

How is COVID-19 impacting local nonprofits?

Survey 6 Results | June 2021

United Way of Central Ohio and Human Service Chamber of Franklin County partnered with Illuminology to survey **80** nonprofit organizations in the health and human services sector in Central Ohio. Data was gathered in May, 2021.

This report details the key findings from this effort, bringing focus to some of the ways health and human service organizations are affected by COVID-19 more than one year since its emergence - in service delivery, funding security, and employee wellbeing. It also provides insight into what nonprofits need to be more successful in their mission, like shared resources and service improvements, as well as attention to systemic issues impacting their clients' success.



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Service Delivery Effects - Programs Experiencing Service Changes

Most Central Ohio health and human service organizations are still experiencing an effect on service delivery from COVID-19; only 18% of all programs currently operate without any limitations or reductions in service capacity. Only 5% of organizations surveyed at this time have no programs limited, suspended, or ended due to COVID-19.

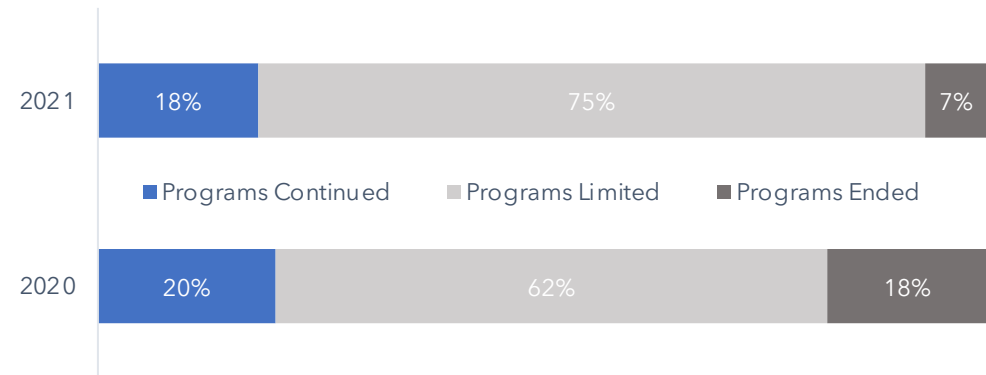
Number of Programs Currently Affected by Service Changes in May, 2021

126 programs continue without changes

521 programs are limited in service capacity

48 programs are currently suspended or ended

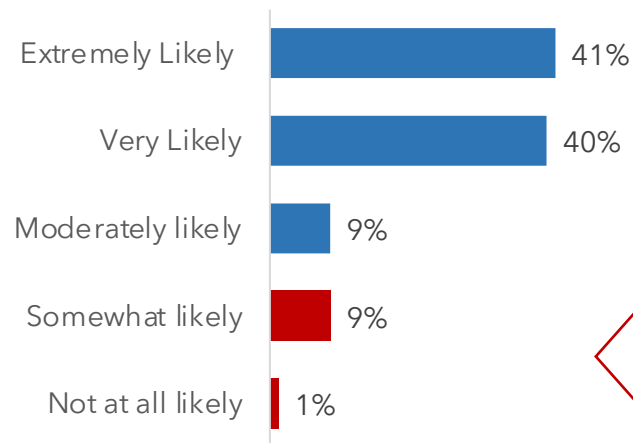
Percent of Health and Human Service Programs Affected by Service Changes, 1 Year Difference



Service Delivery Effects - Future Delivery of Programs

Most organizations (81%) report they are very or extremely likely to continue to serve the community with their key programs and services, at least into the near future.

Likelihood of Continuing Key Programs and Services for Next 2 Years



Programs mentioned to be at risk by organizations:

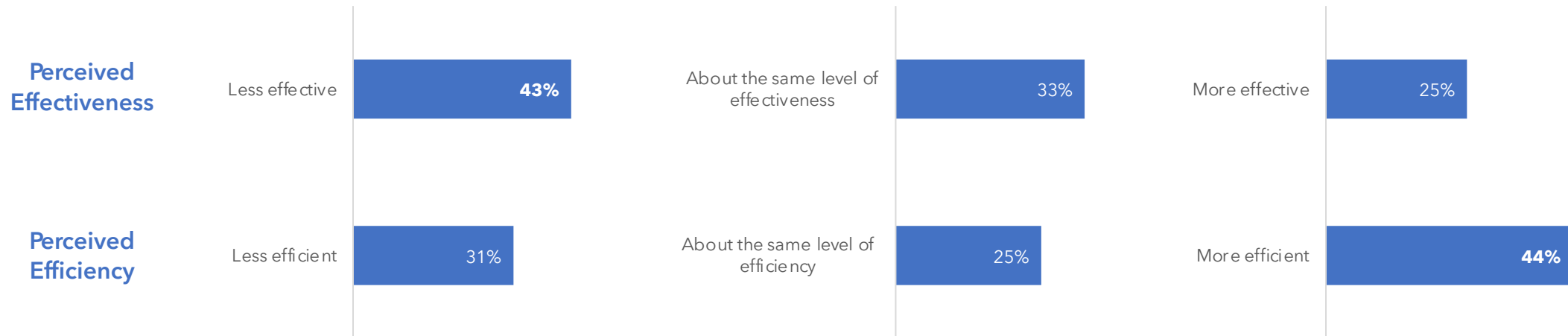
- Speech therapy
- Student programs
- Peer support

As COVID-19 safety precautions continue to place emphasis on technology, it can be difficult for some programs to get clients to attend virtual programming, threatening these programs in the short term. Other programs experiencing lack of or doubts about funding sources as well as staffing issues are also at risk.

Service Delivery Effects - Changes in Effectiveness and Efficiency

Slightly under half of organizations (43%) think their programs and services are less effective than they were before COVID-19. However, a similar percentage (44%) think their programs and services are running more efficiently than before COVID-19.

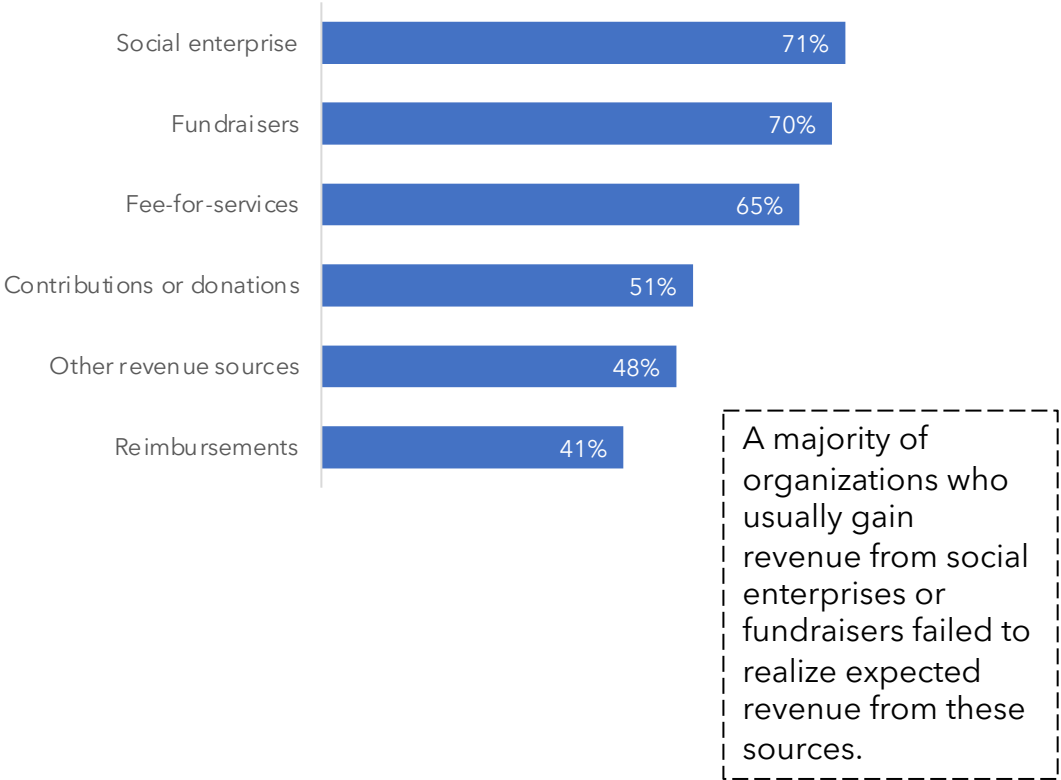
Organizations whose key programs and services are...



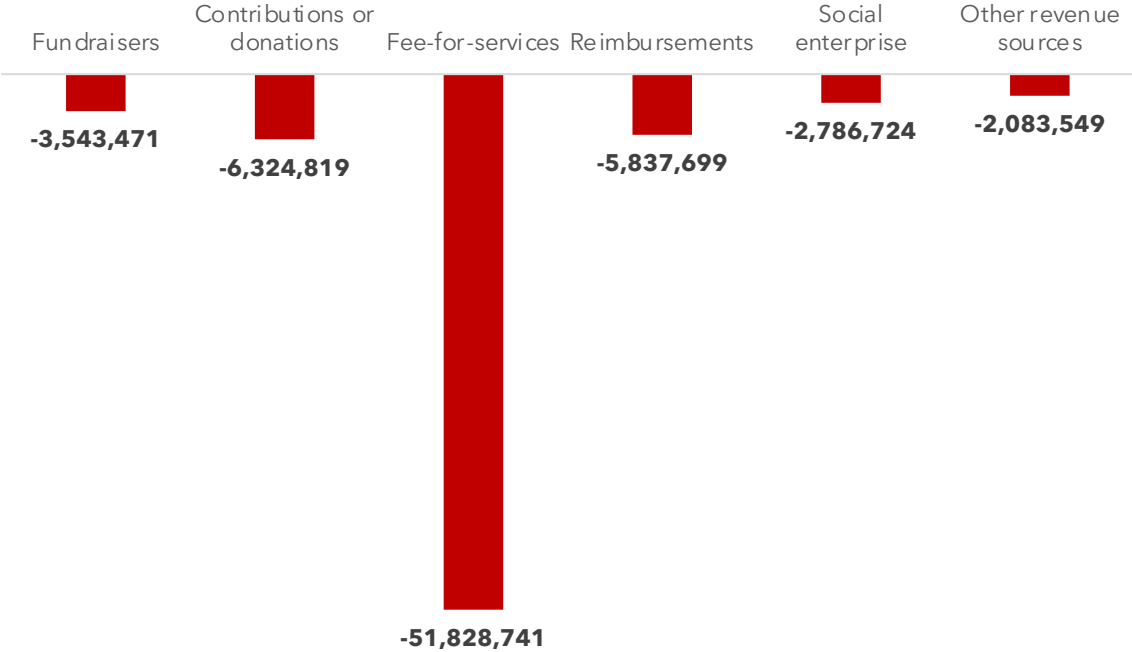
Budgetary Effects - Unrealized Revenue

79% of organizations have experienced revenue loss since the beginning of COVID-19.

Percent of Organizations Failing to Realize Revenue from Typical Sources



Total Unrealized Revenue, by Source

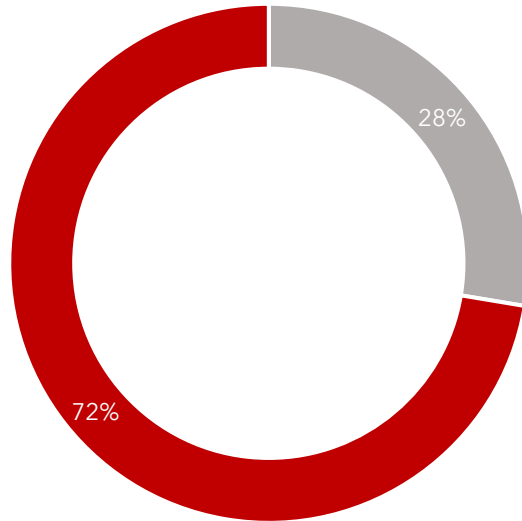


Combined revenue lost: **\$72,405,000**

Budgetary Effects - Increased Costs

Over two-thirds of organizations (72%) also had costs increase since the emergence of COVID-19.

Organizations' Experiencing Increase in Cost of Service Delivery



■ Did not happen ■ Costs increased

Across 80 Health and Human Service Organizations:

Combined revenue lost: **\$72,405,000**

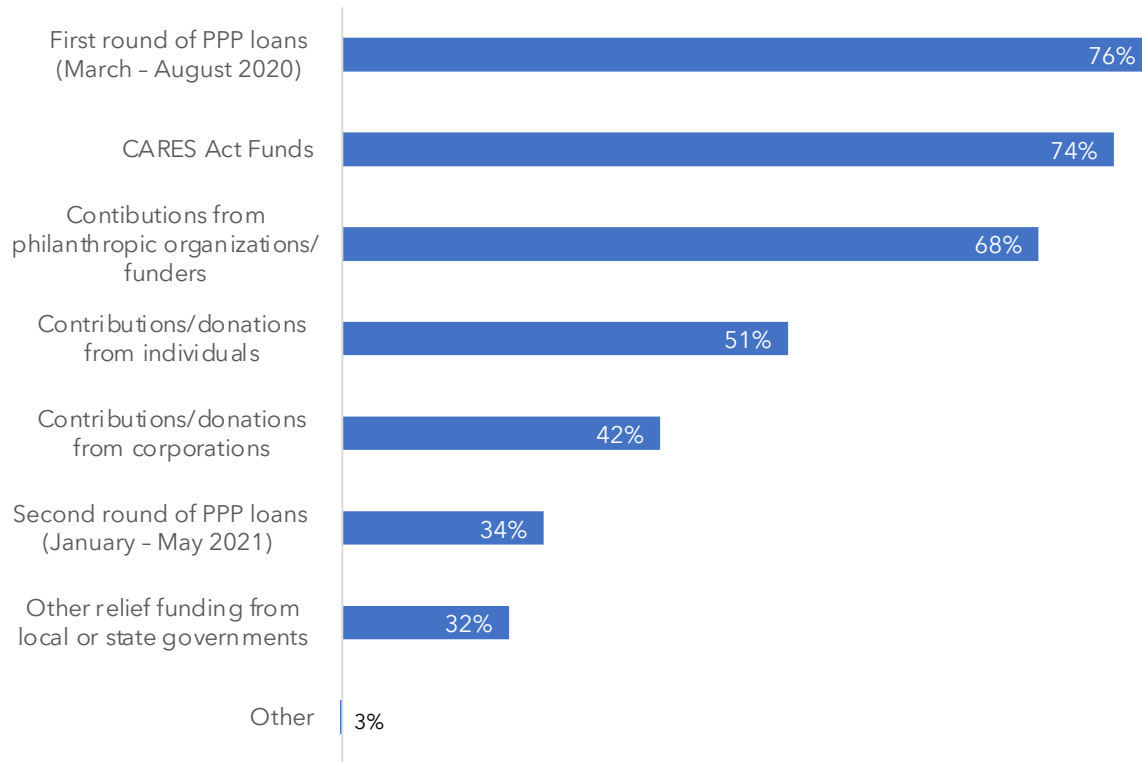
+ Combined increased cost: **\$13,546,980**

Combined deficit: \$85,951,980

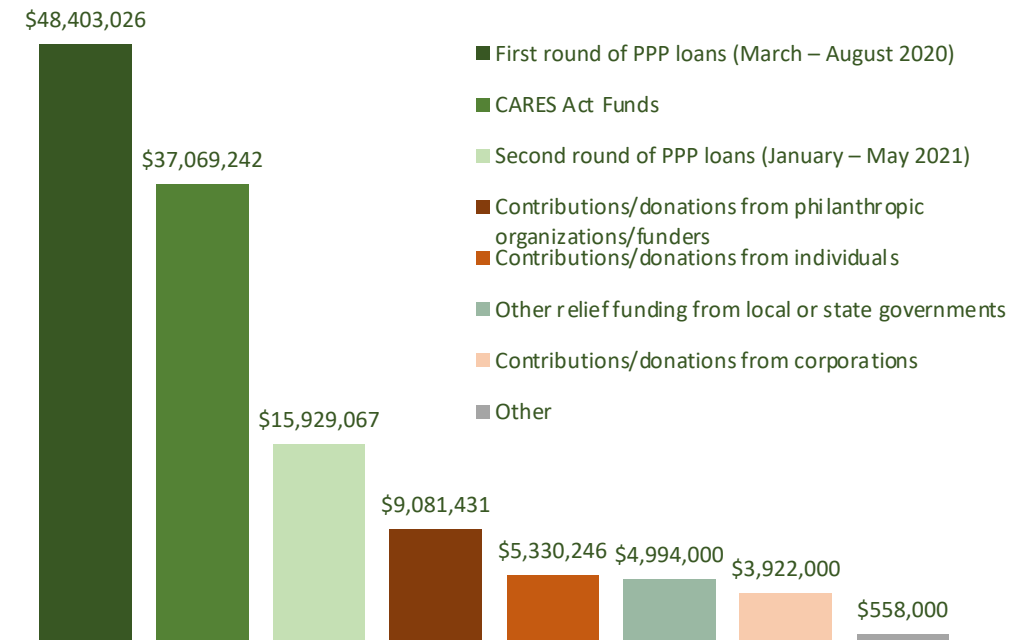
Budgetary Effects - Relief and Supplemental Funding

95% of organizations surveyed received relief or supplemental funding of some kind. Most organizations received funding from the first round of PPP loans, the CARES Act, and contributions from philanthropic organizations or funders.

Percent of Organizations Receiving Relief/Supplemental Funding



Total Relief/Supplemental Funding Received, by Source

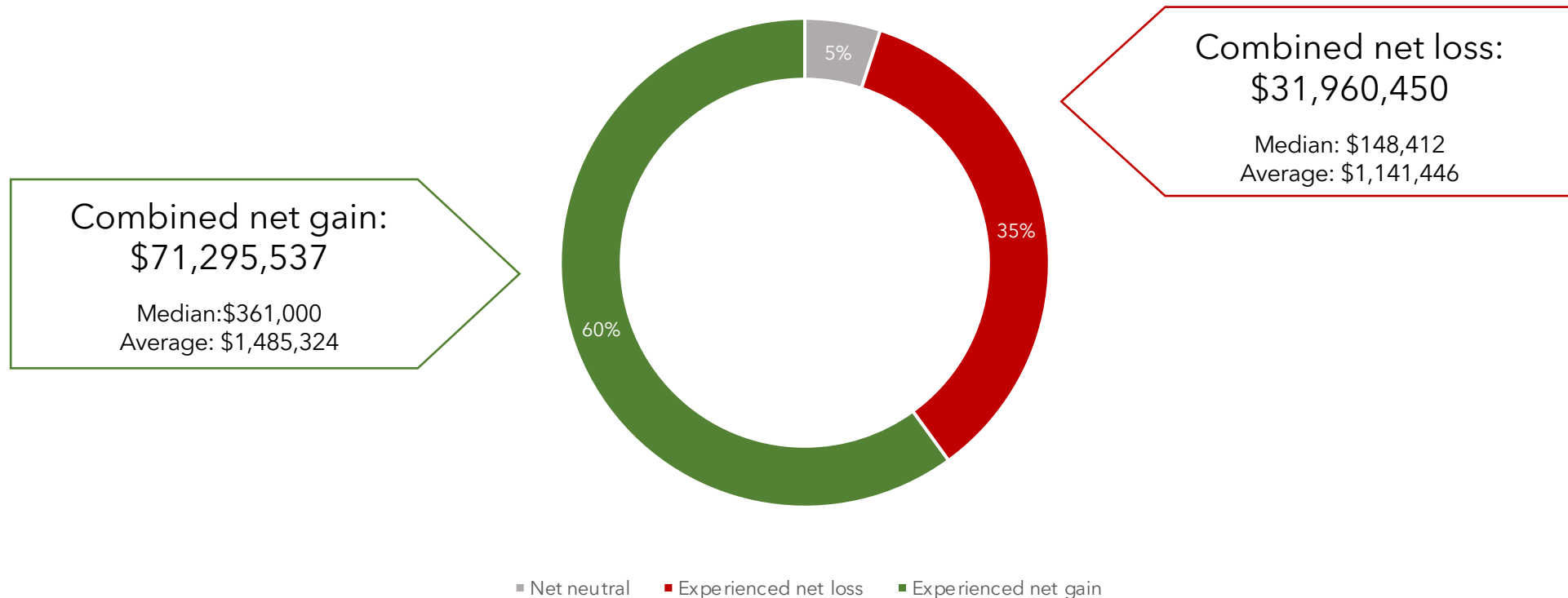


Combined relief funding: **\$125,287,020**

Budgetary Effects - Organizations' Net Losses And Gains

A net loss or net gain was calculated by considering the revenue each organization failed to realize, the increased costs reported by each organization, and the relief and supplemental funding each organization received. A majority of organizations (60%), experienced a net revenue gain since COVID-19 emerged, with a median net gain of \$361,000. However, 35% of organizations experienced a net revenue loss, with a median net loss of \$148,412.

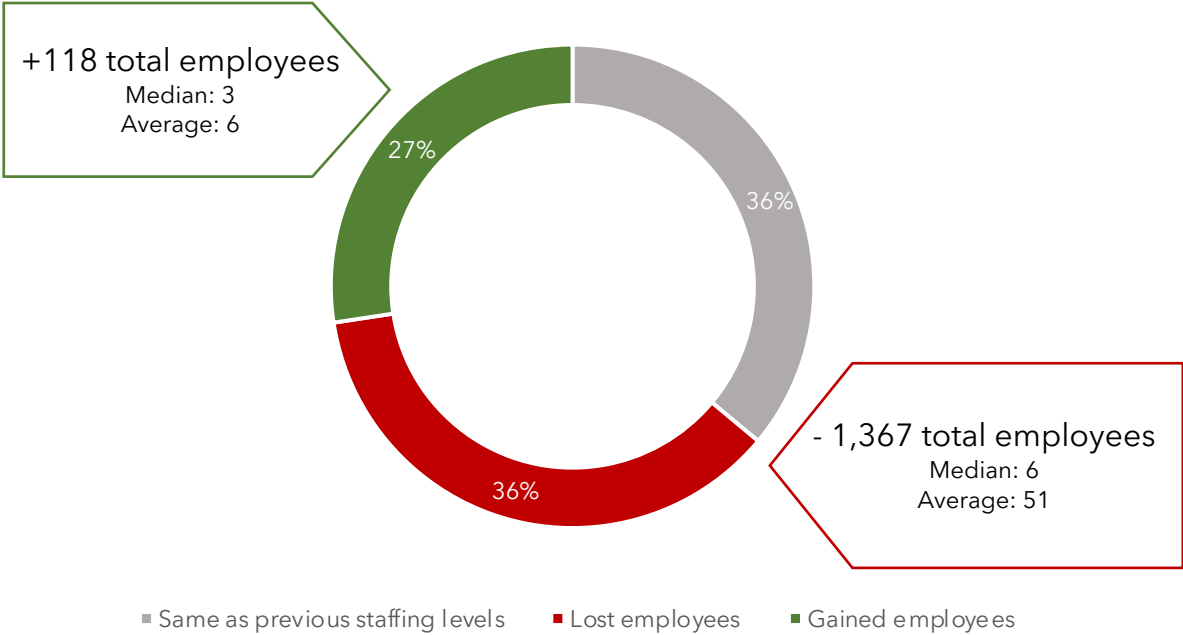
Percent of Organizations With Net Revenue Loss or Gain



Staffing Effects - Changes in Staffing Levels

37% of organizations report employing fewer people than they did before COVID-19. Overall, staffing levels in the organizations surveyed are 89% of what they were on March 1, 2019. By 2022, these organizations hope to grow their current staff by a combined **2,426** employees, which would surpass pre-COVID staffing levels.

Organizations Experiencing Change in Staffing Levels, 1 Year After COVID-19 Emergence



87% of organizations surveyed want to increase the number of people employed by their organization.

Total employed March 1, 2020 (prior to COVID-19 emergence)

| Full time employees | Part-time employees |
|---------------------|---------------------|
| 8,137 | 3,499 |

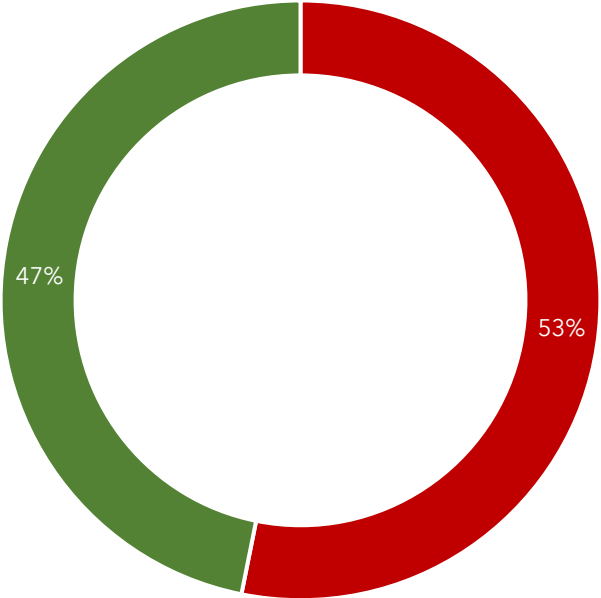
Total employees desired by March 1, 2022

| Full-time employees | Part-time employees |
|---------------------|---------------------|
| 9,060 | 3,561 |

Staffing Effects - Changes in Staffing Levels

Around half of organizations had employees leave the organization on their own accord during COVID-19.

Organizations Experiencing Voluntary Employee Turnover During COVID-19



■ Employees left on their own ■ This did not happen

401 employees left, due to:

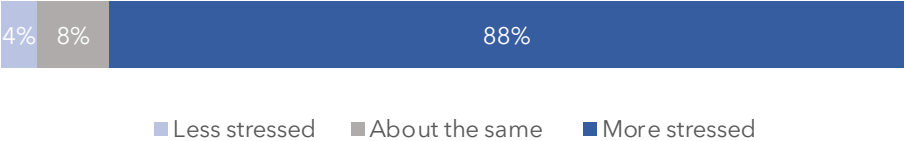
- Fear of exposure/contracting COVID-19
- Family needs, like child-care and home schooling
- Moves out of state or city to be safer or closer to family
- Retirement or another job offer
- Burn out

Staffing Effects - Changes in Staff Wellbeing

A majority of health and human service organization leaders report that their employees and themselves are more stressed and tired than before COVID-19 emerged. Over half of organizations report employees who are very or extremely stressed.

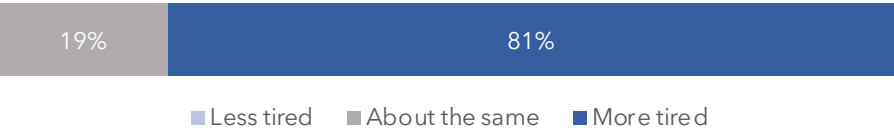
Focus on Full-time Employees

Employees' Stress Level Compared to March, 2019



60% of organizations' employees are very or extremely stressed.

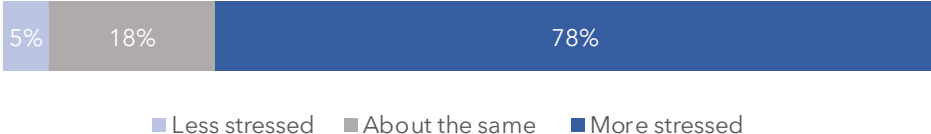
Employees' Level of Tiredness Compared to March, 2019



63% of organizations' employees are very or extremely tired.

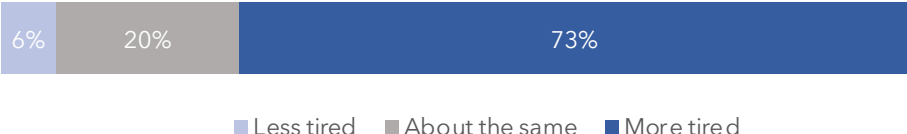
Focus on Organization Leaders

Leaders' Stress Level Compared to March, 2019



53% of organizations' leaders are very or extremely tired.

Leaders' Level of Tiredness Compared to March, 2019



51% of organizations' leaders are very or extremely tired.

Staffing Effects - Current and Desired Efforts Toward Staff Wellbeing

28% organizations are very or extremely concerned that COVID-19 will make it difficult to maintain the employees they currently have. Less than half of organizations (37%) believe their organization to be very or extremely capable of supporting the physical and mental wellbeing of staff and volunteers.

To support the physical and mental wellbeing staff and volunteers during COVID-19, some organizations...

- Invoked flexible work schedules, working from home or hybrid models
- Formed wellness programs and committees to promote self-care and physical exercise
- Increased communication and support through group and individual check-ins, employee recognition and appreciation
- Provided access to mental health services/counselors/therapists, (some paid for by the organization)
- Promoted and provided paid time off

Organizations would like to better support the mental and physical wellbeing of staff. However, making the following ideas happen is largely dependent on their available budget:

- Hiring more staff to relieve the workload on current employees
- Providing more paid time off
- Increasing wellness resources like stress management and mindfulness/physical activity programs
- Raising wages

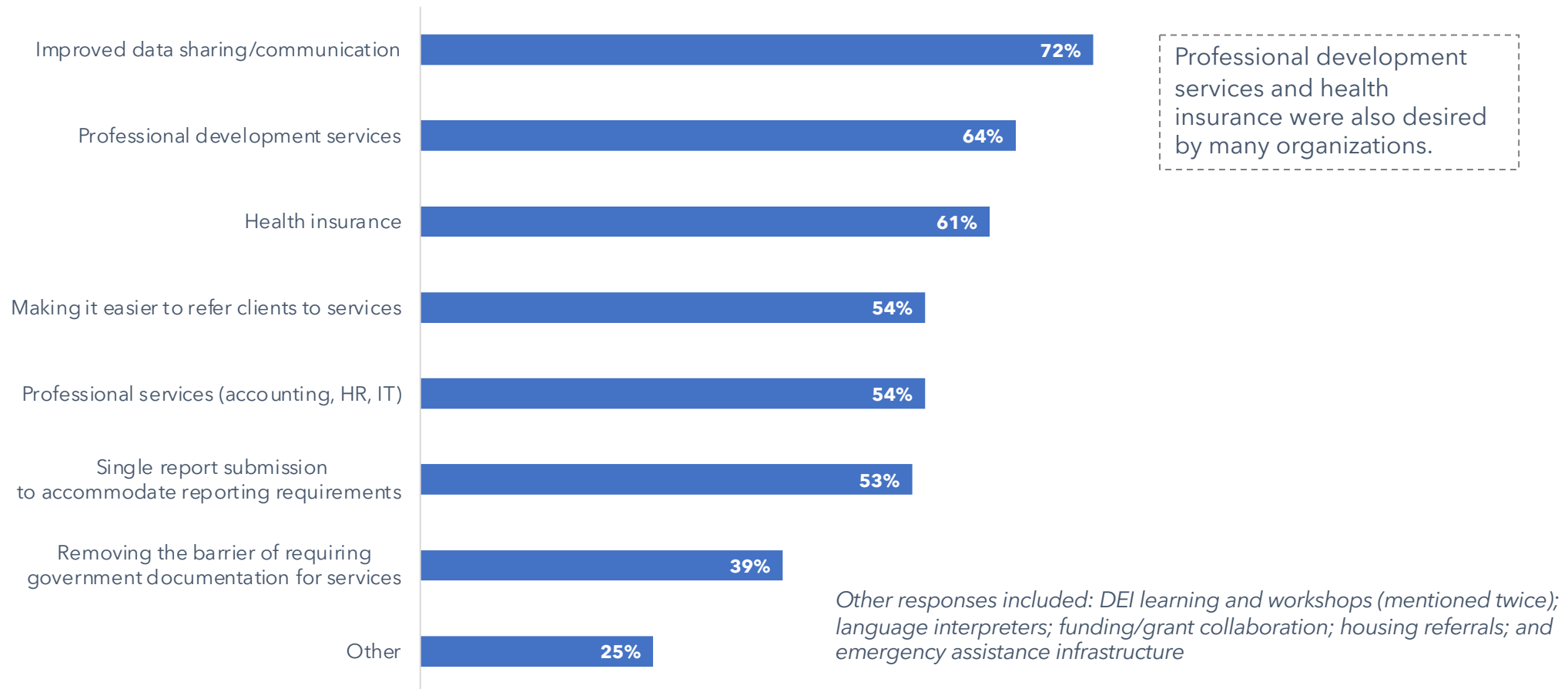
Some other ways organizations want to support their staff include:

- Having more opportunities for interpersonal connection within the organization
- Providing public recognition of employees' service to the community and professional development opportunities

Shared Concerns of Nonprofits - Service Improvements

75% of organizations are at least moderately interested in sharing services or infrastructure with other organizations. Most of these organizations indicated **improved data sharing and communication services** to assist referrals between organizations would be valuable to them.

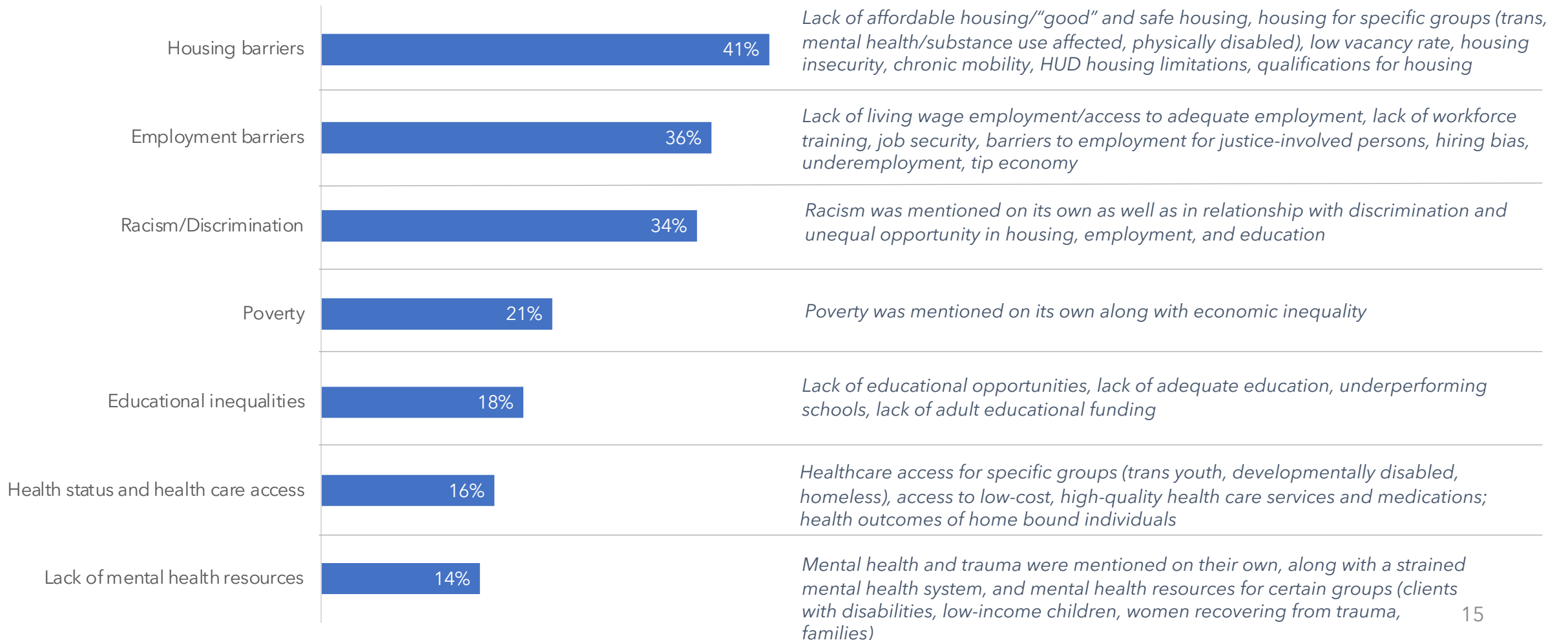
Percent of Organizations Interested in Sharing Various Services



Shared Concerns of Nonprofits - Greatest Systemic Impacts on Clients

Barriers to housing, barriers to employment, and racism were the most commonly reported systemic issues having an impact on clients. 41% of leaders listed housing barriers, 36% listed employment barriers, and 34% listed racism.

Greatest Systemic Impacts on Clients



Shared Concerns of Nonprofits - Other Systemic Impacts on Clients

Many organizations listed multiple systemic issues impacting their clients, as many of these issues co-occur and are compounded by one another.

Other Systemic Impacts on Clients

