

**United Way of the Plains**

# **2009 Nonprofit Economic Survey of South Central Kansas**

**October 26, 2009**



# **2009 Nonprofit Economic Survey of South Central Kansas**

October 2009



**United Way of the Plains**

## Executive Summary

In April 2009, United Way of the Plains conducted a study among nonprofit organizations in the south central Kansas area defined as Sedgwick, Butler, Harvey, Reno and Sumner counties to examine the existing economic climate and to determine the impact of the economy on their operations. The results of that study were published April 22, 2009, and are available at [www.unitedwayplains.org/special/publications/main.htm](http://www.unitedwayplains.org/special/publications/main.htm).

In order to better understand the changing needs in the area, United Way of the Plains conducted a follow-up study among the same organizations six months later (October 2009) to again assess the impact of the economy on the area's nonprofit community. Respondents were asked to focus on their organization's changes, specifically those occurring within the six-month period from April to October, 2009.

Research findings from October's *2009 Nonprofit Economic Survey of South Central Kansas* indicate:

- **Nonprofit organizations have a positive outlook regarding their prospects for the current year.**
  - > More than four in five area nonprofits report optimism regarding the overall prospects for their organization for 2009. (17% very optimistic; 66% optimistic)
  - > The remaining organizations are pessimistic (13%) or very pessimistic (4%) regarding the end of the year.
- **Nonprofit organizations are running to stay in place financially.**
  - > Excluding organizations which did not express their financial expectation for completing 2009, nearly half (49%) of the area nonprofits expect to complete the year below breakeven, and nearly a third (32%) expect to complete the year at breakeven.
  - > Only 19 percent of area nonprofits expect to complete the year above breakeven.
- **Nonprofits are experiencing decreases in funding.**
  - > Sixty percent of area nonprofits reported revenue decreases for the previous six months when compared to the same time period in 2008; including 39 percent that reported revenue decreasing more than 10 percent.
  - > For the previous six months, 44 percent of nonprofits reported a decrease in donations by individuals; 35 percent reported a decrease in government funding; and 33 percent reported a decrease in corporate and foundation giving.
  - > Donations from individual were identified by 50 percent of the nonprofit organizations as one of three top sources of funding. Other top sources of funding included:
    - State government grants 33%
    - Fundraising/special events 29%
    - Federal government grants 29%
    - Private foundations 26%
    - United Way funding 24%



- **Nonprofits are seeing increases in demand for services.**
  - > In both April and October 2009, 75 percent of nonprofits indicated they had experienced an increase in demand in the six months prior.
    - In April 2009, 39 percent of the organizations characterized the increased demand as significant.
    - By October 2009, 48 percent had seen significant increases in demand.
  - > In April 2009, 34 percent of the nonprofits reported being able to meet all of the increased demand for services; by October 2009, 41 percent were meeting all of their organization's increased demand for services.
  - > Half of the nonprofits are able to serve all of the referrals they receive.
- **The faces of those seeking services are changing.**
  - > Nearly three in five (57%) organizations witnessed a change in client demographics between April and October 2009, mostly due to serving more families. Forty-three percent of organizations have experienced no changes in client demographics over the past six months.
- **Nonprofit organizations are changing to meet the economic challenges.**
  - > The most common organizational change made over the previous six months was to increase services in response to increased client demand, with 40 percent of the nonprofits increasing services provided.
  - > The second most common change was using reserves to cover the organization's current budget, an action taken by 39 percent of responding nonprofits.
  - > In April 2009, no nonprofits had taken out or expected to take out an additional line of credit. By October 2009, four agencies had established additional lines of credit.
  - > Looking forward over the next six months, area nonprofits are considering:
    - Continuing to reduce non-personnel expenses      35%
    - Dedicating more staff time to fundraising            33%
    - Laying off existing staff                                    11%
    - Reducing staff hours                                         17%
  - > Nearly two in five (38%) nonprofits expect to see continued increased client demand, requiring an increased need for services.

Given the uncertainty of the current economic climate, decreased funding, increased demand for services, and the ever-increasing need to do more with less, it may be surprising that 83 percent of nonprofit agencies in south central Kansas are optimistic regarding the overall prospects for their organizations as 2010 approaches. Perhaps this optimism springs from the same core beliefs that lead individuals to serve in the nonprofit sector, expressed by survey respondents as "*Challenging times make for creative responses*" and "*Agreeing on how bad it all is only lessens an individual's choice at success and happiness.*"

The following section contains a detailed summary of the research findings.

## Summary of Findings

**Question 1. During the last six months, has your organization experienced an increase in demand for services that you would attribute to the economic downturn?**

- Yes, we have experienced a significant increase in demand
- Yes, we have seen a small increase in demand
- No, demand has remained unchanged
- No, demand for our services has declined

**Table I. Change in Demand for Services, Last Six Months**

	October 2009		April 2009	
Significant increase	64	48%	65	39%
Small increase	35	27%	61	36%
No change in demand	26	20%	35	21%
Decrease in demand	7	5%	6	4%
<b>Total</b>	<b>132</b>	<b>100%</b>	<b>167</b>	<b>100%</b>

**Question 2. If you have experienced an increase in demand for services, has your organization been able to meet that demand?**

- Yes, all of the increased demand
- Yes, about 50 percent of the increased demand
- Yes about 25 percent of the increased demand
- Yes, about 10 percent of the increased demand
- Yes, less than 10 percent of the increase
- No, none of the increased demand

(NOTE: Asked only of organizations reporting increase in demand for services in Question 1.)

**Table II. Ability to Meet Increased Demand for Services, Last Six Months**

	October 2009	
All of increased demand	41	41%
50% of increased demand	28	28%
25% of increased demand	14	14%
10% of increased demand	6	6%
Less than 10% of increased demand	5	5%
None of increased demand	5	5%
<b>Total organizations experiencing increased demand</b>	<b>99</b>	<b>99%</b>

Column percentages do not sum to 100 percent due to rounding error.

Organizations who could serve all of the increased demand state: *"It's been very hard," "Our management staff are working extra hours to meet the demand," and "We have had to cut back on how much food we have given out in the past, but we have been able to see each client."*

A sample of comments offered by organizations meeting half of the increased demand includes: *"The school year is fairly new, but we are noticing increased demand, for sure" and "We are turning away more families of four or more due to not having bed space available."*

Organizations able to meet a fourth of the increased demand for services note: *"We are examining the way we deliver services to see if we can do more with less," "Food is hard to find at the prices we can afford to pay but yet give away," and "We have been able to meet the need although with less food; financially as far as rent/utility assistance, we have not been able to meet the need."*

Those able to serve 10 percent or less of the increased demand say that since they *"do not receive federal, state or local grants,"* they *"have to rely on donations and fundraising."* Also, they *"have not been able to find a sufficient number of volunteers to help" and "attribute this directly to the number of layoffs and people who are working, having less time to donate due to fewer employees."*

Those who had not experienced an increase in demand note: *"We didn't have any more resources available."*

**Question 3. Are the demographics of your clients different than they were six months ago?**

- No, they are the same.
- Yes, we are seeing more families.
- Yes, we are seeing fewer families.
- Yes, we are seeing more working individuals and families.
- Yes, we are seeing fewer working individuals and families.
- Yes, we are seeing more seniors (age 65 and above).
- Yes, we are seeing fewer seniors (age 65 and above).
- Yes, we are seeing more young individuals (age 40 and under).
- Yes, we are seeing fewer young individuals (age 40 and under).
- Yes, we are seeing more families, more working people, more seniors and more young people.

**Table III. Change in Client Demographics, Last Six Months**

	<b>October 2009</b>	
No change in demographics	57	43%
More families	20	15%
Fewer families	2	2%
More working individuals/families	11	8%
Fewer working individuals/families	6	5%
More seniors (age 65+ years)	4	3%
Fewer seniors (age 65+ years)	0	0%
More young individuals (age < 40 years)	5	4%
Fewer young individuals (age < 40 years)	0	0%
More families/working people/seniors/young people	27	20%
<b>Total</b>	<b>132</b>	<b>100%</b>

**Question 4. Is your organization able to serve all the referrals you are receiving?**

- Yes, all of them
- Yes, about 50 percent of them
- Yes, about 25 percent of them
- Yes, about 10 percent of them
- Yes, fewer than 10 percent of them
- No, none of them
- I don't know

**Table IV. Organization's Ability to Serve Referrals**

	<b>October 2009</b>	
Able to serve all referrals	66	50%
Able to serve 50% of referrals	33	25%
Able to serve 25% of referrals	8	6%
Able to serve 10% of referrals	6	5%
Able to serve fewer than 10% of referrals	8	6%
Not able to serve any referrals	4	3%
Don't know	7	5%
<b>Total</b>	<b>132</b>	<b>100%</b>

**Question 5. Has your organization's revenue changed during the last six months compared to the same period last year?**

- Revenue increased more than 10 percent
- Revenue increased slightly, less than 10 percent
- Revenue remained level
- Revenue decreased slightly, less than 10 percent
- Revenue decreased more than 10 percent

**Table V. Organizational Revenue Changes Last Six Months Compared to Same Period Last Year**

	October 2009	
Revenue increased more than 10%	10	8%
Revenue increased less than 10%	9	7%
Revenue remained level	30	23%
Revenue decreased less than 10%	28	21%
Revenue decreased more than 10%	51	39%
Don't know	4	3%
<b>Total</b>	<b>132</b>	<b>101%</b>

Column percentages do not sum to 100 percent due to rounding error.

Organizations that have seen their revenue increase cite new funding sources, grants received and additional fee-for-service clients who qualify for Medicaid.

Those organizations for whom revenue has decreased note *"Donations from the public are down significantly," "Less participation in our fundraisers,"* and *"We are aware that some of our major corporate donors will not be able to help us at the past levels."* In addition, *"Funding has been reduced at the national level and has never been adequately funded at the state level"* and *"All State General Funds received in FY 09 have been cut."*

**Question 6. What specific changes in funding did you experience during this six-month period?**

(Check all that apply.)

- Increase in donations by individuals
- Decrease in donations by individuals
- Increase in government funding (federal, state, local)
- Decrease in government funding (federal, state, local)
- Increase in corporate and foundation giving
- Decrease in corporate and foundation giving
- Other (Please specify.)



**Table VI. Changes in Funding Experienced, Last Six Months  
(Sorted by Order of October 2009 Responses)**

	October 2009		April 2009	
Decrease in donations by individuals	58	44%	61	37%
Decrease in government funding	46	35%	37	22%
Decrease in corporate/foundation giving	43	33%	49	29%
Increase in government funding	12	9%	9	5%
Increase in donations by individuals	6	5%	21	13%
Increase in corporate/foundation giving	5	4%	11	7%
Other	8	6%	N/A	N/A
Don't know	3	2%	N/A	N/A

Multiple responses possible; percentages sum to more than 100 percent.  
October 2009 base = 132 organizations; April 2009 base = 167 organizations

The "other" category includes both increases and decreases in funding, as evidenced by a sample of their comments:

*"Increase in civic and church giving."*

*"More third party billing."*

*"Insurance, Medicaid."*

*"More individuals qualifying for fewer available public funds."*

*"Loss of a Medicaid-funded service."*

**Question 7. In response to the economic downturn in the last six months, which of the following changes has your organization already made? (Check all that apply.)**

- |  |                        |
|--|------------------------|
| Increase services in response to increased client demand | Reduce staff hours     |
| Dedicate more staff time to fundraising                  | Lay off staff          |
| Review or reallocate financial assets and investments    | Reduce services        |
| Reduce non-personnel expenses (i.e. travel, expenses)    | Eliminate programs     |
| Use reserves to cover current budget                     | Other (Please specify) |
| Take additional line of credit                           |                        |

**Table VII. Organizational Changes Made in Last Six Months  
In Response to Economic Downturn  
(Sorted by Order of October 2009 Responses)**

	October 2009		April 2009	
Increase in services, increased client demand	53	40%	52	31%
Use reserves to cover current budget	52	39%	36	22%
Reduce non-personnel expenses	43	33%	85	51%
Review/reallocate financial assets/investments	36	27%	51	31%
Dedicate more staff time to fundraising	23	17%	34	20%
Reduce staff hours	20	15%	26	16%
Lay off staff	20	15%	20	12%
Reduce services	17	13%	19	11%
Eliminate programs	13	10%	12	7%
Take additional line of credit	4	3%	0	0%
Other	17	13%	N/A	N/A
Don't know	2	2%	N/A	N/A

Multiple responses possible; percentages sum to more than 100 percent.  
October 2009 base = 132 organizations; April 2009 base = 167 organizations

Other changes enacted by organizations with the past six months include:

*"Eliminate wage increases this year."*

*"We have not replaced certain positions that have left the organization."*

*"Recruiting volunteers."*

*"Moved to less expensive building."*

*"Improving tools for managerial efficiency; improved group purchase agreements, etc."*

**Question 8. Which of the following changes will your organization consider making in the next six months? (Check all that apply.)**

- |  |                        |
|--|------------------------|
| Increase services in response to increased client demand | Reduce staff hours     |
| Dedicate more staff time to fundraising                  | Lay off staff          |
| Review or reallocate financial assets and investments    | Reduce services        |
| Reduce non-personnel expenses (i.e. travel, expenses)    | Eliminate programs     |
| Use reserves to cover current budget                     | Other (Please specify) |
| Take additional line of credit                           |                        |

**Table VIII. Organizational Changes Considering in Next Six Months  
(Sorted by Order of October 2009 Responses)**

	October 2009		April 2009	
Increase in services, increased client demand	50	38%	59	35%
Reduce non-personnel expenses	46	35%	78	47%
Dedicate more staff time to fundraising	44	33%	63	38%
Review/reallocate financial assets/investments	36	27%	50	30%
Use reserves to cover current budget	31	24%	34	20%
Reduce staff hours	23	17%	40	24%
Reduce services	20	15%	24	14%
Eliminate programs	16	12%	24	14%
Lay off staff	14	11%	17	10%
Take additional line of credit	3	2%	0	0%
Other	21	16%	N/A	N/A
Don't know/no response	6	5%	N/A	N/A

Multiple responses possible; percentages sum to more than 100 percent.  
October 2009 base = 132 organizations; April 2009 base = 167 organizations

Other changes being considered by organizations with the upcoming six months include:

*"Restructure how we meet our mission."*

*"Communicating with other partner agencies to compliment each other's work. Continued to search for new community partnerships, increase collaboration, seek for volunteers to assist in specific agency needs."*

*"We are planning to review staff health insurance after we see what the government does with this after the first of the year."*

*"Furloughs."*

*"Close down."*

**Question 9. What effect from the economy do you anticipate in the next six months?** (Check all that apply.)

- Increase in program expenses
- Decrease in program expenses
- Increase in the number of people who need the program
- Decrease in the number of people who need the program
- Increase in requests from new clients
- Decrease in requests from new clients
- None of these effects

**Table IX. Effects Anticipated From Economy, Next Six Months  
(Sorted by Order of October 2009 Responses)**

	October 2009		April 2009	
Increase in people needing program	101	77%	106	63%
Increase in requests from new clients	80	61%	92	55%
Increase in program expenses	77	58%	81	49%
Decrease in requests from new clients	2	2%	4	2%
Decrease in program expenses	1	1%	9	5%
Decrease in people needing program	1	1%	3	2%
Anticipate none of these effects	13	10%	N/A	N/A

Multiple responses possible; percentages sum to more than 100 percent.  
October 2009 base = 132 organizations; April 2009 base = 167 organizations

**Question 10. Thinking of 2009, do you expect for your organization to complete the year financially:**

- More than 10 percent above breakeven
- Slightly above breakeven, less than 10 percent
- At breakeven
- At a slight deficit, less than 10 percent below breakeven
- At a deficit, more than 10 percent below breakeven

**Table X. Financial Expectations for Completing 2009**

	October 2009			
	All Responses		Excluding Don't Knows	
More than 10% above breakeven	2	2%	2	2%
Less than 10% above breakeven	20	15%	20	17%
At breakeven	38	29%	38	32%
Less than 10% below breakeven	37	28%	37	31%
More than 10% below breakeven	21	16%	21	18%
Don't know	14	11%	--	--
Total	132	101%*	118	100%

\*Column percentages do not sum to 100 percent due to rounding error.



*"As an organization, we are working 'leaner,' not giving increases, and not hiring. We are considering adding time to part-time staff positions rather than taking on new employees."*

*"Budget cuts of 40 percent. Employee layoffs of 37 percent. Decrease in capacity to serve of 45 percent."*

*"Families that used other afterschool and summer care that had higher costs are now turning to us. Layoffs have forced them to discontinue the YMCA and private babysitters due to the cost."*

*"If we can keep our funding at the same level and recruit more volunteers, we may be able to break even next year. If we receive a reduction in funding, we will have to cut services and staff."*

*"It will become more difficult to apply for grants, especially those that require a match."*

*"Layoffs are the main reason we are seeing an increase in needs. It's mostly because they are waiting for their unemployment benefits to start or sometimes because they have run out. We've seen an increase of single moms with kids who have been laid off."*

*"Many clients have an extremely unrealistic view of how government programs are designed to help. The subject of about 50 percent of our calls is related to 'rescue funds' that we supposedly have to assist with an immediate concern."*

*"Many more clients come to us for rent and utility assistance; we can rarely make a dent in what they owe. Requests for food and groceries are way up, we have gone to purchasing salvage from the Food Bank and sorting through it to enhance what we can offer."*

*"More requests for financial assistance in meeting drug and home health needs."*

*"People are more appreciative of what they receive, and fewer complaints have been expressed."*

*"The bright side of the current economy is that we are finally able to fill staff positions at the direct service level that were very difficult to fill in better times. This has the effect of lowering our operational costs."*

*"The demand for our service of homeless prevention has increased significantly at a time when our organization's earnings are being severely impacted by the decline in the economy."*

*"The economic downturn has increased the number of people who believe they need counseling services, but are unable to pay the session fees."*

*"The economy has caused our organization to think more creatively on how to reach prospective clients and communicate upcoming events through use of the internet and various social networking markets to save time and money."*

*"The funds are not coming in. Our organization has been around for over 45 years, and we are at a point that we may have to close our doors."*

*"We are seeing a large increase in delinquent mortgage counseling."*

*"We are seeing individuals and families becoming our patients that were previous donors. They have never utilized the social network system before. These are people in the community that have no idea how to access health care, food banks, etc."*

*"We have been unable to replace staff positions resulting in serving less children."*

*"We rely on referrals from the state. They are significantly down which in turns impacts revenue and thus our staffing patterns."*

*"With the economic downturn, we are seeing more domestic violence in our area."*



**Question 13. Categorize your organization's area of service. (Check all that apply.)**

- |  |                                   |
|--|-----------------------------------|
| Aging Services                           | Employment Services               |
| Business/Consumer/Environmental Services | Financial Assistance              |
| Childcare                                | Health/Medical/Mental Health      |
| Children (Tutoring, Mentoring, etc.)     | Holiday Assistance                |
| Clothing/Food/Personal Goods/Services    | Legal Services/Immigration        |
| Counseling/Crisis Services               | Shelter/Housing                   |
| Disaster Services                        | Transportation Service/Assistance |
| Education and Training                   | Other (Please specify)            |

Because many nonprofit organizations represent more than one type of program area, the total areas of service presented in Table XII sum to more than 100 percent.

**Table XII. Organization Area of Service  
(Sorted by Order of October 2009 Responses)**

	October 2009		April 2009	
Clothing/Food/Personal Goods/Services	40	30%	38	23%
Education and Training	39	30%	55	33%
Health/Medical/Mental Health	38	29%	51	31%
Counseling/Crisis Services	36	27%	45	27%
Shelter/Housing	30	23%	30	18%
Aging Services	29	22%	27	16%
Children (Tutoring, Mentoring, etc.)	21	16%	37	22%
Financial Assistance	20	15%	23	14%
Transportation Service/Assistance	20	15%	24	14%
Holiday Assistance	17	13%	17	10%
Employment Services	12	9%	20	12%
Disaster Services	11	8%	16	10%
Childcare	7	5%	10	6%
Legal Services/Immigration	3	2%	6	4%
Business/Consumer/Environmental Services	1	1%	5	3%
Other	14	11%	11	7%

Multiple responses possible; column percentages sum to more than 100 percent.  
October 2009 base = 132 organizations; April 2009 base = 167 organizations

Other organizational areas of service include:

*"Substance abuse prevention and treatment."*

*"Home and community developmental supports for persons with developmental supports for persons with developmental disabilities."*

*"Assistive technology."*

*"Child welfare."*

*"Child protective services."*

*"Inmates and families."*

*"Outdoor education/recreation for all ages."*

**Question 14. How many staff does your organization currently employ? (full-time, part-time and temporary)**

**Table XIII. Number of Full-time, Part-time and Temporary Staff Employed By Organization**

<b>Staff</b>	<b>October 2009</b>	<b>April 2009</b>
<b>Full-time</b>		
Average	28.0 employees	28.61 employees
Range	0 - 635 employees	N/A
<b>Part-time</b>		
Average	9.4 employees	14.93 employees
Range	0 - 122 employees	N/A
<b>Temporary</b>		
Average	2.1 employees	0.62 employees
Range	1 - 46 employees	N/A

October 2009 base = 132 organizations; April 2009 base = 167 organizations

**Question 15. In which county is your organization primarily located?**

**Table XIV. County in Which Nonprofit Organization is Primarily Located**

	October 2009	
Sedgwick County	98	74%
Harvey County	14	11%
Reno County	9	7%
Butler County	8	6%
Sumner County	3	2%
<b>Total</b>	<b>132</b>	<b>100%</b>

**Question 16. Which of these counties does your organization serve? (Check all that apply.)**

**Table XV. South Central Kansas Counties Served (Sorted by Order of October 2009 Responses)**

	October 2009		April 2009	
Sedgwick County	104	79%	120	72%
Butler County	68	52%	76	46%
Harvey County	59	45%	70	42%
Sumner County	56	42%	61	36%
Reno County	52	39%	68	41%
Cowley County	51	39%	54	32%
Kingman County	46	35%	53	32%
Harper County	43	33%	52	31%

Multiple responses possible; percentages sum to more than 100 percent.  
 October 2009 base = 132 organizations; April 2009 base = 167 organizations

**Question 17a. What is your organization's annual operating budget?**

Survey respondents represented small, medium and large organizations. In October 2009, the organizations' annual operating budgets ranged from \$0 to \$73,000,000, and averaged \$3,101,159. The median annual operating budget was \$600,000, with half of the operating budgets at or above that amount, and the other half below that amount. Organizations reporting no annual operating budget indicated they were volunteer-run and distributed whatever donations were received.

**Question 17b. What are your organization's total assets? For this question, "total assets" includes cash on hand, cash reserves, facilities, endowments and all other assets.**

In October 2009, the value of organizations' total assets ranged from \$0 to \$24,385,000, and averaged \$3,039,927. The median value of total assets was \$500,000, with half of the organizational assets totaling that amount or above, and the other half below that amount.

**Question 18. What are your organization's top three sources of funding?**

- |                            |                        |
|----------------------------|------------------------|
| Donations from individuals | Local government grant |
| Fundraising special events | Corporate foundations  |
| United Way                 | Private foundations    |
| Federal government grant   | Other (Please specify) |
| State government grant     |                        |

**Table XVI. Organizational Sources of Funding  
(Sorted by Order of October 2009 Responses)**

	October 2009		April 2009	
Donations from individuals	66	50%	85	51%
State government grant	44	33%	48	29%
Fundraising special events	38	29%	47	28%
Federal government grant	38	29%	46	28%
Private foundations	34	26%	43	26%
United Way	31	24%	36	22%
Local government grant	24	18%	26	16%
Corporate foundations	20	15%	20	12%
Fee for service	19	14%	N/A	N/A
Faith community	7	5%	N/A	N/A
In-kind contributions	6	5%	N/A	N/A
Other	5	4%	N/A	N/A

Multiple responses possible; percentages sum to more than 100 percent.  
October 2009 base = 132 organizations; April 2009 base = 167 organizations

Additional options identified as other sources of organizational funding include "*civic organizations*," "*membership*," "*billable services*" and "*memorials*."

## Appendix A

### October 2009 Questionnaire and Project Correspondence



**United Way of the Plains**

## United Way of the Plains

245 N. Water  
Wichita, KS 67202  
Phone: (316) 267-1321  
Fax: (316) 267-0937  
www.unitedwayplains.org



what matters.™

### M E M O R A N D U M

DATE: October 1, 2009  
FROM: Patrick J. Hanrahan, President  
SUBJECT: South Central Kansas Nonprofit Survey; Your Input Is Requested

Six months ago, I contacted you and requested that you complete a brief but important survey regarding the local economic climate and its expected impact on your organization. Much has taken place in the past half year.

In order to better understand the impact of the current economy on nonprofit organizations in South Central Kansas, you are again being invited to participate in this important project, with your response indicating your agency's **current situation**. We estimate it will take five minutes to complete, and responses will be reported only in the aggregate. At the completion of the survey, you will have the option of providing your email address to receive a copy of the research summary.

We are seeking information that is accurate, complete and timely. For that reason, we need to receive your input no later than **Wednesday, October 7<sup>th</sup>**, with research findings available by the end of October.

Please take a few minutes now to complete and return your survey. A postage-paid business reply envelope is enclosed for your convenience.

Feel free to direct questions or additional comments to our Director of Research, Gloria Summers, at [gsummers@unitedwayplains.org](mailto:gsummers@unitedwayplains.org) or (316) 267-1321, ext. 4212. If you would prefer to complete the survey electronically, please provide Gloria with your email address and a link to the survey will be emailed to you.

**2009 Nonprofit Economic Survey**  
**South Central Kansas**  
(Wichita Metropolitan Statistical Area)

**Introduction:**

Six months ago, you were contacted by United Way of the Plains and asked to complete a brief but important survey regarding the local economic climate and its expected impact on your organization. Much has taken place in the past half year.

United Way of the Plains is exploring how the economy is affecting the nonprofits within our area. We are focusing on **your** organization's changes, specifically within the last six months.

We have a long history of helping those in the community, and we would like your feedback on what's happening. Your opinion counts and will help us understand the changing needs of our area. Responding to this survey -- indicating **your agency's current situation** -- will help us review the next step to ensure those in need continue receiving the best support.

We estimate the survey will take approximately five minutes to complete, and your answers will remain confidential. Please take the time to carefully evaluate and answer the questions. Select the answer that best describes your organization's situation.

At the conclusion of the survey, you will be given the opportunity to indicate whether you would like to receive a copy of the summary of findings from this report. Thank you.

**1. During the last six months, has your organization experienced an increase in demand for services that you would attribute to the economic downturn?**

- Yes, we have experienced a significant increase in demand
- Yes, we have seen a small increase in demand
- No, demand has remained unchanged
- No, demand for our services has declined

**2. If you have experienced an increase in demand for services, has your organization been able to meet that demand?**

- Yes, all of the increased demand
- Yes, about 50 percent of the increased demand
- Yes about 25 percent of the increased demand
- Yes, about 10 percent of the increased demand
- Yes, less than 10 percent of the increase
- No, none of the increased demand

**Additional comments:** \_\_\_\_\_

\_\_\_\_\_



**3. Are the demographics of your clients different than they were six months ago?**

- No, they are the same
- Yes, we are seeing more families
- Yes, we are seeing fewer families
- Yes, we are seeing more working individuals and families
- Yes, we are seeing fewer working individuals and families
- Yes, we are seeing more seniors (age 65 and above)
- Yes, we are seeing fewer seniors (age 65 and above)
- Yes, we are seeing more young individuals (age 40 and under)
- Yes, we are seeing fewer young individuals (age 40 and under)
- Yes, we are seeing more families, more working people, more seniors and more young people

**4. Is your organization able to serve all the referrals you are receiving?**

- Yes, all of them
- Yes, about 50 percent of them
- Yes, about 25 percent of them
- Yes, about 10 percent of them
- Yes, fewer than 10 percent of them
- No, none of them
- I don't know

**5. Has your organization's revenue changed during the last six months compared to the same period last year?**

- Revenue increased more than 10 percent
- Revenue increased slightly, less than 10 percent
- Revenue remained level
- Revenue decreased slightly, less than 10 percent
- Revenue decreased more than 10 percent
- I don't know

**Comments regarding revenue changes:** \_\_\_\_\_  
\_\_\_\_\_

**6. What specific changes in funding did you experience during this six-month period? (Check all that apply.)**

- Increase in donations by individuals
- Decrease in donations by individuals
- Increase in government funding (federal, state, local)
- Decrease in government funding (federal, state, local)
- Increase in corporate and foundation giving
- Decrease in corporate and foundation giving
- I don't know
- Other (Please specify) \_\_\_\_\_

**7. In response to the economic downturn in the last six months, which of the following changes has your organization already made? (Check all that apply.)**

- Increase services in response to increased client demand
- Dedicate more staff time to fundraising
- Review or reallocate financial assets and investments
- Reduce non-personnel expenses (i.e. travel, expenses)
- Use reserves to cover current budget
- Take additional line of credit
- Reduce staff hours
- Lay off staff
- Reduce services
- Eliminate programs
- Other (Please specify) \_\_\_\_\_

**8. Which of the following changes will your organization consider making in the next six months? (Check all that apply.)**

- Increase services in response to increased client demand
- Dedicate more staff time to fundraising
- Review or reallocate financial assets and investments
- Reduce non-personnel expenses (i.e. travel, expenses)
- Use reserves to cover current budget
- Take additional line of credit
- Reduce staff hours
- Lay off staff
- Reduce services
- Eliminate programs
- Other (Please specify:) \_\_\_\_\_

**9. What effect from the economy do you anticipate in the next six months?  
(Check all that apply.)**

- Increase in program expenses
- Decrease in program expenses
- Increase in the number of people who need the program
- Decrease in the number of people who need the program
- Increase in requests from new clients
- Decrease in requests from new clients
- None of these effects

**10.. Thinking of 2009, do you expect for your organization to complete the year financially:**

- More than 10 percent above breakeven
- Slightly above breakeven, less than 10 percent
- At breakeven
- At a slight deficit, less than 10 percent below breakeven
- At a deficit, more than 10 percent below breakeven
- I don't know

**11. Describe your feelings about the overall prospects for your organization for 2009.**

- Very optimistic
- Optimistic
- Pessimistic
- Very pessimistic

Comments: \_\_\_\_\_  
\_\_\_\_\_

**12. Please share an anecdote about how the current economic downturn is impacting your organization and/or your clients. (Optional. Limit 200 words.)**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**13. Categorize your organization's area of service. (Check all that apply.)**

- Aging Services
- Business/Consumer/Environmental Services
- Childcare
- Children (Tutoring, Mentoring, etc.)
- Clothing/Food/Personal Goods/Services
- Counseling/Crisis Services
- Disaster Services
- Education and Training
- Employment Services
- Financial Assistance
- Health/Medical/Mental Health
- Holiday Assistance
- Legal Services/Immigration
- Shelter/Housing
- Transportation Service/Assistance
- Other (Please specify) \_\_\_\_\_

**14. How many staff does your organization currently employ?**

- # Full-time Staff: \_\_\_\_\_
- # Part-time Staff: \_\_\_\_\_
- # Temporary Staff: \_\_\_\_\_

**15. In which county is your organization primarily located?**

- Sedgwick
- Butler
- Harvey
- Sumner
- Other (Please specify) \_\_\_\_\_

**16. Which of these counties does your organization serve? (Check all that apply.)**

- |                                   |                                  |
|-----------------------------------|----------------------------------|
| <input type="checkbox"/> Sedgwick | <input type="checkbox"/> Harvey  |
| <input type="checkbox"/> Butler   | <input type="checkbox"/> Kingman |
| <input type="checkbox"/> Cowley   | <input type="checkbox"/> Reno    |
| <input type="checkbox"/> Harper   | <input type="checkbox"/> Sumner  |

17. **What are your organization's annual operating budget and total assets? For this question, "total assets" includes cash on hand, cash reserves, facilities, endowments and all other assets.**

Annual Operating Budget \$ \_\_\_\_\_

Total Assets \$ \_\_\_\_\_

18. **What are your organization's top three sources of funding?**

\_\_\_ Donations from individuals

\_\_\_ Fundraising special events

\_\_\_ United Way

\_\_\_ Federal government grant

\_\_\_ State government grant

\_\_\_ Local government grant

\_\_\_ Corporate foundations

\_\_\_ Private foundations

\_\_\_ Other (Please specify) \_\_\_\_\_

\_\_\_\_\_

***If you would like to receive the survey results, please provide your email address.***

Email address: \_\_\_\_\_

**(for survey results only)**

We value your time and your input.

Please return your completed survey in the enclosed postage-paid  
business reply envelope to United Way of the Plains  
245 North Water Street, Wichita, KS 67202 or by fax  
to 316-267-0937 **no later than Wednesday, October 7, 2009.**

Appendix B

Methodology



**United Way of the Plains**

## Methodology

**Geography:** The five-county area of South Central Kansas defined by Sedgwick, Butler, Harvey, Reno and Sumner counties. This includes the four-county Wichita, KS Metropolitan Statistical Area (MSA), plus Reno County.

**Distribution:** The 2009 Nonprofit Economic Survey of South Central Kansas was programmed into SurveyMonkey, an online, web-based survey tool. Access to the survey was provided electronically via email (where valid email contact information was available) to nonprofit organizations primarily located in the five-county area of south central Kansas, as previously defined. The balance of nonprofit organizations received the survey, cover memorandum and a self-addressed, postage-paid business reply envelope via first class mail.

**April 2009:** In the first pulse of the measuring how the economy was affecting the area nonprofit community, United Way of the Plains distributed the **2009 Nonprofit Economic Survey of South Central Kansas** on April 1, 2009, with a requested response date deadline of April 7, 2009. Hard-copy and electronic were accepted through close of business Thursday, April 9.

A total of 278 surveys were distributed to area nonprofit agencies/ organizations, with 214 originally distributed via email and 64 originally distributed via first class U.S. mail. Excluding two surveys returned as nondeliverable, the 167 completed surveys from a base of 276 valid surveys represent an overall response rate of 61 percent

	<b>April 2009 Surveys</b>				
<b>Organization's Primary Location</b>	<b>Distributed</b>	<b>Non-Deliverable</b>	<b>Valid</b>	<b>Returned</b>	<b>Returned Per County</b>
Butler County	15	0	15		
Harvey County	19	0	19		
Reno County	33	0	33		
Sedgwick County	204	2	202		
Sumner County	7	0	7		
<b>Total</b>	<b>278</b>	<b>2</b>	<b>276</b>	<b>167</b>	<b>61%</b>

Following the April 2009 survey distribution, notice had been received that two of the original organizations were no longer in business.



October 2009: In the second pulse of the project, surveys were distributed on October 1, 2009 , with a requested response date deadline of October 7, 2009. Hard-copy and electronic were accepted through close of business Friday, October 9. Surveys received after that time have not been included in this analysis.

A total of 276 surveys were distributed to area nonprofit agencies/ organizations, with 205 (74 percent) distributed via email and 71 (26 percent) distributed via first class U.S. mail.

Excluding 12 surveys returned as nondeliverable, the 132 completed surveys from the base of 264 valid surveys represent an overall response rate of 50 percent. Fourteen percent (n=19) of the completed surveys were returned via mail, and 86 percent (n=113) were submitted electronically.

	<b>October 2009 Surveys</b>				
<b>Organization's Primary Location</b>	<b>Distributed</b>	<b>Non-Deliverable</b>	<b>Valid</b>	<b>Returned</b>	<b>Returned Per County</b>
Butler County	15	1	14	8	57%
Harvey County	19	1	18	14	78%
Reno County	33	2	31	9	29%
Sedgwick County	202	8	194	98	51%
Sumner County	7	0	7	3	43%
<b>Total</b>	<b>276</b>	<b>12</b>	<b>264</b>	<b>132</b>	<b>50%</b>

Within the one-week response timeframe, 57 percent of those received access to the survey electronically responded, as compared to 28 percent of those who received their survey through the mail.

	<b>October 2009 Surveys</b>				
<b>Method of Survey Distribution</b>	<b>Distributed</b>	<b>Non-Deliverable</b>	<b>Valid</b>	<b>Returned</b>	<b>Returned Per Dist. Method</b>
Email	205	8	197	113	57%
Mail	71	4	67	19	28%
<b>Total</b>	<b>276</b>	<b>12</b>	<b>264</b>	<b>132</b>	<b>50%</b>