

For the Common Good

2014



Report on the Impact of Our Nonprofits on Monterey County

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County

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**“Nonprofit organizations
play a vital role in sustaining
Monterey County’s
economic and social
health.”**

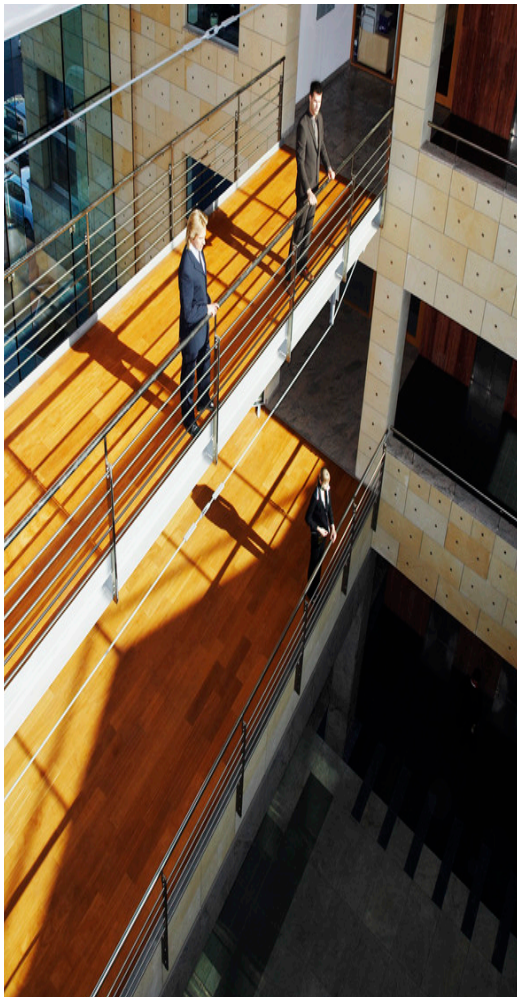


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Executive Summary

Executive Summary:

This study was commissioned by the Nonprofit Alliance of Monterey County to update and elaborate on a study originally published in 2005 (Action Council of Monterey, For the Common Good, 2005). The intent was to derive a new snapshot, some ten years later, of the impact of the nonprofit sector on the County and its constituents.

The original study gathered data on Monterey County's nonprofits using IRS tax reports filed by nonprofits as well as a survey of the approximately 400 501c3 organizations in the county. The current study replicates that methodology and survey sample. But in addition to the economic impact of Monterey nonprofits, the current study extends the research to also identify other important impacts in addition to the economic. These factors include political, social, technological, legal and environmental impacts.

Comparisons with the Previous Report

There are total 1152 nonprofit organizations in Monterey County; about 60 fewer than were registered in 2002. This decline is consistent with the trends that have occurred at both the California and national levels. Following 2010, the numbers of nonprofits began to decline at all levels and did so through 2012. Recent numbers reported at the national level for 2013 suggest that the numbers of nonprofits are once again increasing (NCCS, 10/2013).

Monterey County Nonprofits had a direct economic impact, as measured by expenditures, of close to 1.2 billion in 2011, a 42% increase over 2002. Applying a typical economic multiplier, the direct and indirect impact of the County's 501c3's is almost \$2.1 Billion.

Economic Impact

County nonprofits had a direct economic impact as measured by expenditures, of \$1,169,000,000 in 2011. This is an increase of nearly 42% over the \$824 million in expenditures reported for 2002 in the *For the Common Good* report. Even when the growth is adjusted for inflation (approximately 25% during the ten year time period), there was a healthy gain in expenditures on programs and services for a wide range of constituents by an overall smaller number of nonprofit organizations.

Nearly $\frac{3}{4}$ of the total expenditures are estimated to have been spent in Monterey County through purchase of goods and services from local businesses and payment of salaries and wages to nonprofit employees residing in the County. The salaries/wages and other compensation totaled nearly \$328 million vs. \$212 million ten years earlier. Payroll taxes accounted for an additional \$14.3 million in expenditures in 2011.

Revenues were up \$50 million over expenditures and again showed a healthy 39% increase over 2002 revenues. Contributions were up 18.5% to \$265 million, but trailed inflation for the period. This was more than compensated for by an increase in program revenues such as program and service fees (e.g., admission fees to the Monterey Aquarium), special events, and rent revenues. Investment income went down more than \$2 million from 2002.

The total economic impact of Monterey's 501c3's, including direct and indirect effects, was almost \$2.1 Billion in 2011 vs. \$1.5 Billion in 2002 (projections are based upon the same economic multipliers used in the previous report).

Even during a difficult economy, a solid majority (58%) of the nonprofits surveyed reported an increase in the number of programs and services offered over the last five years, while only 8% reported a decrease. An even greater proportion (80%) reported an increase in the number of individuals served. Among the reasons for the increase in programs/services are more staff and volunteers (36%), greater resources (51%), the addition of services for unmet needs (58%), and increased management efficiency (22%). About $\frac{3}{4}$ of the respondents expect that the demand for their programs and services will increase over the next five years and an equal number anticipate that the number of individuals served will also continue to increase during the same period.

Our survey results indicated that the average number of full time employees per organization is 16 but the median of 2 better reflects the typical organization. The average number of part time employees is 7 while the mean is 2.5. Almost 30% of responding organizations have no full time employees and almost 20% have no part time employees.

The preceding paragraph underscores the importance of volunteers. Our survey sample reported close to 542,000 volunteer hours provided by 13,160 volunteers (only 5% of respondents do not use volunteers). Although the average number of volunteer hours per year per volunteer is 41 hours, on average, the typical nonprofit adds the equivalent of almost 4 full time employees by having volunteer help.

An increase in revenues, program/service demands, and employee and volunteer hours has helped County nonprofits add programs and serve more than 5.7 million constituents in 2012.

Monterey County is diverse in so many ways that nonprofits have extraordinary challenges in serving their broad constituencies.

Our survey sample reported serving more than 5.7 million constituents in 2012 (these numbers include serving individuals more than once during the year as well as visitors to our County through programs like Point Lobos or the Aquarium). The median number served per organization was 2,060 people.

Political Impact

Only 30% of survey respondents do not engage in political advocacy activities. For the majority of the 70% that do engage, over half conduct education and outreach (including for volunteers), nearly 1/3 engage in local, state or national political hearings and meetings, and 22% send letters, emails, or petitions to public officials.

Our respondents have helped to shape legislation and political outcomes pertinent to their constituent bases. The top three areas of influence are environmental, fundraising (e.g., laws regarding charitable giving), and social issues. Among the policy issues in which organizations are active include working to strengthen state and federal policies on marine protected areas, non-lead ammunition laws, and extending foster care benefits.

Our nonprofits are also required to be accountable to a variety of entities in addition to their immediate constituents. Nearly 90% of our respondents evaluate and report on the impact of their programs and services for those that they serve, and about 80% measure on an annual or more frequent basis. The boards that manage or advise our nonprofits are quite diverse. The average number of board members is ten but numbers range from 3 to 21. Women comprise 53% of board members, and 50% of boards have Latino, 29% have Asian, and 16% have African American members. Most boards (79%) include professionals with business acumen, while nearly half include attorneys and financial advisors or accountants. Almost 2/3 list professionals with program related expertise as members. Above 1/3 have marketing and/or communication professionals included.

Only 1% of board members are under 20 years of age and half are 51 or older. Term limits or staggered term limits are required by 86% of responding boards.

Social Impact

A majority (58%) of those organizations surveyed serve all of Monterey County and 28% serve constituents outside of the county as well as within it. Of those focusing in more specific regions, 28% serve the Salinas area 25% of the Monterey Peninsula and about 15% serve the North and/or South County.

The income groups served are predominantly lower income with 51% of the respondents serving those within the three lower income categories with only 15% of those served falling in the moderate to high income levels. Another 31% focus on all income levels.

The primary non-English language communities served are Spanish speakers (91% of organizations). More than 20% of organizations serve Chinese, Spanish, Vietnamese, Japanese and Korean language speakers and around 15% serve Tagalog and Arabic speakers. As many as 100 communities speaking other languages are also served. Non-English language speakers are served through language specific printed materials (55%), Websites (24%), and translation and/or interpretation services, 42%. About 1/3 of the organizations provide no non-English language services.

Technological Impact

New technologies are used by 80% of organizations to contact and serve constituents, to publicize activities, and to remain in regular contact. Nearly 2/3 of the respondents report using social media for fundraising activities. Top media platforms include websites (92%), email (89%), Facebook (80%), print newsletters (45%), Telephone (27%) and Twitter (25%).

Other technological tools used to serve constituents include financial transactions such as PayPal and Square (70%), or free and cloud based tools such as Office 365 or eTapestry (cloud based office suites or cloud based fund raising --31%). Tools such as GPS tracking and big data analytics are used by less than 10%. Only 15% use no social media.

Environmental Impact

Over half of (52%) of the organizations surveyed are tracking their environmental impact and are promoting ways to preserve or conserve our environment. Nearly 30% are conducting recycling or waste diversion and 20% are practicing water conservation. Another 12% are using compostable materials, solar energy, and building green facilities and about 6% are already LEED certified.

Environmental nonprofits comprise about 8% of total respondents and between 8% and 16% work on open space, park development, land use or endangered wildlife concerns. Smaller numbers are involved in educational workshops, environmental advocacy, and funding support.

Needed Impacts

The organizations that were surveyed were asked to identify needs in the County that they perceive as being currently inadequately served by the nonprofit community. Between 25-30% of respondents identified each of the following concerns: housing issues, rising costs of living, inadequate services for those with mental or physical disabilities, health issues and access to health care, and unemployment or underemployment of the workforce.

Integration of
new
technologies has
transformed the
ability of
nonprofits to
operate more
efficiently and
better serve their
constituencies.



Introduction

Key Analytics

- There are a total of 1,152-registered nonprofits in Monterey County (60 fewer than in 2004).
- Nonprofits had \$1.218 billion in gross revenues in 2011, \$343 million more than in 2002.
- Nonprofits had a direct economic impact, as measured by gross expenditures, of over \$1.168 billion in 2011, nearly \$344 million more than in 2002.
- The direct and indirect economic impact of the county's profits using the economic multiplier applied for 2002 was over \$2B in 2011 and \$1.5B in 2002.
- Salaries/wages and other compensation in 2011 totaled \$329 million plus an additional \$14 million in payroll taxes.
- Gross assets at the end of 2011 totaled over \$2.45 billion, \$753 million more than in 2002.

There are nearly 1,200 nonprofit organizations in Monterey County that provide programs and services to address community needs and enhance the overall welfare of the County. They employ over 8,000 full and part time employees and involve many more thousands of volunteers. Programs and services are provided to an estimated 6 million people. The economic impact of nonprofits in the County was documented in 2005 in a study published by the ACTION Council of Monterey County. The study concluded that County nonprofits provided an estimate of \$824 million as the direct contribution to the County's economy (*For the Common Good*, 2005). Of course, nonprofit organizations contribute in many other ways than just economic impact to the welfare of their constituents. For example, they may improve the health of those that they serve through medical services, distribution of nutritious food, physical therapy and sports activities, or by raising

the awareness of the population about illness prevention and treatment approaches. Other organizations may help their constituents secure jobs or housing depending upon their particular mission. In an effort to provide a clearer picture of the overall impact to the many stakeholders of Monterey's nonprofits, the Nonprofit Alliance of Monterey County (NAMC) commissioned this study to go beyond the traditional economic impact analysis and extend it to include a variety of other factors. The analytical technique that serves as a framework for the study is a PESTLE Analysis. The PESTLE technique and derivations of it are widely used by businesses and organizations to identify and understand the influences of global forces and trends that may have an impact on the performance of their organizations (see for example: Dcosta, A. Components of a PESTLE Analysis, 2011).

PESTLE explained

PESTLE is a mnemonic for Political, Economic, Social, Technological, Legal, and Environmental factors that impact organizations and the larger environment in which they operate.

It is common for organizations to analyze economic trends such as growth in certain industries or market segments or the impact of predicted economic downturns on their overall success. But it has become clear as environments become more complex and challenging that those areas such as new government funding and regulation, demographic and immigration changes, technological innovations, and climate change may have an equal or even greater impact than swings in the economy on organizations and their constituents

In order to better convey the depth and breadth of involvement of Monterey County nonprofits in the lives of the County's population, the PESTLE technique has been added to the traditional economic impact analysis for the 2014 study.

The methodology employed included compilation of tax filing information (form 990) on the 1,152 nonprofits in the County and a direct sample of organizations categorized as 501c3's with \$25,000 plus of revenues in 2012 that filed form 990. Of the 378 such organizations, contact information was available for 320 of them. The response rate to the survey was 25% or 80 respondents and they closely resembled the population of organization by category (see table at the right). (Note: A more detailed description of the methodology is provided in the appendix).

The report on the results of the study that follows presents the information obtained, analyzed, and summarized for each letter of the PESTLE framework in sequence.

Category That Best Describes Your Organization		
Category Description	% of all 2012 Organizations	% of Surveyed Respondents (80)
Agriculture	2%	4%
Arts, Culture, and Humanities	16%	15%
Education	19%	25%
Environmental	7%	8%
Health and Mental Health Services	11%	11%
Human Service	26%	19%
International and Foreign Affairs	2%	4%
Mutual/Member Benefit	1%	1%
Public & Societal Benefit	10%	10%
Real Estate & Housing	4%	1%
Religious	3%	3%
Total	100%	100%
<ul style="list-style-type: none"> Public & Societal Benefit organizations: These are typically groups for civic leagues or social welfare public benefit 501c(3) corporations. Charitable purposes include schools or educational facilities organized as public benefit corporations for benevolent purposes. Mutual/Member Benefit organizations: These organizations promote social or economic welfare of member individuals or organizations (trade groups, professional organizations, etc.) <p>* Numbers rounded</p>		

ADVOCACY

What types of advocacy activities does your organization participate in?

- Education and Outreach 53%
- Rally and protest Planning and Participation 5%
- Sending letters/emails/petitions to public figures 22%
- Participate in local, state, or federal political meetings/hearings 32%
- Conduct research, produce policy initiatives and reports 8%
- N/A (not applicable) 30%
- Other 6%

For organizations that engage in advocacy activities, the top three ways in which they engage are:

- Education and outreach 53%
- Participate in local, state, or federal political meetings/hearings 32%
- Sending letters/emails/petitions to public figures 22%

What types of law or political outcomes have your organization produced or influenced that has directly impacted your constituents?

Environmental

- State and federal policy on marine protected areas, research and conservation
- Funding state parks
- Approval of San Clemente Dam removal
- Supporting the Polystyrene plastic bag ban
- Support stricter environmental purchasing/waste policies and practices in Monterey County



Photo courtesy of <http://www.discprofiles.com/blog/2012/12/7-common-management-issues/meeting-istock/>

Political, Legal and Governance Impacts

Most (70%) of our respondents engage in advocacy activities including helping to shape legislation and participating as organizations in a wide array of political issues and processes.

Health

- Adding dental coverage back to Medi-Cal; giving constituents greater access to healthcare and dental care; and mental illness (statewide)
- Influencing the Older American Act to support funding
- Senior nutrition programs (county, state, and nationwide)

Education

- Social Issues
- Inclusionary housing laws
- Supporting extended foster care benefits
- Improved 2010 General Plan and Better planning decisions
- Laws affecting sexual assault survivors and sex offenders nationwide
- City and county alcohol and drug ordinances concerning minors
- Supporting reversal of Hartnell College trustee vote concerning construction of new science building

Other

- Various State and law issues
- State policy on non-lead ammunition law

Fundraising

- State law concerning charitable giving
- Lobbied for local laws supporting the sales of fireworks by Charities and Nonprofits
- Supported legislation regarding funding of Ombudsman program
- Supporting the Reauthorization of Older Americans Action regarding giving funding to senior services

Leading reasons organizations did not engage in advocacy activities

- | | |
|--|-----|
| • Not our mission | 31% |
| • Lack of resources | 0% |
| • Don't want to appear politically biased | 8% |
| • Would like to, but don't know where to start | 3% |
| • N/A | 16% |
| • Other | 5% |

Additional information

- Respondents that answered "other" didn't believe it was appropriate to engage in advocacy or did not want to appear biased to their constituency.
- Environmental agencies were particularly active in this space, with all but one environmental organization participating in political/law advocacy (5 of 6).



Based on our sample, the top three types of advocacy activity focuses on:

- Environment
- Fundraising
- Social Issues

Photo courtesy of <http://www.thecalifornian.com/article/99999999/NEWS11/104090314/>

Governance - Program Evaluation

Nonprofits are required to be accountable to the constituents they serve and must be responsive to the broader public interests and governmental/regulative guidelines in which they operate. Program evaluation provides a way to gauge nonprofit's performance for their constituents.

How our Organization is evaluating the impact of Program/Services?

- 10% evaluate using qualitative metrics (non-numeric)
- 16% evaluate through quantitative metrics (numeric, statistics)
- 60% use both qualitative and quantitative metrics
- 11% use none
- 4% other evaluation methods

60% of the organizations use both qualitative and quantitative evaluations

'Other' responses include: Comments on social media; submissions of reports; and site visitations

Specific Methods/ Measurements the Organizations are using to Evaluate Impact

Top methods of Evaluating Impact include:

- 51% of respondents use interviews, surveys, and focus groups for evaluating impact, 30% of which use it as their main measurement
- 36% of respondents utilize program follow-up as an impact measurement. This includes evaluations, board reviews, reports, testing, environmental impact assessment, quality control, and overall satisfaction
- Data analysis and tracking the number of people served are some of the least utilized methods, at 21% and 20%, respectively

How often do you evaluate the Impact of your Services/ Programs?

31% conducted evaluations between 0-6 months

35% conducted evaluations between 6 months - 1 year

11% conducted evaluations between 1 - 5 years

1% conducted evaluations every 5+ years
9% of organizations never performed evaluations

13% of organizations evaluated their programs according to another time schedule

- 66% of organizations evaluate their programs/services within a year.
- Seven organizations evaluate on completion of the program/workshop/event.
- One organization does a community assessment every 5 years.



Governance - Nonprofit Boards

Non-profit boards are a key building block of a successful organization. Having clear guidelines in place ensures a board that it is effective in managing the organization and the programs it offers. This section looks at how our nonprofits boards are doing in Monterey County.

How Many Members are on your Board of Directors?

- 10: Average number of members on the board of directors
- 21: Largest board
- 3: Smallest board
- Mutual Benefit has the highest number of board members at 20 on average
- Religious organizations have the fewest board members at 3 on average

What Percentage of Women are on Your Board of Directors?

- 53%: Average percentage of women on boards
- 2: Mental Health Organizations that have 100% women boards
- 22%: Average percentage of women on boards of Real Estate and Housing organizations
- Agriculture and Health and Human Services have the highest average percentages, at 68% and 67%, respectively

79% of organizations have professionals with business acumen on their boards. Over half of boards consist of educators and professionals with expertise related to the organization's programs/services. Other members consist of community members of many kinds – community activists, parents, law enforcement, local business operators, parish members, and breast cancer survivors.

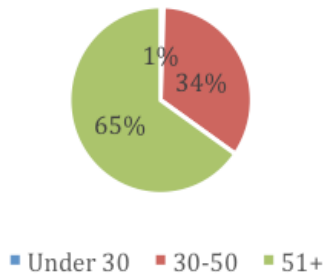
***Our Board Consists of:**

Legal Advisors/Attorneys	49%
Financial Advisors/Certified accountants	45%
Professionals with business acumen	79%
Communications professionals	38%
Marketing professionals	36%
Educators	60%
Professionals with expertise related to your programs/services	64%
Other	18%

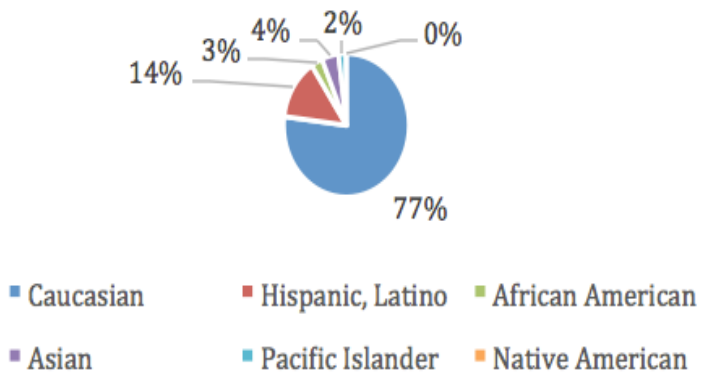
***Our Board also consists of:**

Latinos	50%
Asians	29%
Africans	1%
African Americans	16%
Native Americans	3%
Caucasians	95%
Pacific Islander	9%
Other	13%

Average Age Composition of the Board (overall)



Average Ethnic Composition of Board (overall)



Ethnic Diversity

- 95% of the organizations have Caucasians on their board, of which average 77% of total members
- Latinos are on 50% of the boards but average only 14% of total members
- International and Foreign Affairs, Agriculture, Environmental, and Mutual/Member Benefit have the least diverse boards, all having 90%+ Caucasian members (on average)
- Arts, Culture, & Humanities and Human Services have the most diverse boards, comprising of two-thirds or less Caucasians but representing all ethnic groups (except Native American)
- One organization in Human Services states: "We fully realize we need to diversify board"

Age Diversity

- Agriculture is the only sector to have less than 50% of board members aged 51+ (on average)
- Only four organizations have board members under the age of 30
- 12 organizations have boards consisting of members that are 100% above the age of 51

*Board Policies

Financial conflict of Interest policy	54	68%
Board compensation policy	34	43%
General conflict of interest policy	62	78%
Mandatory retirement	6	8%
Term limits	45	56%
Staggered term limits	24	30%
Other	6	8%

- 78% of respondents have a general conflict of interest policy in place for their boards
- 8 organizations only have one policy in place; 5 have only a general/financial conflict of interest policy and 3 have only a term limit policy in place
- Mandatory retirement is the least common policy, with only 8% of respondents having this policy

Economic IMPACTS

Nonprofit Assets

In 2002, Monterey County nonprofits controlled capital assets in the amount of \$1,710,966. A typical nonprofit organization reported end-of-year assets of roughly \$120,000. In 2011, nonprofits in the county reported asset holdings of \$2,453,153,126 for an estimated growth of 43.38% in assets. The assets of Nonprofits ranged from a little over \$300 to nearly \$507M, with a mean of \$6.5M and a more typical median of \$204,988. This is nearly a 70% increase in the typical median nonprofit investment in capital assets. The top four nonprofit industry segments with the greatest assets in 2002 were: Health (\$726M), Education (\$259M), Animal (\$206M), and Environmental (\$112M) organizations. In 2011, the leading industries for assets accumulation were Health Services at \$1.03B, Environmental organizations at \$451M, Education at \$416M, and Public and Societal nonprofits at \$233M.

Nonprofit Finance (Revenue)

The 2011 Contributions, Gifts, Grants, and Member Dues category shows a 14% increase over 2002 revenues. The Program Service Revenue category reflects a larger increase in 2011 over 2002 of 23.6%. Although there were increases in these categories, they became smaller percentages of the overall revenue in 2011 whereas Income from Special Events (up 1.6%) and Other Revenue (up 11.7%) categories became larger percentages the total revenue. The bulk of the significant growth in other revenue (\$147 million over 2002) is due the sales of securities, assets, and inventories.

NONPROFIT REVENUE BY SOURCE

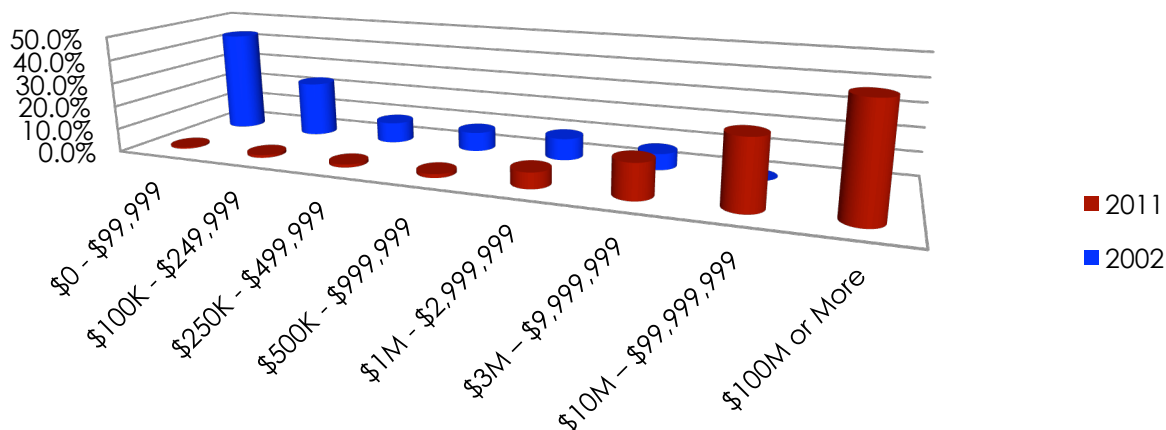
SOURCE	2002 AMOUNTS	% of Total	2011 GROSS AMOUNTS	% of Total
Contributions, Gifts, Grants, & Member Dues ¹	\$231,595,226	26.5%	\$264,171,524	21.7%
Program Service Revenue	\$597,042,820	68.2%	\$737,908,437	60.5%
Rental Income	\$5,207,761	.6%	\$6,909,733	.6%
Other Investment Income	\$20,373,992	2.3%	\$18,236,343	1.5%
Income from Special Events	\$7,406,240	.9%	\$30,786,065	2.5%
Other Revenue	\$13,392,081	1.5%	\$160,432,385 ²	13.2%
TOTAL REVENUE	\$875,018,120	100%	\$1,218,444,487	100%

Notes:

1. Category includes Federal Campaigns, Member Dues, Fundraising Events, Related Organizations, and Government Grants/Contributions, and all Other Contributions/Gifts/Grants. Member Dues of \$8,752,072. in 2002 was also included in this category.
2. Category includes gross figures for Royalty income (\$42k), sales of Securities (\$139.6m), Assets (\$5.3m), and Inventories (\$15.6m) sold in 2011.
3. Note: 2002 figures have not been adjusted for the Consumer Price Index (CPI) inflation ratio estimated at 1.2501.

Economics - Nonprofit Finances (Revenue) continued...

Nonprofit Revenue Comparative 2002 vs. 2011



2011 Gross Revenues are noticeably different from 2002 Revenues as shown in the analysis table. There are larger nonprofit organizations in 2011 receiving significantly larger amounts of revenue than in 2002. Likewise, the percentage of Nonprofits with revenues under \$1M in 2011 declined significantly compared to those same revenue categories in 2002. Specifically, in 2002 43.5% of nonprofits received revenues less than or equal to \$99,999 and none received revenues of \$10 million or more. Conversely, in 2011 nonprofits reported that only .6% received revenues less than or equal to \$99,999 and 73.8% received revenues of \$10 million or more.

Nonprofit Revenue by Category

REVENUE TIERS	2011 GROSS REVENUE \$ AMOUNT	2011 # of Nonprofits by %	2011 \$AMT (Size) by %	2001 \$AMT (Size) by %
--			--	--
\$0 - \$99,999	\$7,098,905	29.40%	0.60%	43.50%
\$100K - \$249,999	\$14,765,532	25.10%	1.20%	23.60%
\$250K - \$499,999	\$15,184,979	11.30%	1.30%	8.80%
\$500K - \$999,999	\$20,375,237	7.70%	1.60%	8.10%
\$1M - \$2,999,999	\$81,960,820	13.50%	6.70%	9.20%
\$3M - \$9,999,999	\$180,611,914	9.20%	14.80%	6.80%
\$10M - \$99,999,999	\$345,682,803	2.90%	28.40%	--
\$100M or More	\$552,764,297	0.53%	45.40%	--
TOTALS	\$1,218,444,487	100%	100%	100%



Funding is the backbone of nonprofits allowing them to serve their constituents, and modern day nonprofits are utilizing both traditional methods as well as new technologies to provide present funding.

Top Methods of Fundraising

Email outreach	38%
Membership fees/dues	23%
Business partnerships	26%
Fundraiser events	58%
Passive fundraising (donations not actively pursued)	21%
Social Media/ Crowdsourcing	13%
Other	59%

What sources provided your organization with financial support in 2012? (Full list)

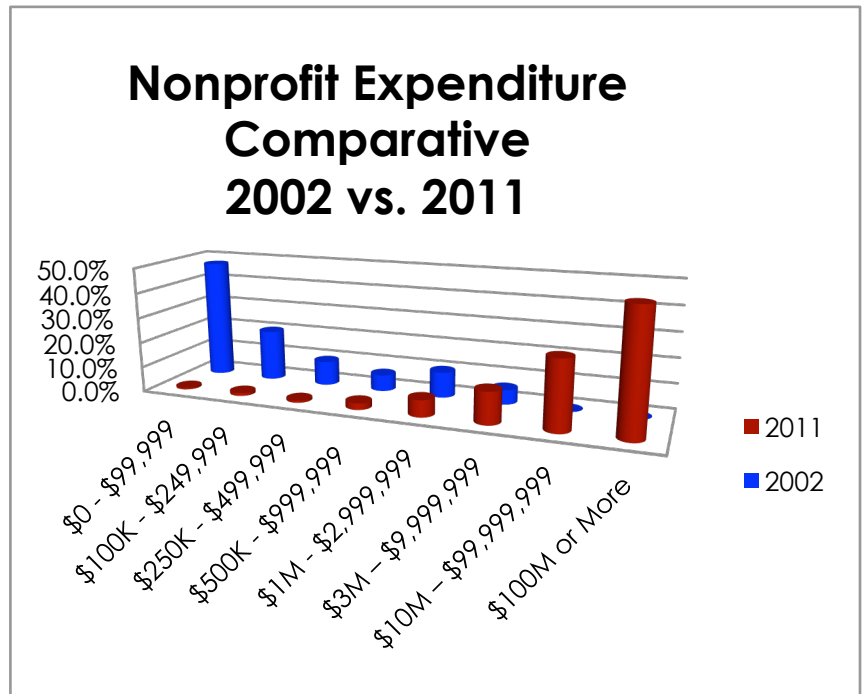
Fundraising events	60%
Membership fees/dues	36%
National organization network	1%
Government grants/contributions	38%
Non-governmental grants/awards	70%
Donations, contributions and gifts	89%
Fees for services	55%
Board of Directors	54%
Investment income	26%
In-kind gifts	40%
Other	15%

Over half of the organizations use fundraising events to raise funds

- 23% use only one method of fundraising
- 12.5% use direct mail and 15% use grants (gov't and others) as a way to raise funds
- Fundraising events provide 9% of total funding for the organizations
- 2: organizations that only use direct contact
- All but 9 of the organizations (89%) received some financial support through donations, contributions, and/or gifts
- Fundraising events, fees for services, and board of directors provided more than half of the organizations with financial support
- 70% of all organizations responding received funding from non-governmental grants/awards
- 38% received funding from government grants/contributions
- 27%: total funding provided by donations, contributions, gifts and non-governmental grants
- 23%; total funding provided by government grants/contributions
- 22%: total funding provided through fee-for-services
- 2%: total funding provided by board of directors

Economics — Nonprofit Finances (Expenditures)

2011 Gross Expenditures are noticeably different than in 2002 Expenditures. As seen with revenues, there are financially larger nonprofit organizations in 2011 spending significantly larger amounts for business operations than in 2002. This is particularly notable in the categories over \$3M which represented 88% of expenditures in 2011 compared to 6% in 2002; a comparable increase of 82%. Expenditure categories under \$500K in 2011 (at 2.8%) compared to those same categories identified in 2002 (at 77.5%) show a decline of 75% in those categories. There is an overall trend of nonprofits growing financially and increasing their expenditures.



Nonprofit 5 Grouped by Total Expenditure Levels

EXPENDITURE TIERS	2011 GROSS EXPENDITURE \$ AMOUNT	2011 # of Nonprofits by %	2011 \$ AMT (Size) by %	2002 \$ AMT (Size) by %
---	---	---	---	---
\$0 - \$99,999	\$8,358,263	34.4%	0.7%	47.5%
\$100K - \$249,999	\$13,936,108	22.5%	1.2%	20.3%
\$250K - \$499,999	\$11,092,763	8.2%	0.9%	9.7%
\$500K - \$999,999	\$29,837,273	10.8%	2.6%	6.5%
\$1M - \$2,999,999	\$78,384,370	11.9%	6.7%	10.2%
\$3M - \$9,999,999	\$148,276,683	8.2%	12.7%	5.8%
\$10M - \$99,999,999	\$319,350,510	3.4%	27.3%	-
\$100M or More	\$559,307,391	0.6%	47.9%	-
TOTALS	\$1,168,543,361	100%	100%	100%



Economics — local spending

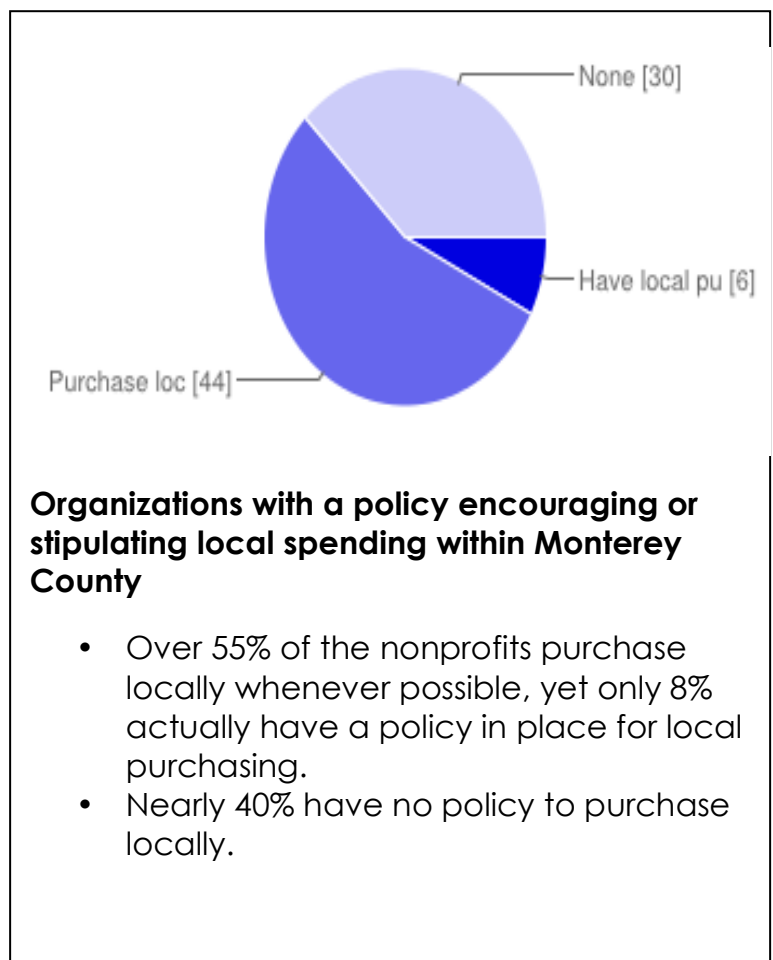
Percentage of Total Expenditures in 2012 (including wages and salaries) that was spent on purchasing goods and services inside of Monterey County

- The top three sectors that spent the greatest portion of their expenditures inside Monterey County were Real Estate & Housing (95%), Mutual/member Benefits (90%), and Religious (90%). These categories also exceed the overall mean of 71%, with the range encompassing 2% and 95%.
- The bottom three sectors (least amount of expenditures spent inside Monterey County) are International and foreign affairs (2%), Agriculture (54%), and Public & Societal Benefit (55%).

Average (mean) percentage of organizational income that comes from Outside Monterey County (by sector)

- The top three sectors that receive the greatest portion of their income from outside Monterey County are Education (38%), International and foreign affairs (33%), and Agriculture (22%).
- The bottom three sectors (least amount of income from outside Monterey County) are Mutual/member Benefits (0%), Public & Societal Benefit (5%), and Religious (10%).

Nonprofits within Monterey County are important not only for the services they provide, but for their economic impact within the County as well.



Organizations with a policy encouraging or stipulating local spending within Monterey County

- Over 55% of the nonprofits purchase locally whenever possible, yet only 8% actually have a policy in place for local purchasing.
- Nearly 40% have no policy to purchase locally.

Photo courtesy of www.chispahousing.org

Employment – Paid Employees

- 13%: Nonprofit organizations that do not have either full-time or part-time paid employees (10/80 that were surveyed)

Number of Full-Time Paid Employees

- 1,225: The total number of full-time paid employees utilized by the 79 organizations that responded (data is missing in some cases)
- 16: The average (mean) number of full-time paid employees within an organization. The median number was two.
- 29%: Nonprofit organizations surveyed that don't have any full-time paid employees (23/80)

Number of Part-Time Paid Employees

- 552: The total number of part-time paid employees utilized by the 80 organizations that responded (data is missing in some cases)
- 7: The average (mean) number of part-time paid employees within an organization (the median is 2.5)
- 19%: Nonprofit organizations surveyed that don't have any part-time paid employees (15/80)

Economics – Employment

This section provides a variety of indicators and comparisons of economic and financial impacts of nonprofits throughout Monterey County including employment, wages & salaries, as well as the flow of economy.

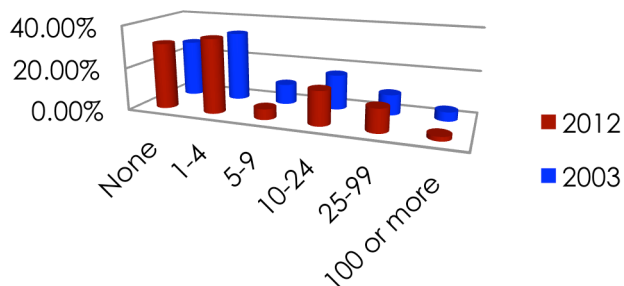
1. Employment in MC in 2012 is 171,225. This is slightly less than the 2000 figure. According to the BLS database, employment dropped lower than the 2000 figure from 2003-2007, peaked at 2008 with 172,450, then dropped to 165,014 in 2009 and has been climbing slowly ever since.
2. Using the 171,225 employment for 2012 and applying a 4.5% (the 2001 std¹) to 5.7% (2006 Pacific Region std) nonprofit employment factor provides a conservative 4.7% estimate of 8,000 nonprofit employees in Monterey County in 2012. There are indicators for continued future growth in the nonprofit sector (nationwide) together with our recent survey findings for anticipated new hires and increases in program/services in next 5 years.
3. 2012 Nonprofit employment in Monterey County exceeded the manufacturing sector (5,287), the construction industry (4,470), financial services (4,233), and other services (7,299) sectors. Comparatively, in 2002 nonprofit employment only exceeded the construction industry and was similar to employment levels in the manufacturing, financial, and real estate industries.

Local nonprofit employment in 2013 also exceeded Federal (5,818) and State (4,729) government positions but not local government positions (19,592). Although the nonprofit sector employment is growing, it is still significantly less than agriculture (46,000), Leisure and Hospitality (21,674) and Business and Professional service (12,500) industries in the county.

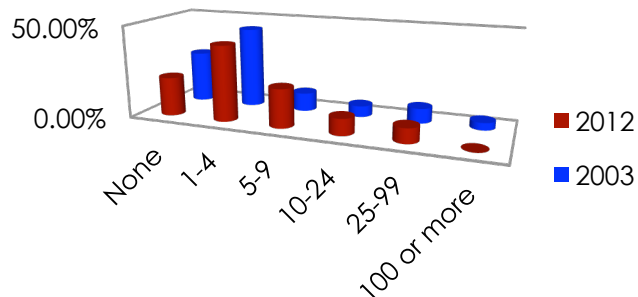
Economics – Employment continued...

Overall, there was a slight increase in organizations that have no full-time staff at all (31% in 2012 from 27% in 2003 for a 4% increase). Surveyed organizations in 2012 also indicated that 21% had no part-time employees, compared against the higher rate of 28% of respondents in 2003. This may partially indicate a shift from hiring full-time employees to part-time employees but the fact remains that some organizations undoubtedly cut full-time employees from their staffs entirely due to economic challenges compared to 2003.

**Nonprofits by
Number of Full-time
Employees**



**Nonprofits by
Number of Part-time
Employees**



EMPLOYMENT COMPARATIVES –SURVEYED RESPONDENTS

EMPLOYMENT TIERS	2012	2012	2003	2003
	FULL-TIME EMPLOYMENT (Size) by %	PART-TIME EMPLOYMENT (Size) by %	FULL-TIME EMPLOYMENT (Size) by %	PART-TIME EMPLOYMENT (Size) by %
None	31.0%	21.0%	27.0%	28.0%
1-4 Employees	35.0%	41.0%	33.0%	44.0%
5-9 Employees	5.0%	21.0%	9.6%	10.0%
10-24 Employees	16.0%	9.0%	16.5%	6.0%
25-99 Employees	11.0%	8.0%	9.6%	8.0%
100 or more Employees	2.0%	0.0%	4.3%	4.0%

Economics - Volunteers

Volunteers are a critical part of the delivery system for nonprofits. On average the typical respondent added the equivalent of four full-time employees through the assistance of volunteers.

Number of Volunteers

- 13,160: The total number of volunteers utilized by the 80 organizations that responded
- 170: The average number of volunteers within an organization
- 4: Organizations that don't use volunteers

Top 3 Sectors for average number of volunteers

- Education: 450
- Agriculture: 300
- Environmental: 100

Bottom 3 Sectors for average number of volunteers

- Public and Societal Benefit: 12
- Real Estate and Housing: 12
- Mutual/Member Benefit: 15

Volunteer Hours

- 7,632: average number of volunteer hours per organization

Additional Volunteer Information

- The Girl Scouts of the Central Coast has the most volunteers: 5,600
- The Monterey Bay Aquarium has the most volunteer hours: 156,000

Volunteers are solicited through multiple channels.

- 54% of organizations recruit volunteers through outreach to local colleges and schools, with 5 of the organizations only using this method
- 48% use Social Media (Facebook, Twitter, etc.)
- 48% use website announcements
- 29% use community recruitment events, with one nonprofit using only this method
- 21% of the organizations use only one method of soliciting volunteers



How does your organization solicit volunteers?

Outreach to local colleges and schools	54%
Social Media (Facebook, Twitter, etc.)	48%
Website announcements	48%
Community recruitment events	36%
Other	59%

Photo Courtesy of www.volunteermontereycounty.org

Economics - Volunteers

continued....

Volunteer Training

Once a year	11%
More than once a year	31%
Currently no volunteer orientation or training but we have plans to implement one	5%
No training provided	18%
Other	35%

90% of the organizations have some sort of volunteer training

25% have a program that is 'as needed'; when volunteers are signed on, when programs begin/change, and for different positions

The 'other' option allowed organizations to write in what they used.

- Four organizations don't have/use any volunteers
- 11 organizations use word of mouth 14%, three of which only use this method
- 13% of organizations recruit volunteers through their membership, and half of these nonprofits (5), only use this method
- 5 organizations use outreach through their program
- 8% use other media, including print advertising, radio, and telephone contact
- Two organizations only use professional outreach to gain volunteers

The Nonprofit industry is fueled by volunteerism. In fact, the nonprofit sector is unique in that it affords citizens an opportunity to direct their personal resources towards addressing the needs of their community.

What's included in your Volunteer Training?

Organization mission and vision 61%

Professional and development 23%

Organization harassment policies 21%

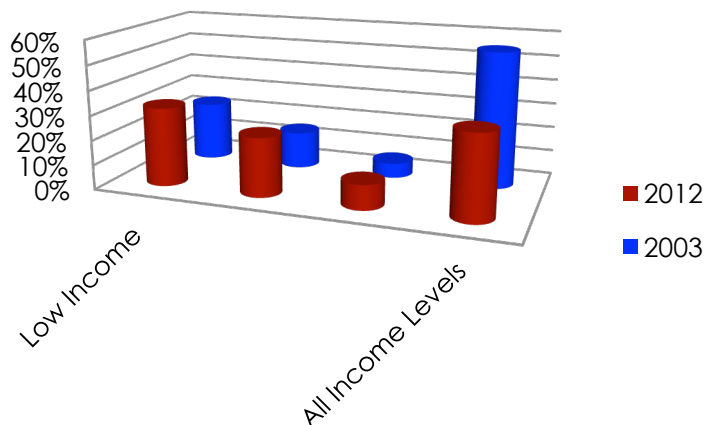
Emergency/disaster procedures 24%

Education 29%

- 2 organizations hold weekly volunteer training
- Over half of the organizations have volunteer training programs that include the organization mission and vision as well as training related to the programs they will be helping with.
- 13% include 'other' training, which consist of certifications and more in-depth, specific training provided internally or with outside groups

Social IMPACTS

Levels of Income Served by % 2012 vs. 2003



Comparisons between 2003 and 2012 show a shift away (21%) from nonprofits serving all income groups and a shift toward specifically serving lower-income groups.

- The top three geographic areas served by Monterey County nonprofits were 'All of Monterey County' at 58%, followed by the Salinas Area at 28%, and Monterey Peninsula at 25%.
- Other' areas (28%) that Monterey County nonprofits serve are Santa Cruz Counties, San Benito Counties, "5 other counties", San Jose, San Luis Obispo, Santa Barbara, Ventura, all of California, 'the West Coast', tourists, travelers/visitors from all countries, developing countries, Africa, Uganda, and "anyone who needs help".
- These service areas are very similar to those reported in 2004. Notable exceptions were the numbers that serve the Salinas areas – which increased by close to 6% and the number serving the entire County – which declined by 17%.

Since the original report, the demographics of Monterey County and the fiscal sphere for nonprofits have changed affecting whom, where and how nonprofits serve.

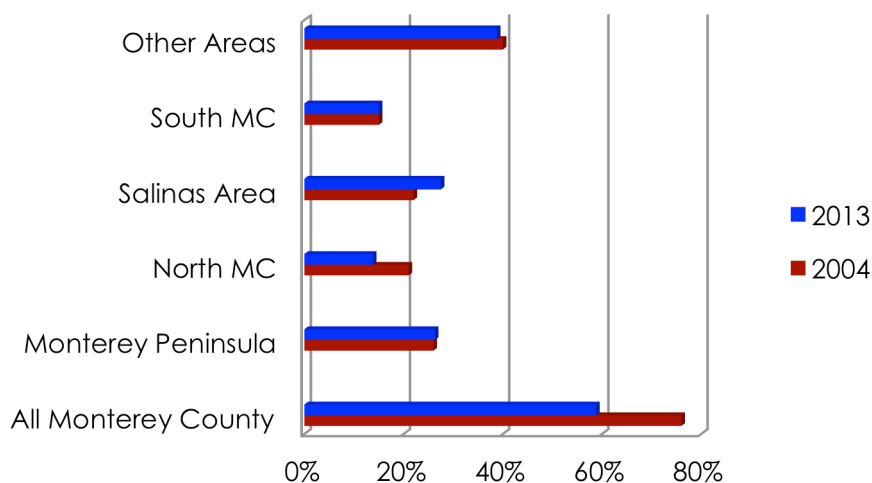
The economic brackets of the constituents served

Extremely low income \$0 - \$24,000	19%
Very low income \$25 - \$34,000	13%
Lower income \$35-47,000	19%
Median income \$48 – 68,000	5%
Moderate income \$69 – 89,000	9%
High Income \$90,000+	1%
All income levels	31%
Other	3%
	100%

- When the lower income levels are combined, the 'extremely low income level' (\$0-\$24,000), the 'very low income level' (\$25,000-\$34,000) through the 'lower income level' (\$35,000-\$47,000) are the three top percentages identified totaling over one half of the demographics that the nonprofit organizations serve.
- Comparison between 2003 and 2012 show a shift away (21%) from nonprofits serving all income groups and a shift toward specifically serving lower-income groups.

Areas of Services by Monterey County Nonprofits

Areas Served by Local Nonprofits Comparative 2013 vs. 2004



Areas of Service of nonprofits in MC (per surveys):

According to survey respondents, a comparison of the areas served by local nonprofits in 2013 over 2004 reveal a decline in each location except in the Monterey Peninsula area (26%) and South Monterey County (15%); both showed no change. The only location that showed an increase (5.5%) over the 2004 figure of 22% was the Salinas area.

The Areas of Service Graph depicts that in 2013, 58% of

The new breakdown is likely explained by a greater number of organizations focusing on one specific region rather than across Monterey County.

13.8% of respondents serviced the Monterey North County compared to 21% surveyed in 2004, an additional decline of 7%. The difference could be due to tighter budgets and gas prices that may have caused Nonprofits to reconsider their reach into the more remote or distant areas of Monterey County.

The percentage related to Other Areas served outside Monterey County remained similar between 2004 and 2013 (40% versus 39% respectively). More information was obtained about this category during the 2013 survey that revealed that 13.8% specifically serve the Big Sur Area. Of the 80 respondents, 5 also reported serving the counties of Santa Cruz and San Benito, while 3 others served San Luis Obispo County and 5 other counties including Santa Barbara and Ventura. Additional "areas" served by 6 of the nonprofits were global or international markets and 4 organizations reported serving tourists and foreign travelers.

** Respondents clicked on multiple answers.*

Social - Constituents Served



Nearly six million people benefit from the program and services that Monterey County nonprofits provide. These organizations range from delivering skills training to assisting those with mental health needs to keeping the children of Monterey County safe. While both large and small nonprofits have play an important role in serving our community, 4 organizations have played particularly important roles.

2012-2013 Survey data:

The current survey results revealed that there were 5,729,183 individuals directly served in 2012 according to 70 respondents (out of the 80 surveyed; 10 did not answer that question).

The growth in total number served in 2011 (5.7 million individuals) over the number served in 2003 (3 million individuals) is 2.7 million. A closer look revealed that 4 organizations played a significant role in serving large constituent bases in the Community.

The following nonprofit organizations are considered outliers to the typical nonprofit in MC: Ag Against Hunger 3M served (where each meal might count as one individuals served); Monterey Bay Aquarium 1,888,899 served (including international tourism); The Offset Project 435,000 served; and Alliance on Aging 35,000 served. Inclusion of these 4 organizations skew the mean average of individuals served, which was calculated at 81,845.

Thus, it would be more appropriate in this case to use the overall median number of individuals served in 2012. Although the medians among nonprofit sectors vary, the overall (average) median across all sectors was 2,060. This is approximately the same as the median reported in 2003. However, overall inclusion of the 3-4 larger nonprofits reveals a definite "growth trend" that is expected to

Photo courtesy of <http://500px.com/kcabreira>

Social - Constituents Served continued...

Total Individuals Reached Through Direct Programs



	Mean	Median
Overall	81,850	2,060
Agriculture	1,000,880	2,120
Arts, culture, and humanities	6,135	6,100
Education	107,820	1,270
Environmental	117,870	3,350
Health and Mental Health Services	1,670	400
Human Services	6,020	3,000
International and Foreign Affairs	4,500	4,500
Mutual/member Benefit	2,000	2,000
Public & Societal Benefit	2,680	550
Real estate and Housing	Not Available	Not Available
Religious	400	400

5,729,183: Estimated total number of individuals reached through Direct Programs in 2012 by nonprofits in Monterey County per the 72 of the survey respondents.

The mean figures in the table on the left are skewed by single large program activities or those utilizing electronic media with greater "reach".

As a result both the mean and the median results are provided. The median number of constituents served range from 400 to 6100, and the overall median of just over 2000 reached by nonprofits is a representative number for most respondents.

The average number of nearly 82,000 is influenced by a handful of very large organizations. This is well illustrated by the agriculture category, which reaches a mean of over a million.

Social - Non-English Speakers in Monterey County

What languages are spoken among those individuals that the organization serves?

- 73 survey respondents (91%) showed that the primary non-English speaking language spoken among individuals they serve is Spanish. This is followed by primarily English speakers at 70%. Chinese is the third highest language used by the individuals the organizations serve.
- The 'other' category based on 17 responses (21%) identified other languages such as indigenous tribes of Mexico (*Triqui, Mixteco, Zapoteca*, etc.) by 5 respondents; 4 organizations identified European languages such as Russian, French, German, Italian, and Polish; other organizations identified serving less

utilized languages such as Khmer of Cambodia, Luganda of Uganda; Bambara of Mali, Rawanda, Democratic Republic of Congo, and Uganda, and sign language; 3 organizations responded that they serve 15-100 additional languages.

- There were 80 respondents and multiple options were provided.

What percentage of people served are primarily non-English speaking?

- The Agriculture sector and real estate/housing sectors show the highest percentage of non-English speaking people served by nonprofits in Monterey County. Both sectors show 80% average, both by the average and the median. This is consistent with the PESTLE Social research that identified large immigrant populations (primarily Spanish speaking) in the agriculture sector that require housing, human services, health and mental health services. According to the survey results, all of these sectors are among the top four categories for highest averages and medians.



Photo courtesy of www.montereycountyweekly.com



Social - Support for Non-English Speakers

What non-English language(s) support do you provide?

- Survey respondents (57) indicated that the primary non-English speaking language supported by their organizations is Spanish at 71%.
- Many organizations (19 or 24%) are unable to provide any support to any of the numerous languages spoken in Monterey County.
- The 'other' category includes additional languages and modes of support provided such as *Portuguese, French, German, Russian, Polish* ("15 others"), *5 indigenous tribes of Mexico (Triqui, Mixteco, Zapoteca, etc.)*, *English Language Development (ELD)*, *Google translations for You Tube*, and "on an ad hoc basis".

What languages are spoken among those individuals that the organization serves?

Spanish	91%
Vietnamese	23%
Japanese	21%
Chinese	26%
Korean	21%
Samoaan	10%
Tagalog	15%
Tongan	9%
Hawaiian	8%
Arabic	14%
English	70%

What non-English languages(s) support do you provide?

Spanish	71%
Vietnamese	6%
Japanese	6%
Chinese	6%
Korean	3%
Samoaan	1%
Tagalog	5%
Tongan	0%
Hawaiian	1%
Arabic	3%
None	24%
Other	18%

Photo courtesy of en.wikipedia.org

Social - Non-English Speakers Outreach



Gratis
*información en español
sobre las bicicletas:*

<http://marilyneh.com/blog/resources/en-espanol>



What type of education outreach materials/services does the organization provide in languages other than English?

- Printed materials rank as the highest form for education outreach provided in other languages (44 responses or 55%).
- The next highest percentage is "None" which is 34% of the responses received. This is a significant portion and may represent the difficulty in providing outreach materials for the vast variety of different languages identified in the two survey questions above.
- Website and Translation services ranked third and fourth at 24% and 23%, respectively.
- Video/Audio ranked the lowest for education outreach materials in languages other than English.
- There were 80 respondents and multiple answers options were provided.

Non-English types of Outreach Materials

Printed materials	55%
Website	24%
Video/Audio	11%
Translation services	23%
Interpretation services	19%
None	34%

Ciclovia Salinas



Where the Streets are Yours! ¡Donde las Calles son Suyas!

Technology IMPACTS

Technology has profoundly changed nonprofits in a plethora of ways that include enabling them to expand their reach, improve and deliver their programs and to providing new methods to fundraise.

Organizations are using social media in the following ways

- 79% of organizations use social media to create and publicize information about upcoming events and service changes
- 39% of organizations use social media to promote educational tools
- 80% of organizations use social media to stay connected with the community
- 65% use social media to publicize fundraising efforts and gather funds
- 32% use social media to share resources
- 15% do not use social media

How social media are impacting organizations

- 55% use it to increase the reach of their programs/services
- 71% use it to increase in visibility of their organization
- 54% use it to increase community participation
- 25% use it to increase funding opportunities
- 21% use it to increase funds received
- 11% have seen little or no impact
- 11% do not use social media
- 6% responded with "Other"

Other

Respondents that marked "Other," did so for the following two reasons:

- Will be getting internet soon
- Have no information at this time

Top 3 Social Media Uses

To stay connected with their communities	80%
For publicizing events and service information	79%
To publicize or gather fundraising support	65%

Media platforms used by organizations to reach those they serve?

Organization Website	92%
Email	89%
Facebook	80%
Twitter	25%
Integram	4%
Blogs	17%
Newsletters (print)	45%
Newsletters (digital)	60%
Telephone	27%
Other	6%

The following technology tools are assisting nonprofits operations and/or expanding their ability to serve constituents more effectively

Software applications (apps) to deliver services	31%
GPS tracking	4%
Big data analytics	9%
Free technology and software	49%
None	11%
Other	20%

Financial transaction tools 70%*



The use of technology by modern nonprofits has been Transformative:

- Many nonprofits are utilizing Software applications (apps) to engage and offer services and information to a wider set of constituents, consistent with that has been seen in the private sector. Examples of nonprofit produced apps are the Seafood Watch app from the Monterey Bay Aquarium and the YFinder app from the YMCA.
- Conversely, some tools such as GPS tracking (3%) and Big Data (4%) had much lower user rates, indicating that these tools have not gained the same traction into the nonprofit sphere.

Additional technology information:

- "Other" tools include: email, telephone, Office 365 and eTapestry.
- Only a scant 15% didn't use any social media.

<http://boldandfierce.com/the-social-media-phenomenon-a-discussion-with-my-husband/>

Environment IMPACTS

While environmental nonprofits constitute only eight percent of our respondents, survey results found that many other local organizations are working to protect and conserve the natural environment that draws people from across the world to Monterey County.

Top 3 Environmental Impacts Organizations are evaluating/tracking

Recycling/waste*	29%
Water conservation	20%
Other recycling	12%

Organizations evaluate or track their environmental impact in the following ways:

Recycling/waste*	29%
Composting emissions	10%
Carbon emissions	1%
Water conservation	20%
Other recycling	6%
N/A	48%
Other	8%

* Recycling/waste diversion

Environmental Impact evaluation and tracking in practice

- Organizations that were tracking/evaluating their environmental impact did so in the following ways:
 - Recycling “everything” and encouraging recycling
 - recycling off-site (at events, etc.)
 - Creating recycling waste at workshop policies
 - Building to “Build it Green” construction standards.
 - Using compostable plates and utensils and not bottled water
 - Creating little waste
 - Using solar energy
 - Turning off lights and washing full loads of laundry, etc.
 - Offering student led programs
 - Donating equipment, reusing goods and furniture, and promoting re-use
 - Placing a timer on sprinklers and engaging in composting, vermiculture, and small scale gardening
 - Using LEED certified facilities

Additional Information

Almost ½ of respondents do not evaluate or track their environmental impact. 12 percent of nonprofits replied that tracking of environmental impact had no relevance to their organizations, meaning they didn't feel environmental stewardship was tied to the mission of their organization. Only one organization provided metrics of their recycling/waste diversion efforts.

Does your organization work towards the preservation or conservation of any of the following?

- Open spaces 16%
- Wildlife (endangered and threatened) 11%
- Marine environments 6%
- Marine wildlife 5%
- Historic structures 8%
- Land use areas 12%
- Local environmental issues 18%
- Domestic animal rescue 2%
- Urban areas (Parks, Housing developments, etc.) 8%
- N/A 48%
- Other 7%

Environmental - Renewable Energy & Conservation



Monterey County organizations are helping to promote renewable energy through the following ways

Printed materials (information)	10%
Funding support	1%
Expertise for projects	2%
Environmental advocacy	6%
Educational workshop	11%
Lecture/speaking	
Engagements	4%
N/A	59%
Other	10%

County organizations are working to preserve or conserve the following areas

All Monterey county	18%
Monterey Peninsula	6%
North Monterey county	1%
Salinas area	6%
South Monterey county	2%
Big Sur area	4%
N/A	44%
Other	14%

Additional information:

Organizations that checked 'Other' said:

- Organizations that checked "Other" are promoting renewable energy by: providing tours of LEED facilities, providing programs for girls, talking to the staff, funding organizations that promote renewable energies, sharing information, providing professional expertise, using electric vehicles, are installing solar,
- Organizations like CHISPA are working to make sure their organizations meet green standards and are supporting renewable energy and sustainability initiatives.

- The focus of most preservation and conservation is taking place throughout Monterey County (18%); whereas focused work is taking place primarily along the Monterey Peninsula and the Salinas Area.
- "Other" locations where organizations were active in environmental protection include Carmel Valley, Salinas Valley, King City, Marina, Point Lobos, and Fort Ord.
- Two organizations noted Fort Ord, all additional "other" regions were only mentioned once.

Programs and Services

Respondents indicate that high percentages of the Monterey County organizations are dedicated to using most of their budgets toward programs/activities.

Our data does not show the actual amount of their budgets allotted for programs/services. However, nonprofit industry standards prescribe that 65%-75% of budgets (without running deficits) are appropriately spent on Programs/Activities. This fiscal emphasis has had a clear impact on the ability of organizations to expand their net of care, which is evident upon seeing the incredible growth in those served throughout Monterey County over the last 10 years.



Photos courtesy www.montereycountygives.com and www.cfmco.org

This next section provides an insight look into how organizations have developed over the last five years as well as shows the trends in how Monterey County nonprofit organizations hope to grow in the upcoming years.

CHANGES IN SERVICE OVER THE PAST 5 YEARS

The resilience of the nonprofit sector can be seen in their response to the recession and its after-effects over the last 5 years. The majority of organizations have successfully been able to stabilize or increase individuals served.

Changes in Total Individuals Served Over LAST 5 Years by percentage

79% (or 63) of the 80 surveyed organizations experienced an increase in the number of individuals reached/served; 10 organizations (or 12%) experienced no change; and 7 organizations (or 9%) experienced a decline in service.

Main Contributors for the INCREASE in Individuals Served during LAST 5 Years

The top two reasons given by the 71 respondents regarding increases in number of individuals served during the last 5 years were 'increased demand for services' at 58% and 'more efficient use of resources/procedures' at 23%.

The 'other' category (34%) comprises a variety of reasons some identified as program development/increased offerings (6 responses), advertising (3 responses), program awareness, social media outreach, expanded geographical area, changes in laws, online training, and new leadership.

Reasons for the changes in total individuals served over last 5 years

Demographic changes	7%
Increased demand for services provided	58%
Economic changes on a constituent level	10%
Economic changes at an organizational level	8%
More efficient use of resources/procedures	23%
I don't know why	1%

Reasons for decline in total individual served over last 5 years

Demographic changes	4%
Increased demand for services provided	0%
Economic changes on a constituent level	6%
Economic changes at an organizational level	3%
More efficient use of resources/procedures	1%
I don't know why	0%
N/A	91%

11 nonprofits responded to this question

LAST 5 YEARS

Nearly 80% of responding organization experienced an increase in the number of people served over the last 5 years.

Multiple answer options were allowed for each respondent in order to capture the 'total number of reasons for the increase or decline in people served.

CHANGES IN SERVICE OVER THE PAST 5 YEARS Continued ...

Main Reasons for the INCREASE in Number of Programs/Services offered in the LAST 5 Years

- The top 3 reasons for the increases were due to 'additional services added to meet the needs' of the community (58%), increase in resources (44%), and 'increased scope of mission' (16%).
- The 'other' category was explained as increases due to increased requests for services.
- Multiple answer options were allowed for each respondent in order to capture the total number of reasons for increase, thus there 126 responses for the 45 respondents that experienced increases in their programs/services offered in the last 5 years.

Number of Programs/services offered INCREASED or DECREASED during the last 5 years

Increase	58%
Decrease	8%
Stayed the Same	34%

Of the 77 respondents, 58% realized an increase in their program/services over the last 5 years and only 8% experienced a decline. About 1/3 stayed the same (no change).

Main Reasons for the DECREASE in Number of Programs/Services offered in the LAST 5 Years

- The survey showed 6 organizations (or 8%) of the 77 respondents experienced a decrease in the number of programs offered in the last 5 years. Of the 6 organizations, 83% reduced program/service offerings due to a decrease in funding, grants, and in-kind assistance resources. Only one was due to lower enrollment.

Reasons for Increase in number of services able to provide

Increase in staff and/or volunteers	36%
Increase in resources (funding, in-kind assistance, etc.)	51%
Increased scope of mission	44%
Additional serviced added to address unmet needs	58%
Redevelopment of current services	18%
Increased efficiency of management systems	22%
I don't know why	0%
N/A	33%
Other	18%

Changes in Total Individuals Served Over Last 5 years by percentage:

- 79% (63 of 80 surveyed) experienced an increase in the number of individuals reached/served.
- 12% experienced no change.
- 9% experienced a decline in service.



Photo courtes of <http://marilynych.com/blog/master-calendar-for-bicycling-monterey-county.html>

ANTICIPATED CHANGES IN SERVICE - NEXT 2 YEARS

Most nonprofits face the future with optimism and hope to continue to increase services to the community.

How has organization been able to continue to provide services/programs in the midst of economic challenges?

- The top three approaches in maintaining programs/services during economic challenges have been 'greater efficiency in organizational operations or processes' (48 responses or 60%), more active fundraising (37 or 46%), and increased networking and sharing of resources with other nonprofits (26 or 33%). The bottom three tactics have been 'pay cuts' (14%), 'offering fewer services/programs' (10%), and 'lay-offs' (8%).
- The 'other' category (28%) included approaches such as work more/longer for same pay, pursue growth, increase of demand, offer unique programs/services, started a revenue making business to offset funding gaps, increase local sponsors, and budget management. Multiple answers were provided from the 80 respondents.

Main Reasons for Expected DECREASE (if applicable) in Demand for Programs/Services in the NEXT 2 Years

- Only 9 organizations responded to this survey question but multiple answers were provided. The 'other' category with 4 responses (or 44%) provided reasons for decrease in services such as services will be dependent upon elderly demographics and competition from similar organizations; 2 responses were N/A.

Reasons for Decrease number of services

Decrease in staff and/or volunteers	0%
Decrease in funding	11%
Reassessed mission	0%
Reassessed existing services/program	11%
No additional services/programs serving unmet needs	11%
Don't know	22%
Other	44%

Programs/Services organization expects to add within NEXT 2 Years

- Additional programs/services have a wide range. These include additional school programs, vocational training, bioethics education, lab garden education, care planning workshops, transitional housing for young men (18-24) and translational housing, individuals and families with children programs, mentoring and parent programs, Latino women health education, increased elderly meal program, aging services, respite and adult services, health and wellness in aging and enrichment programs, community CPR training, at-risk youth/families/mental health/substance abuse programs, additional crisis program, immigration services, expand free legal clinics, and outreach to underserved in Salinas Valley. There are also plans for dance and graphic design adult workshops, art and music theatre/community studio, new Latino Nutcracker, public school ArtSmart program, local youth music education, opera training, coed soccer competition teams, and youth aquatics sports and swim programs.

ANTICIPATED CHANGES IN SERVICE - NEXT 2 YEARS

Continued...



Photos courtesy of <http://www.cfmco.org/index.cfm/id/4/Grants-Support/> (right), <http://greatnonprofits.org/org/spca-for-monterey-county> (top left)

Programs to Add Within Next 2 Years	Respondents	Percent age
Restructure/expand current programs	27	33%
Add new programs	32	40%
More community outreach	7	9%
Work closer with other non-profits	3	4%
Grant giving	2	3%
Additional facilities	3	4%
No Response	6	7%
	80	100%

Programs/Services organization expects to add within NEXT 2 Years

Additional programs include after-school programs, LeadYoung social influencers program, and IT mentorship/digital training/repair clinics. There will be additional heritage area designation, new family housing and senior complexes, homeless veteran assistance, increased marine conservation, animal shelter and veterinarian services, solar power installation education, living history program, cultural programs/ poetry/ symposiums/ concerts, food bank expansion, and small organization support.

ANTICIPATED CHANGES IN SERVICE - NEXT 5 YEARS

Individuals Served (*Anticipated increase or decrease in number of individuals served over the NEXT 5 Years*)

Increase	74%
Decrease	1%
Stay the same	25%

A majority of the 80 organizations surveyed responded positively with only 1 (a religious organization) anticipating a decrease in number of individuals served. The majority of 74% expect numbers to increase and 24% expect the number they serve to remain the same over the next 5 years.

Main Reasons for the Expected INCREASE in Number of Individuals Served over the NEXT 5 Years

- The three top reasons for the expected increase in number of individuals served were 'additional services added to address unmet needs' at 39%, 'increase in resources' at 36%, and 'increase in staff and/or volunteers' at 23%.
- The 'other' reasons given included demographics, fundraising and development to meet mission, working to creating a more sustainable organization, and increased focus/effort on target audience.
- N/A responses reflect those organizations that expect 'no changes' in the number of individuals served in the next 5 years.

Expected Demand for Organization's (number) of Program/Services offered in the next 5 years was:

Same	15%
Less	1%
More	78%
Don't know	6%

Main Reasons for the Expected DECREASE in Number Individuals Served over the NEXT 5 Years

- Of the 32 organizations that responded to this survey question, only 1 organization expects to decrease the number of individuals served. The reason was due to competition by similar NGO.

Programs/Services offered in the NEXT 5 Years (*Expected Demand for organizations*)

- The majority of organizations (62 or 78%) expect greater demand for their programs/services in the next 5 years. Only 15% expect the demand to remain the same.

Reasons for increase in individuals served:	
Increase in staff and/ or volunteers	23%
Increase in resources (funding, in-kind assistance, etc.)	36%
Increased scope of mission	19%
Additional services added to address unmet needs	39%
Redevelopment of current services	16%
Increased efficiency of management systems	14%
I don't know why	0%
N/A	23%

ANTICIPATED CHANGES IN SERVICE - NEXT 5 YEARS *Continued...*

Reasons for INCREASE

Increase in staff and/or volunteers	31%
Increase in funding	40%
Reassessed mission	21%
Reassessed existing services/programs	36%
Additional services/programs reaching previously unmet needs	66%
Don't know	2%
Other	16%

Main Reasons for Expected INCREASE in Demand for Programs and Services offered in the NEXT 5 Years

- 62 organizations responded to this survey question but multiple answers options were provided. The top three reasons for expected increase are 'additional services/programs reaching previously unmet needs' (66%), increase in funding (40%), and reassessment of existing services/programs (36%).
- The 'other' category is comprised of reasons such as (5) demographic changes (increase in elderly and increase in general population), increase in tourism, increase in illness, reaching new constituents, and expanding geographic scope.

How to Continue Services

Offer fewer services/programs	10%
More active fundraising	46%
Fundraise through alternative channels	25%
Increase reliance on volunteers	26%
Pay cuts	14%
Lay-offs	8%
Increase networking among other nonprofits to share resources	33%
Greater efficiency in our operations or processes	60%
Little or no change has been needed	15%
Other	28%

**Alternative channels include social media, website, etc.*



Photo courtesy of
<http://www.cfmco.org/index.cfm/id/15/Community-Leadership-Project/>

UNMET Needs



While the arms of nonprofits stretch wide, many organizations are concerned that some people are falling through the cracks. Our survey asked Monterey County nonprofits what did they perceive as unmet needs in the community.

Needs That Monterey County Non-Profits believe Remain Unmet

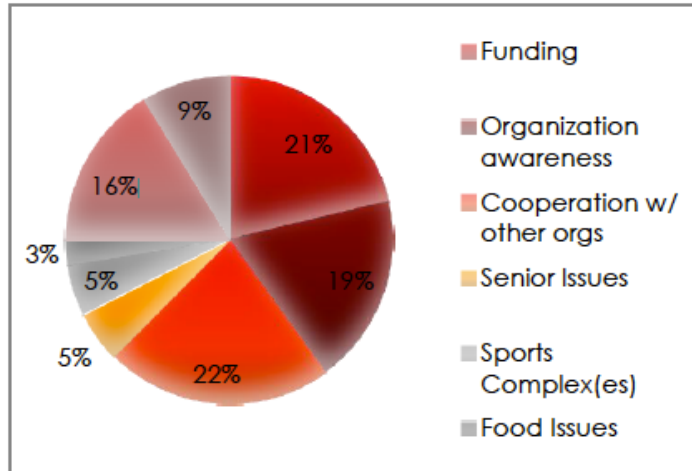
Unemployment and underemployment	25%
Housing issues	29%
Rising costs of living	29%
Hunger and/or nutrition issues	24%
Health issues and access to health care	25%
Lack of services and/or access for those mental and/or physical challenges	28%
Lack of educational services or access to training	19%

Other Concerns Include:

- Lack of quality, affordable child care
- Environmental literacy and resource conservation needs
- Limited access to the arts
- Lack of single parent legal advocacy
- Lack of homeless programs
- Need of more educational support for families to better understand the school system and the current changes (Common Core standards)

Photo courtesy of salinasvalleyfordlincoln.blogspot.com

What More Needs to be Done in Monterey County?



Unmet Needs continued...

What more needs to be done?

Organizations feel that more cooperation with other organizations, funding, and organization awareness are the most needed things amongst non-profits in Monterey County

Below are some key cross-sector responses from organizations:

- Annual non-profit summit
- We spend 4x on seniors than youth – youth are our future!
- More coordination for increased impact – knowing gaps/overlaps and addressing them for efficiency
- Facilitating collaboration between similar programs to increase efficiency and leverage resources
- Financial support to allow us to provide more in-depth training for individuals and organizations in the areas of team building, critical thinking, problem-solving, and ways to get various groups to come to the table, talk with each other and build connections rather than continue with so many silos
- Municipal investment in facilities to support non-profit youth sports organizations



Photo courtesy of www.mymuseum.org

Shared Stories – Revealing the real impact of non-profits on the Monterey County community

Everyone's Harvest - In its ten years of operations, EH has developed a network of farmers' markets, a farm stand, and events that engage people in healthy food dialogue and inspire families to eat more fresh local fruits and vegetables. The organization's current projects include the facilitation of community gardens for the underserved through partnerships and the following:

Certified farmers' markets in Alisal/East Salinas, Natividad Medical Center, Salinas Valley Memorial Healthcare, Marina, and Pacific Grove. These markets:

- Accept Electronic Benefit Transfer (EBT) - the modern food stamp - called "Cal Fresh," allowing access to healthy food for low-income families. In 2013, EH markets conducted \$7,994 in EBT transactions and distributed \$3,184 in EBT bonus vouchers through a Market Match program.
- Host events in collaboration with groups from our local communities to celebrate culture and healthy food and provide an information/outreach booth and children's activity table.
- Conduct healthy interactive cooking workshops that engage youth and their families, led by chefs who teach nutrition, culinary skills, and preparation of healthy meals. In 2013, EH conducted 14 interactive family-focused workshops with a total of 207 participants receiving \$2,070 worth of "produce cash" to buy fresh produce at the farmers' markets.

Respondent Stories

Arts council for Monterey County - We currently have an amazing project in Pajaro installing a 2400 sq ft mural, trail markers and historic pavers for their new community park. We are part of the county's \$5 million grant from the State of California. We provided part-time, temporary work to dozens of artists including CSUMB students, Pajaro graffiti artists, and students from East Salinas. We also provided work to Monterey Signs and Diamond D Contractors. We helped launch a new social benefit business Hijos Del Sol, providing them temporary space at Northridge. Hundreds of students have also been involved and the whole community is already celebrating.... We find over and over that the arts are the answer...

Youth Arts Collective - Because of the work we do at YAC many of our members have gotten scholarships to major universities and art schools based on the art they have done at YAC. Many of our kids sell their art at YAC and community exhibits. They are also often hired for part-time jobs at local art related businesses. Many have gone on to art related professions. One example: one of our alumni who we hired to assist in the program was hired to be an art teacher at York School this past year.



Monterey County Nonprofit stories continued...

Lyceum of Monterey County - Our Expanding Your Horizons program reaches about 300 pre and teenaged girls to engage them in STEM careers. Our Cyber Adventures and Space Camps encourage interest in sciences. Our academic programs inspire youth to strive for academic and personal success.

The Offset Project - We are proud to use groups like Sunstreet Centers drug and alcohol rehab program and Girls Inc for our environmental program operations. Funds go back into these important social and economic programs.

Sun Street Centers - Reuniting broken families - families in recovery, reunited with children that have gone into foster care system; and teaching parenting skills. Avoiding the next DUI injury or death through education and counseling. Developing the next community leaders through regular volunteer and employment opportunities for teens age 14 through college years.

Kernes Adaptive Aquatics - Our programs help people maintain and improve health and well being through adaptive aquatic exercise. This can reduce the incidence of secondary health conditions, such as diabetes, obesity, heart conditions, etc. People who are healthier remain more independent and productive, placing fewer burdens on other health and social services, such as hospitalization and long-term care.

Carmel Valley Community Youth Center - CVCYC provides public access to high-quality swimming lessons to three hundred elementary-age children each summer, and free swim instruction to another three hundred Tularcitos students in the spring and fall two hours per week, and provides access to recreational swimming to families during the summer months. And we have the unique advantage of being an outdoor pool, and in a warm, sunny location.

Finally, our aquatics program provides employment to teen and college-bound students. This summer-season's lifeguard and snack bar payroll averaged \$17,000 per month. These earnings in many cases are needed to assist family household support, and in other cases are saved for college-related expenses.

Community Foundation for Monterey County - Our grants have this impact in many ways. We provide very few direct services. LEAD Institute has had the social benefit of participants taking on greater positions of responsibility, and being prepared to do so. While we can't guarantee it across the board, anecdotally we see them being more effective nonprofit leaders and managers, which translates into better services in the community.

CHISPA - Affordable Housing combined with community services allows our residents to stabilize and improve their lives.

Photo courtesy of www.theoffsetproject.org

Who Responded to the Survey?



Position in Organization	Respondents	Percentage
CEO	5	6%
Executive Director	37	46%
Board Member/Chair	6	8%
President/Founder	9	11%
Director of Development, Community Relations, Advancement, etc.	14	18%
CFO/Treasurer	4	5%
Administrator	3	4%
Volunteer Coordinator	1	1%
Unknown	1	1%
	80	100%

Nearly half of the respondents were Executive Directors. The rest of respondents consisted of organizations Directors (18%), President (11%), Board Member (8%), CEO (6%), or the CFO, Administrators or Volunteer Coordinator.

Photo courtesy of <http://www.oyster.com/monterey-county/hotels/portola-hotel-and-spa-at-monterey-bay/photos/amenities--v1868246-70/>

APPENDIX

Methodology and Multiplier Effect – Appendix A

The methodology employed included the compilation of tax filing information (form 990) on the 1,152 nonprofits in Monterey County and a direct sample of organizations categorized as 501c3's with \$25,000 plus of revenues in 2011 and 2012 that filed US form 990 (the sample excluded churches and private foundations). The sample drawn applied the same criteria as the original study published in 2005.

Of the 378 such organizations, contact information was available for 320 of them. The response rate to the survey was 25% or 80 respondents. A stratified sampling technique was employed using emails and telephone contact to obtain a "representative" sample of the population of nonprofit organizations by category (e.g., agriculture, religious, education, and real estate/housing). Responses were obtained in all categories in a relatively close proportion to the number in the population.

Other data on nonprofits was gathered from a variety of sources including the National Center for Charitable Statistics (NCCS) and the Nonprofit Almanac. These and other sources are cited in the text as appropriate. Many comparisons are drawn throughout the report with data derived in the original 2005 Study.

In regard to the economic multiplier used, there were a variety of comparisons made with studies using multipliers. For example, a recent study on the Agriculture Industry in the County applied an economic multiplier of 1.6 (The Impact of Agriculture on the Economy of Monterey County, 2011, p. 5).

The "sub-industries" within the nonprofit category are quite diverse and ideally a separate multiplier would be constructed for each one. However, to maintain consistency with the original study, the same aggregate multiplier used in 2005 (1.79) was applied so that direct comparisons could be drawn between the two studies.

UNDERSTANDING AND USING ECONOMIC MULTIPLIERS

"Economic multipliers are always greater than 1.0 – which represents the direct effect. The increment above 1.0 represents the indirect effects from the initial spending. To illustrate, an output multiplier of 1.8 indicates that a \$1 increase in final demand for a particular industry will result in \$1.80 in demand for goods and services throughout the economy (\$1.00 direct + \$0.80 indirect).

The magnitude of the economic multiplier (how much greater than 1.0) depends upon the particular mix of industries in a specific region and the patterns of economic exchange between the various firms in the region (in other words who buys what from whom). Certain industries have higher or lower indirect effects based upon the impact of that industry's on other economic activity.

Larger geographic regions of study will have larger multipliers since fewer dollars 'leak' from that region (or more dollars stay in that region). Large urban areas tend to have higher multipliers than rural areas. Accordingly, the economic multipliers for Monterey County will be lower than for California."

Action Council of Monterey County.
For the Common Good, 2005, p.13.

Survey Questions – Appendix B

Section 1A: Organizational Information

1. Name of your non-profit organization:

2. Federal Employer Identification Number (EIN)

3. Number of full-time paid employees? (32 hours or more per week) _____

4. Number of part-time paid employees? (Less than 32 hours per week) _____

5. What are the total numbers of volunteers in your organization? (Excluding Board and Committee members) #: _____

6. Total number of volunteer hours for your fiscal year ending in 2012: (Excluding Board and Committee member's volunteer hours) #: _____

7. How does your organization solicit volunteers? *(Please check your top two)*

- ☐ Reach out to local colleges and high schools
- ☐ Offer volunteer opportunities via Social Media
- ☐ Offers volunteer opportunities through your Website
- ☐ Conduct volunteer recruitment events in your community
- ☐ Other (specify) _____

8. Does your organization offer a volunteer orientation?
None ___ Once a year ___ More than once a year ___

9. What is included in your organization's volunteer training program? *(Please check all that apply)*

- ☐ Introduction to the organization
- ☐ Professional Development training
- ☐ An overview of organization's harassment policies
- ☐ Emergency/disaster procedures
- ☐ Others (specify) _____
- ☐ No training provided

Section 1AB: Service and Program Impact

10. What is the primary category that best describes your non-profit organization? *(Select one)*

- ☐ Arts, culture, and humanities
- ☐ Education (youth development, training, education and outreach)
- ☐ Environmental, Open Land, wildlife/ marine life and animals
- ☐ Health and Mental Health Services
- ☐ Human Services (Employment and Job Training)
- ☐ International & foreign affairs
- ☐ Mutual benefit, membership benefit organizations, other
- ☐ Public and Societal Benefit (Human/ Civil rights, advocacy, community development, disaster response, public safety, etc.)
- ☐ Religion related, spiritual development
- ☐ Agriculture (Farmer's Rights, Food Security and Worker's rights)
- ☐ Real Estate and Housing
- ☐ Other (specify) _____

11. What are the 3-program/ activities that use the greatest portion of your organization's budget? Please specify the budget for each program and how many people were served in fiscal year 2012.

1 service

Program Budget \$ _____ People Served _____

#2 service

Program Budget \$ _____ People Served _____

3 service

Program Budget \$ _____ People Served _____

12. How many individuals did your organization reach through its total direct program activities during Fiscal year 2012?

LAST 5 YEARS

13. Has the number of individuals served increased or decreased over the LAST five years?

(Please provide estimate)

- ☐ Stayed the Same
- ☐ Increased _____ %
- ☐ Decreased _____ %

14. If there has been an increase in individuals during the LAST five years, what are the main reasons behind the higher numbers of people served? (Check the top two reasons)

- ☐ Demographic changes
- ☐ More of a need for certain services
- ☐ Changes in Funding (due to economic conditions and/or changes in your capacity to serve)
- ☐ More efficient processing /distribution procedures
- ☐ I don't know why
- ☐ Other (specify) _____
- ☐ Not Applicable

15. If there has been a decrease in individuals served during the LAST five years, what are the main reasons behind the lower numbers of people served? (Check the top two reasons)

- ☐ Demographic changes
- ☐ Less of a need for certain services
- ☐ Changes in Funding (due to economic conditions and/or changes in your capacity to serve)
- ☐ Processing requirements have increased (e.g. more paperwork and/or more lengthy process)
- ☐ I don't know why
- ☐ Other (specify) _____
- ☐ Not Applicable

16. Has the number of programs and services your organization offers increased or decreased over the LAST five years? (Please provide estimate)

- ☐ Stayed the Same
- ☐ Increased _____ %
- ☐ Decreased _____ %

17. If there has been an increase in program or services during the LAST five years, what are the main reasons behind the higher numbers of programs delivered? (Check the top two reasons)

- ☐ An increase in staff or volunteers
- ☐ Additional resources (award, funding, donors, in-kind assistance, etc.)
- ☐ My organization has increased its scope of work (reassessed mission)
- ☐ To address an unmet need in the community or expand current services
- ☐ Due to efficiency in the processing system
- ☐ Other (specify) _____

☐ Not Applicable

18. If there has been a decrease in programs and services during the LAST five years, what are the main reasons behind the lower numbers of programs delivered? (Check the top two reasons)

- ☐ A decrease in staff or volunteers
- ☐ Reduced resources (award, funding, donors, in-kind assistance, etc.)
- ☐ My organization has decreased its scope of work (reassessed mission)
- ☐ Unable to meet the needs in the community
- ☐ Other (specify) _____
- ☐ Not Applicable

NEXT 5 YEARS:

19. Do you anticipate that the number of individuals served will increase or decrease over the NEXT five years? (Please provide estimate)

- ☐ Stay the Same
- ☐ Increase _____ %
- ☐ Decrease _____ %

20. If you expect an increase in individuals served during the NEXT five years, what are the main reasons behind the higher numbers of programs to be delivered? (Check the top two reasons)

- ☐ Demographic changes
- ☐ Changes in Funding (due to economic conditions and/or changes in our capacity to serve)
- ☐ More of a need for certain services
- ☐ Due to efficiency in the processing system
- ☐ I don't know why
- ☐ Other (specify) _____
- ☐ Not Applicable

21. If you expect a decrease in individuals served during NEXT five years, what are the main reasons behind the lower numbers of programs to be delivered? (Check the top two reasons)

- ☐ Not Applicable
- ☐ Demographic changes
- ☐ Unable to meet needs for certain services
- ☐ Changes in Funding (due to economic conditions and/or changes in our capacity to serve)
- ☐ Processing requirements have increased (e.g. more paperwork, more lengthy process)
- ☐ I don't know why
- ☐ Other (specify) _____

22. In the NEXT five years, do you think the demand for your organization's programs and services will be greater, fewer, or about the same as now? Please pick the most appropriate answer:

- ☐ Same
- ☐ Fewer
- ☐ More
- ☐ Don't Know

23. If you believe demand for your organization's programs and services will increase over the NEXT five years, please choose what you think will be the biggest drivers of demand for your services: *(Rank your top three according to importance, 1 = Most Important)*

- ____ An increase of staff or volunteers
- ____ An increase of resources (funding, donors, etc.)
- ____ My organization will expand its scope of work (reassessed mission)
- ____ My organization is offering a more effective approach to reach that target audience
- ____ Other (specify) _____

24. What programs do you expect to add?

25. If you expect a decrease in program or services over the NEXT five years, what are the main reasons behind the lower numbers of programs delivered? *(Rank your top three according to importance, 1 = Most Important)*

- ____ A lack of staff or volunteers
- ____ A lack of resources (funding, donors, etc.)
- ____ My organization has narrowed its scope of work (reassessed mission)
- ____ Another organization is offering a more effective program to reach that target audience; therefore we decided to eliminate the program
- ____ Other (specify) _____

26. What programs do you anticipate cutting?

27. How has your organization been able to continue providing services in the midst of economic challenges? *(Check all that apply)*

- ☐ We offer fewer services
- ☐ We more actively fundraise
- ☐ We rely on more volunteers
- ☐ Our staff has taken a pay cut and/or we have slimmed down our staff
- ☐ Greater efficiency in our operations or processes
- ☐ We have made little or no changes to our organization
- ☐ Other (specify) _____

Section 2 A: The Communities you serve

28. What is the geographical area served by your organization: *(Select all that apply)*

- ☐ All Monterey County
- ☐ Monterey Peninsula
- ☐ North Monterey County
- ☐ Salinas Area
- ☐ South Monterey County
- ☐ Specific cities in Monterey County (specify) _____
- ☐ Areas outside Monterey County (specify) _____

29. Which category best describes the primary economic group you serve? *Pick the most appropriate answer:*

- ☐ Unemployed
- ☐ Low income (\$1,000 - \$5,000)
- ☐ Low and Middle income (\$5,001 - \$50,000)
- ☐ Middle and High income (\$50,001-\$90,000+)
- ☐ High Income (\$90,000 +)
- ☐ All income levels
- ☐ Other (specify) _____

30. What percentage of the people that your organization serves primarily speaks a non-English language? _____ %

31. What languages are spoken? *(Please indicate the percentage of your constituents that speak the following languages)*

- ☐ Not Applicable
- ☐ Spanish _____ %
- ☐ An Asian Language (Vietnamese, Japanese, Chinese, etc.) _____ %
- ☐ American Indian/ Alaskan Native/ Hawaiian Native _____ %
- ☐ Other (specify) _____ %

32. If you provide in-language support to your non-English speaking demographic populations, in which languages is that support provided? (*Check all that apply*)

- ☐ Not Applicable
- ☐ Spanish
- ☐ Vietnamese
- ☐ Japanese
- ☐ Chinese
- ☐ American Indian/ Alaskan Native/ Hawaiian Native
- ☐ Other (specify) _____

33. If yes, what type of education and outreach materials do you provide in languages other than English to your demographic populations in Monterey County? (*Check all that apply*)

- ☐ None
- ☐ Printed Materials
- ☐ Website
- ☐ Videos/Audio

Section 2B: Financial Information

34. What are your organization's top three methods of fundraising? (*Rank your top three methods of fundraising, 1 = Most Important*)

- ____ Email Outreach calling for donations
- ____ Membership fees
- ____ Business Partnerships
- ____ Fundraiser events (Friendraiser, Gala event, contests, etc.)
- ____ Passive fundraising (collecting donations over the website)
- ____ Social Media and Crowdsourcing (Facebook, Twitter, Kickstarter, etc.) call for donations
- ____ Other (specify) _____

35. What sources provided your organization with financial support in 2012? Please estimate how much support you get (in percentages) from the following choices:

- ☐ Fundraising Events (including ticket sales, publications sales, merchandise, etc.) _____%
- ☐ Membership fees/dues: _____%
- ☐ Related Organizations (e.g. National or Umbrella organization and/or other partnerships): _____%
- ☐ Government Grants/Contributions: _____%
- ☐ Non-governmental Grants and Awards: _____%
- ☐ Donations, Contributions, and Monetary Gifts (including business sponsorship): _____%
- ☐ In-kind gifts (non-cash professional assistance, free legal help, goods, etc.): _____%
- ☐ Board of Directors: _____% * What percentage of BOD team contributes? _____%

- ☐ Investment Income: _____%
- ☐ Others (specify): _____%

36. How much of your organization's income (see question #35) comes from sources outside of Monterey County? _____%

37. What percentage of your 2012 total expenditures (including wages and salaries) was spent on the purchase of goods and services outside of Monterey County: _____%

38. Does your organization have a policy that encourages purchasing locally (within Monterey County)? Please pick the most appropriate answer:

- ☐ None
- ☐ Have local purchasing policy
- ☐ Purchase locally when possible

Section 3: Political and Legal Impacts

39. Has your organization produced or influenced laws or political outcomes that impact any of your constituents in Monterey County or beyond?

(*Check all that apply. Please indicate the topic if applicable*)

- ☐ Not Applicable
- ☐ Locally (Monterey County) Topic? _____
- ☐ Statewide (California) Topic? _____
- ☐ Nationally? Topic? _____
- ☐ Internationally? Topic? _____

40. What types of activities does your organization participate in? (*Check all that apply*)

- ☐ Education and Outreach
- ☐ Plan rallies and protests
- ☐ Send letters/emails to public figures
- ☐ Conduct Research and produce policy initiatives and reports
- ☐ Other (specify) _____
- ☐ Not Applicable

41. If your organization does not participate in political activities, please pick the best reason from below: (*Check all that apply*)

- ☐ Not our mission
- ☐ Don't have the resources
- ☐ Do not want to appear politically biased
- ☐ Would like to but don't know how
- ☐ Other (specify) _____

- ☐ Not Applicable

Section 4: Environmental Impact

42. Does your organization evaluate or track its own environmental impact? (e.g. *Annual CO2 offset of 200,000 lbs., 50,000 miles not driven, 1 ton of food averted from local landfill, etc.*)

- ☐ Not Applicable
- ☐ Recycling/Waste diversion Amount? _____ lbs.
- ☐ Composting Amount? _____ lbs.
- ☐ Carbon Emissions Amount saved? _____
- ☐ Water conservation Amount? _____ liters
- ☐ Carbon Emissions (use of public transportation, biking, etc.) Amount saved _____
- ☐ Recycling _____ Amount? _____
- ☐ LEED Certified facilities What level? _____
- ☐ _____ Amount? _____
- ☐ Other (specify) _____ Amount? _____

43. If you answered "N/A" to previous question, please provide the best reason why your organization does not track its environmental impact:

- ☐ No policy/program in place (yet)
- ☐ Don't have the resources (personnel, time, or funding, etc.)
- ☐ Would like to but do not know how
- ☐ Other (specify) _____

44. Does your organization work towards the preservation or conservation of any of the following? (Check all that apply)

- ☐ Open Spaces
- ☐ The Environment (parks, beaches, forests)
- ☐ Wildlife
- ☐ Marine Environments
- ☐ Marine Wildlife
- ☐ Historical structures and/ or land use areas
- ☐ Other (specify) _____

- ☐ Not Applicable

45. Please tell us which of these locations has your organization worked to preserve or conserve the environment (as addressed previous question): (Check all that apply)

- ☐ All Monterey County
- ☐ Monterey Peninsula
- ☐ North Monterey County
- ☐ Salinas Area
- ☐ South Monterey County

- ☐ South Monterey County
- ☐ Specific cities in Monterey County (specify) _____

- ☐ Elsewhere (specify) _____

- ☐ Not Applicable

46. Indicate how your organization helps to promote or proliferate the use of renewable energy (such as Solar, Wind, Biogas, Thermal, etc.) by providing any of the following to Monterey County residents: (Check all that apply)

- ☐ Not our mission
- ☐ Resources (printed materials, funding support, energy efficient materials, etc.)
- ☐ Expertise for projects
- ☐ Educational Workshops
- ☐ Lectures/speaking engagements

Section 5: Technological Impact

47. How is social media used in your everyday operations to help your organization? (Check all that apply)

- ☐ To make or publicize events or service announcements
- ☐ As an educational tool (e.g. such as posting informational articles or tips on Facebook, Linked-In, Twitter, organizational blog, etc.)
- ☐ As a platform to publicize fundraising initiatives or to gather funds
- ☐ As an engagement and resource sharing tool
- ☐ Other (specify) _____

- ☐ My organization does not use social media

48. How does utilization of social media impact your organization? (Rank the top three (3) uses according to importance, 1 = Most Important)

- _____ It increases the reach of our organization
- _____ It increases the visibility of our organization
- _____ It increases funding opportunities for our organizations
- _____ Other (specify) _____
- _____ My organization does not use social media at all or often enough to make an impact

49. What are the top three ranking media platforms that your organization uses to reach those you serve? (Rank your top three according to importance, 1 = Most Important)

- _____ Organizational Website
- _____ Facebook
- _____ Twitter
- _____ Instagram
- _____ Blogs

- ☐ Email
☐ Newsletter (print)
☐ Newsletter (digital)
☐ Telephone
☐ Other (specify)

50. What technology does your organization use to assist with operations and/or serve constituents more effectively?

- ☐ My organization does not use any of these technologies
- ☐ Financial transaction tools (such as the Square, PayPal, etc.)
- ☐ Apps (software applications) to deliver your service (such as the Monterey Bay Aquarium's Seafood Watch App, YMCA Finder, etc.)
- ☐ GPS tracking (utilizing Geographic Information Tracking or Google Maps to track geographical data.)
- ☐ Big Data Analytics (utilizing programs/organizations such as Teradata, ESRI, etc. to make data driven business decisions.)
- ☐ Free Technology & Software Programs (such as OpenOffice, Dropbox, Weebly, etc.)

Section 6: Evaluation

51. Indicate how you are evaluating the impact of your program/services: *(Check the best answer that applies)*

- ☐ We are not measuring impact
- ☐ Using Qualitative metrics
- ☐ Using Quantitative metrics
- ☐ Using both Qualitative and Quantitative metrics
- ☐ Other
(specify) _____

52. If you are evaluating the impact of the services/programs that you provide, please indicate what qualitative and/or quantitative metrics you are using. *Such as numbers served, amount of food distributed, number of students that went on to further educational programs, etc.*

-
- ☐ Not Applicable

53. When you evaluate impact, what is the time frame in which impact is measured? *Pick the most appropriate answer from below:*

- ☐ 0-6 months
- ☐ 6 months -1 year
- ☐ 2-5 years
- ☐ 5+ years
- ☐ Never

54. How many members are on your organization's Board of Directors? _____

55. What is the percentage of women and men on the Board of Directors?

Men _____% Women _____%

56. Please indicate the diversity of professional expertise on your board:

a. Percentage of industry professionals with expertise related to your program or service _____%

b. Percentage of industry professionals with expertise non-related to your program or services, such as:

Legal Advisors/Attorneys _____%

Financial Advisors/Certified Accountants _____%

Professionals with Business Acumen _____%

Communications _____%

Marketing _____%

57. Is there ethnic diversity among your Board of Directors?

(Please indicate percentages)

Latino American _____%

Asian American _____%

African American _____%

Caucasian _____%

Native American _____%

Others _____%

58. What percentage of Board of Directors fall into the following age ranges?

☐ Under 30 years old _____%

☐ 30 to 50 years old _____%

☐ 51 years old and above _____%

59. Does the Board of Directors have the following policies?

(Check all that apply)

☐ Financial conflict of interest policies?

☐ Board Compensation policies

☐ Mandatory retirement

☐ Term limit policies (if there are board term limits, please specify: _____)

Section 7: Storytelling

Almost done! This is the last section.

We end this survey on a lucky note: lucky section number 7! The following sets of questions are important for gauging the specific social and economic impact unique to your organization. Thank you again for your participation.

60. In your opinion, what more needs to be done in Monterey County relative to your type of programs?

61. Is there an unmet need you can identify in the County that isn't being addressed by any current non-profit or its services?

(Rank your top three according to importance, 1 = Most Important)

____ Unemployment and underemployment

____ Housing Issues

____ Rising costs of living

____ Hunger and/or nutrition issues

____ Health issues and access to health care

____ Lack of services and/or access for those with mental or physical challenges

____ Lack of educational services or access to training

____ Additional reasons

(specify) _____

62. Please provide any example or story concerning the economic and/or social benefits of your programs activities on the individuals you reach and/or the community at-large.

- ☐ *If you would like to be contacted to provide more information about your organization and its services and programs, please check the following box.*

Required Additional

1. Your Name, Email address and Phone number:

2. What is your position with the organization?
