

STATE OF THE NONPROFIT SECTOR [SURVEY]

July 3 - August 1, 2020



As a strategic partner to nonprofits nationwide, our mission is to help organizations grow, achieve their missions, and increase their impact. Orr Group helps its partners fundraise, develop and build consensus on new strategies, secure and manage talent, recruit and engage board members, and provide short- or long-term executive and development staff solutions.

To better understand the impact of the COVID-19 pandemic on nonprofit organizations, Orr Group conducted a survey to assess the current state of the nonprofit sector. With over 100 nonprofit organizations responding, some of our most notable findings include:

- **The majority of respondents have adjusted their programming and the case they make to donors to reflect the changed environment.**
- **Organizations are continuing to rely on philanthropy with most organizations stating that as a percent of total income, they expect philanthropy to remain constant or grow.**
- **An overwhelming number of responding organizations expect to increase their reliance on individual philanthropists making gifts of all sizes to support their mission.**
- **Those organizations currently in or planning campaigns have all adjusted their case and/or timing, but most recognize the need for substantive fundraising to continue and are moving forward in some way.**

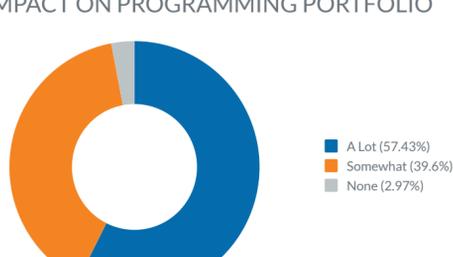
We hope that the findings of this survey will help us and our nonprofit partners to better serve the community while contributing to the body of knowledge in the field.

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STATE OF THE NONPROFIT SECTOR SURVEY

HOW THE COVID-19 PANDEMIC HAS IMPACTED PLANNING AND STRATEGY.

IMPACT ON PROGRAMMING PORTFOLIO



More than half of nonprofit respondents cited that their **programming portfolio has changed significantly** in response to the pandemic.

IMPACT ON STRATEGIC PLANNING



Of nonprofit organizations with a strategic plan in place, **roughly 50% of respondents are revisiting their strategic plans.**

IMPACT ON PLANNING PROCESS



One in four responding nonprofit organizations are **considering launching a planning process for a new strategic plan** at this time.

75%

of respondents are **planning to revisit their cases for support** to accommodate messaging related to the pandemic.

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STATE OF THE NONPROFIT SECTOR SURVEY

HOW THE COVID-19 PANDEMIC HAS IMPACTED FUNDRAISING.

IMPACT ON FUNDRAISING



At this time, **roughly 30%** of nonprofit respondents **predict that fundraising in 2021 will decrease somewhat.**

IMPACT OF PHILANTHROPY ON TOTAL INCOME

As a percent of total organizational income, **one in four respondents expect philanthropy to stay the same in 2021.**



IMPACT ON FUNDRAISING TEAM SIZE



The **majority** of responding nonprofits plan to **maintain their fundraising team size over the next 12 months.**

INDIVIDUAL GIVING

... revenue is expected to **grow the most in 2021** according to nonprofit respondents.

EVENTS

... revenue is expected to **decrease the most in 2021** according to nonprofit respondents.

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HOW THE COVID-19 PANDEMIC HAS IMPACTED CAMPAIGNS.

53%

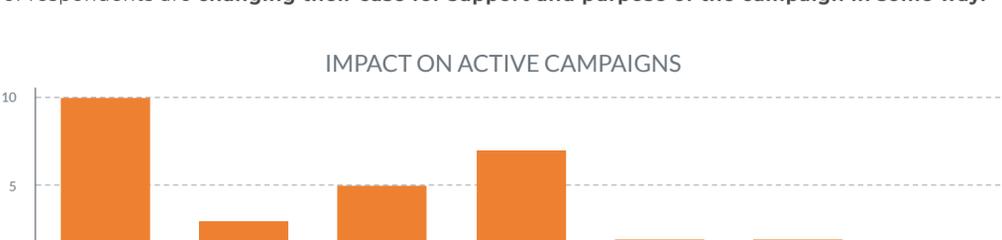
of nonprofit respondents were **planning for a major campaign** prior to the pandemic.

IMPACT ON CAMPAIGN PLANNING



Of the organizations in the midst of planning for a major campaign pre-pandemic, **roughly half** of respondents are **changing their case for support and purpose of the campaign in some way.**

IMPACT ON ACTIVE CAMPAIGNS



Of the organizations in the midst of a major campaign pre-pandemic, **25%** of respondents cited they were **making no changes to the course of their campaign** and **18%** cited **changes to the campaign case for support.**

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ABOUT THIS SURVEY

The findings of this survey were the result of data collected by Orr Group via an online questionnaire administered between July 3, 2020 and August 1, 2020.

The responses were comprised from 112 nonprofit professionals nationwide, from organizations with annual operating revenues under \$5 million to greater than \$25 million.

ABOUT ORR GROUP

Responding to the increasingly complex burdens on nonprofit leaders, Orr Group has developed a transformational approach to fundraising and strategy consulting. Our teams of experienced professionals seamlessly embed themselves with nonprofits to fundraise, to recruit and improve board leadership, to build consensus and direction through new strategies, and to provide executive, fundraising, and financial leadership. With offices in Washington, DC and New York City, Orr Group has partnered in our clients' success for almost three decades, helping more than 600 nonprofits raise hundreds of millions of dollars for their causes.

We help clients with:

- **Strategy.** Strategy sets an organization's direction and provides a framework to focus energy, time and resources on highest-priority activities. We help you clearly articulate your strategic goals, build consensus with your stakeholders and establish a plan to achieve those goals.
- **Leadership.** A gap in leadership has ripple effects throughout an organization. Short- or long-term, our highly-experienced and seasoned professionals can set vision and strategy, engage staff and stakeholders, develop boards, and grow philanthropic revenue.
- **Fundraising.** Helping our clients help others by growing philanthropy and increasing impact. It's at the heart of what we do.
- **Campaigns.** A thoughtful campaign has the power to rally stakeholders, inspire donors and transform a nonprofit's ability to pursue its mission. We help nonprofits from feasibility, to readiness, through all stages of campaign implementation.
- **Events.** A well-organized and well-marketed event will improve both an organization's financial results and boost its image and reputation. Our expert event fundraisers and expert nonprofit event producers will ensure you do both.
- **Recruitment/Outsourced HR.** From attracting and retaining top talent to serving as transitional leaders, we can provide you with the recruitment, talent management, and interim HR leadership that you need.

For questions regarding this survey, or more for information regarding Orr Group and its services, please contact us at info@orrgroup.com.

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