

THE CONTINUING IMPACT OF COVID-19 ON THE SOCIAL SECTOR

La Piana Consulting surveyed our social sector contacts, receiving more than 750 responses to our March and April surveys. The results paint a compelling picture of the impact of COVID-19.

MAY 2020

OVER THE LAST TWO MONTHS, 91% OF RESPONDENTS HAVE BEEN FORCED TO CURTAIL SERVICES OR ADAPT HOW THEY PROVIDED THEM.

80% OF RESPONDENTS HAVE MOVED SOME OR ALL OF THEIR PROGRAMS TO AN ONLINE OR OTHER DIGITAL DELIVERY METHOD.

RESPONDENTS HAVE LAID OFF OR FURLOUGHED 18% OF THEIR STAFF, ON AVERAGE.

RESPONDENTS HAVE MOVED AN AVERAGE OF 83% OF THEIR OPERATIONS TO A WORK FROM HOME ARRANGEMENT.

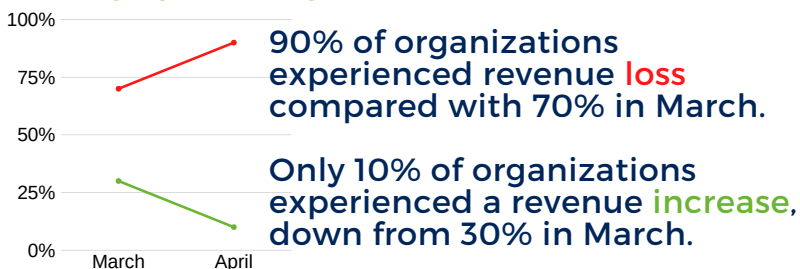


THE DRAMATIC LOSSES THE SECTOR EXPERIENCED IN MARCH CONTINUED THROUGH APRIL.

69% OF RESPONDING ORGANIZATIONS HAVE APPLIED FOR A CARES ACT PAYCHECK PROTECTION PROGRAM LOAN RANGING BETWEEN \$5K AND \$6.8M.

FEWER THAN HALF HAVE RECEIVED FUNDING.

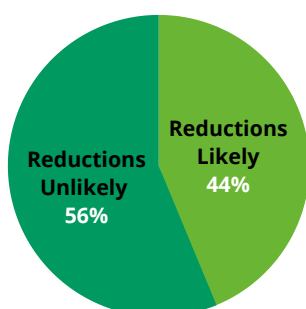
THE PANDEMIC IS HAVING A DEVASTATING EFFECT ON REVENUE:



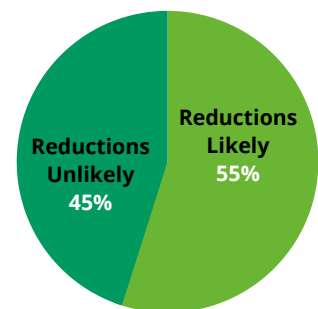
NEARLY A QUARTER OF RESPONDENTS ARE CONSIDERING PARTNERSHIPS, SUCH AS MERGER WITH ANOTHER NONPROFIT, AS A STRATEGY FOR RESPONDING TO THE PANDEMIC

BEYOND CURRENT LOSSES, SIGNIFICANT FURTHER REDUCTIONS ARE ANTICIPATED:

NEARLY HALF OF RESPONDENTS EXPECT TO MAKE FURTHER REDUCTIONS IN STAFF:



THE MAJORITY OF RESPONDENTS EXPECT TO MAKE FURTHER REDUCTIONS IN SERVICES:



La Piana

THE CONTINUING IMPACT OF COVID-19 ON THE SOCIAL SECTOR

"It's been exhausting, because it's like an increase of 40% of the work, with no increase in pay, and none of the rest of our work went away! Jumping through hoops that change daily, hoping for time off when everyone else reopens, but that's unlikely! :)"

"Because we support a very vulnerable population, we have lost many of our individuals who live with us as well as 2 staff. That is very difficult for everyone and our staff need mental health and grief counseling."

"As a music education institution, the requirement of social distancing makes it nearly impossible to deliver our curriculum completely. Most of our offerings require close interaction with students. It is impossible for wind instrumentalists to wear a mask. It's a real challenge! As well, due to spray, we are also not able to offer choral or other vocal classes."

"Efficacy of programs is a cause for concern. Technology gaps present a problem in underserved communities."

THIS IS CHANGING EVERYTHING.

"I'm very concerned that the philanthropic community is pivoting towards ONLY funding COVID-19 related organizations and I am concerned about social service groups that aren't directly working on this and therefore not eligible for the grants and resources."

"It's really rough. It's scary. We don't know if we'll survive through the shutdown and even if we do, we don't have high hopes that the economy will return to normal any time soon, so revenue will continue to be difficult to raise or secure."

BUT THE SECTOR IS RESILIENT...

"It's been difficult in many ways; but also very positive in adapting our culture to be more fluid, nimble and paperless."

"It has created an opportunity for our entire network to mobilize around a single external threat. We are operating on all cylinders organizing at the local level, the state level, national and international level with an intensity I've never seen before. It has helped us get aligned and clear about our purpose-- saving lives and combating the racial inequities that make the virus (like all other social determinants of health) hit black and brown communities in a more devastating way."

"On the positive side, the impact of the pandemic has us all thinking about models of teaching and learning."

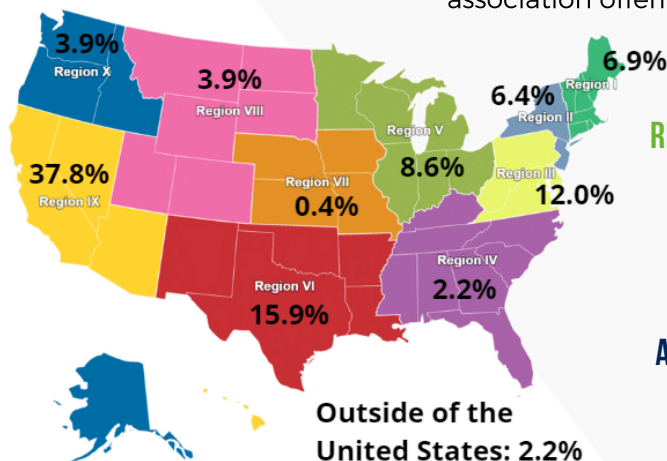
"We are looking at more partnerships and sharing across our state with other similar organizations, not mergers so to speak. We are past the first wave of panic. The environment is bleak, but now is the time to move toward leadership in creating the world we want after this shelter in place."

"Inspired us to be more agile, to pivot and approach issues more innovatively... and challenged us to look at our work differently going forward with many staff working remotely and utilizing technology."

"COVID-19 is causing us to re-think our approach to addressing our mission. We might need completely new strategies."

"In order to keep staff, we are exploring a partnership with another nonprofit to share that employee's time and cost of employment."

"We are discussing partnering with another nonprofit association offering services to general nonprofits."



RESPONDENTS CAME FROM ORGANIZATIONS ACROSS THE NATION AND BEYOND, FROM MOST SUB-SECTORS AND EVERY BUDGET SIZE, WIDELY REPRESENTING OUR NONPROFIT SECTOR.

THANK YOU FOR YOUR PARTICIPATION IN OUR SURVEY AND FOR ALL THE WORK YOU ARE DOING FOR YOUR COMMUNITIES. WE MAY SEEK YOUR INPUT AGAIN IN THE COMING MONTHS AS WE CONTINUE TO MONITOR THE IMPACT OF COVID-19.