. Approximately 66 percent of responding nonprofits maintained the same level of concern between April and August; the remainder was split between increasing and decreasing their level of concern. In this wave of the survey, we asked about expected revenue for 2020. Results are displayed in **Figure 9**. We found a high degree of variation in expectations. Approximately 6 percent are in a good situation, expecting more revenue this year than last. Thirteen percent of respondents expect to receive somewhere between 91-100% of last year’s revenue. Unfortunately, just over half of the responding nonprofits expect to receive 61% or less of the revenue that they had last year, which requires significant cuts. The largest decreases were most prevalent among very small organizations.

Figure 9: What percent of your annual revenue from the previous fiscal year, do you expect for this fiscal year?



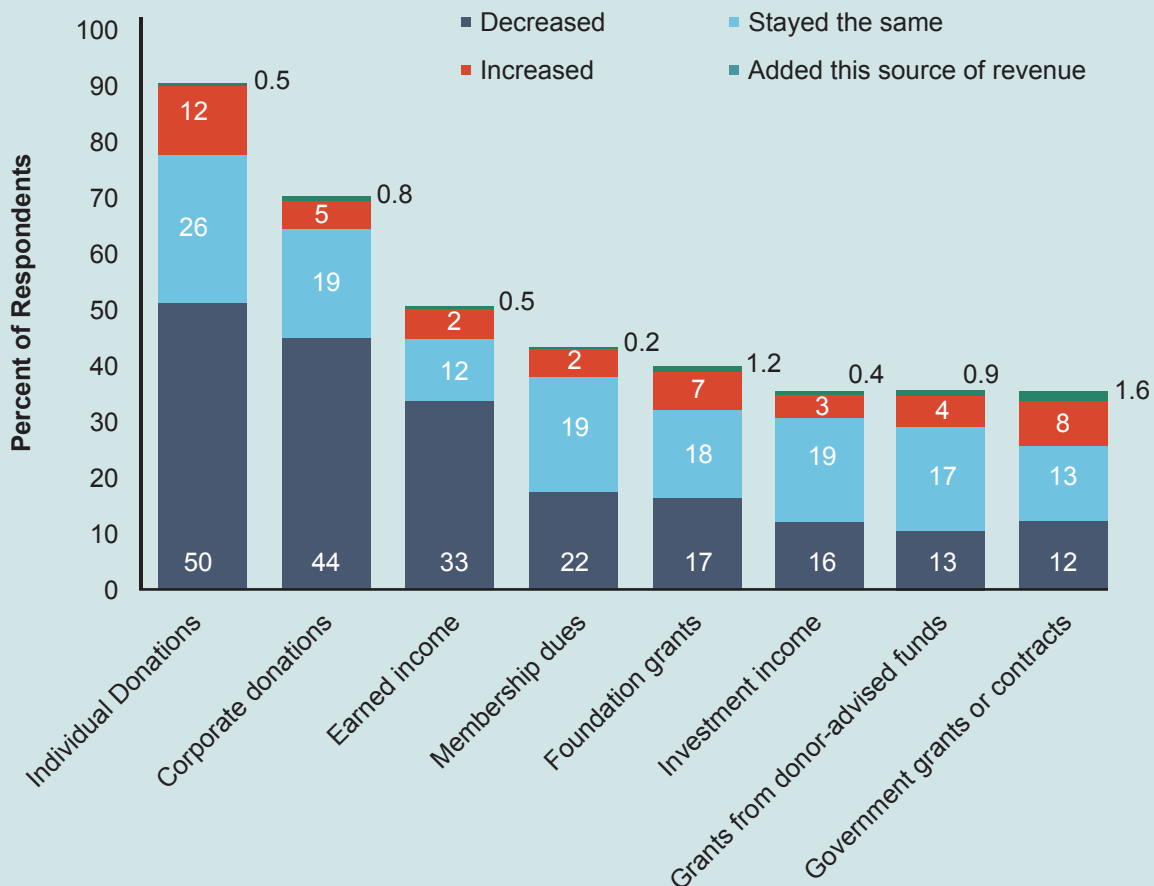
We also asked about the different sources of revenue that are presented in **Figure 10**. Respondents reported more decreases than increases across all sources of revenue. Many nonprofits rely heavily upon individual donations, and that source of revenue has been the hardest hit as a result of the pandemic. Far more organizations reported this source of revenue as decreasing (50 percent) compared to those who reported an increase (12 percent). Of the respondents that have individual donations as a source of income, 8.8 percent reported that they had donors retract gifts that those donors had previously pledged. Corporate donations are also a very important source of revenue and have similarly been impacted by the pandemic.

Earned income, which includes fees and charges for services, is a source of revenue for about 44

percent of all respondents. This source of revenue has seen the most widespread decrease amongst nonprofits, with only a small proportion of organizations reporting that this revenue has stayed the same (12 percent) or increased (2 percent). Membership dues have held slightly stronger, with 19 percent staying the same since prior to the pandemic.

Although many respondents said that they are seeking new sources of income (24 percent, see **Figure 3**), only a small number of organizations have been successful in doing so. For instance, less than 1 percent have added individual donations, corporate donations, earned income, membership dues, investment income, and donor advised funds. More, but still very few, have been successful at adding foundation grants (1.2 percent) and government grants or contracts (1.6 percent).

Figure 10: How have the following sources of income changed for your organization since the beginning of COVID-19?



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“We have experienced a large increase in the needs of individuals who have suffered trauma and complicated bereavement due to COVID and quarantine conditions. However, many of our current and new clients do not have insurance due to job loss or cannot afford new insurance deductibles and we cannot serve them because we have had a reduction in contract and grant income.”

-Leader of a nonprofit that offers mental health services

”

Needs of the Sector Moving Forward

We were interested in what types of support would be the most useful to nonprofit organizations at this point in time, so we provided a list of possibilities for respondents to rank in importance. **Table 1** shows that the most common request was for help reevaluating fundraising strategies, with 27 percent saying that it would be beneficial for them. The second most common request was help with volunteer recruitment and management (14.5 percent).

Rank	Support Type	Percentage
#1	Reevaluating fundraising strategies	27.0%
#2	Volunteer recruitment and management	14.5%
#3	Technological support (e.g., moving programs online)	12.8%
#4	Sharing real time data about our nonprofit's needs with funders, government officials, and corporate leaders	11.7%
#5	Guidance to our board of directors	10.2%
#6	Financial scenario planning	7.9%
#7	Wellness and self-care for myself and/or team	6.3%
#8	Coaching sessions for coping with emotional stress of pandemic	4.7%
#9	Guidance on employment issues	3.6%
#10	Other	1.3%

Some respondents chose to write in additional training or support that would help their organization recover from the pandemic. The following summarizes those responses:

Collaboration: Education and networking opportunities to partner or merge with aligned organizations.

Grant Writing: Training on how to apply for grants and where to find them.

Young Nonprofit Help: Training and assistance for new nonprofits, including those in their first years of operations.

Service Identification: Locating free or inexpensive services or software that would be helpful to nonprofits.

Non-virtual Support: Help for those who do not have Internet access.

Cultural Awareness and Sensitivity Training: For board members and employees.

Funding: Outside sources of funding, like PPP loans and/or more grant opportunities (to include organizations without staff).

Website Creation and Support: Training on how to create and maintain a web presence.

Organizational Restructuring: Training or strategy on how to successfully restructure a nonprofit.

'Best Practices' Curriculum: Curriculum on the best practices for nonprofits based on their mission during COVID-19, such as food pantries or animal shelters.

COVID-19 Guidelines: More information on how to operate during the pandemic, and what to expect after it is over.

Internet Marketing: Strategies for marketing over the Internet.

Business Development: Education on diversifying income, strategies to appeal to donors, writing strategic plans, etc.

Board: How to find diverse board members and attain their commitment.

Ways to Help

The survey results from Wave 1 and Wave 2 suggest several implications for Ohio's nonprofit sector moving forward. Nonprofit organizations are being asked to do even more with even less. We believe one important observation is that nonprofits are increasingly spread thin. Most organizations reported they have created a new program or service as a result of the pandemic, reported that they are planning to continue offering them in the long term (for at least three more years). Similarly, the organizations who reported that they have discontinued programs or services because of the pandemic, reported that they plan to bring back these dissolved offerings in three years or less. If new programs and services are remaining

and discontinued programs and services will be reinstated, nonprofits are likely to become overextended. Although more service and program offerings mean that more people in Ohio will be served by nonprofits, we must recognize that there may not be enough financial support within our state to support this programming. For this reason, it is vital that more support be given to the nonprofit sector. This support could come in several forms, including assistance from donors, grantmakers, government officials, and nonprofit consultants. The following outlines our recommendations for these stakeholders based on the feedback we received from respondents.

Donors and Grantmakers Can:

Understand the new tax benefits available through the CARES Act. Individual and corporate donations are being incentivized in 2020 – take advantage of these benefits.

Give as much as you can now to help sustain the sector. If there is not enough funding in the short run, organizations like historical societies may no longer exist in the long run.

Remain flexible in your donations and grants. If you have previously restricted a donation, consider lifting those restrictions so that nonprofits can use the donation in ways that will meet their immediate needs. Refrain from adding restrictions to new donations and grants.

If your foundation or organization offers grants, consider altering the applications to be more accessible, easier to complete, and more inclusive of a variety of nonprofits, especially smaller ones.

State and Local Government Officials Can:

Create funding opportunities for nonprofits. This could be achieved through donor tax breaks at the state and local level, economic recovery funds, or via incentives for banks to offer nonprofits loans. If there are recovery funds being offered to businesses, be sure that nonprofits qualify for those funds. Also, consider small nonprofits because they did not qualify for PPP loans due to their staff size.

Consultants and Nonprofit Experts Can:

Offer services and guidance to nonprofits pro bono, specializing in the following topics that our survey results suggest are important needs:

- o Fundraising strategies, especially for online modalities
- o Volunteer management and recruitment
- o Organizational restructuring
- o Shut down and merger resources
- o Grant identification and writing

Survey Sample & Methods

Characteristics of Responding Nonprofits

The nonprofit respondents to the survey were, as in Wave 1, diverse in their characteristics. Approximately 45 percent of those nonprofit leaders who completed the survey were serving as the organization’s Executive Director, CEO, or President. Several CFO or finance directors responded on behalf of their organization too (21 percent). The remainder of respondents were the COO, Administrative Manager, Board Chair, or served another position within the organization.

As **Figure 11** shows, survey respondents included organizations from all the purpose areas associated with the nonprofit sector. The largest purpose area

among the respondents, and among the nonprofit sector at large (NCCS, 2020), was human services (1,210 respondents, representing 33 percent of the sample). There was also a strong representation from the arts, education, health, and environment subsectors. The responding organizations serve a diversity of populations: 21 percent serve the general population (no specific subgroups), 22 percent children/youth, 14 percent families, 8 percent LGBT, 7 percent women, 3 percent immigrants/refugees, 7 percent racial or ethnic minorities, 4 percent the unemployed, and 9 percent seniors.

Figure 11: Primary Purpose of Responding Nonprofits (number)

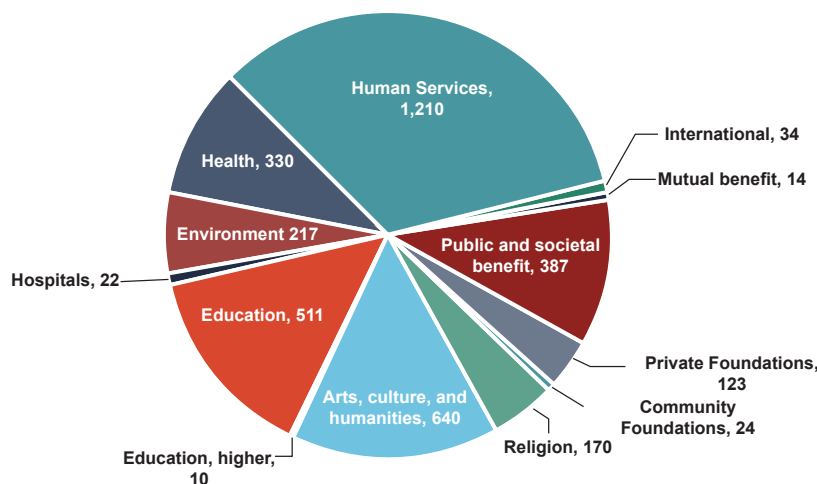
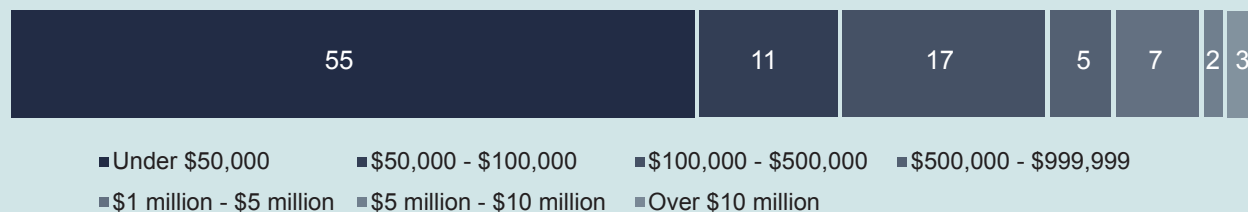


Figure 12 shows the size of responding nonprofits. Like the sector at large (NCCS, 2020), they were small in size. Approximately 55 percent had an annual revenue of \$50,000 or less, and 12 percent had over \$1 million.

Figure 12: What was the annual revenue for your organization last year?



These smaller annual revenues also reflected small average staff sizes. Most of the respondents had no staff – 63 percent had no full-time staff and 60 percent had no part-time staff. Only 2.5 percent and 2 percent of the responding organizations had 100 or more full-time and part-time staff, respectively.

There continued to be strong geographic representation across the state of Ohio as well. Approximately 19 percent of responding organizations are located in central Ohio, 37 percent in northeast, 11 percent in northwest, 9 percent in southeast, 15 percent in southwest, and 10 percent in west Ohio.

Given the importance of racial and ethnic representation on boards (Brown, 2002; Kim & Mason, 2018), we asked the responding organizations about the makeup of their board. Nonprofits, on average, reported that 15 percent of their board seats are filled by people of color. However, the average is skewed by a small proportion of nonprofits that have 100% of their board seats filled by people of color (7 percent of all responding organizations). In actuality, well over half (57 percent) of responding nonprofits have zero people of color serving on their board.

Figure 13: How many members of the organization’s board are persons of color?



Survey Methods & Representation

The procedures used to conduct the Ohio Nonprofit COVID-19 survey follow traditional standards for rigor in academia and nonprofit studies (Berry, Arons, Bass, Carter, & Partney, 2003). The instrument was developed with the input of the study partners and the Ohio Attorney General’s Charitable Advisory Council. The research protocol was approved by The Ohio State Office of Responsible Research Practices, and all respondents consented to participation.

The second wave of the survey was released August 20, 2020 to the Ohio Attorney General’s list of public charities registered with the state, minus those that had opted out of the survey in Wave 1. After several email reminders, we drew the survey results on September 5. A total of 3,724 organizations responded to Wave 2 of the survey, which represents approximately 9.2 percent of public charities in the state. Some nonprofits responded to the survey for the first time during Wave 2 (1,184 organizations), while others had also responded to Wave 1 (2,540 organizations). Those responding to both waves provided us with longitudinal data to understand how a specific organization’s concerns and actions had shifted since earlier in the pandemic. Comparisons of Wave 1 and Wave 2 responses contained in this report

are done on a same-respondent basis rather than an average basis. This was done to ensure that differences between Wave 1 and Wave 2 were attributable to changes in responses by organizational leaders and were not due to differences in the Wave 1 and 2 samples.

Wave 2 respondents to the survey reflect the sector’s diversity. However, statistically, the sample overrepresents arts organizations. We believe this is because arts organizations are being hit particularly hard by the pandemic and these organizations’ leaders wanted to express their concerns. The sample also slightly overrepresents health and human services organizations, while underrepresenting religious organizations and private foundations. As shown in the responding nonprofits’ characteristics, the sample includes organizations of all sizes. Statistically, the sample slightly overrepresents larger organizations and underrepresents the smallest organizations (i.e., less than \$25,000 in annual revenue). The results should be interpreted with these caveats in mind.

Report Partners



Charities fulfill a critical role in Ohio, meeting needs that the market and the government cannot or will not. The attorney general has the privilege of being the state officer charged with protecting and regulating the charitable sector, a role which affords him the opportunity to support such a wonderful segment of Ohio's civil society. The Ohio Attorney General's Charitable Law Section provides oversight and support of the state's charitable sector. The Section handles registration of charities and professional solicitors, investigates abuses of charitable trusts, provides tools for the public to research charities, and offers resources and training to charitable organizations to enhance transparency and accountability.

The Ohio Association of Nonprofit Organizations (OANO) is the only statewide membership association that reflects the full diversity of the nonprofit sector in Ohio. OANO members include organizations of all sizes and mission areas, including arts and culture; health and human services; community development; and many other types of organizations. OANO's mission is to provide leadership, education, and advocacy to enhance the ability of Ohio's nonprofit organizations to serve their communities.

Philanthropy Ohio is an association of foundations, corporate giving programs, individuals and organizations actively involved in philanthropy in Ohio. Its vision is a just and vibrant Ohio through impactful philanthropy and its mission is to lead and equip Ohio philanthropy to be effective, powerful change agents in our communities. It provides the network, tools and knowledge to help people engaged in philanthropy become more effective, powerful change agents in their communities. Together, its more than 210 members hold over \$121 billion in assets and provide over \$1.5 billion in grants to nonprofit organizations that work to improve the lives of community residents. Learn more at philanthropyohio.org.

Report Authors



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The findings expressed in this report are the product of research conducted by the author and do not represent the views of either the John Glenn College of Public Affairs or The Ohio State University.

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