

MAY 2018

NONPROFIT ASSESSMENT

AN INITIAL SCAN & SURVEY OF
PINELLAS COUNTY NONPROFITS

A joint project of



Foundation for a
Healthy St. Petersburg



NONPROFIT LEADERSHIP CENTER

RESEARCH AND DATA

FOR HEALTH EQUITY



Foundation for a
Healthy St. Petersburg





WELCOME

The Foundation for a Healthy St. Petersburg believes in evidence-based approaches to continually improve the lives of those in Pinellas County, especially those who experience health outcomes consistently 'less than' the norm. Dis-equity is most often found along the lines of race, gender, geography and income. Nonprofits in human services predominantly work with those facing equity challenges, and these organizations are critical to the health of our county.

While this Nonprofit Scan and Assessment captures a great deal of information, it is just the beginning. Scans and assessments typically point to more questions. It is, however, a first step in capturing important information and elevating this work among community leaders.

The nonprofit organizations in our county perform far beyond the numbers and charts and graphs in this report. Every day they serve people, brighten lives, expand horizons through the arts, provide added education services to our children, lift-up the marginalized, provide mental health and emotional support, transportation, food, clothing, shelter, and all of the primary human needs for life. Without these amazing organizations in our county, the plight of several hundred thousand residents would be much more dramatic.

And yet, we experience major challenges and differences in outcomes in our county based on race, age, geography, and income. This is a form of community 'dis'-ease and we are in 'dis'-equity with 140,000 people in poverty (Bureau, 2018).¹

The Foundation's focus relates to our mission of health equity and what is needed to expedite our mission. Nonprofits are the partners that can and will have the highest impact on those in need. We need a strong, healthy, vibrant county of nonprofits that lead to solutions.

The health of the nonprofit sector and opportunities for investment and growth will change Pinellas County's ability to achieve equitable outcomes over time.

The purpose of this scan and assessment is to offer our community the current status of the nonprofit sector so we can understand, learn, and support our nonprofit organizations. This will result in healthier and happier people and communities, and sustaining a strong economy that benefits all who live within our county's boundaries.

¹ <https://www.census.gov/quickfacts/fact/table/pinellascountyflorida/PST045216>

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LETTER FROM PRESIDENT & CEO

Greetings,

Nonprofit organizations are inspired and driven by passion and concern for others, by people who want to heal an issue, by those who love children, by those who lead with their hearts. But make no mistake, nonprofits are also business-led enterprises that range in complexity from massive \$100 million programs to \$50,000 entities that provide a much-needed service to people others cannot reach.

The magic is the astounding results achieved given the formidable obstacles faced by these organizations. It is a tremendous challenge to combine the passions of staff, those receiving services, board members and volunteers, with the required business acumen to fuel multi-fund accounting requirements, follow complex government regulations, please grant makers, raise funds, and support an underpaid staff. And yet combined with the passion, these skills are added to magically serve many in need.

While nonprofits need champions to advocate on their behalf, perhaps most of all, they need better understanding among their partners in the public, private, and faith sectors about how they work. The release of this report will lead to more study, more analysis, tighter relationships and, ideally, some well-deserved support for the nonprofit sector. We believe that this data will help improve collaboration, strategic thinking, and smarter impact on the missions of the nonprofits over time.

Nonprofits do much of the work we depend upon to have healthy communities. But they cannot function and fulfill their missions alone. They need support to grow, to bring efficiencies and to advance our communities as kinder places to live, work and play. Kinder, because a community in which two children can live five minutes from one another and have access to dramatically different resources to help them thrive and grow is fundamentally not a healthy one.

This report is a beginning of the Foundation's focus on nonprofit organizations as a major segment of our community. There will be further analysis in response to inquiries from organizations and individuals driven by the Foundation's mission of health equity. There is a great deal more to learn, and we have provided a list of questions at the end of this report to begin the deeper dive to learn more.

We are so grateful to each and every nonprofit that functions in Pinellas County and especially to those we surveyed and who responded for this analysis. Thank you for your interest and support of the Foundation's mission to ensure that each of us can achieve optimal health outcomes regardless of our race, gender, age, ability, geography, or income.

Yours in Health Equity,



President & CEO
Foundation for a Healthy St. Petersburg

FOREWORD

A NATIONAL PERSPECTIVE



NONPROFITS EMBODY THE BEST SPIRIT AND VALUES OF OUR NATION. THEY HELP MILLIONS OF INDIVIDUALS AND FAMILIES DAILY. THEY PROTECT, FEED, HEAL, SHELTER, EDUCATE, AND NURTURE OUR BODIES AND SPIRITS. NONPROFITS ALSO GIVE SHAPE TO OUR BOLDEST DREAMS, HIGHEST IDEALS, AND NOBLEST CAUSES. THEY TURN OUR BELIEFS INTO ACTION - AS PROMOTERS OF DEMOCRACY, CHAMPIONS OF THE COMMON GOOD, INCUBATORS OF INNOVATION, LABORATORIES OF LEADERSHIP, PROTECTORS OF TAXPAYERS, RESPONDERS IN TIMES OF TROUBLE, STIMULATORS OF THE ECONOMY, AND WEAVERS OF COMMUNITY FABRIC.” - THE NATIONAL COUNCIL OF NONPROFITS

Nonprofit organizations are an essential component of vibrant and healthy communities. They engage and connect us to each other, take on seemingly intractable challenges and deliver services to better and enrich our lives.

Strengthening this key component of our communities begins with understanding it. Around the country, a growing number of communities, states and even multi-state regions are coming together to assess the size, scope and health of their nonprofit sectors. In Wisconsin, my company, Spectrum Nonprofit Services, helped produce *Nonprofit Wisconsin In Brief* in 2015. The report provided a clearer understanding of the sector’s value to Wisconsin residents and an appreciation for its role as a major economic force.

Beyond the economics, however, the report has been used as an engine to engage nonprofits in a new and more meaningful way in community development. Nonprofit leaders, board members, funders and other stakeholders all benefit from reliable information that can help them better fulfill their many roles and plan for the future.

Congratulations on taking this important step toward defining and understanding the nonprofits in Pinellas County. The information you have gathered about your local nonprofits, and future studies yet to be undertaken, will help you nurture and grow these important organizations and safeguard the critical role they play in our communities and our democracy. Best wishes on this important undertaking.

STEVE ZIMMERMAN, CPA, MBA

*Principal, Spectrum Nonprofit Services
Milwaukee, Wisconsin*

Steven D. Zimmerman, CPA, MBA is the Principal of Spectrum Nonprofit Services where he provides training and consulting in the areas of finance and strategy for community-based organizations, foundations and government agencies throughout the country. Steve is a co-author with Jeanne Bell of the book *The Sustainability Mindset: Using the Matrix Map to Make Strategic Decisions*. The two also co-wrote *Nonprofit Sustainability: Making Strategic Decisions for Financial Viability* with Jan Masaoka. Steve also writes the Finance and Strategy column for Blue Avocado, an online magazine for nonprofits with 60,000 subscribers, *The Nonprofit Quarterly* and Board Source. Steve is a Certified Public Accountant and earned a BA from Claremont McKenna College and an MBA from Yale University.

RESEARCH METHODOLOGY

In early 2017, the Foundation formed a workgroup to discuss how to survey the nonprofit sector, inspired by some examples of similar initiatives undertaken in other states and regions of the country, such as California, the Pacific Northeast and Michigan.

Nonprofit Leadership Center (NLC), led by CEO Emily Benham, FAHP, CFRE, was selected to partner with the Foundation in this endeavor, based on NLC's position as the leading organization in our region using training, education, consultation and coaching to build capacity among nonprofit organizations, leaders and staff to better achieve their missions and drive positive change in the Tampa Bay area.

To explore the assets, challenges and opportunities faced by the sector, the workgroup pursued a mixed-methods approach, including a high-level scan of the current state of knowledge on nonprofits in Pinellas County, an administration of a survey to all nonprofits in Pinellas County reporting revenue in 2013-2017, and a deeper exploration using a targeted, semi-structured interview with leadership of organizations focused on social determinants of health.

RESEARCH METHODOLOGY FOR THIS DATA INCLUDED FOUR PHASES:

01

HIGH-LEVEL NONPROFIT SCAN

Information on nonprofits registered or providing services in Pinellas County was gathered from GuideStar, Florida Department of Agriculture and Consumer Services, Sunbiz, NLC, Florida Nonprofit Alliance, United Way Suncoast, and National Center for Charitable Statistics. Information was gathered from 990s filed by all 501(c) organizations from 2013 to 2017.

The scan created a high-level overview of the nonprofit landscape for Pinellas County, including the following categories: Number of Nonprofits Registered or Serving Pinellas County, Locations, Geographic Service Areas, Financials, Service Type, Workforce Capacity, Number and Types of Foundations in Pinellas County.



NONPROFITS ARE ALL AROUND US AND TOUCH MILLIONS OF LIVES EACH DAY. YOU WOULD BE HARD PRESSED TO FIND ANYONE WHO HAS NOT BEEN TOUCHED IN SOME WAY BY A NONPROFIT ORGANIZATION, WHETHER THEY KNEW IT OR NOT.” - THE NATIONAL COUNCIL OF NONPROFITS

02

ONLINE SURVEY

Once the scan of Pinellas County was complete, this data was used to inform the development of a comprehensive online survey to extract both quantitative and qualitative data. Potential survey participants were selected if they had any revenue of any amount in any year from 2013-2017. Of the 1,301 organizations that fit this category, 770 had adequate contact information.

The survey methodology was designed and implemented by the workgroup. Items for the survey were generated by the high-level scan, the listening sessions and experiences shared with the Foundation by community nonprofits, the NLC, and other collaborative partners. The survey was divided into five central themes. These are: **mission and organizational structure, sustainability, programs, training and capacity building, and leadership.** It concluded with demographic questions that allowed NLC to gather baseline data for each organization: location, budget, staff, board structure, service area, and whether they self-identify as an organization having an impact on social determinants of health. The survey was pilot tested with a select group of people with varying experiences in the nonprofit sector.

NLC emailed the survey to 770 nonprofit CEOs, Executive Directors, or Board Presidents and garnered 240 responses. Of the 240 respondents completing some parts of the survey, 163 completed every question, giving each one a sample size of 163-239. The survey was open for 33 days and allowed each respondent to provide contact information at their discretion. Respondents could receive a \$50 gift card to a local retailer or Amazon for participating, and 88 nonprofits requested a card.

03

TELEPHONE INTERVIEWS

The final process in the Nonprofit assessment data collection was an in-depth phone interview with 30 nonprofit CEOs, Executive Directors, or Board Presidents for 30 organizations that self-identified as having an impact on social determinants of health in the online survey. The participating organizations varied in budget size, staff capacity, and mission. Interviews were conducted by an NLC subcontractor. NLC designed the questionnaire to focus on five (5) distinct areas addressed in the online survey.

04

DATA ANALYSIS

Data from the high-level scan was analyzed using univariate and summary infographics from available dashboards and existing reports. Survey data was analyzed in SPSS version 24 using univariate and descriptive statistics. Interview data was imported into data analysis software Dedoose to identify themes and develop a coding structure based on assets, challenges and opportunities. Quantitative survey data and qualitative interview data were integrated through concept ratings.

HIGH-LEVEL SCAN FINDINGS

EXECUTIVE SUMMARY

Pinellas County Economic Development reports that there are 24 incorporated municipalities in the county, encompassing more than 280 square miles. Thirty percent of the county remains unincorporated, relying on county government for services and making nonprofit work more diverse in its challenges.

Our scan of Pinellas County nonprofits yielded 6,167 501(c) organizations registered or providing services in the county. Of these, 82 percent hold 501(c)3 classifications. Most nonprofits registered in Pinellas County are located in St. Petersburg (2,399) and Clearwater (1,320). We identified 48 geographic service areas for Pinellas County, based on municipality or population density in a specific community or zip code. Some of these communities are in unincorporated areas.

Of the county's more than 6,000 nonprofit organizations, 1,301 have reported income since 2013 in a Form 990. 1,129 have reported revenue of more than \$10,000. Most of the organizations in Pinellas County report net assets, expenses, or revenue between \$100,000 and \$499,999. Coming in second are organizations with \$10,000 to \$49,999, making the nonprofit financial capacity for Pinellas County smaller than the national average.

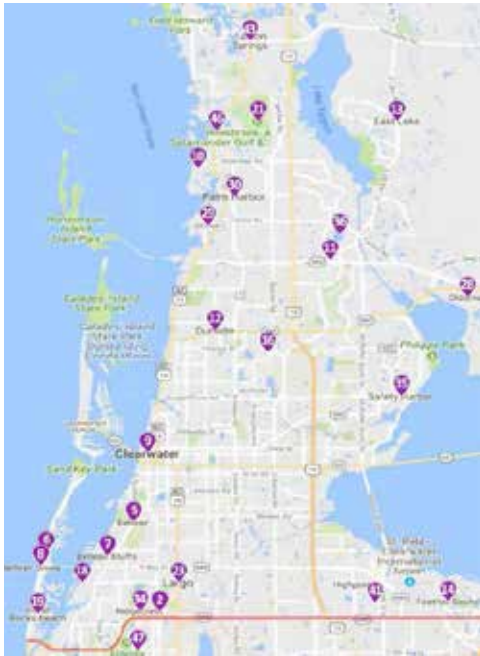
Some additional detail will help provide the context derived from the larger scan that led to the survey instrument and stakeholder interviews.

ADDITIONAL DATA FROM THE SCAN SHOWS THAT:

- **The most common response (1,042) of Pinellas County nonprofits identified on their IRS NTEE Code as having an unknown or undesignated service area;**
- **629 identified as Educational Institutions;**
- **573 identified as Organizations of Religious or Spiritual Development;**
- **572 identified as Human Services Organizations; and**
- **Collectively, research institutions — social science, technology, and medical — comprise the lowest number of nonprofit institutions.**

COUNTY BREAKDOWN

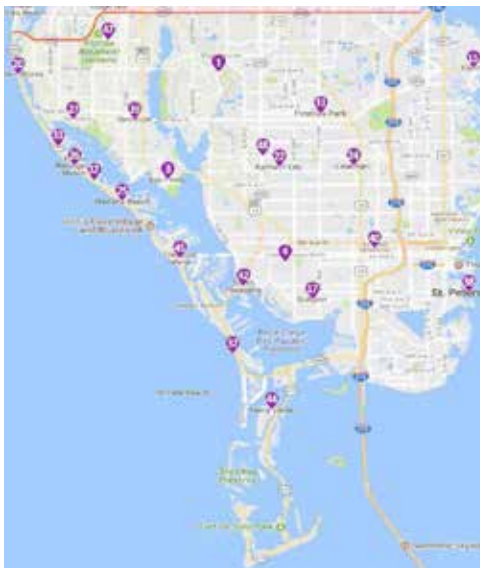
Registered North County Organizations: 2,943



AREA	# OF ORGANIZATIONS	AREA	# OF ORGANIZATIONS
2 Baskin	0	19 Innisbrook	0
5 Belleair	41	21 Indian Shores	10
6 Belleair Beach	0	23 Largo	572
7 Belleair Bluffs	4	28 Oldsmar	135
8 Belleair Shore	0	29 Ozona	9
9 Clearwater	1,320	30 Palm Harbor	400
10 Crystal Beach	8	34 Ridgecrest	0
11 Curlew	0	35 Safety Harbor	141
12 Dunedin	268	36 St. George	0
13 East Lake	0	41 South Highpoint	0
14 Feather Sound	0	43 Tarpon Springs	35
16 Greenbriar	0	46 Wall Springs	0
18 Harbor Bluffs	0		

COUNTY BREAKDOWN

Registered South County Organizations: 3,224



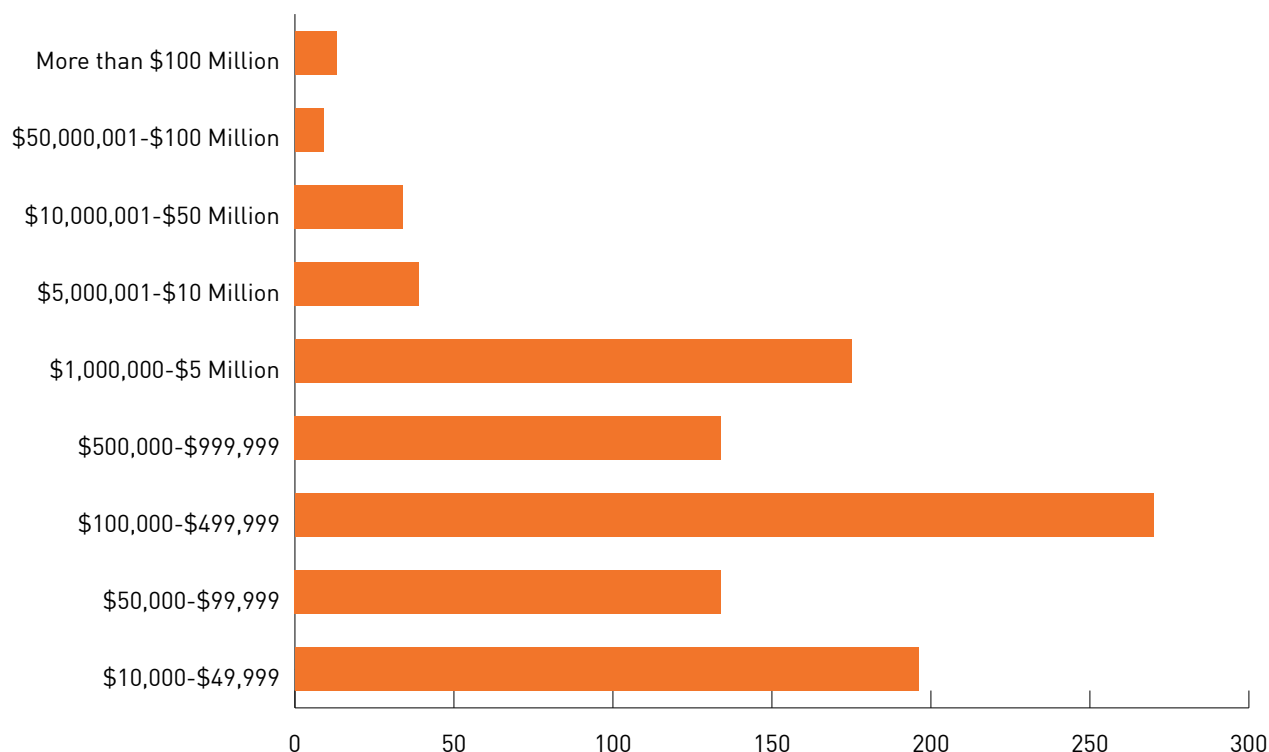
AREA	# OF ORGANIZATIONS	AREA	# OF ORGANIZATIONS
1 Bardmoor	0	32 Redington Beach	1
3 Bay Pines	11	33 Redington Shores	1
4 Bear Creek	0	37 St. Pete Beach	75
15 Gandy	0	38 St. Petersburg	2,399
17 Gulfport	70	39 Seminole	291
20 Indian Rocks Beach	9	40 Seminole Park	0
22 Kenneth City	17	42 South Pasadena	7
24 Lealman	0	44 Clearwater	1,320
25 Madeira Beach	51	45 Treasure Island	7
26 North Redington Beach	1	47 Walsingham	0
27 Oakhurst	0	48 West Lealman	0
31 Pinellas Park	266		

The variation of municipalities in terms of size, boundaries and turf are all evolutionary and depend upon the histories of each of those communities. In North County, for example, Clearwater has 1,320 nonprofits registered, yet it is in no way implied that these entities only serve Clearwater. That is where the nonprofits are headquartered.

The environment of each of these areas can vary dramatically – from beachfront cities and municipalities heavily dependent upon the tourist industry to organizations headquartered in mid-county. These environments change who is comfortable coming to the nonprofit and how accessibility for those who are poorest is managed or addressed when services are not nearby. Many of the challenges of reaching equity include where services can be sustained and where they are needed are not necessarily connected.

ORGANIZATIONS BY NET ASSETS

There are 1,004 organizations with net assets above \$10,000



1,135 of 6,167 records have expenses of \$10,000 or more - Relates to total expenses on Form 990

While it is overwhelming to realize there are nearly 6,200 nonprofits in Pinellas County, just 1,004 have net assets of \$10,000 or more. This also points to the possibility that a number of nonprofits may have missions related to human services, but are not at a scale or size to deliver. Is it time to seek mergers and combine forces? Many communities are moving in this direction. Additional data analysis will illustrate more detail about the focus and reach of these organizations.

LARGEST FOUNDATIONS IN PINELLAS COUNTY

Of the total 364 foundations, 152 have net assets of \$500,000 or more.

Those with net assets above \$10 million, listed largest to smallest:

ORGANIZATION NAME	NET ASSETS
Raymond James Charitable Endowment Fund	\$289,546,542
Foundation for a Healthy St. Petersburg, Inc.	\$170,293,274
Johns Hopkins All Children's Hospital Foundation	\$168,772,116
Allegany Franciscan Ministries, Inc.	\$121,309,697
Morton Plant Mease Health Care Foundation Inc.	\$92,744,373
Pinellas Community Foundation	\$85,672,957
Two Red Roses Foundation Inc.	\$65,409,896
St. Petersburg College Foundation, Inc.	\$61,548,112
Bob & Trish Duggan Foundation	\$59,240,000
Hospice Foundation of the Florida Suncoast, Inc.	\$47,000,883
Hoehl Family Foundation	\$39,117,556
Pinellas Education Foundation, Inc.	\$33,592,619
HTR Foundation Inc.	\$16,574,792
Thomas A and Mary S Foundation, Inc.	\$13,189,758
The Arc Tampa Bay Foundation, Inc.	\$12,743,378
Hough Family Foundation Inc.	\$11,978,410
KML Foundation Inc.	\$11,190,480

Note: Due to self-selection of IRS taxonomy codes the list of organizational records included in the categories above may not be inclusive of all foundations or organizations that distribute funds in Pinellas County.

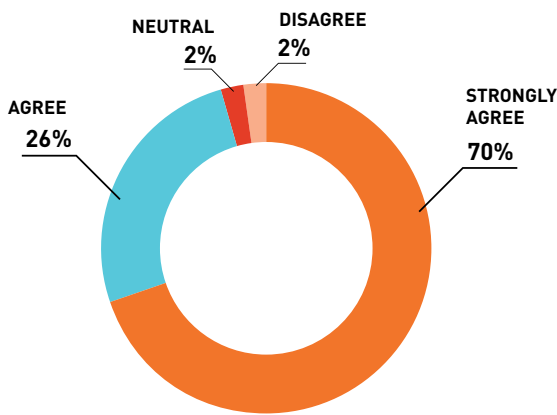
This illustrates the size and scope of Foundations – many of which are not grant-making entities but rather hold reserves whose interest supports ongoing operations. There are limited Foundation dollars on an annual basis for ongoing nonprofit support.

PRIMARY SURVEY DATA PRESENTATION

As described in the methodology section, 240 out of 770 nonprofit leaders survey responded (31 percent response rate) to the online survey. Not every respondent answered every question. The following data charts report the aggregate data collected from the online survey. The authors understand and believe there are additional deeper dives necessary to identify some of the questions that will likely come from the review of these responses. We present this initial data to stimulate additional thinking and focus on questions the audience would like to know more about; this will shape additional research over the coming months and years. There will be formal and informal ways audiences can seek additional research outlined at the end of this report.

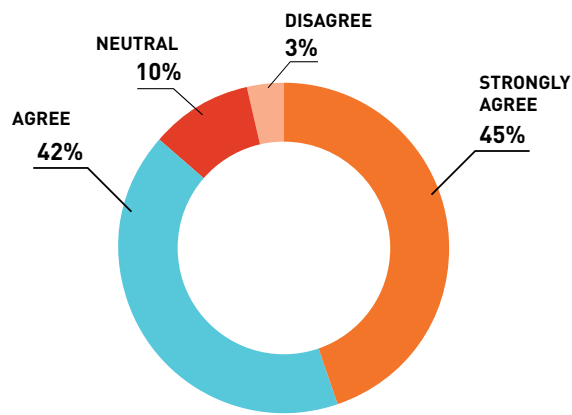
BOARD AND EXECUTIVE LEADERSHIP

Q1 Please respond to the following statements.



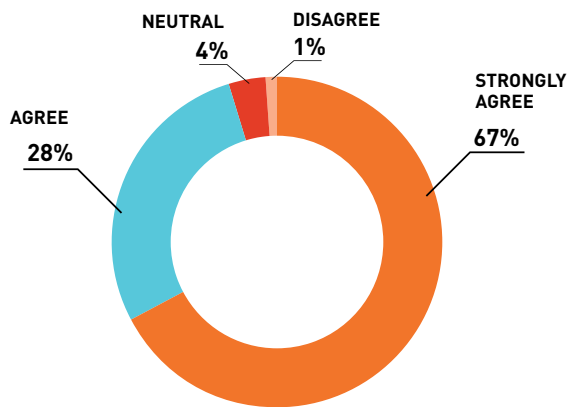
My organization has a clear mission and a statement of organizational values.

240 Respondents



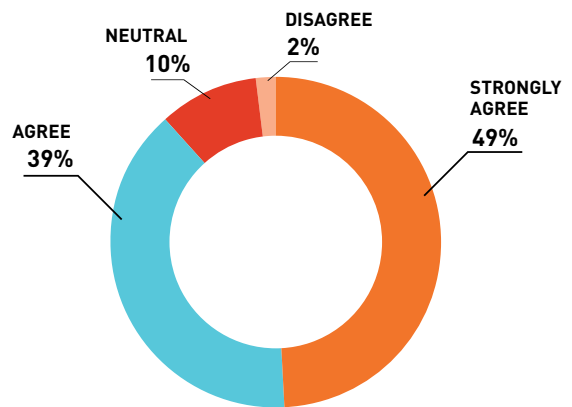
Employees in my organization are encouraged to pursue the most strategic use of their time and talents.

237 Respondents



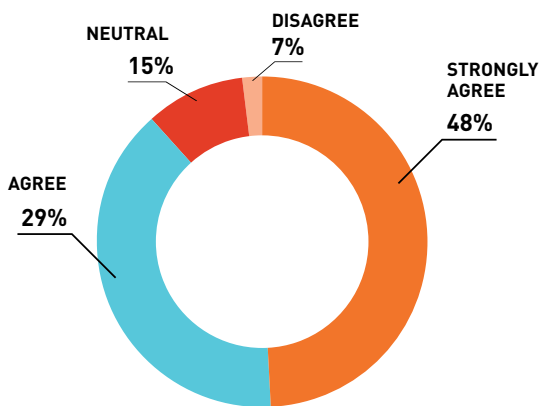
My organization's relationship to the communities we serve is respectful, collaborative and prioritizes listening.

238 Respondents



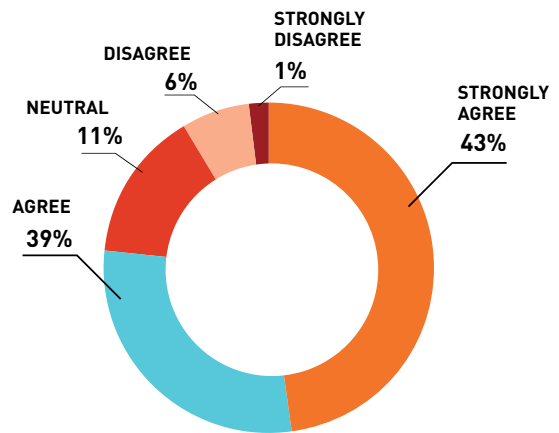
Employees would describe our organization as an environment that is always learning and adapting.

237 Respondents



My organization has a robust conflict of interest policy that is clear and enforceable.

238 Respondents

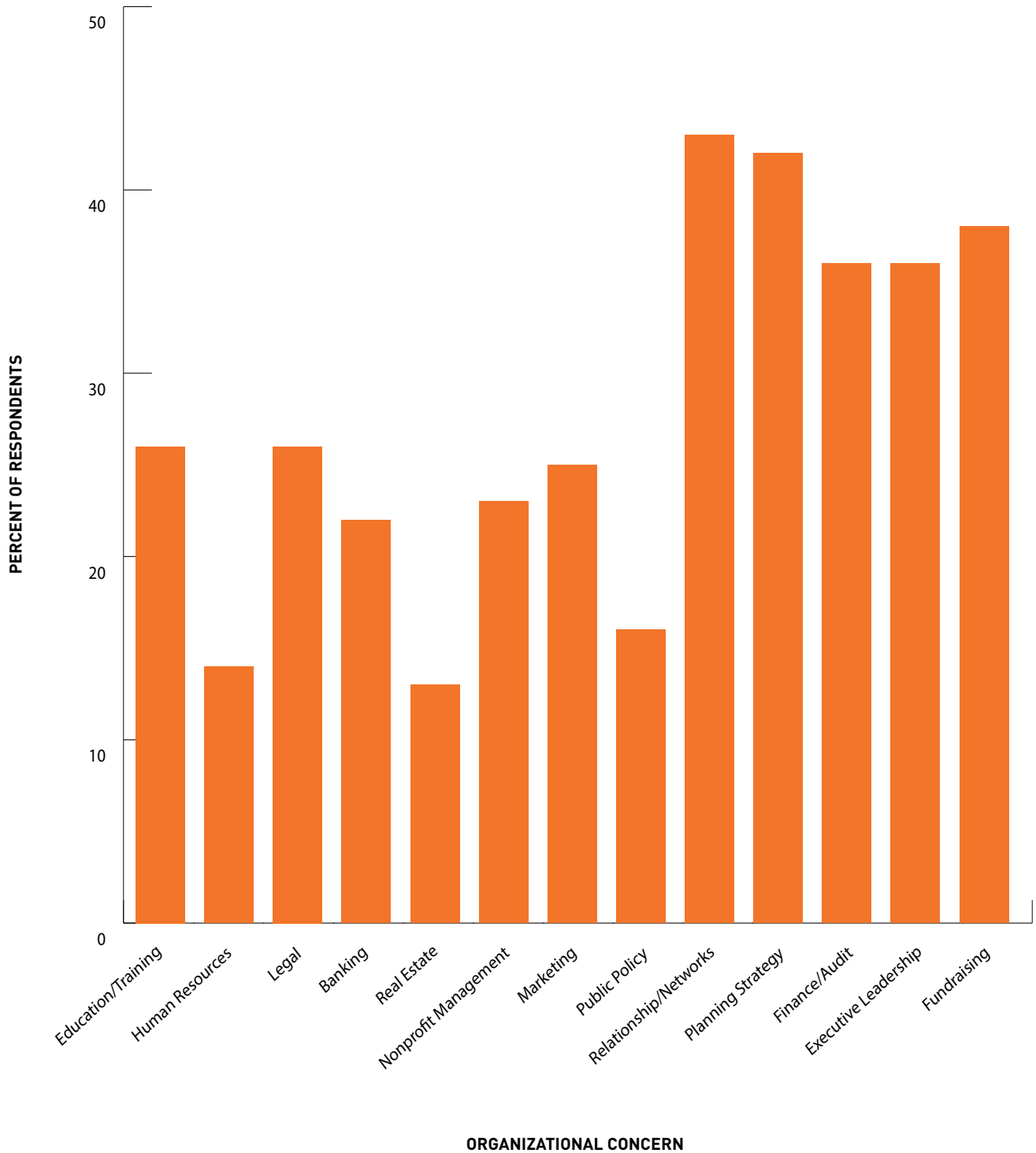


My organization can quickly adapt and aligns resources and services with community needs.

238 Respondents

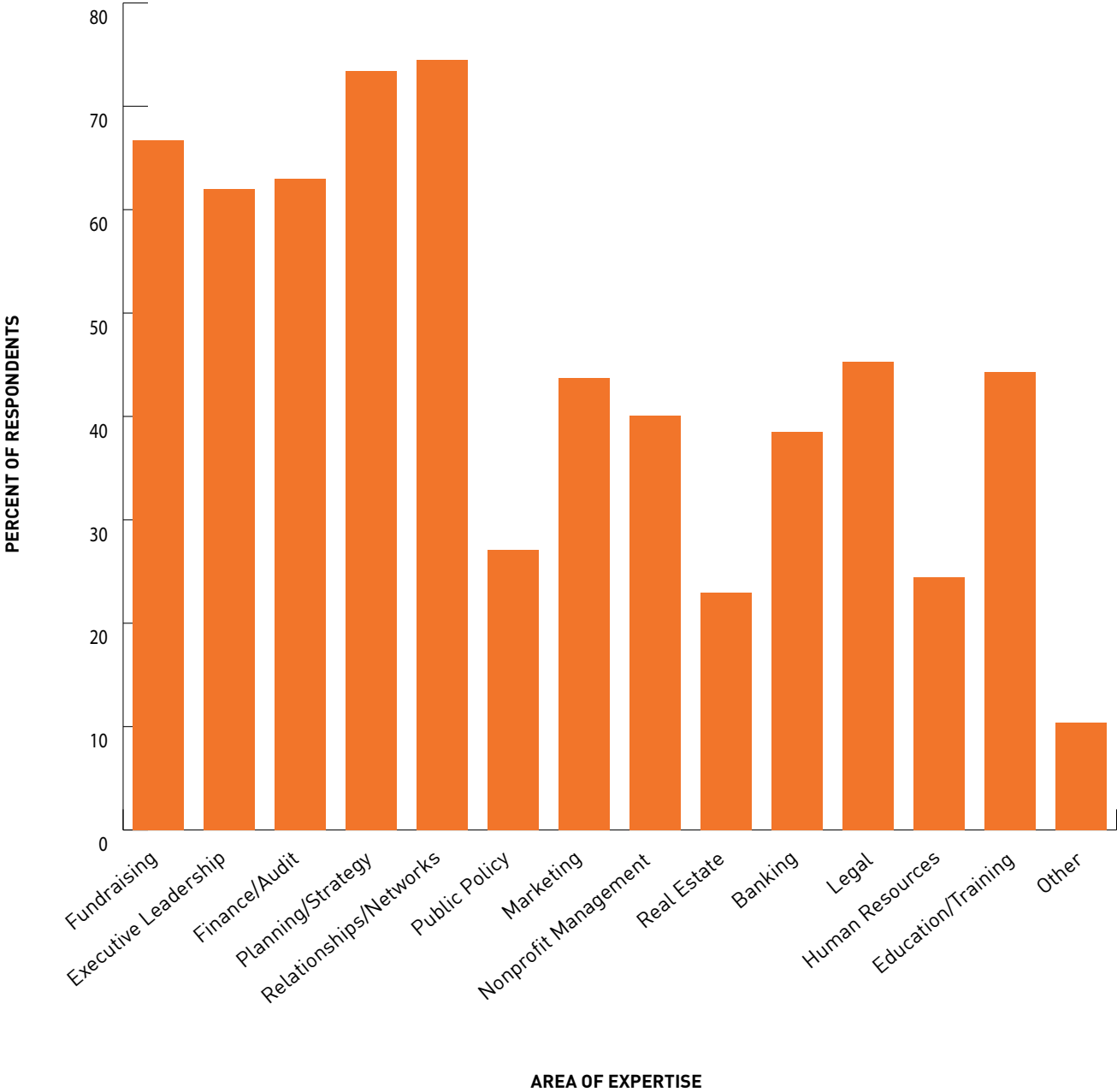
Q2 Aside from funding, what critical capacity-related issues keep you up at night?

240 Respondents



Q3 Board members and community volunteers provide the following areas of expertise to our organization:

192 Respondents

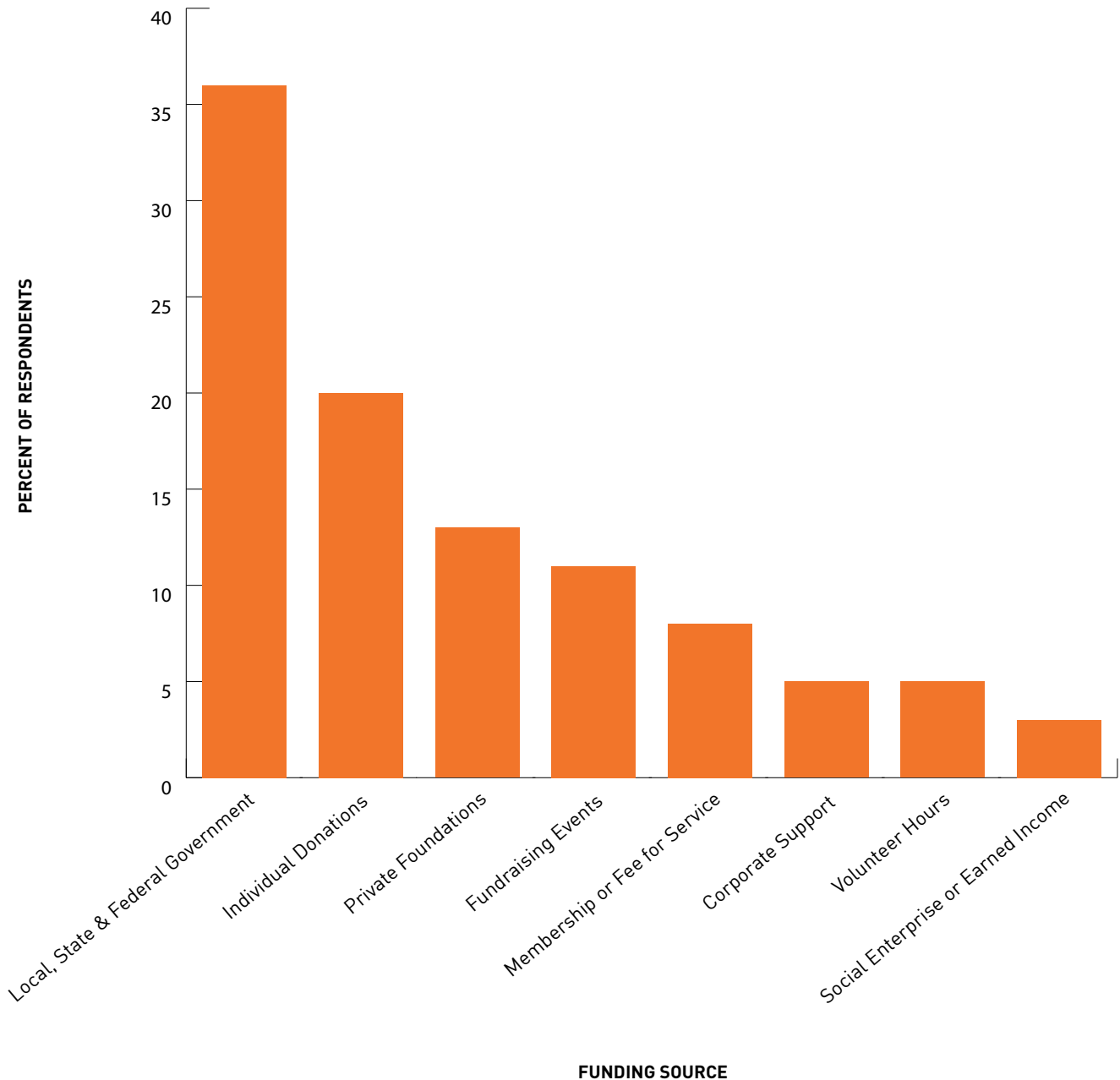


SUSTAINABILITY

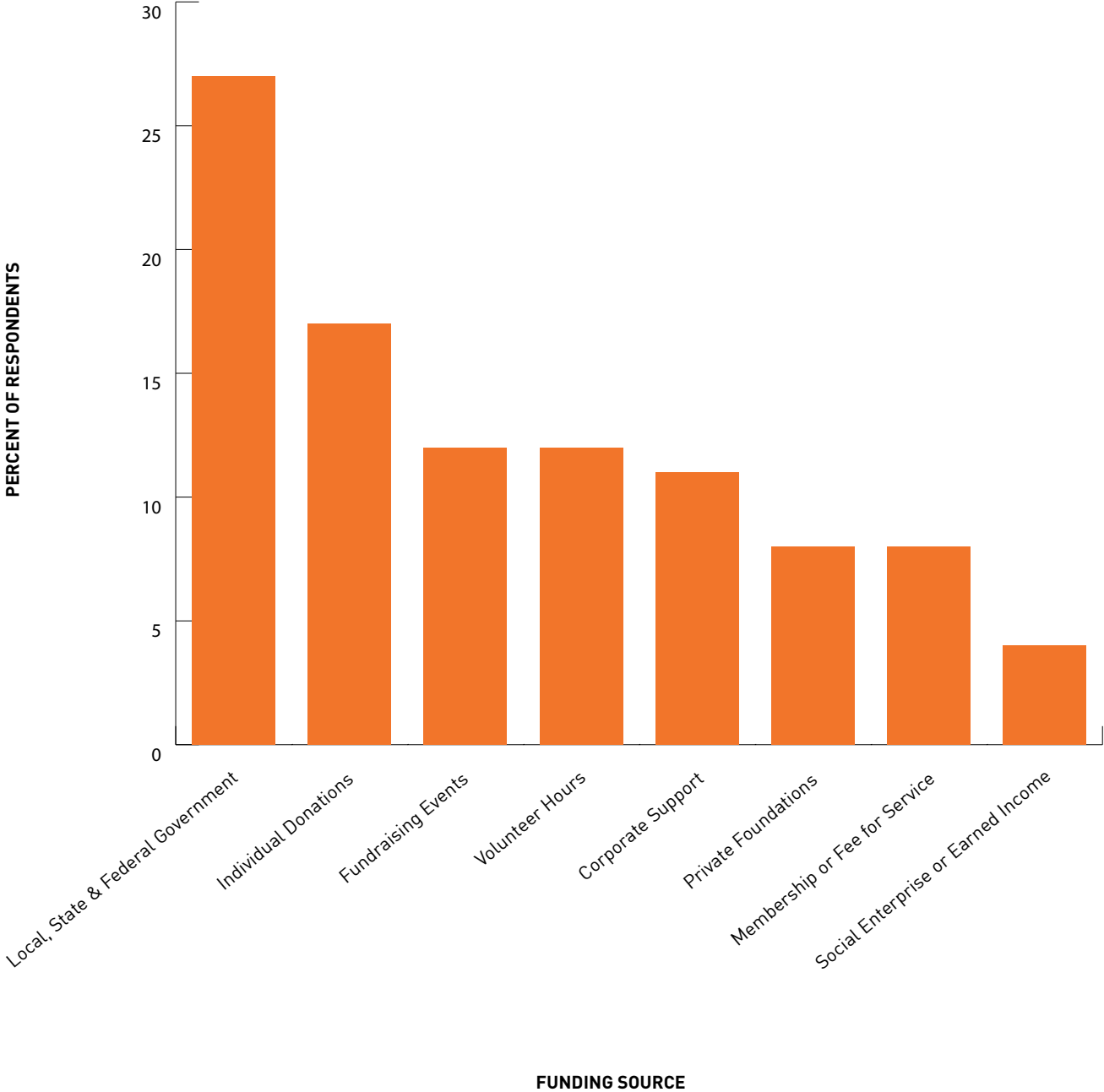
Q4 Choose the Top 3 funding sources most critical to your organization's current budget.

192 Respondents

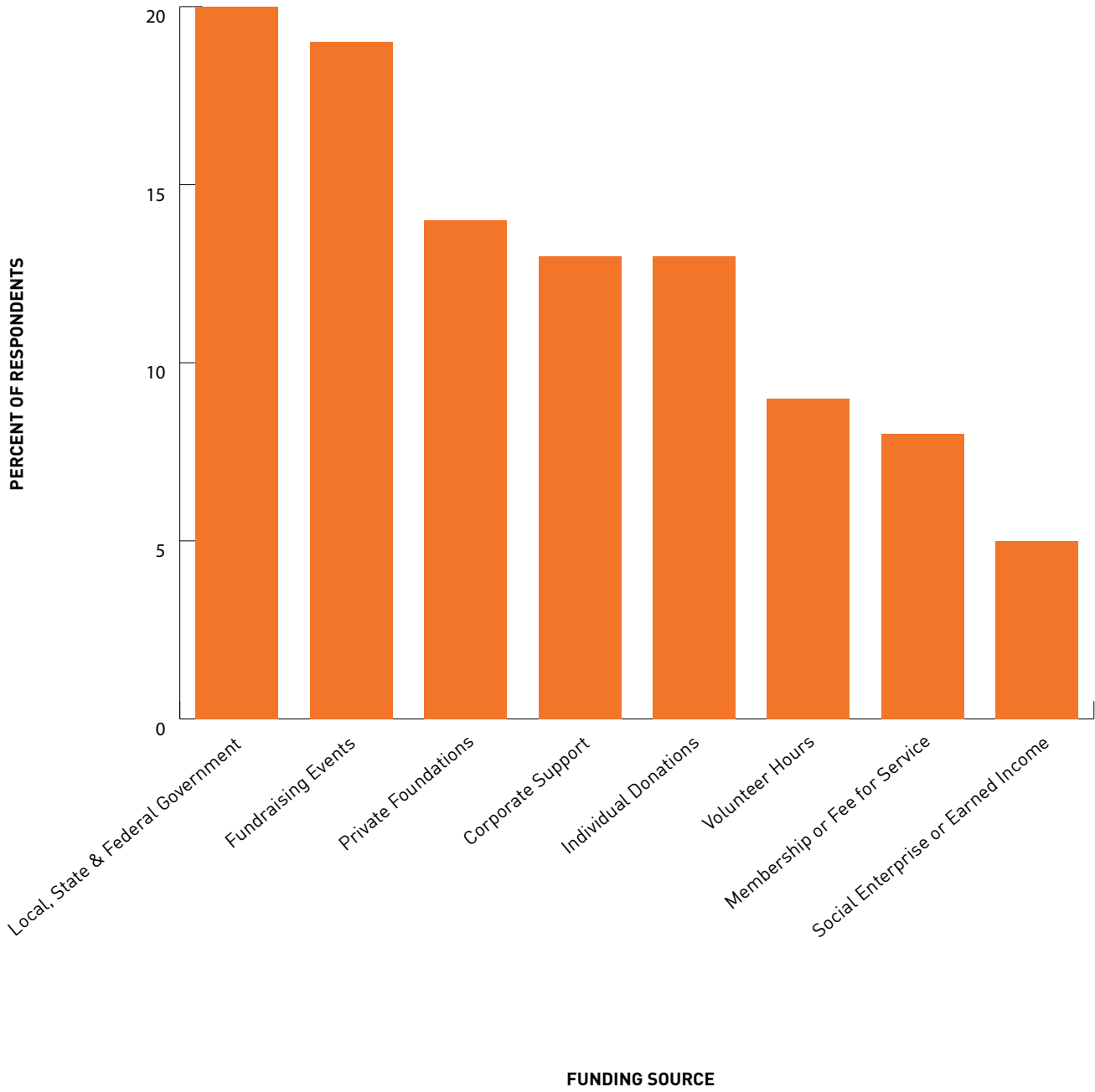
FIRST SOURCE



SECOND SOURCE

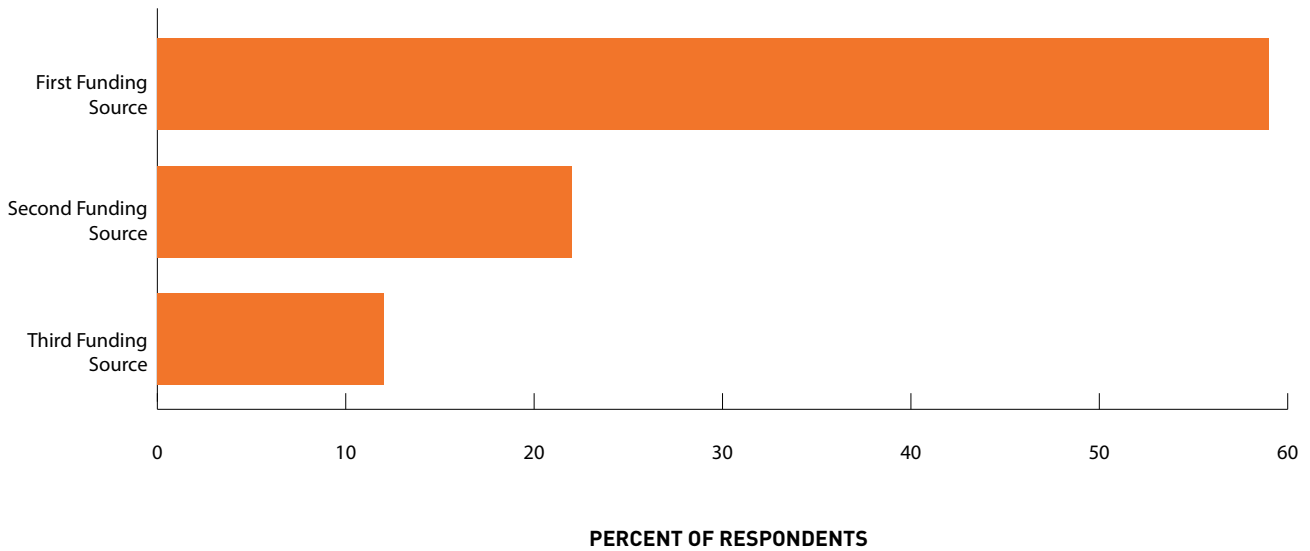


THIRD SOURCE



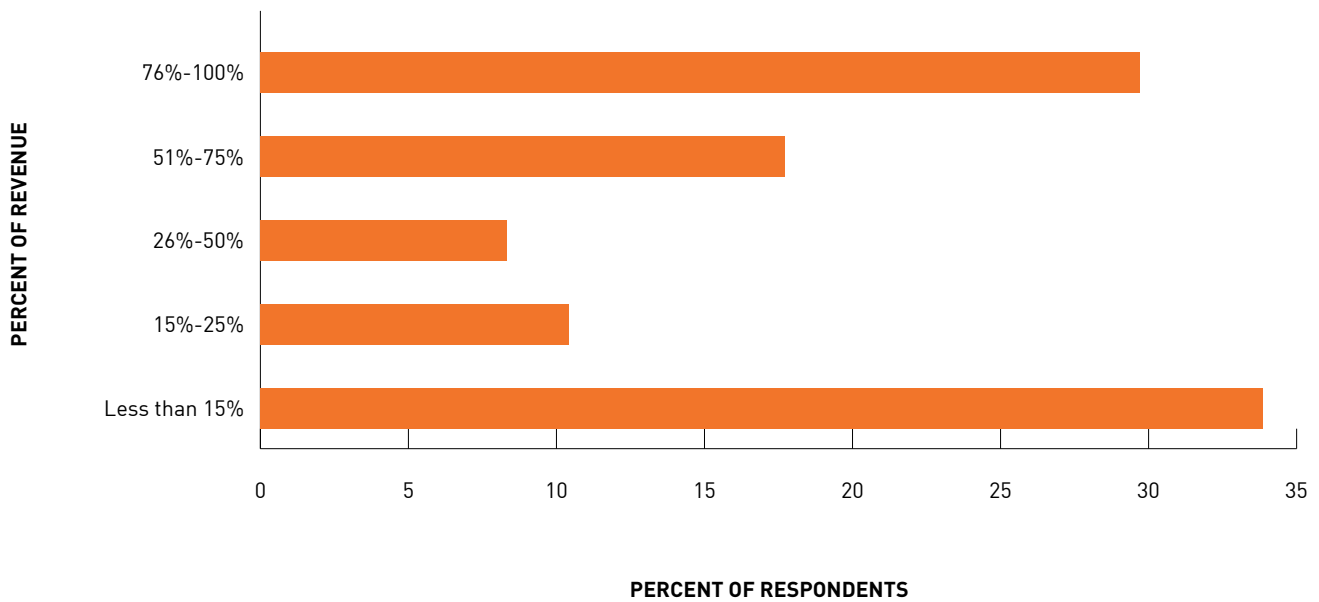
Q5 Of your top three funding sources, which percentage of your nonprofit organization's budget do they represent?

192 Respondents

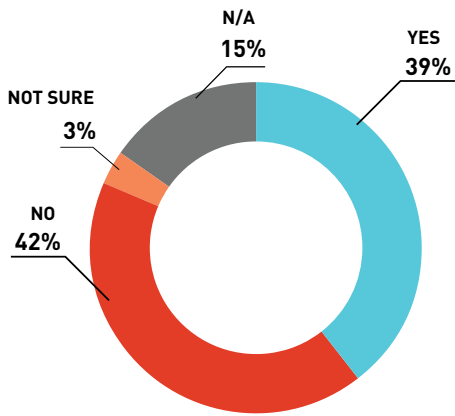


Q6 What percentage of your revenue is unrestricted?

192 Respondents

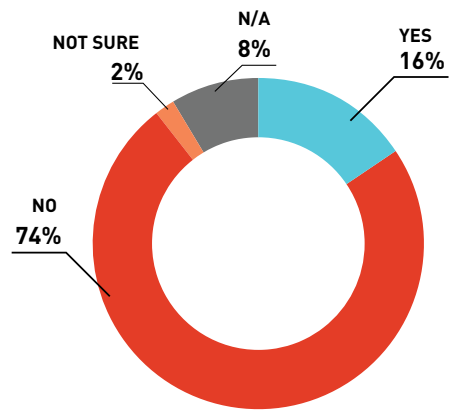


Q7 Fundraising Capacity



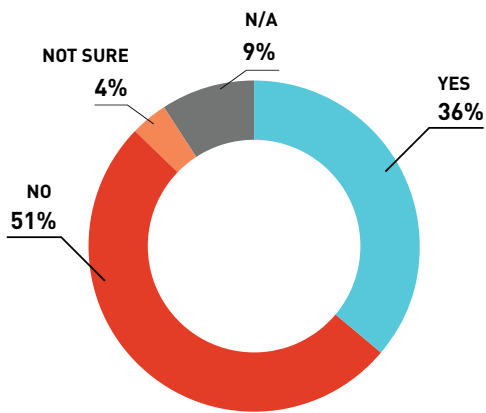
Over each of the last three years we have met our fundraising goals.

190 Respondents



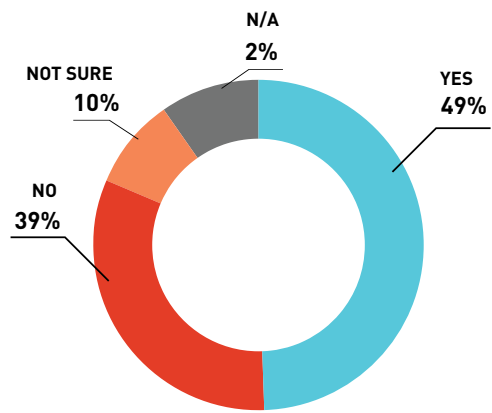
The majority of our gifts in the past 24 months have been \$5,000 or more.

191 Respondents



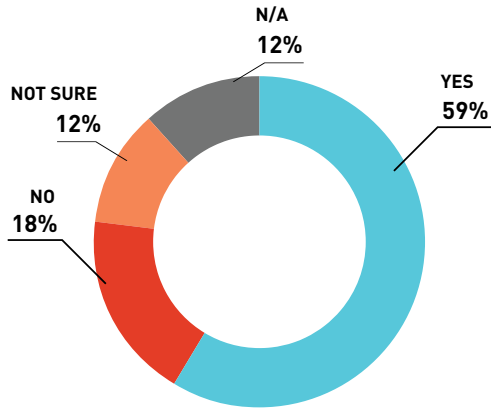
We are able to recruit donors at \$5,000 and above on an annual basis.

191 Respondents



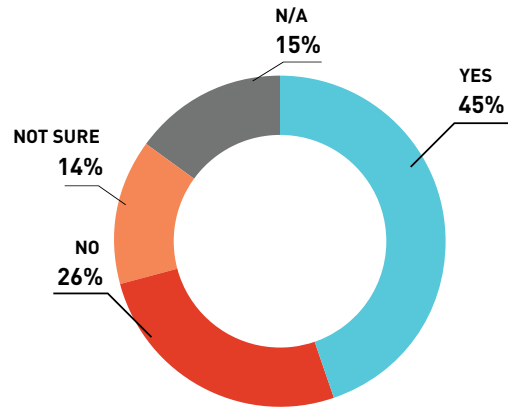
We are able to recruit new donors of any giving level annually.

190 Respondents



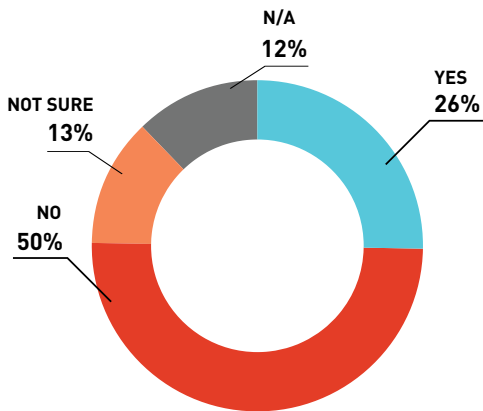
Our written policies allow us to receive planned gifts.

191 Respondents



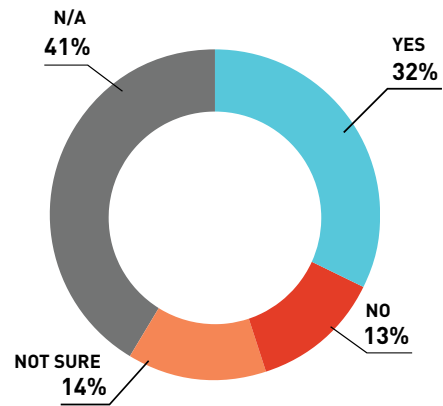
Our donor retention from year to year is above 70%.

190 Respondents



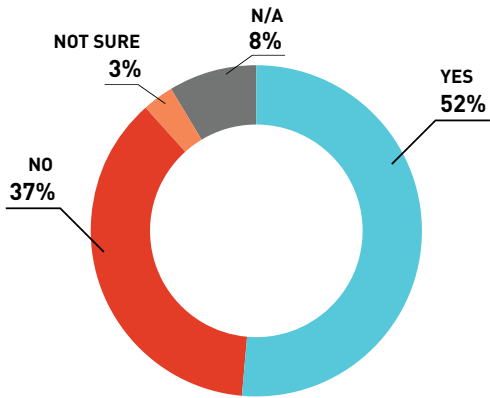
We have written policies about donor retention and donor recognition.

192 Respondents



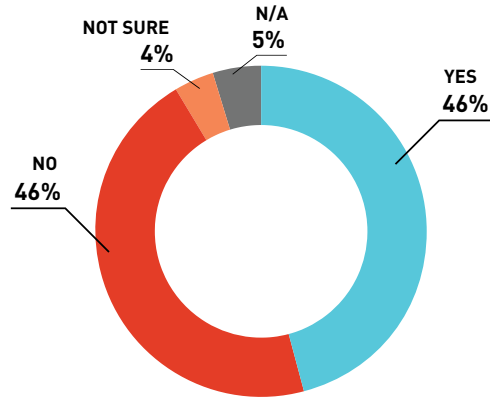
We adhere to our policies on donor retention and donor recognition.

191 Respondents



Staff is encouraged to make personal monetary donations to our organization.

190 Respondents

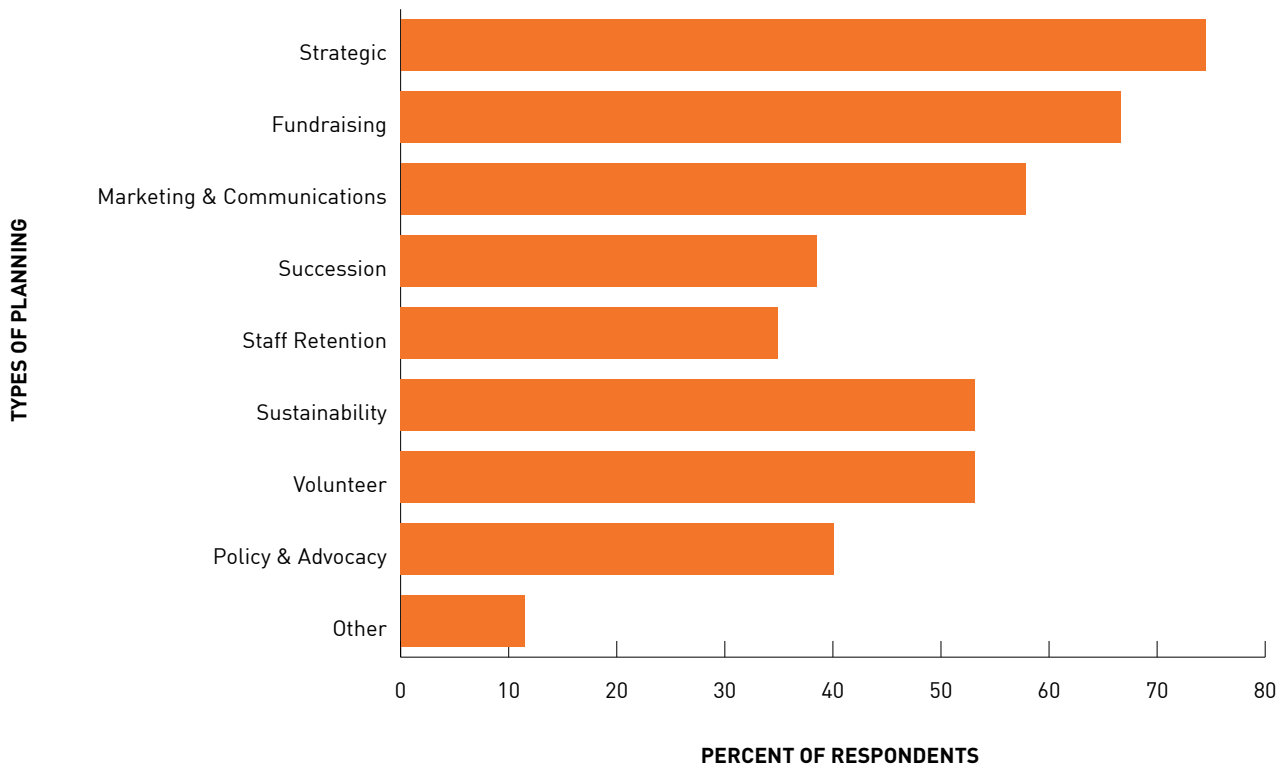


100% of our board members give a personal monetary donation to our organization.

191 Respondents

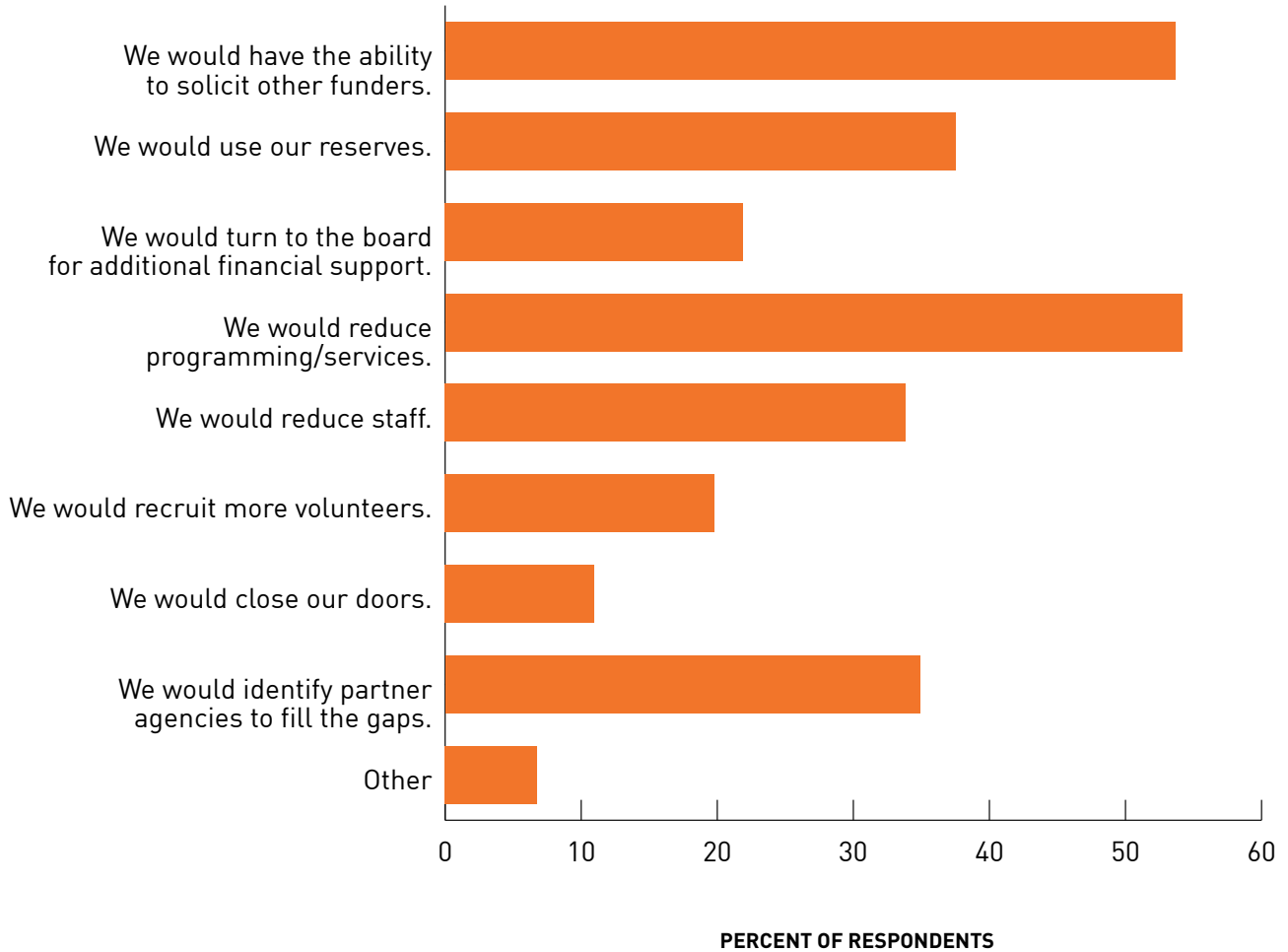
Q8 Which types of planning does your organization actively/regularly engage in?

192 Respondents



Q9 If one or two of your key funders stopped funding your organization, which three options below would most likely occur:

192 Respondents

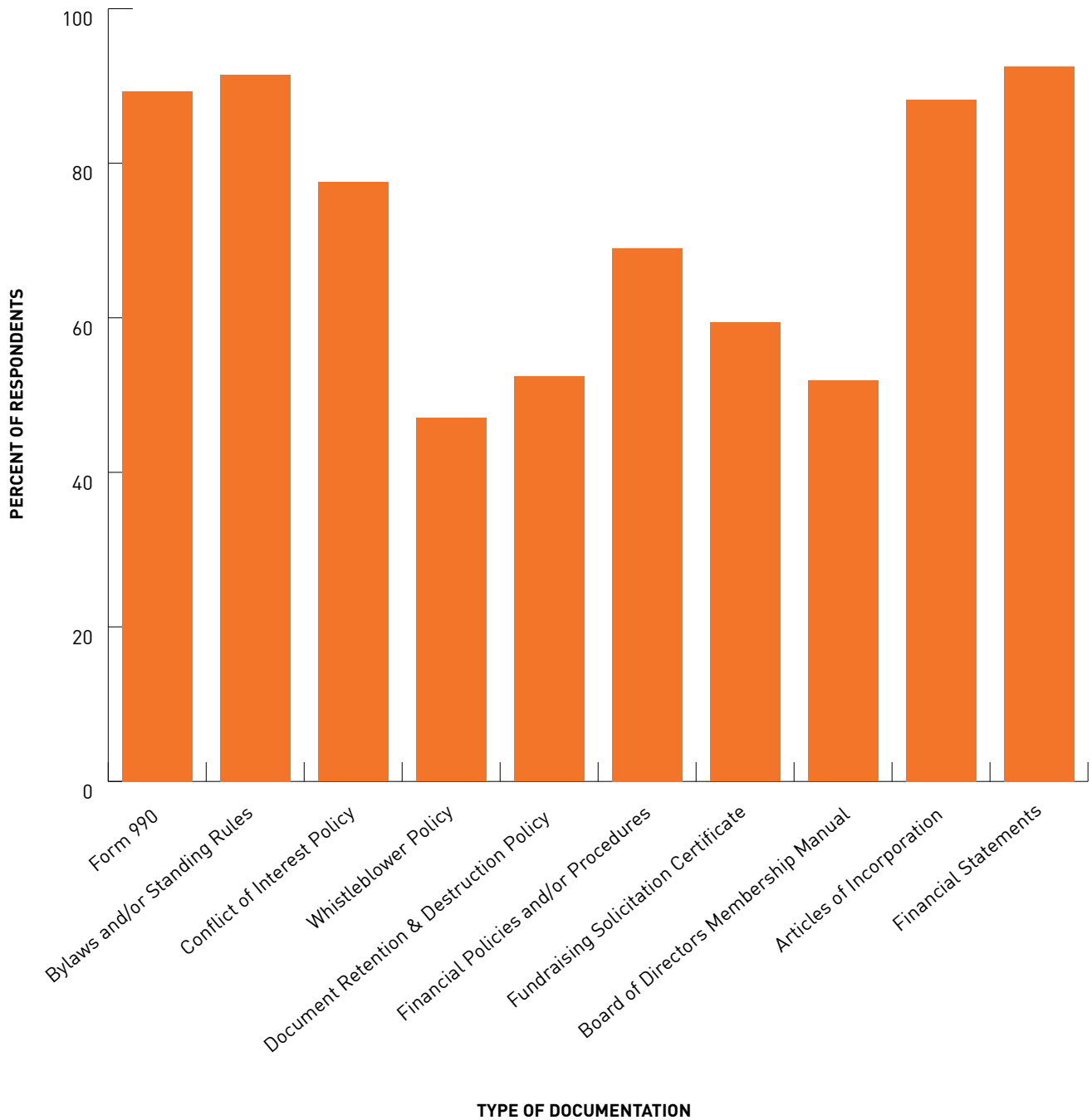


OUR FUNDERS ARE EXCELLENT, BUT THEY DON'T ALWAYS WANT TO FUND THE WHAT OUR PARTICIPANTS WANT TO BE DOING. THE MORE WE FORCE OUR CLIENTS TO PARTICIPATE [IN PROGRAMS THAT FUNDERS WANT], THE MORE [THEY] DROP OFF."

OPERATIONS & PROGRAM SERVICES

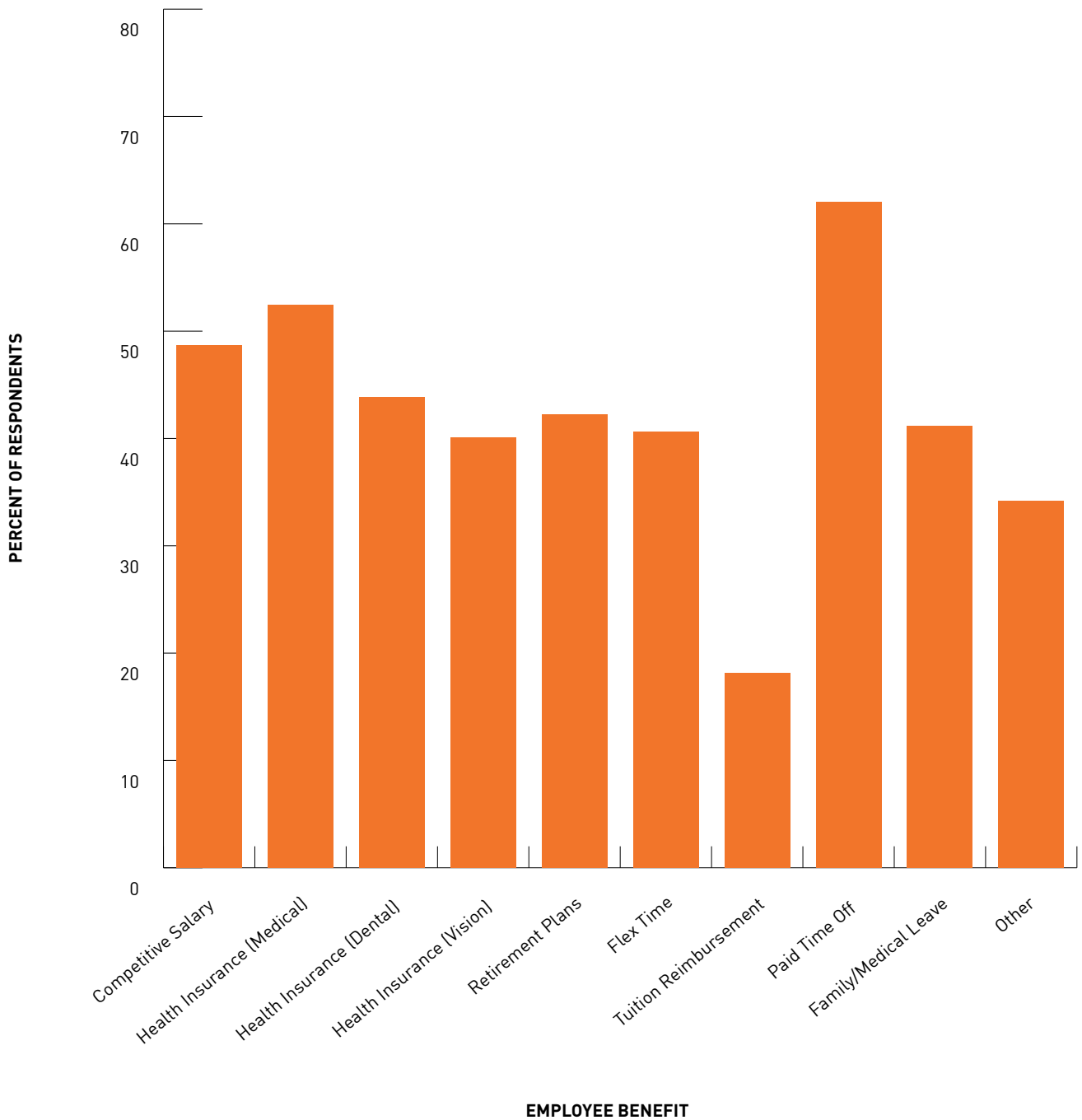
Q10 Our organization can provide the following upon request:

187 Respondents



Q11 We offer the following employee benefits:

187 Respondents

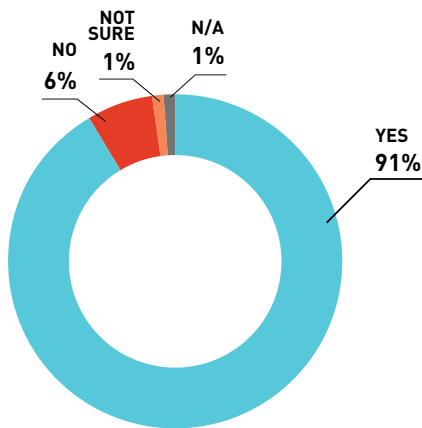


Q12 Our organization provides services to our community in the following ways:

187 Respondents

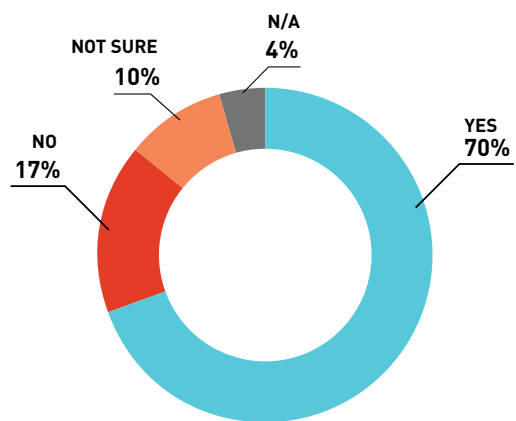


Q13 Our organization has the necessary tools, facilities and technology to do the following:



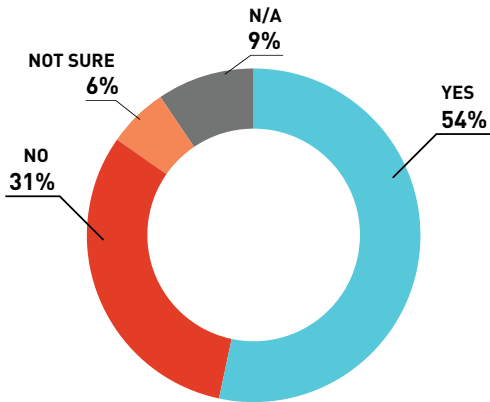
Deliver services within our mission.

187 Respondents



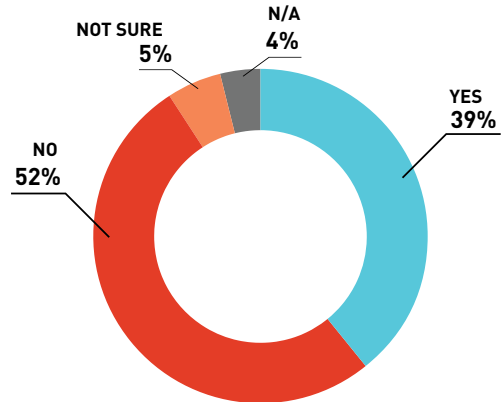
Measure effectiveness with client response/satisfaction input.

187 Respondents



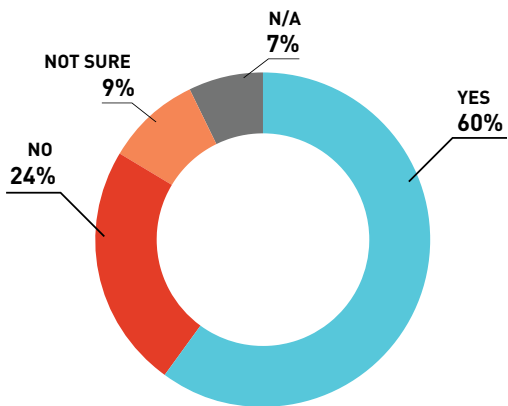
Have a written policy that encourages training and professional development for staff.

185 Respondents



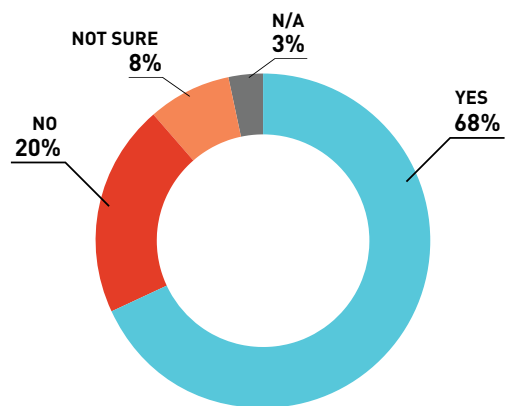
Have ample resources to meet annual needs.

186 Respondents



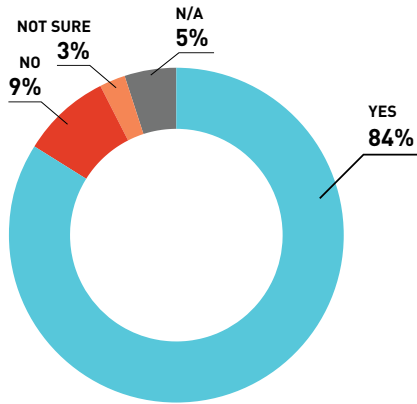
Clearly craft position descriptions, recruit, orient and retain talent.

185 Respondents



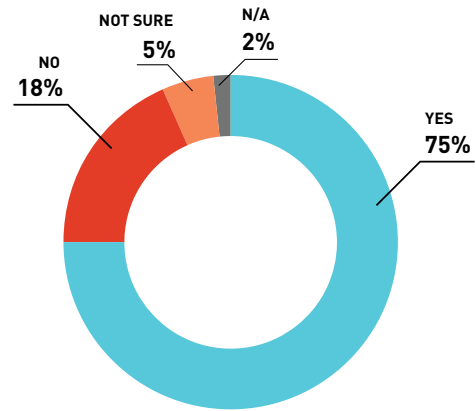
Communicate effectively to ensure clients and donors are aware of our services, efforts and impact.

186 Respondents



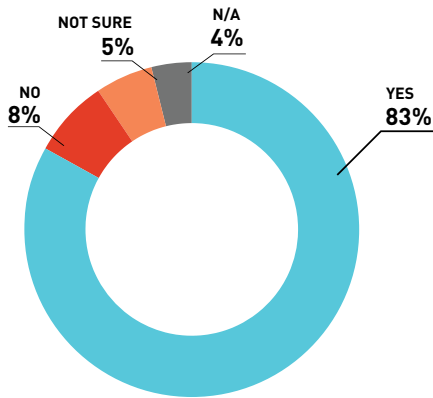
Ensure staff have the information and tools to perform their jobs.

187 Respondents



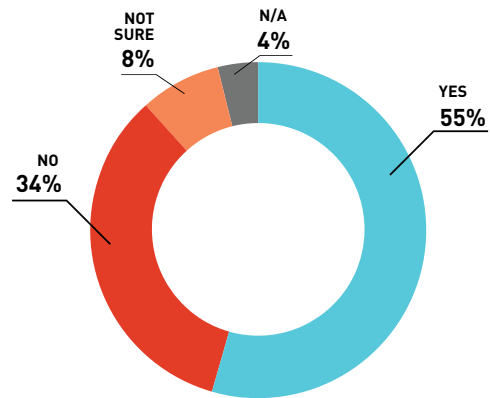
Maintain an online presence and update website at least twice a month.

186 Respondents



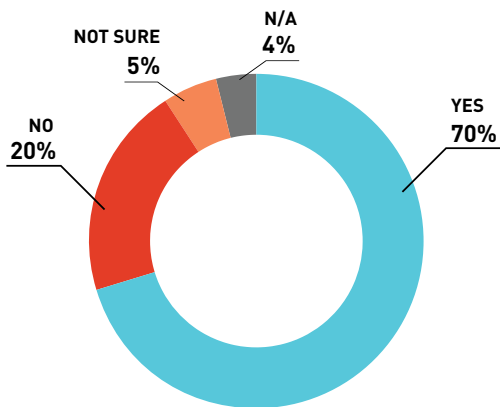
Engage stakeholders through at least one social media channel.

185 Respondents



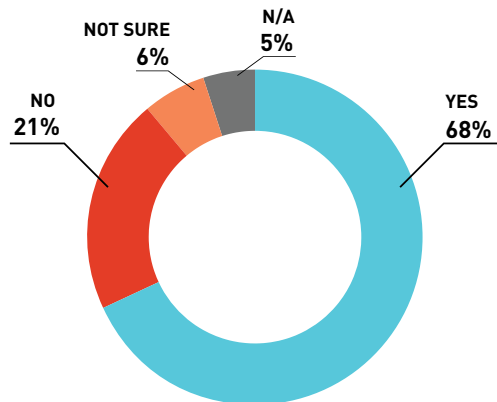
Engage stakeholders as often as we'd like to on social media.

183 Respondents



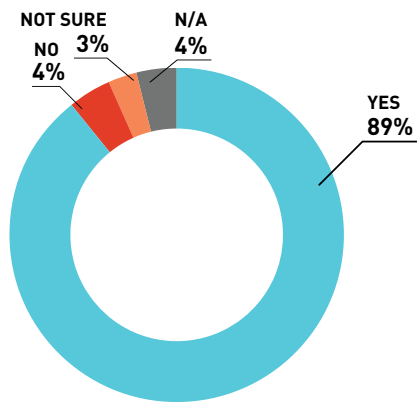
Collect, measure and report program outcomes and impact.

186 Respondents



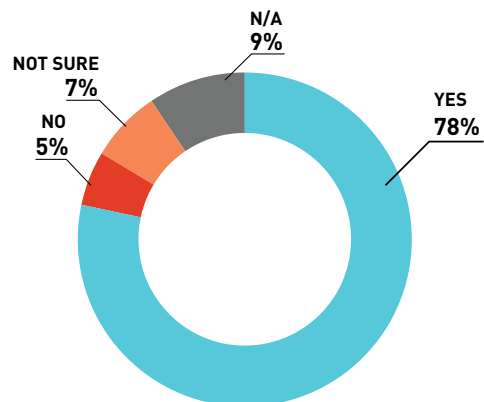
Use data to inform program design.

183 Respondents



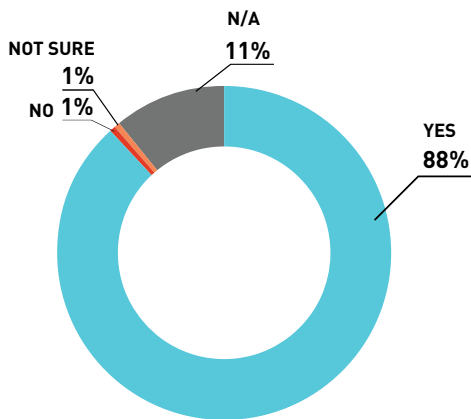
Manage accounting in order to comply with relevant audit standards.

185 Respondents



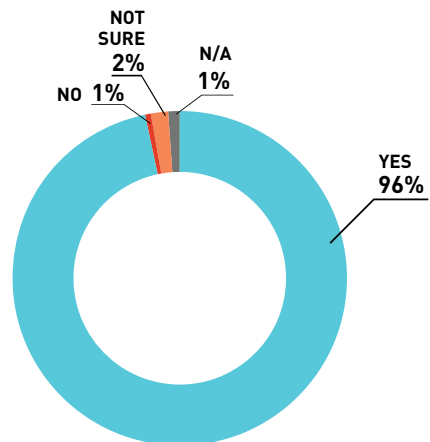
Manage client data security, in compliance with regulatory requirements.

185 Respondents



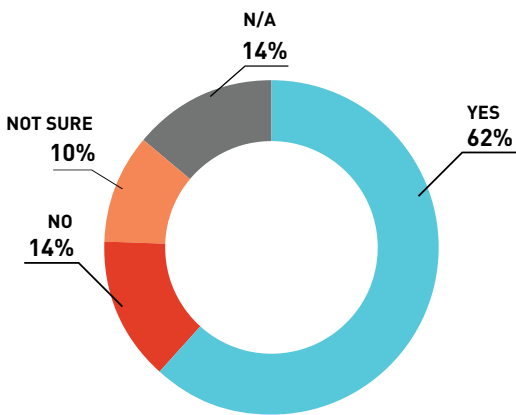
Comply with funding contracts.

186 Respondents



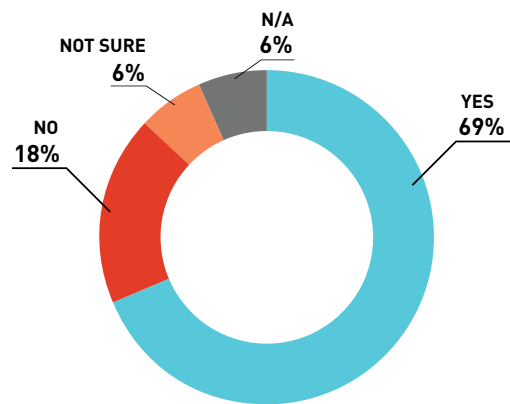
Comply with all local, state and federal regulations.

186 Respondents



Provide policy advocacy.

173 Respondents

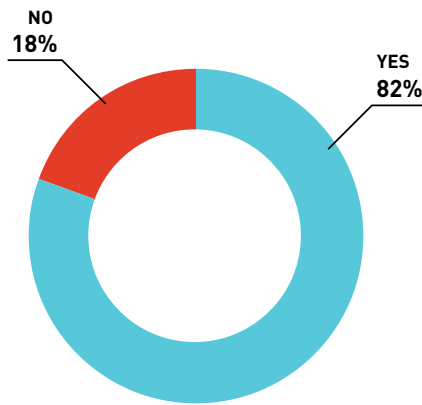


Recruit, train, manage, reward and retain volunteers.

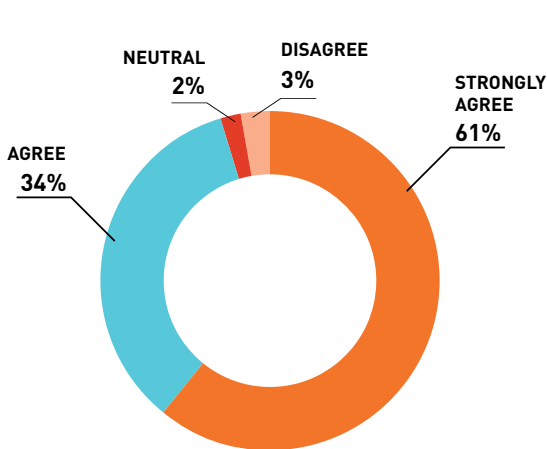
186 Respondents

Q14 Does your nonprofit organization have paid staff (Part or Full Time)?

187 Respondents

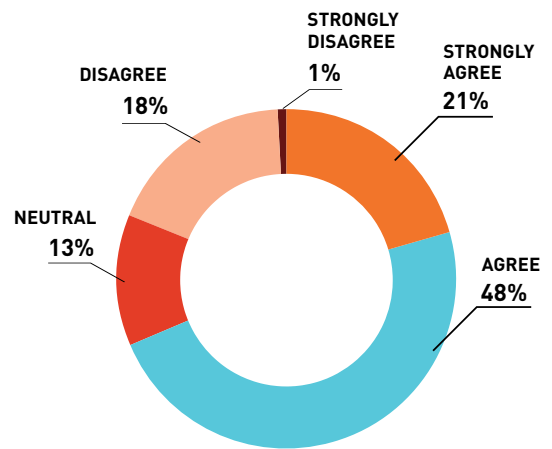


Q15 My organization has the right people, skills, knowledge or expertise to:



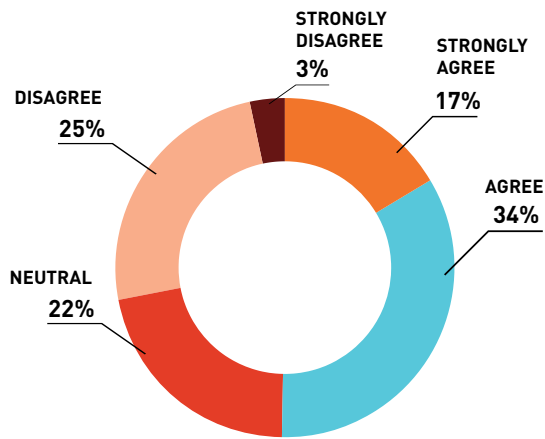
Directly address our mission.

151 Respondents



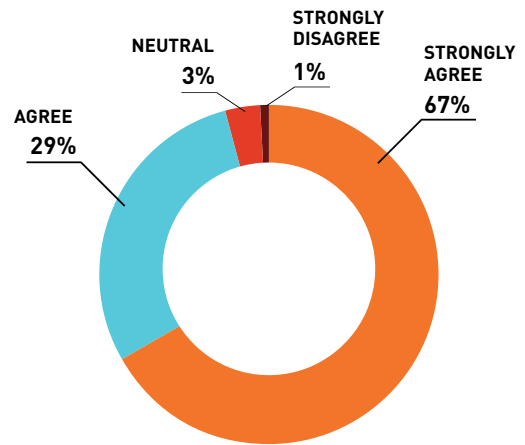
Utilize technology in the most effective and efficient manner.

150 Respondents



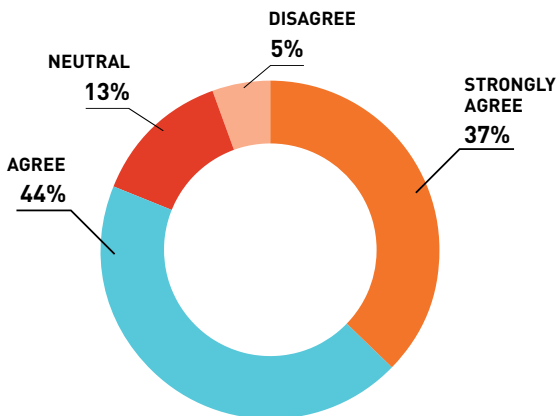
Raise funds needed to accomplish our work.

151 Respondents



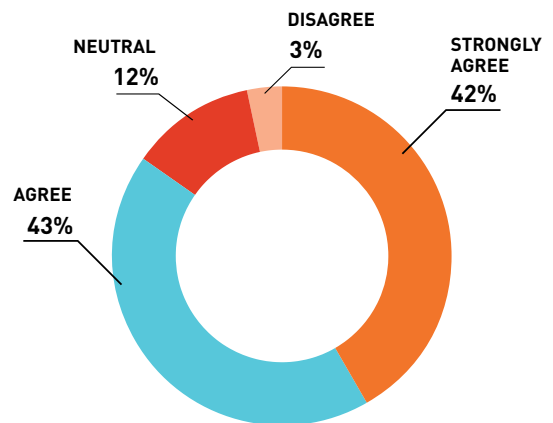
Meet audit and accounting standards.

151 Respondents



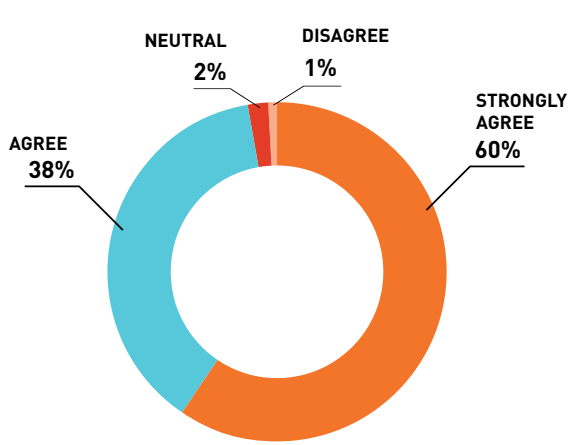
Satisfy the needs of our clients through ongoing client feedback.

150 Respondents



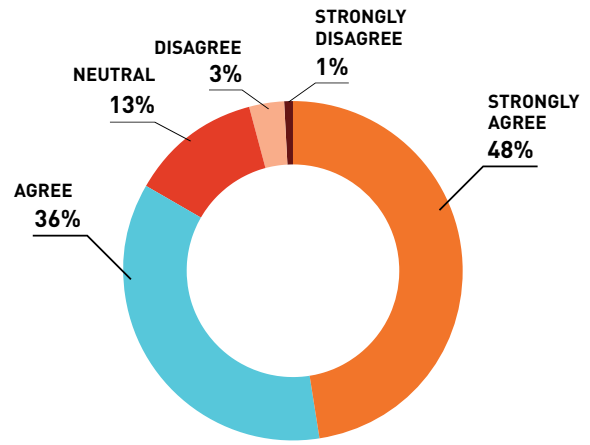
Evaluate our efforts and share those results with the Board and the community.

151 Respondents



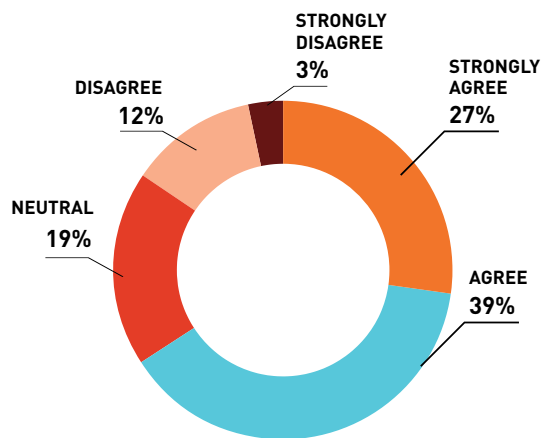
Develop and maintain a culture that allows us to do work toward our mission.

151 Respondents



Plan and organize our staff to fulfill annual goals established.

151 Respondents

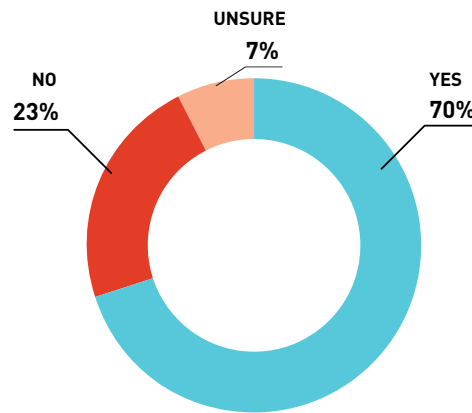


Successfully recruit, train, retain and support our volunteer force.

150 Respondents

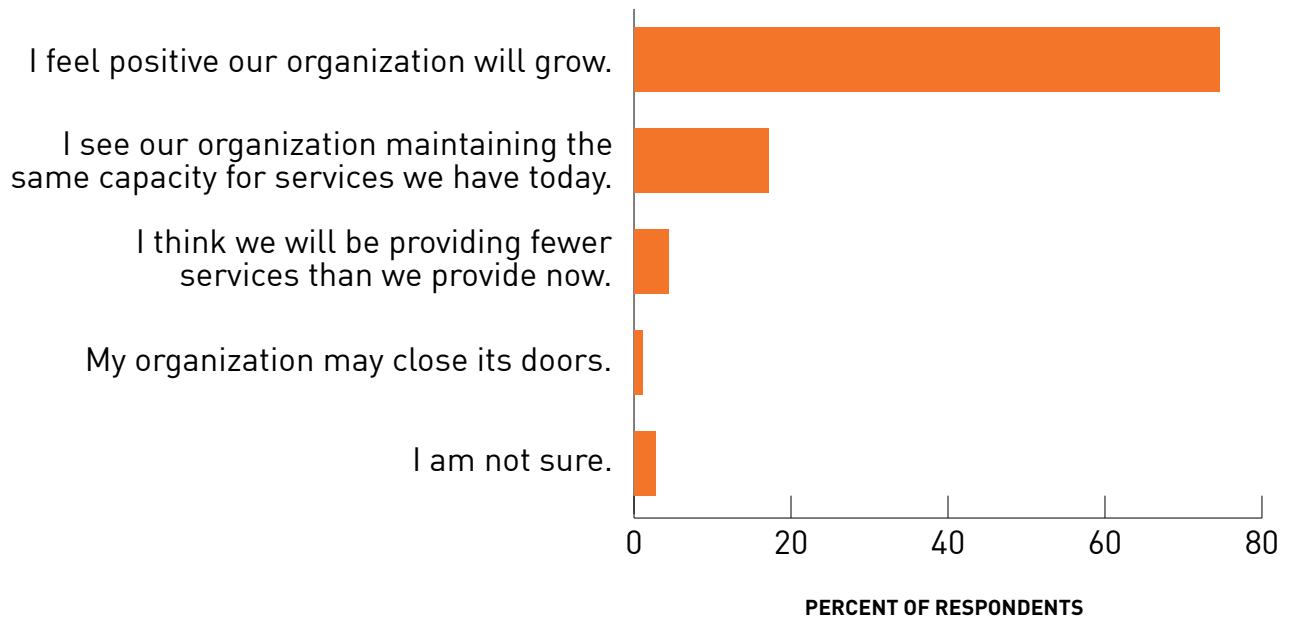
Q16 Does the make-up of your staff reflect the demographics of the population your organization serves?

150 Respondents



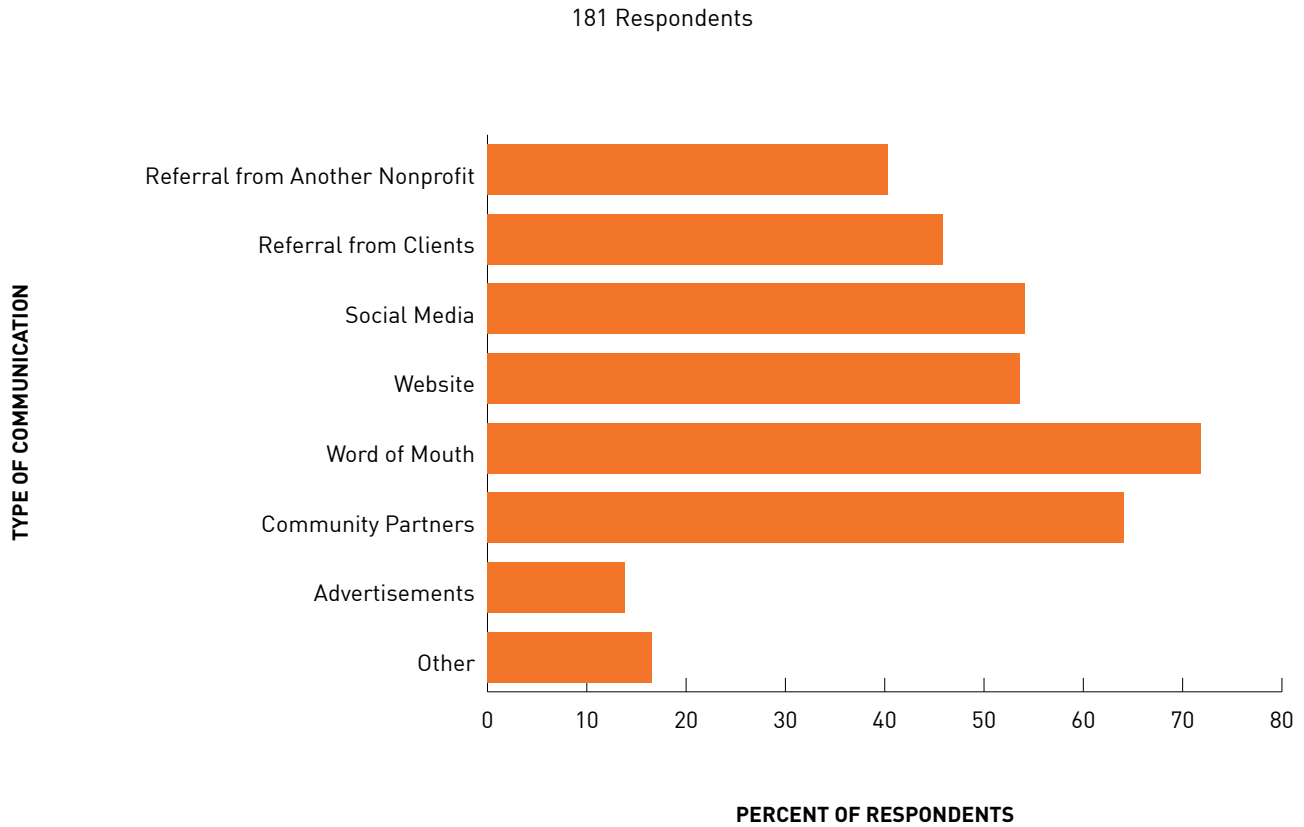
Q17 Which statement best applies to your current feelings about your organization's future growth in the next three years?

181 Respondents



MISSION & VALUES

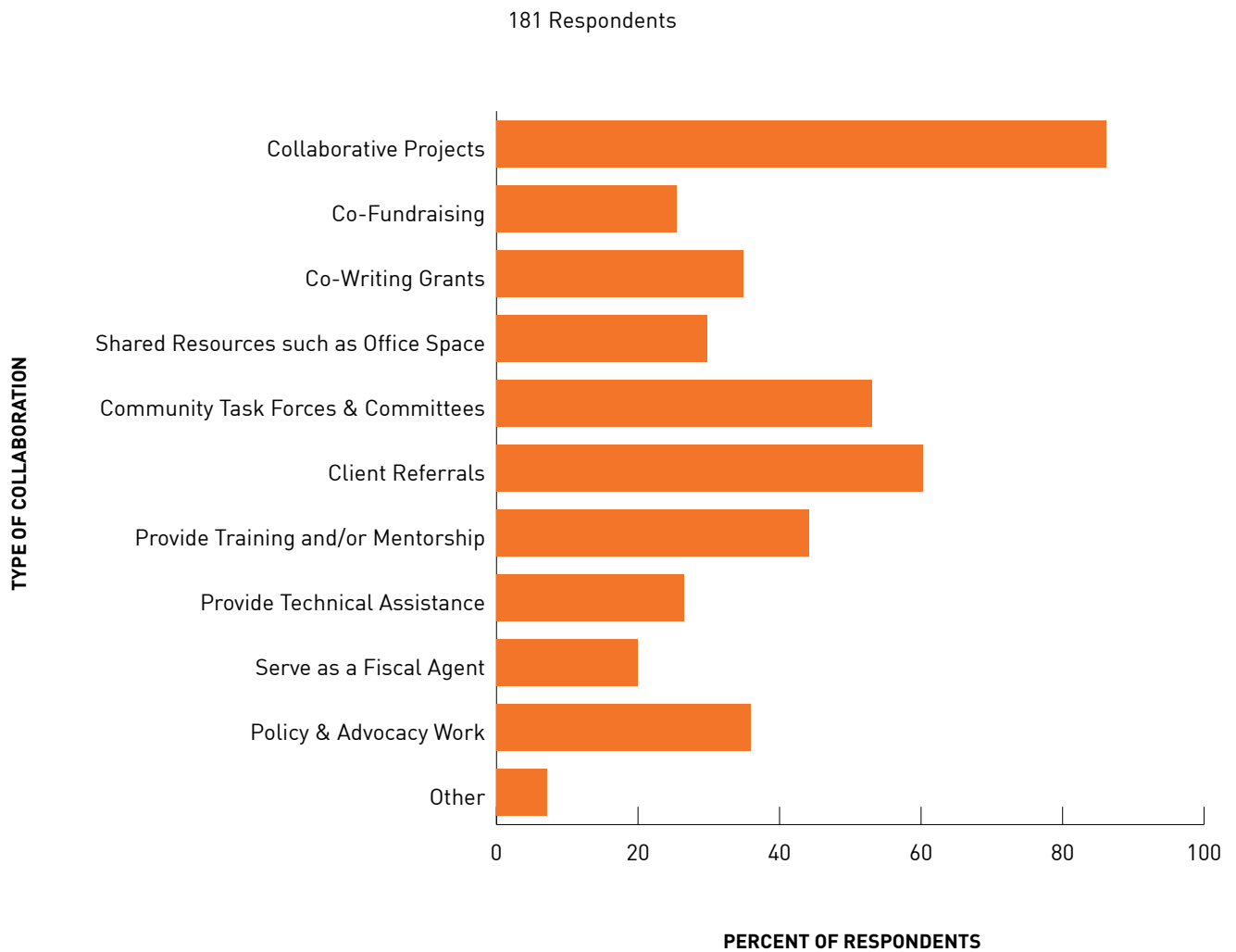
Q18 What are the three main ways people learn about your nonprofit organization?



“ WE HAVE THE DATA, BUT WE DON’T HAVE THE STAFF TIME TO ANALYZE IT TO SHARE WITH THE COMMUNITY.”

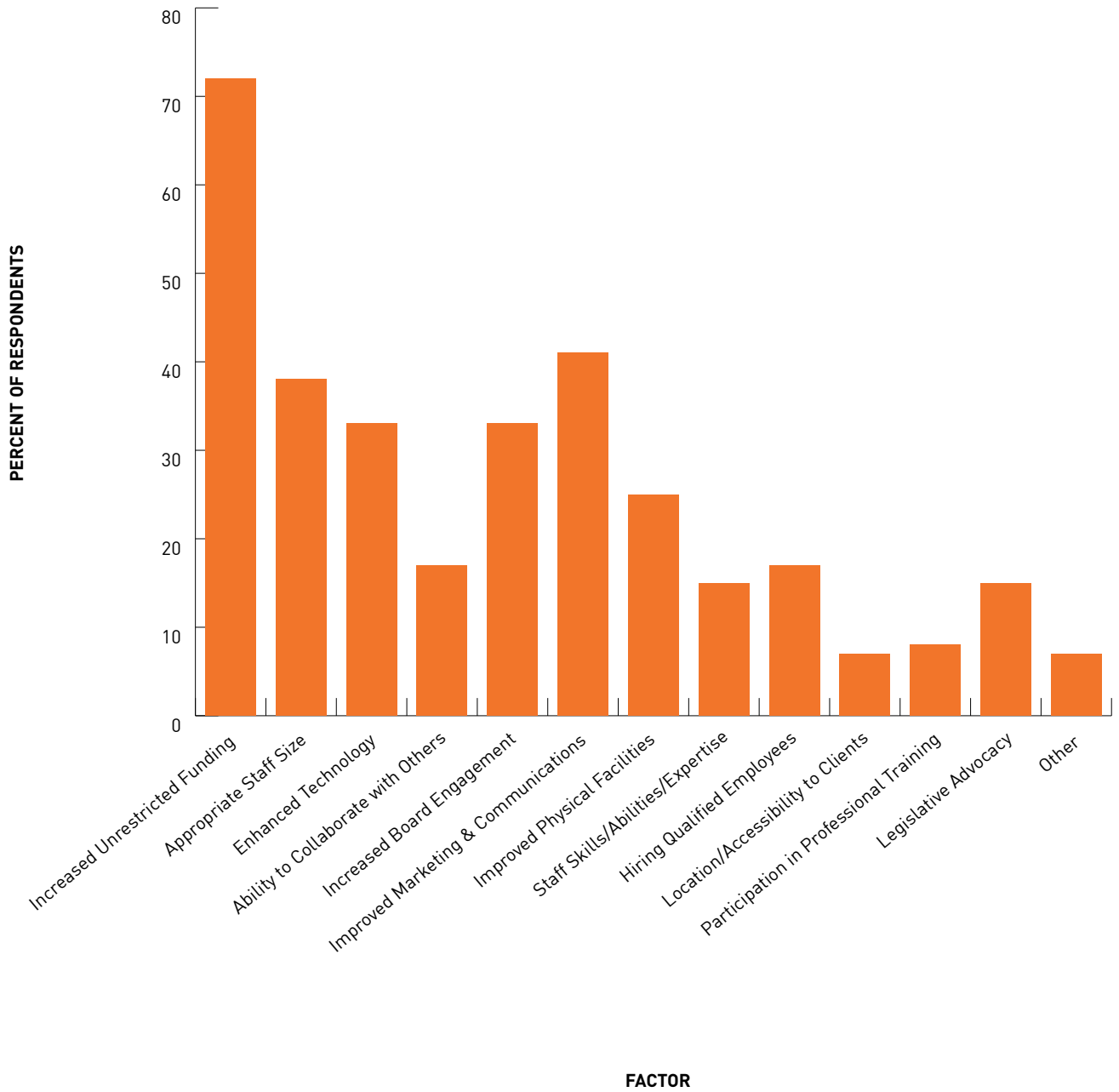
“ THE WORK IS SO MUCH, NO ONE HAS TIME TO CREATE STRONG COLLABORATIONS.”

Q19 How does your nonprofit organization collaborate with other nonprofit organizations?

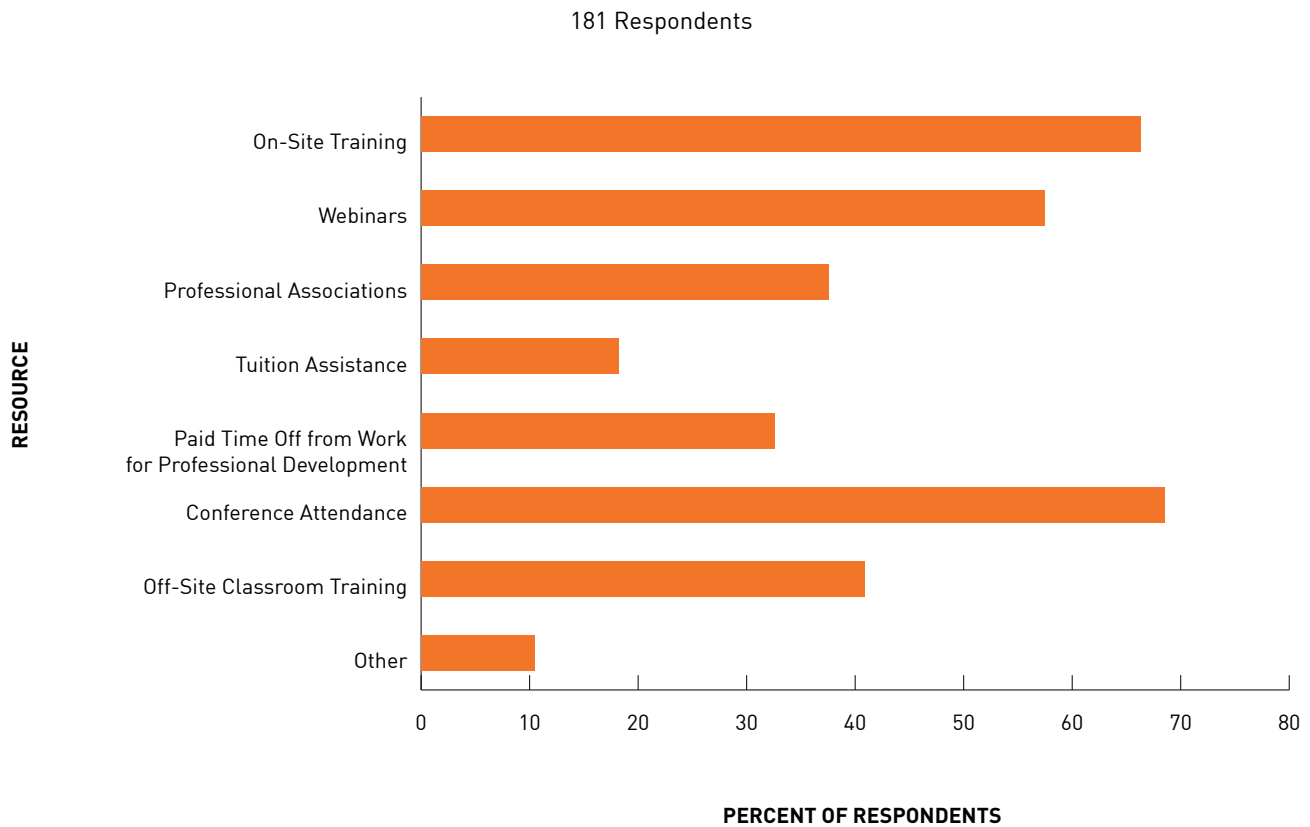


Q20 Of the following, which three factors would most increase the capacity of your nonprofit?

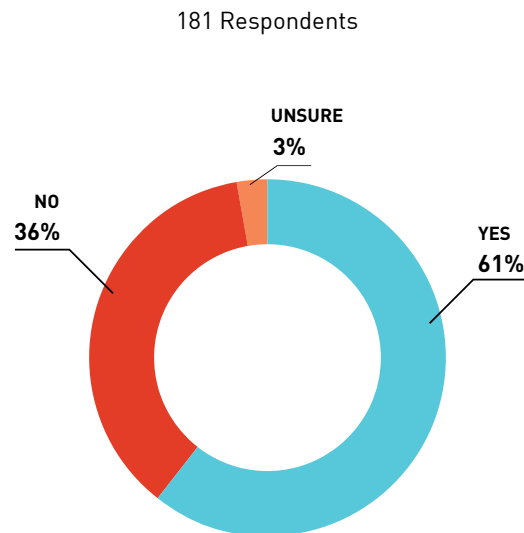
181 Respondents



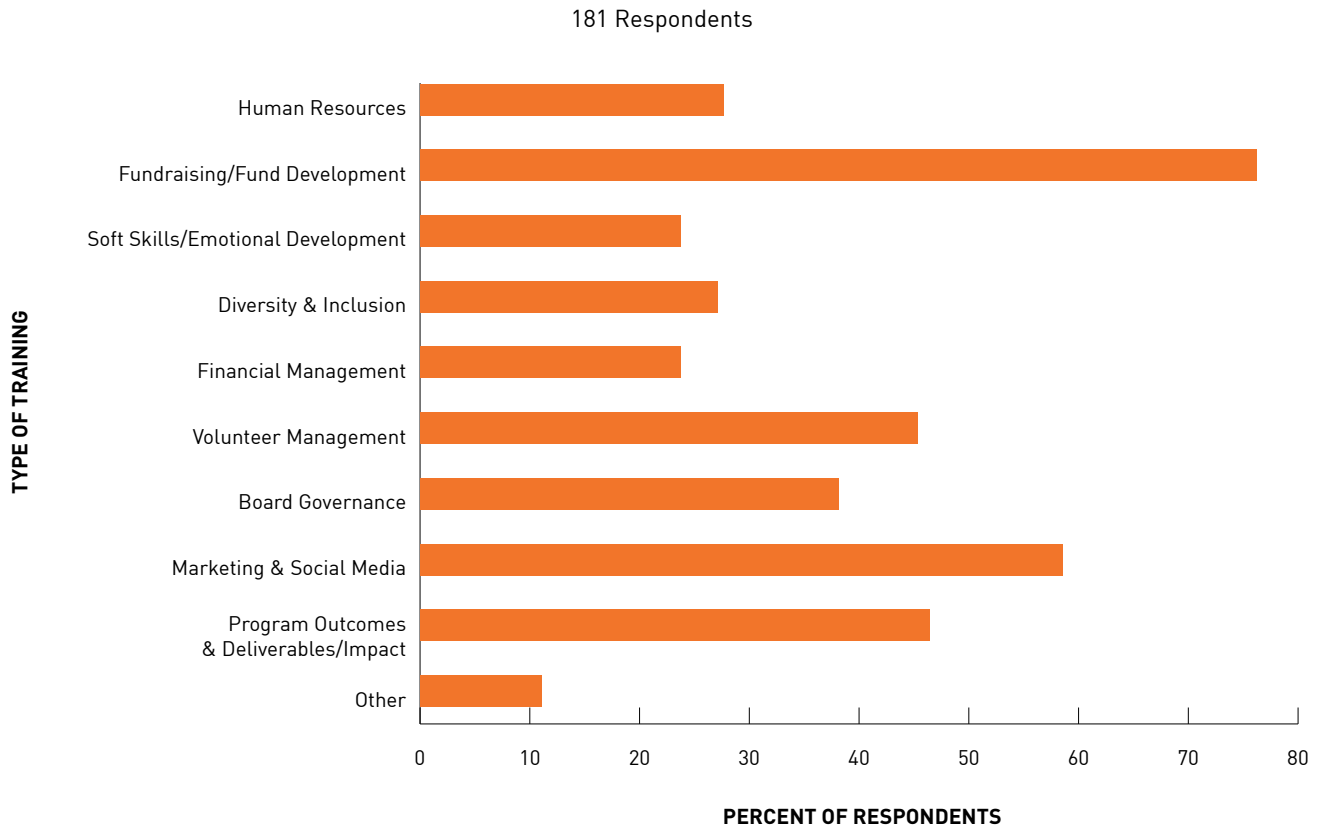
Q21 We currently provide the following resources to encourage board members, staff and volunteers to take advantage of training and educational opportunities:



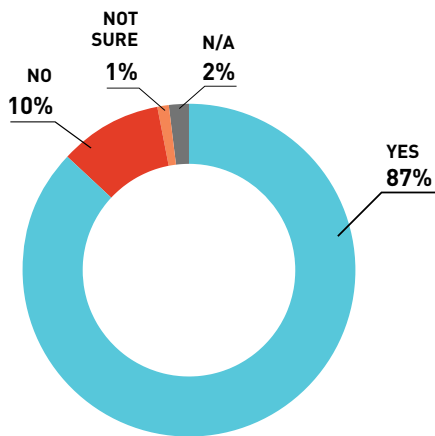
Q22 Does your nonprofit organization have a budget line item for training?



Q23 What type(s) of training does your organization need?

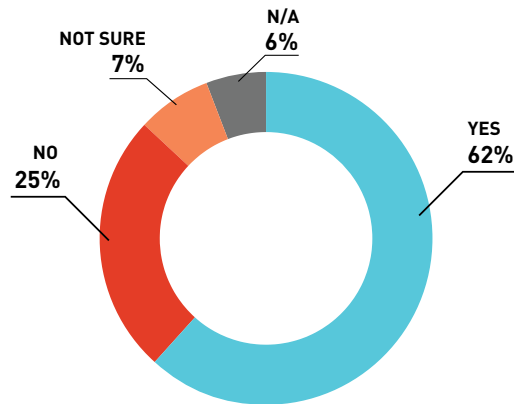


Q24 My organization has:



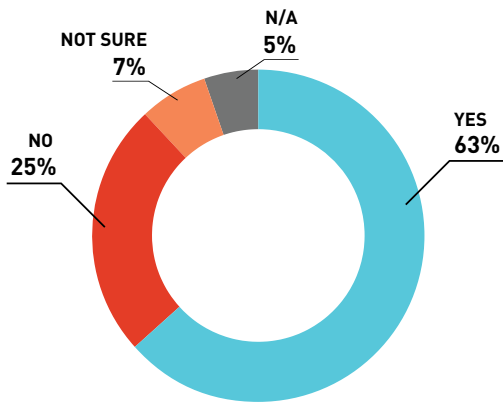
At least four regularly scheduled board meetings each year.

178 Respondents



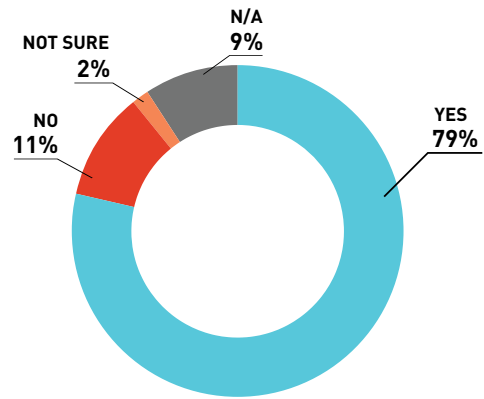
A written policy that is assessed annually and explicitly states the relationship between the top executive and the Board of Directors.

178 Respondents



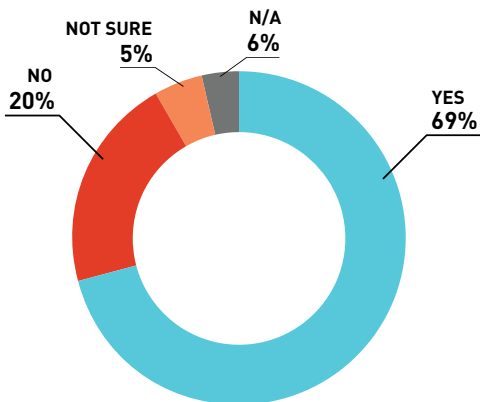
Current written job descriptions for the Board that are reviewed, as needed.

178 Respondents



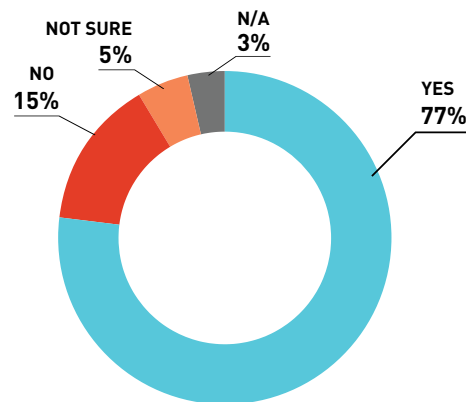
Current written job descriptions for the staff that are reviewed, as needed.

178 Respondents



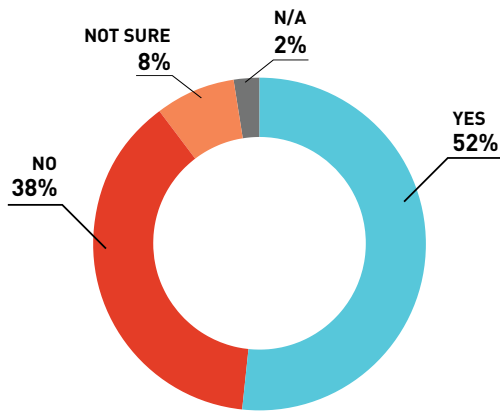
A Board of Directors that gives or gets resources for the organization.

178 Respondents



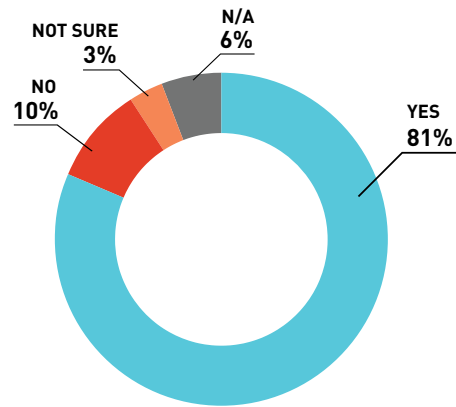
A Board that works as ambassadors for my organization and makes connections to our work through their networks.

178 Respondents



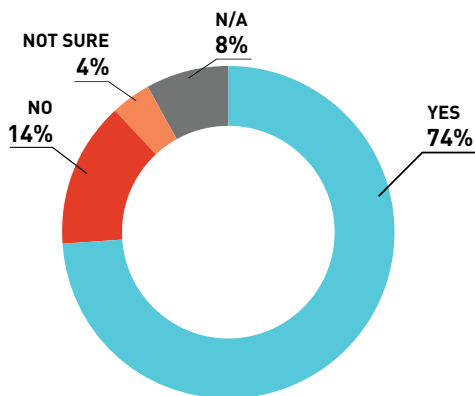
Board members that reflect the race, age, gender, geography and diversity of thought found in my community.

178 Respondents



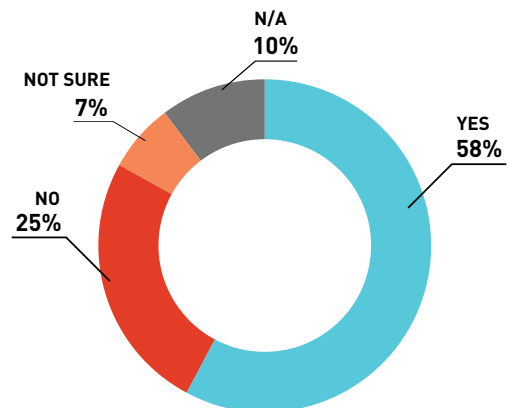
A Board of Directors that provide financial oversight for my organization through review of at least quarterly financial statements.

178 Respondents



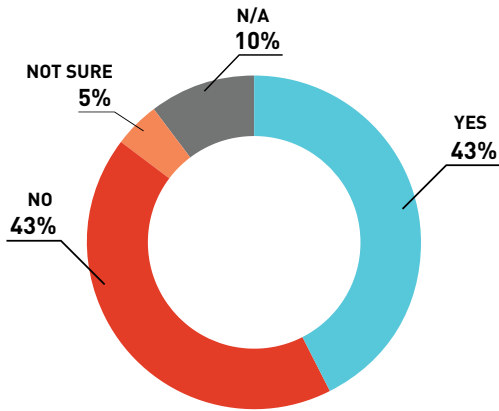
Bylaws that spell out term limits for the Board of Directors.

178 Respondents



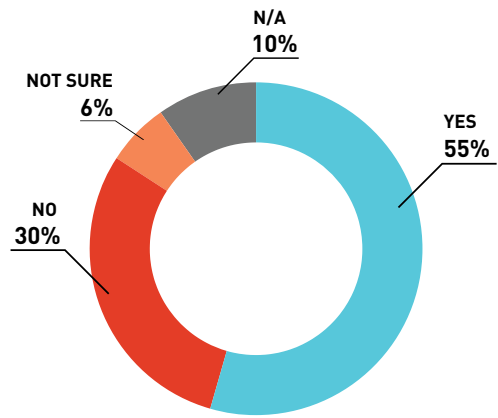
Term limits for the Board of Directors that are adhered to on an ongoing basis.

178 Respondents



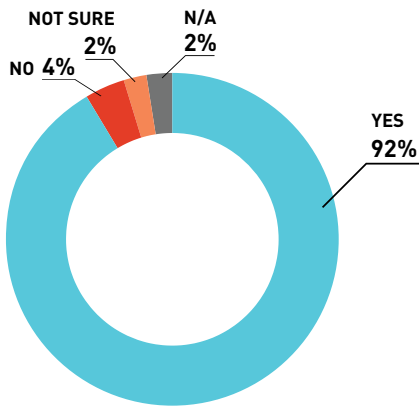
An annual assessment by the staff of the top executive.

178 Respondents



An annual evaluation by the Board of Directors of the top executive.

178 Respondents



A Board of Directors that advocates for our organization's mission.

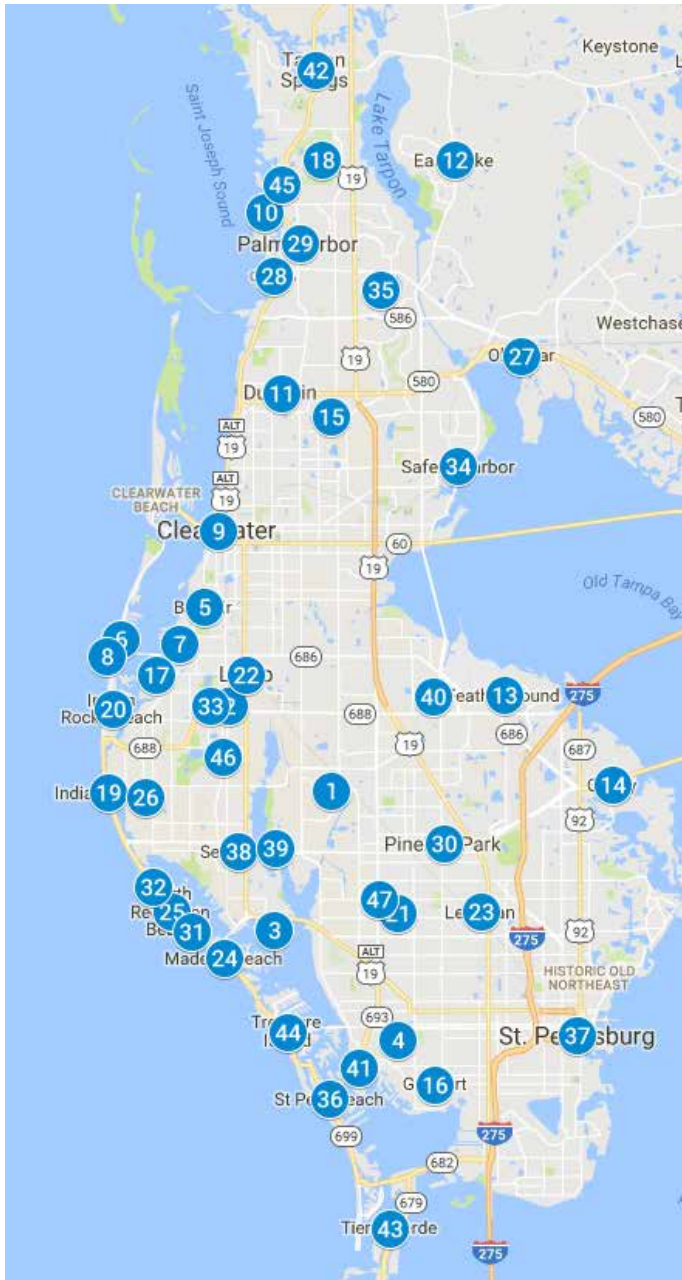
178 Respondents

DEMOGRAPHICS

Q25 Question 25 provided individual contact information for each nonprofit.

Q26 | 27 Select the Pinellas County location where you are headquartered and where your organization provides services.

163 Respondents



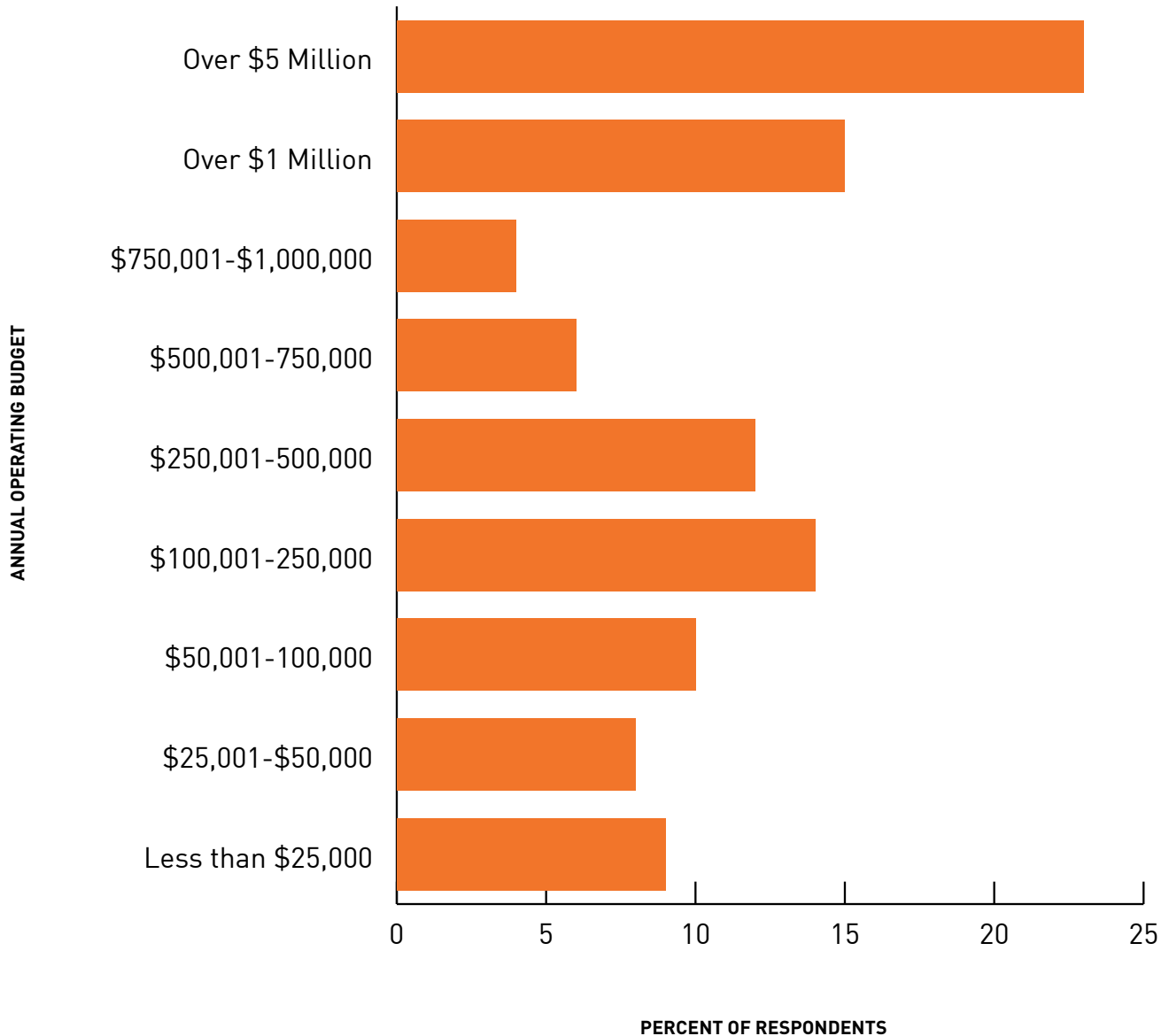
1	Bardmoor	25	North Redington Beach
2	Baskin	26	Oakhurst
3	Bay Pines	27	Oldsmar
4	Bear Creek	28	Ozona
5	Belleair	29	Palm Harbor
6	Belleair Beach	30	Pinellas Park
7	Belleair Bluffs	31	Redington Beach
8	Belleair Shore	32	Redington Shores
9	Clearwater	33	Ridgecrest
10	Crystal Beach	34	Safety Harbor
11	Dunedin	35	St. Pete Beach
12	East Lake	36	St. Petersburg
13	Feather Sound	37	Seminole
14	Gandy	38	Seminole Park
15	Greenbriar	39	South Highpoint
16	Gulfport	40	South Pasadena
17	Harbor Bluffs	41	St. George
18	Innisbrook	42	Tarpon Springs
19	Indian Rocks Beach	43	Tierra Verde
20	Indian Shores	44	Treasure Island
21	Kenneth City	45	Wall Springs
22	Largo	46	Walsingham
23	Lealman	47	West Lealman
24	Madeira Beach		

	Location	Headquarters	Service Providers
1	Bardmoor	1	39
2	Baskin	0	31
3	Bay Pines	0	40
4	Bear Creek	0	33
5	Belleair	0	39
6	Belleair Beach	0	36
7	Belleair Bluffs	0	36
8	Belleair Shore	0	35
9	Clearwater	25	69
10	Crystal Beach	0	31
11	Dunedin	4	49
12	East Lake	0	38
13	Feather Sound	0	35
14	Gandy	3	41
15	Greenbriar	0	30
16	Gulfport	0	51
17	Harbor Bluffs	0	34
18	Innisbrook	0	34
19	Indian Rocks Beach	0	37
20	Indian Shores	0	35
21	Kenneth City	1	49
22	Largo	15	68
23	Lealman	4	56
24	Madeira Beach	0	38
25	North Redington Beach	0	39
26	Oakhurst	0	36

	Location	Headquarters	Service Providers
27	Oldsmar	1	39
28	Ozona	0	33
29	Palm Harbor	3	43
30	Pinellas Park	12	64
31	Redington Beach	0	37
32	Redington Shores	0	37
33	Ridgecrest	0	42
34	Safety Harbor	0	47
35	St. Pete Beach	0	42
36	St. Petersburg	82	116
37	Seminole	1	41
38	Seminole Park	0	40
39	South Highpoint	0	42
40	South Pasadena	0	30
41	St. George	0	47
42	Tarpon Springs	1	35
43	Tierra Verde	1	35
44	Treasure Island	0	37
45	Wall Springs	0	30
46	Walsingham	0	38
47	West Lealman	0	47
	TOTAL	154	1981

Q28 Which range best describes your annual operating budget?

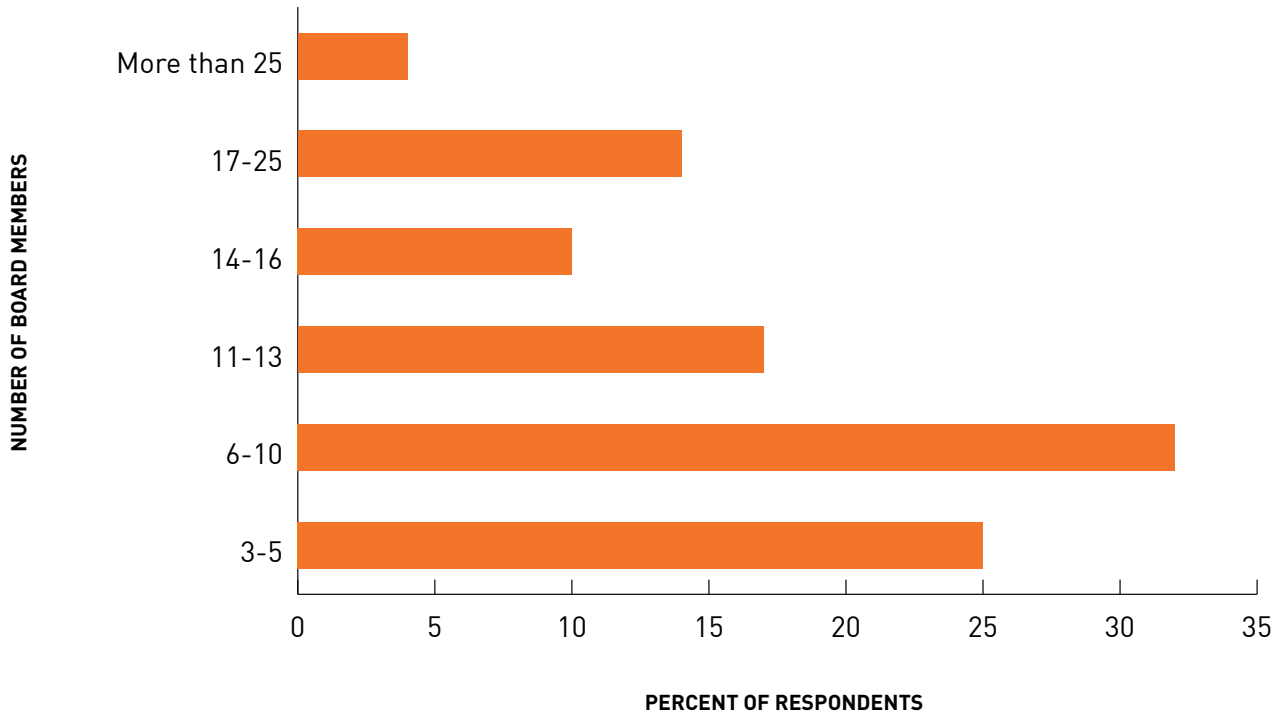
163 Respondents



WE NEED TO EXPAND CURRENTLY EXISTING PROGRAMS, BUT TYPICALLY ONLY GET FUNDING FOR NEW PROGRAMS.”

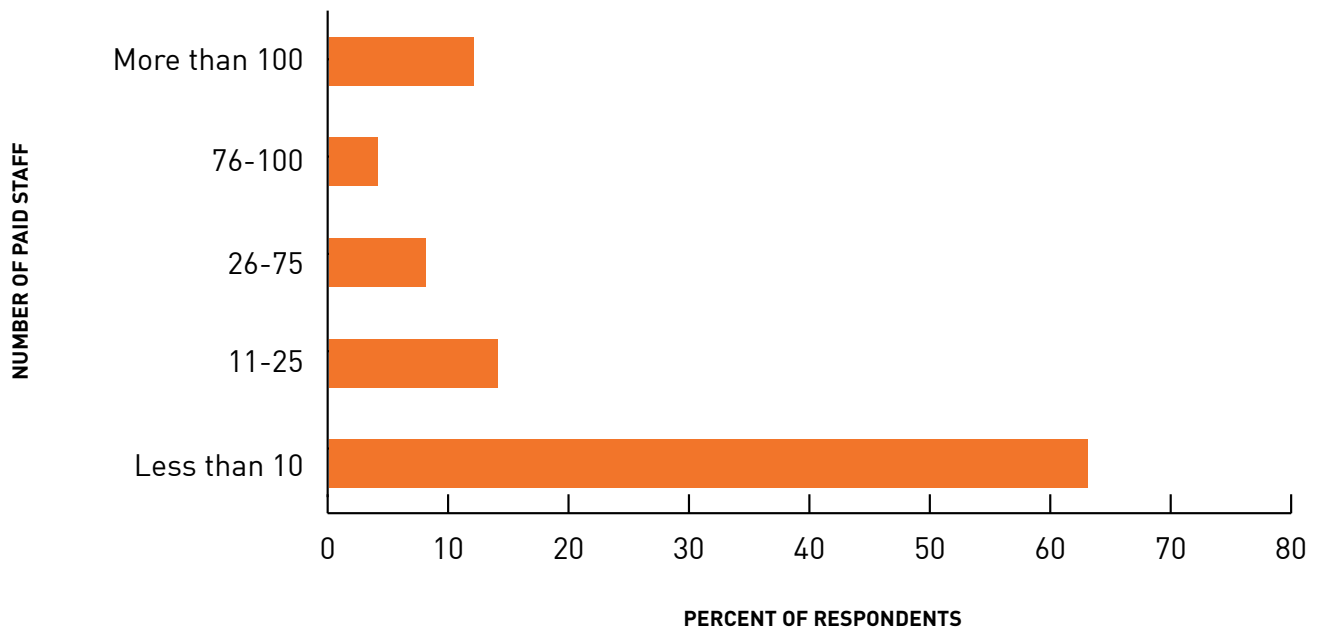
Q29 How many members serve on your governing board?

163 Respondents



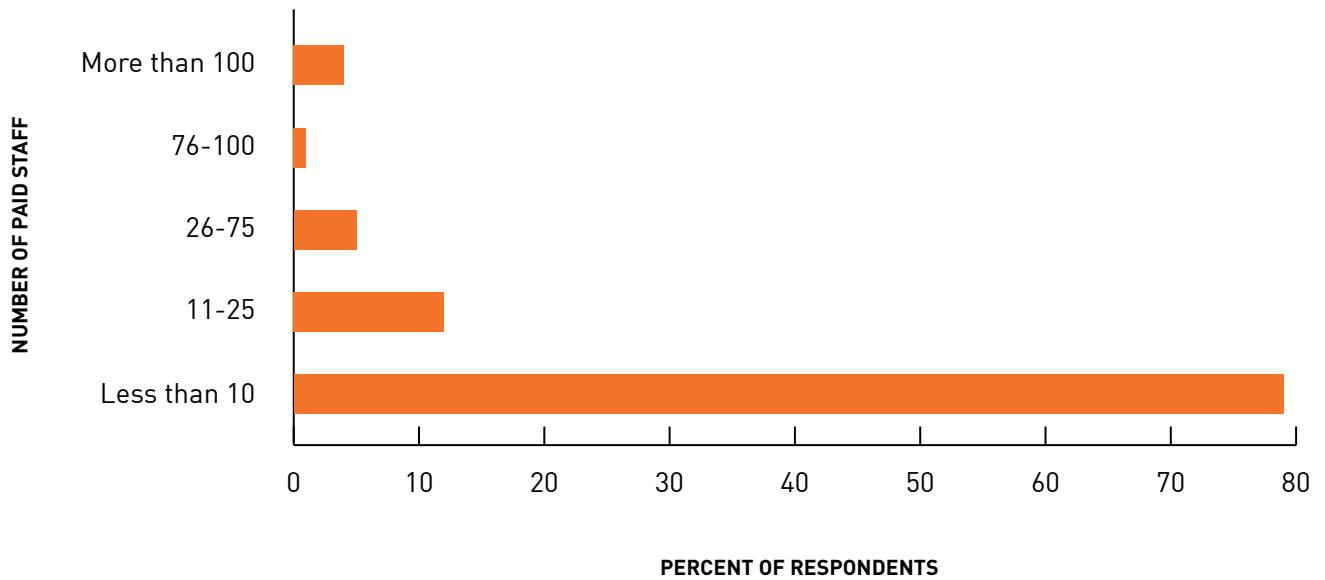
Q30 How many paid full-time staff do you have?

163 Respondents



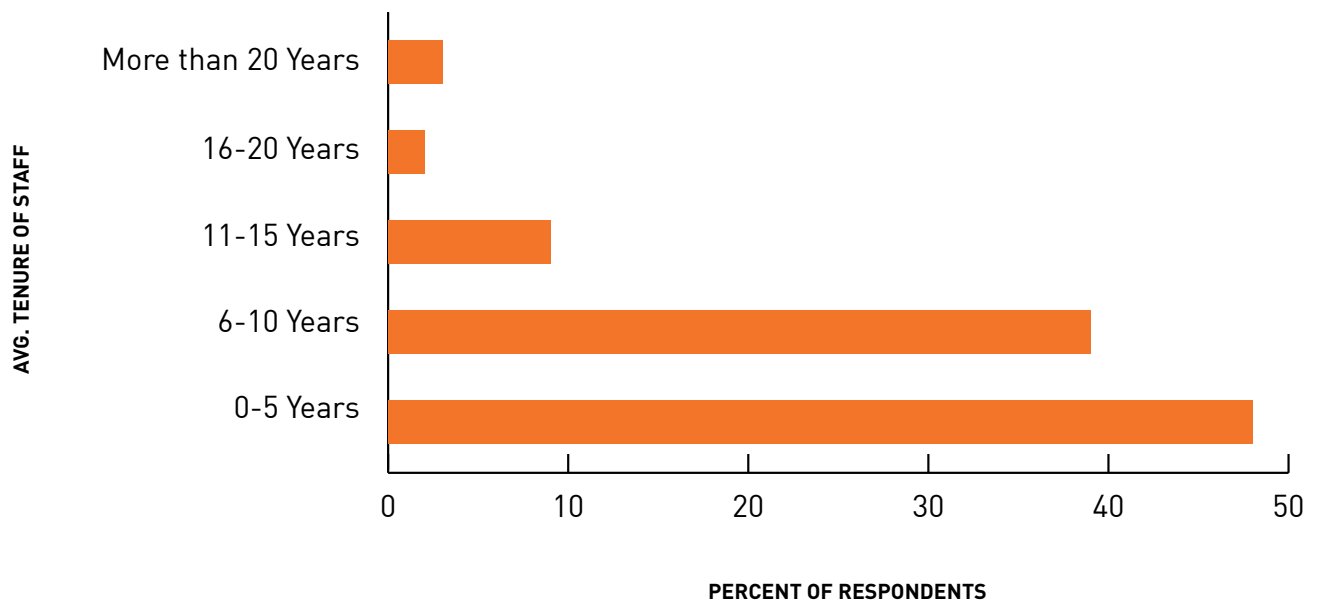
Q31 How many paid part-time staff do you have?

163 Respondents



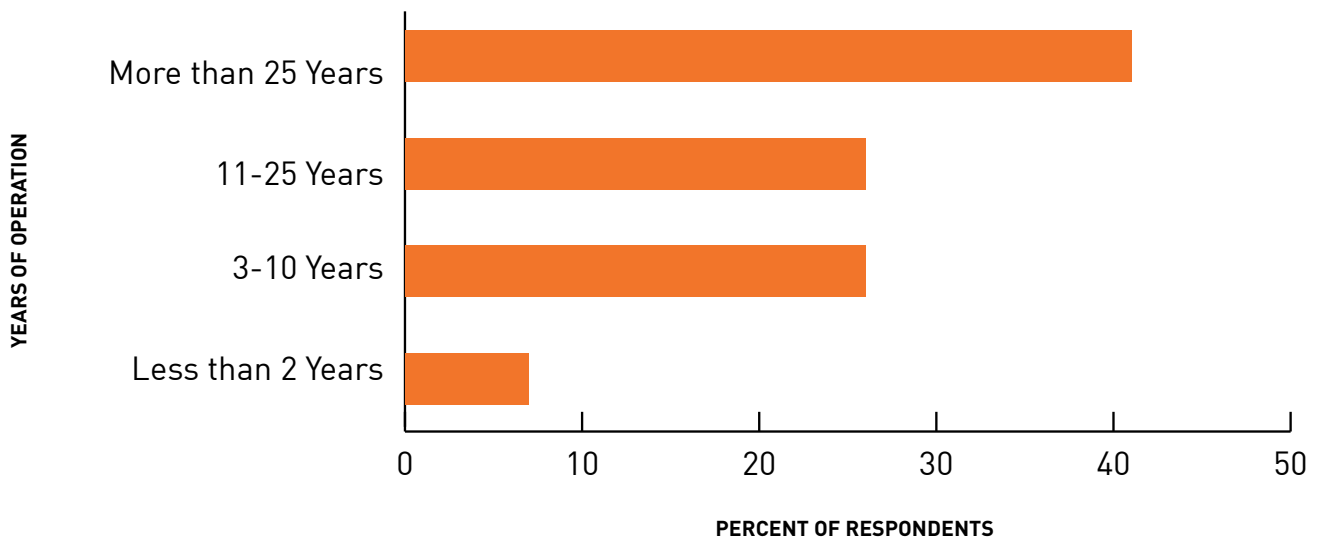
Q32 Which best describes the average tenure of your staff?

163 Respondents



Q33 How long has your agency been operating in Pinellas County?

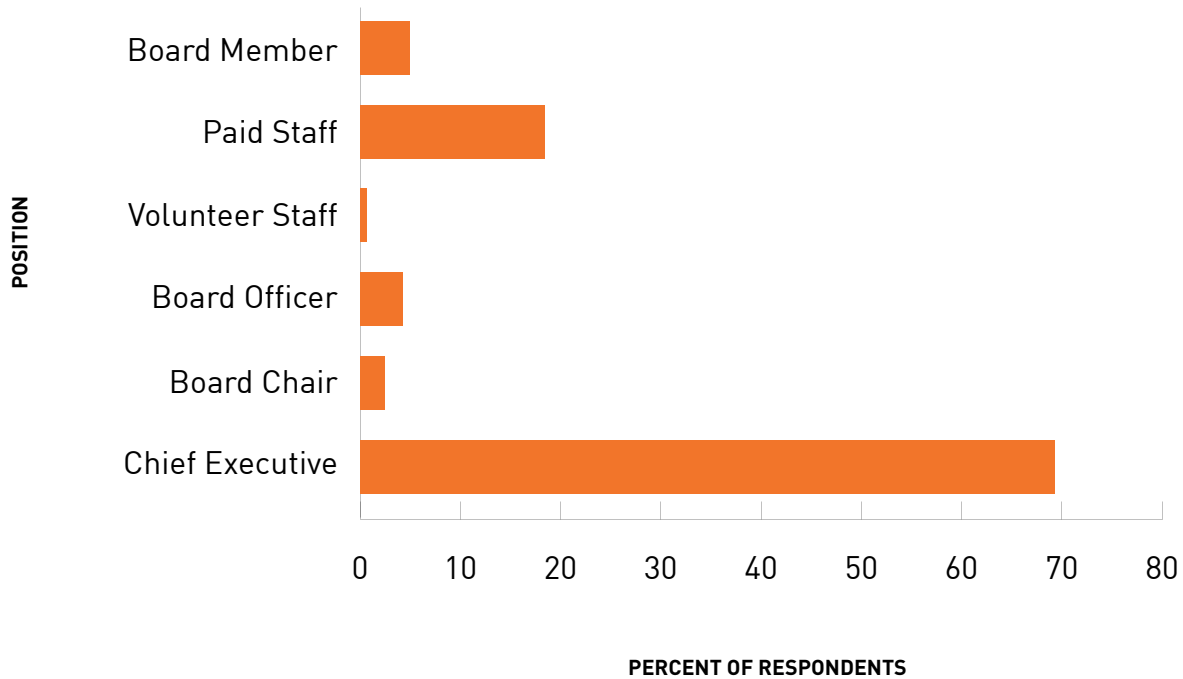
163 Respondents



“ WE WORRY ABOUT SUCCESSION PLANNING, AND HOW WE CAN GET NEW LEADERS.”

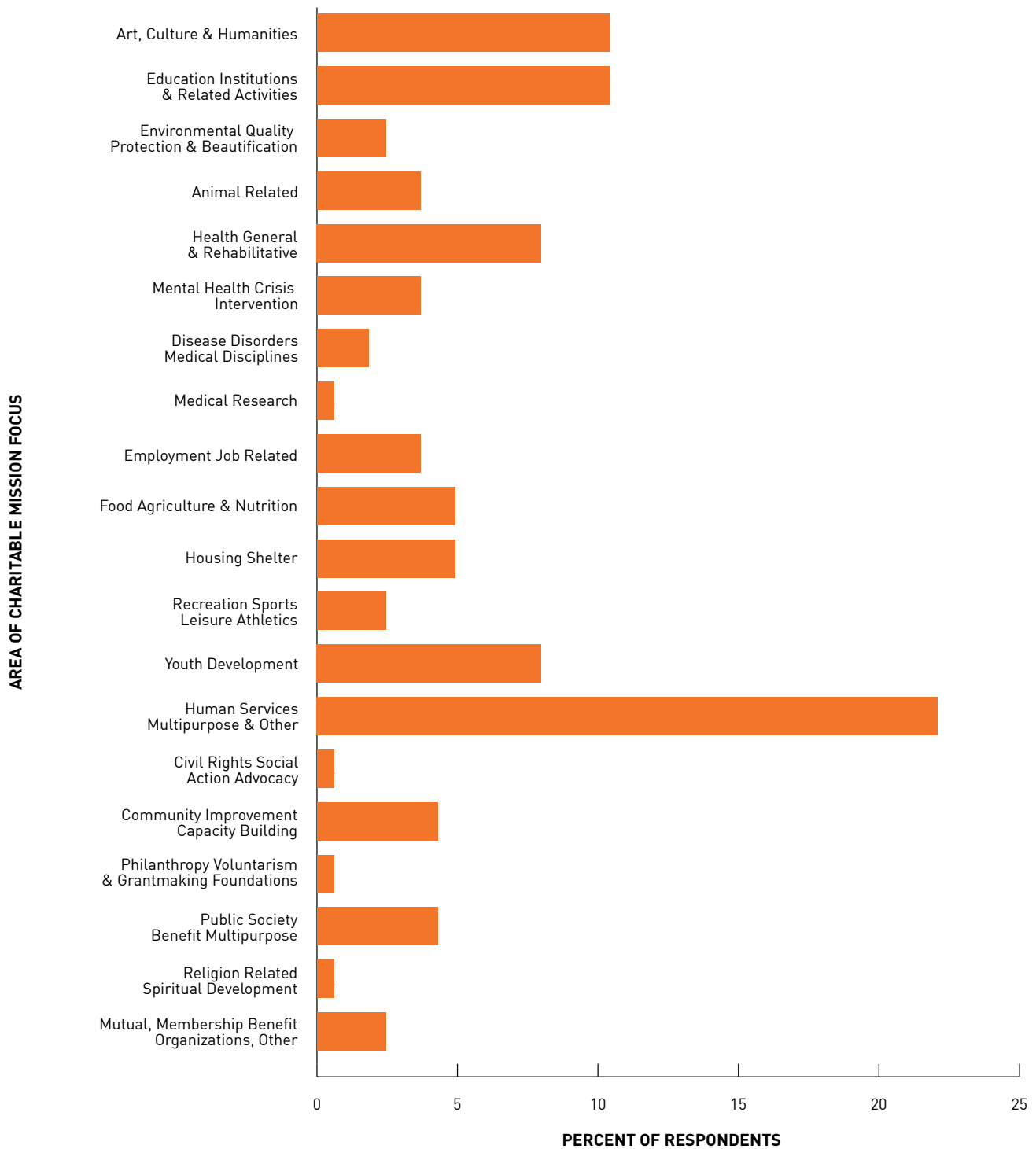
Q34 What is your position with the nonprofit agency?

163 Respondents



Q35 Choose the area of charitable mission focus (based on National Taxonomy of Exempt Entities) that best describes your mission focus and incorporation.

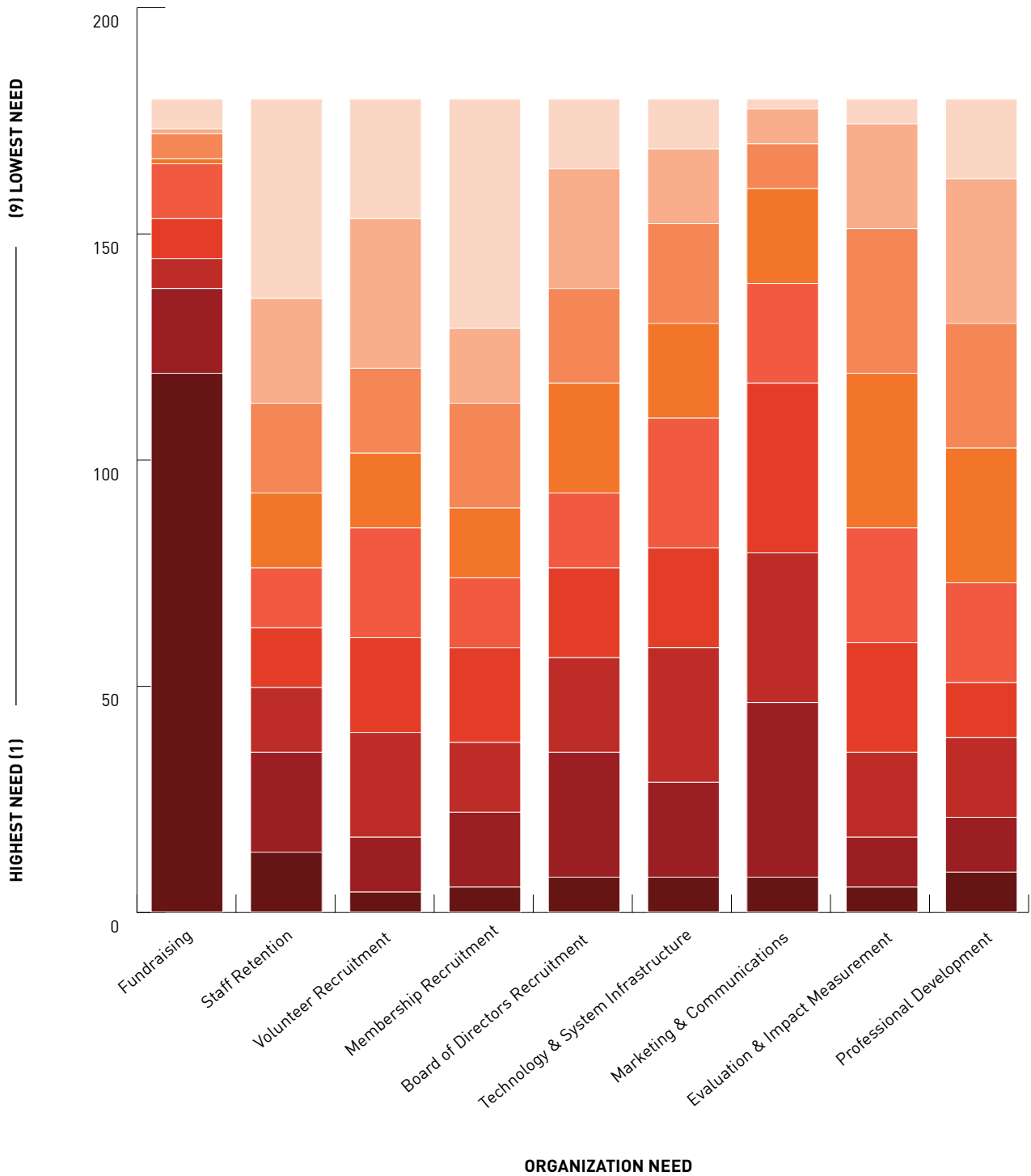
163 Respondents



NOT SELECTED: Crime Legal, Public Safety Disaster Preparedness & Relief, International Foreign Affairs & National Security, Science and Technology Research Institutes Services, Social Science Research Institutes & Internal U.S.

Q36 Prioritize your greatest needs as an organization.

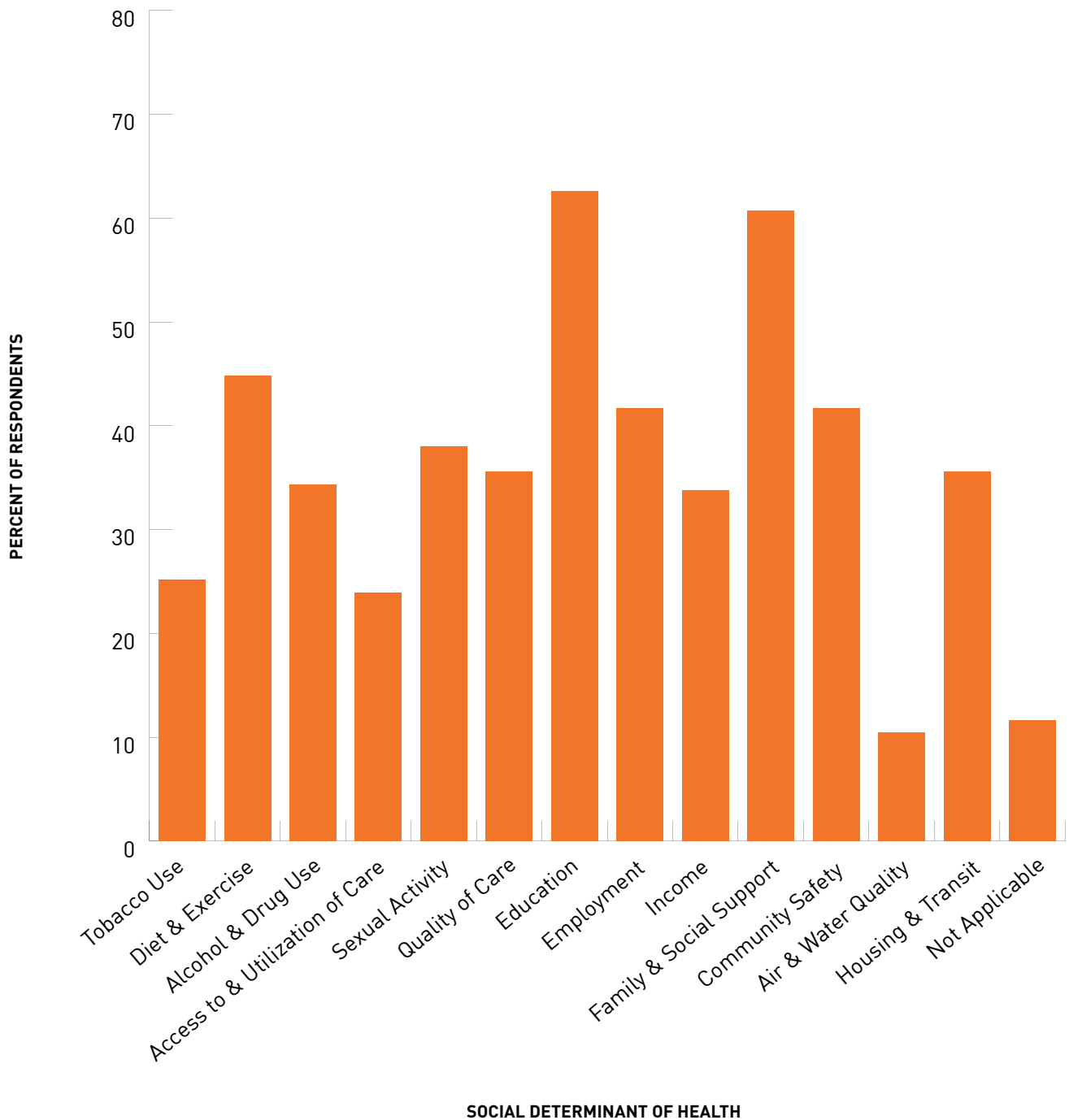
163 Respondents



The Three Most Prioritized Needs: Fundraising, Marketing & Communications, Technology and Infrastructure

Q37 Of the 13 commonly understood social factors that impact community health, which social determinant(s) of health does your organization address?

163 Respondents



BRIGHT SPOTS

PINELLAS NONPROFIT SECTOR STRENGTHS, ASSETS & QUESTIONS

Nonprofit Leadership Center CEO Emily Benham, FAHP, CFRE, shares her top five reasons for optimism about the sector based on the scan and survey results, along with a few cautionary notes and areas for future research.

01

THERE ARE A LOT OF BOOTS ON THE GROUND WORKING FOR THE GOOD OF THE COMMUNITY.

The high-level scan revealed that there are many nonprofits operating in Pinellas County (6,167 registered, with 1,129 reporting revenue of \$10,000 or more since 2013 filing a Form 990).

The flip side: The majority completing this survey have less than 10 on staff and budgets less than \$500,000. Conclusion: Many may be competing for the same resources — human and financial.

02

THERE IS AN ABUNDANCE OF PHILANTHROPIC RESOURCES IN PINELLAS COUNTY.

17 foundations are registered in Pinellas County, reporting assets greater than \$10 million.

The flip side: How many of those dollars are being invested locally?

03

PINELLAS COUNTY NONPROFITS ARE FIRST AND FOREMOST DRIVEN BY THEIR MISSIONS.

95% of respondents agree or strongly agree that they have a clear mission and statement of organizational values.

The flip side: Are they sometimes hiring for passion for the mission over skills for the job?

04

THE FABRIC OF THE PINELLAS COUNTY NONPROFIT SECTOR IS A COLORFUL TAPESTRY WOVEN BY A DIVERSE SET OF PROVIDERS WORKING IN MANY DIFFERENT ASPECTS OF SOCIAL CHANGE.

As per the scan data, the largest segment of nonprofits, 1,042, report having an unknown or undesignated service area. The next three largest segments include educational institutions (629), organizations of religious or spiritual development (573), and human service organizations (572).

The flip side: This could mean a duplication of service or at the very least lack of coordination of service where missions overlap.

05

THE LEADERS OF PINELLAS COUNTY NONPROFITS ARE OPTIMISTIC.

76 percent believe they will grow in the next 3 years.

The flip side: At the same time, 85 percent say they would reduce programs or staff if they lost one or two key funding sources. Is their optimism tethered too closely to a single source of funding rather than a more diverse and therefore sustainable base?

PINELLAS NONPROFIT SECTOR

THEMES OF CHALLENGE & OPPORTUNITY



TALENT

MORE SKILL NEEDED TO DRIVE THE MISSION

Nonprofits need talent in three critical areas to thrive: on their staffs, boards, and among their volunteers.

When referring to staff, 95 percent of Pinellas County nonprofit leaders believe they have the right people in the seats to accomplish their missions. However, that number drops to 69 percent when asked whether those people have the skills and expertise they need to do their jobs. Confidence drops even further when the question turns to fund development: Only 50 percent of leaders believe their teams have the fundraising skills necessary to accomplish their goals.

- Turnover is a concern: 48 percent of nonprofit leaders report average staff tenure is 0-5 years. And while 48 percent believe they pay a competitive salary, they also report the top two reasons team members leave is insufficient pay and burnout.



FUNDERS DETERMINE HOW MUCH WE CAN PAY FUNDED STAFF, MAKING IT HARD TO RECRUIT EXPERIENCED PROFESSIONALS.”

- **Nonprofits indicated their staff members “wear many hats.”** Couple this fact with the finding that only 38 percent have a plan for how to continue providing services when they lose staff, and staffing transitions can have an impact on multiple areas of the organization.
- **Fundraising talent is an area of concern:**
 - Only 39 percent Pinellas nonprofits report reaching annual fundraising goals in each of the last three (3) years.
 - 46 percent of leaders believe they have right fundraising team in place to raise money.
 - Roughly half of nonprofits report having difficulty recruiting new donors annually.
 - Half report having no written policies for donor recognition and retention. Of those with policies, only one-third adhere to them.

TOP CHALLENGES IN HIRING QUALIFIED FUNDRAISERS

01 | SCARCITY OF TALENT

02 | HIGH SALARY REQUIREMENTS

03 | COMPETITION WITH OTHER NONPROFITS

04 | KNOW-HOW IN THE INTERVIEW PROCESS TO DETERMINE QUALIFICATIONS

Board leadership should drive the strategic direction of the organization, yet many organizations lack a diversity of talent representative in their board members, and roles and responsibilities continue to be a challenge. More than half of the organizations surveyed report that they are missing marketing, legal, and human resources expertise on their board. **More than one-third report missing expertise in fundraising, leadership, and financials.**

- **Diversity:** While 70 percent of Pinellas County leaders report their staff appropriately reflects the population they serve, only 51 percent believe their board does the same.
- **Personal Giving:** Less than half report that they achieve 100 percent personal giving from their board.
- **Culture:**
 - While the majority of boards of directors have bylaws with defined term limits, more than 40% of those nonprofits are not implementing term limits with their board members.
 - Only half of the organizations surveyed report that their board members conduct an annual evaluation of the top executive.

“ WE RELY ON VOLUNTEERS TO DO WORK THEY’RE NOT REALLY QUALIFIED TO DO.”

Volunteers are essential to the operations of many Pinellas County nonprofits. However, many of them lack expertise in areas they’re being asked to support.

“ THE TRAINING WE PROVIDE FOR VOLUNTEERS IS SCARCE AND USUALLY ONLY COVERS WHAT IS REQUIRED BY FUNDERS.”

1 in 5 organizations surveyed rely solely on volunteers to carry out their mission.



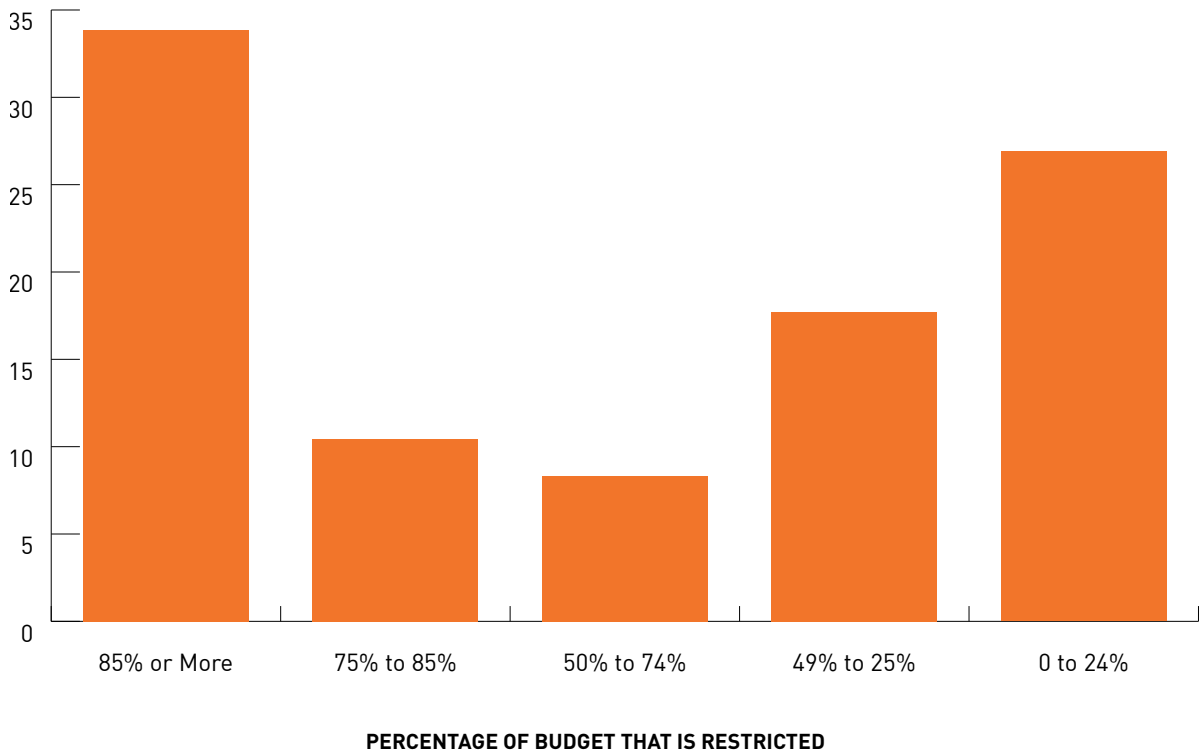
SUSTAINABILITY

AN URGENT NEED FOR UNRESTRICTED FUNDING

A nonprofit’s ability to be financially viable and have impact are deeply connected. Ultimately, sustainability depends upon both. **Only 39 percent of Pinellas County nonprofits report ample resources to meet annual needs.** Furthermore, if faced with the loss of one or two major funders, the most common response was to “reduce programs or services.”

44 percent of Pinellas nonprofit leaders report restricted funding makes up 75 percent or more of their annual budgets.

Percent of Organizations Reporting Restricted Funding



“ [FUNDING] RESTRICTIONS MEAN WE CAN’T ALWAYS DO WHAT THE FAMILY NEEDS.”

Nonprofit leaders in Pinellas County report that restricted funding has created several challenges.

“ RESTRICTIONS MAKE US FEEL AS THOUGH FUNDERS DON'T SEE US AS EXPERTS.”

Measuring Impact

The scarcity of unrestricted funding has direct effect on a nonprofit's ability to demonstrate impact to a funder and to the community.

While 70 percent of the organizations surveyed indicate that they are tracking outcomes, qualitative data shows that outcomes are typically driven by the needs of the funders and having multiple funders makes it difficult to know what to measure.

Many nonprofits report it is difficult to find the financial resources to implement procedures for tracking outcomes. They often lack the technology or additional staff to conduct research of program impact. Additionally, they indicate restrictions on funding that create short-term support structures for programs mean that some programs are not around long enough to track true success.



COLLABORATION

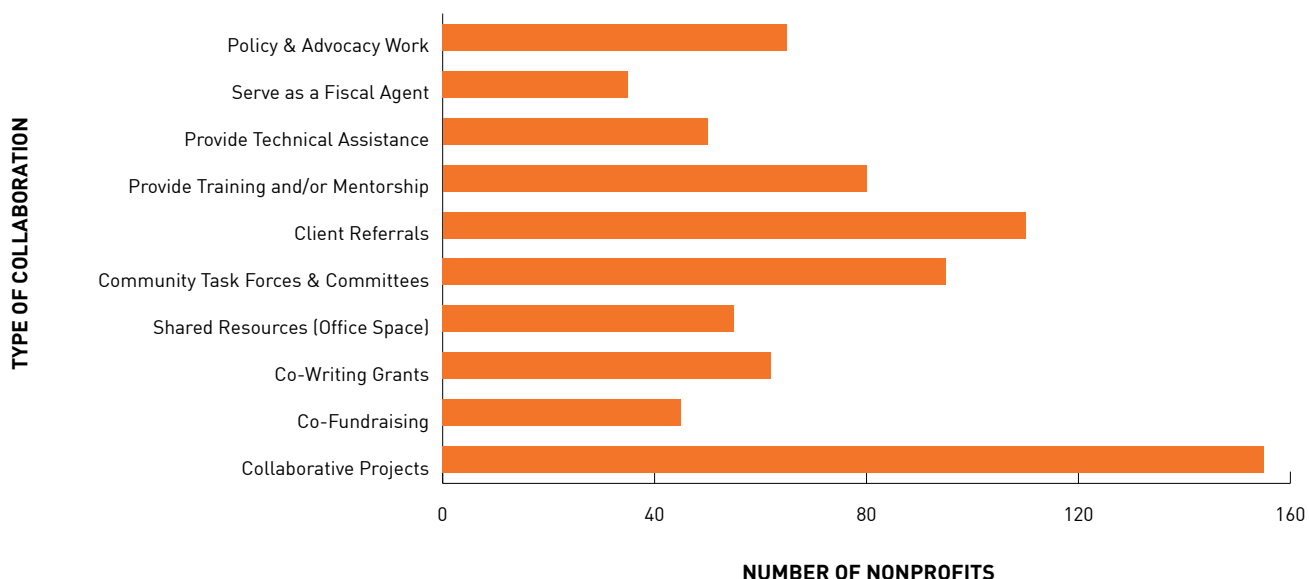
LACKING AN ENVIRONMENT OF TRUST

Collaboration is frequently defined as two or more organizations coming together with a common goal to pool resources and meet a need that neither can meet alone. What is clear in both the survey and interview data is that collaboration means different things to many nonprofit leaders. Also apparent: Pinellas nonprofit leaders have many more stories of failed attempts at collaboration than they do of success and repeatedly cite “a lack of trust” between nonprofits as the primary reason many attempts fall flat.

- 86 percent of Pinellas organizations report some level of collaboration with other county organizations. Many participate in collaborative projects, provide referrals, or participate with one another on committees or taskforces.
- *Fewer (34 percent) work collaboratively with one another for funding of projects.* Executives cite not feeling comfortable sharing or co-seeking financial resources that are already so scarce.
- *Only 34% indicated that they would reach out to collaborate with other organizations if they lost funding sources.*

“ [WE EXPERIENCED A] LACK OF EQUAL PARTNERSHIP BETWEEN LARGE AND SMALL AGENCIES IN A COLLABORATION.”

How Nonprofits Collaborate with Each Other



However, when asked to share positive thoughts on how to foster collaboration, they offer these ideas:

- Create opportunities to provide their organization’s services in other nonprofits’ facilities, so those seeking services can get most of their needs met at one location.
- Identify funders who will invest in collaboration among nonprofits for more than one year.
- Ensure convenings stay on track and encourage organizations to “move the needle” in some way each time they come to the table.



CAPACITY GROWTH

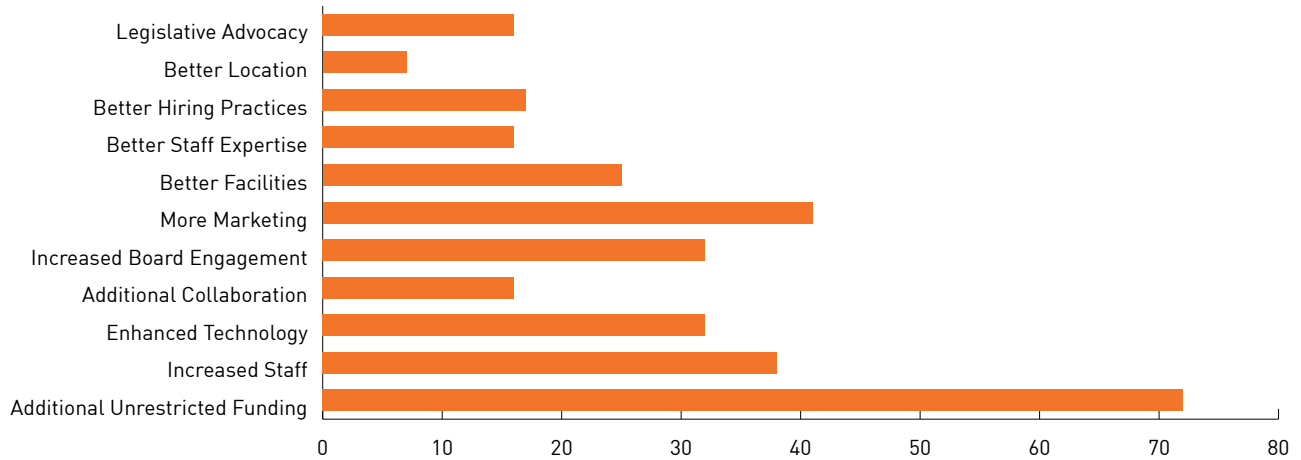
SIGNIFICANT NEEDS BUT HARD TO PRIORITIZE

Responses from nonprofit executives reveal there is little agreement on what capacity building is and who is responsible for it. However, they overwhelmingly agree on one thing: the top driver to increase their effectiveness is unrestricted funding.

And though organization leaders know that additional training could develop better talent, they report they can rarely make it a priority. Only 60 percent of nonprofits report being able to budget for staff training, and much of that training is dictated by funder requirements, e.g. workplace safety topics rather than job skills.

88 percent report their organization supports a learning and adapting environment, yet only 60% report a line item for training.

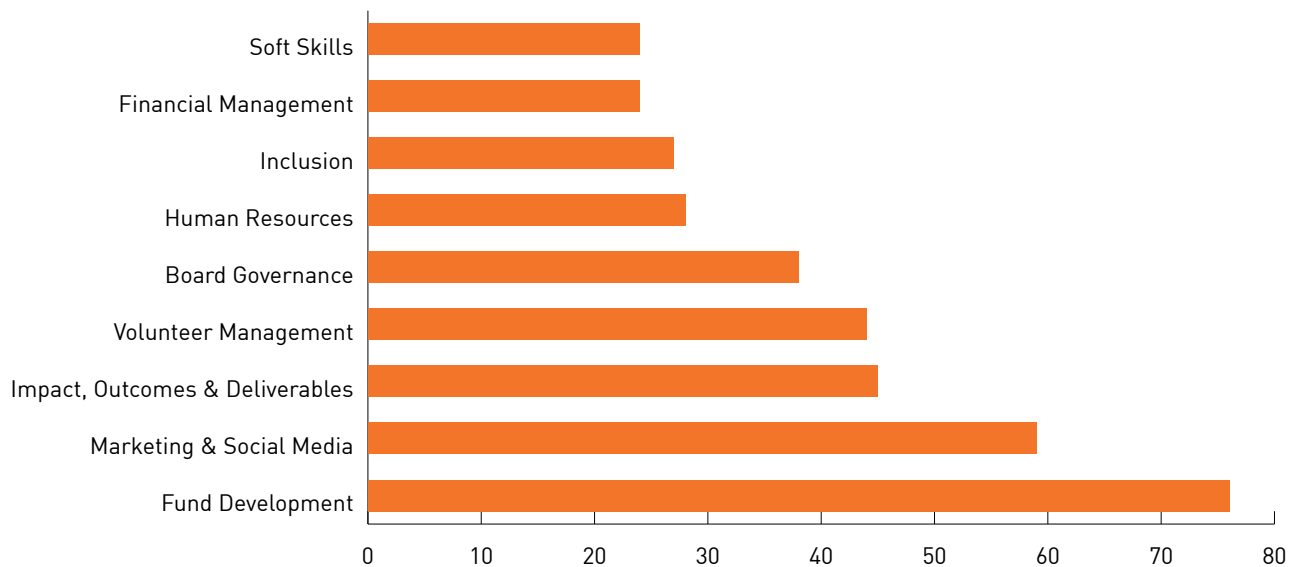
What Would Increase Your Capacity? (by Percentage)



73 percent of nonprofits surveyed consistently report the need for unrestricted funding to increase capacity. Of the other 10 needs reported, more than half could be addressed by professional training, consulting, or coaching.

Organizations in Pinellas County overwhelmingly report needing Fundraising and Development training. While Human Resources training remains a lower priority, many executives say that staying up-to-date with changing legalities surrounding pay, hiring, and termination practices is a challenge. Additionally, the board’s understanding and execution of their roles in raising funds, being donors, and advancing the organization in the community continues to be a concern, as does their ability to recruit new board members effectively.

Training Needs by Percentage



PROPELLING FORWARD

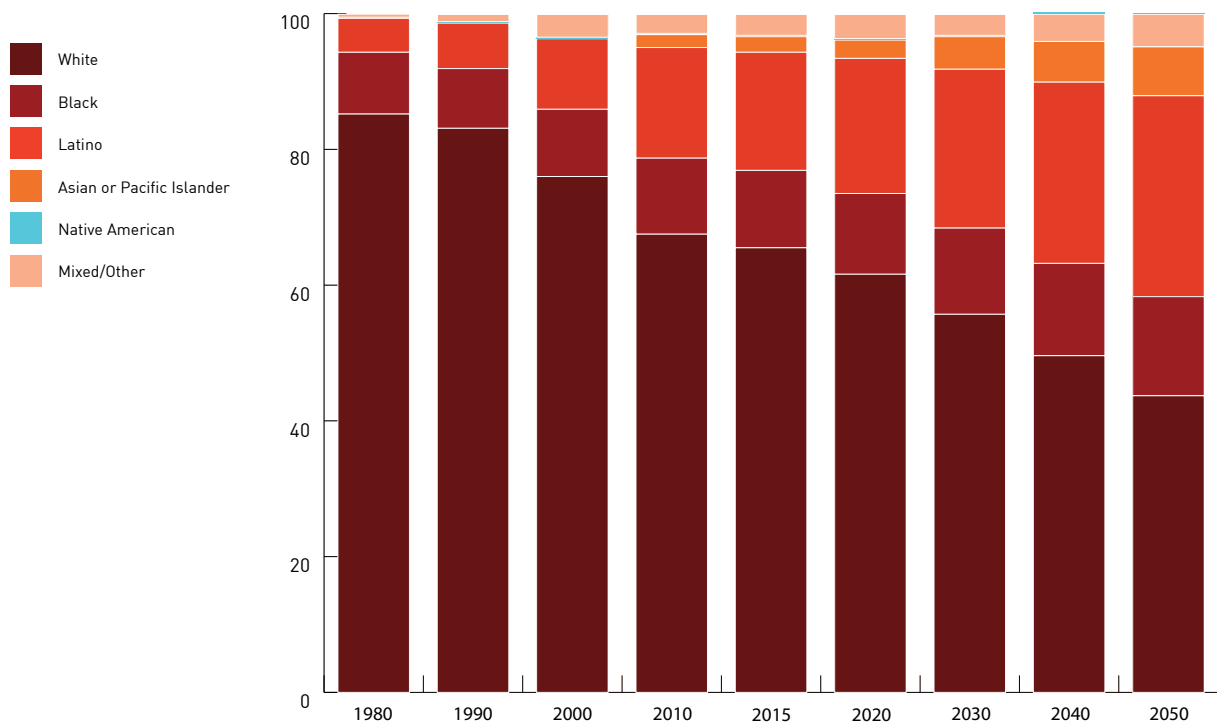
WHAT HAVE WE LEARNED?

We have a vibrant nonprofit community requiring attention. Respect and comprehension of their vital role is critical. According to the National Equity Atlas published by PolicyLink, in about 30 years, approximately 2048, Pinellas County will become “Minority White.” Given the disproportionate outcomes for persons of color at present, unless fundamental changes are made to our systems our dis-equity will continue to burgeon. This is not sustainable and requires system improvements toward equity.

Raising income is an antidote to poverty, but it is nowhere near that simple. The history of systemic discrimination and white preference has led to generational poverty and the creation of a range of cultures and beliefs by race, class and geography. If racial gaps in income were eliminated, our regional economy would grow by \$14.9 billion.¹

Our challenge is to foster and sustain transformation within communities where so many are in poverty at the same time as policies and systems continue to favor gains by the most privileged among us. Without the nonprofit sector, established cycles of poverty and ill community health will not end.

Racial/Ethnic Composition: Tampa-St. Petersburg-Clearwater, FL Metro Area, 1980-2050



¹ National Equity Atlas, Tampa, St. Petersburg, Clearwater, “GDP Gains with Racial Equity,” 2015

America is becoming a true world nation that is increasingly multiracial and multicultural. In 1980, 80 percent of the population was White. By 2044, a majority of Americans will be people of color. The focus on equity is needed to respond to the growing diverse cultures, and socioeconomic and immigration statuses. Nonprofits will play an important role in serving all sectors of our population and helping to build up and reinforce the assets that every demographic can contribute to the community.

WHAT DO WE STILL WANT TO KNOW?

We hope this scan and assessment answered some questions and stimulated many others. Here are some initial ideas about deeper dives into the survey to learn more:

- Leadership: What are the needs of the specific leaders who desire to assertively address their mission and lead to community impact, not just fulfillment of contracts?
- How do we inspire the boards of directors of organizations to grasp the fiduciary responsibility of mission fulfillment?
- What do municipal, corporate, faith and private donors want to know about nonprofits in order to increase donations and the amount of unrestricted support they provide?
- How many of the nonprofits are focused on health equity in Pinellas County? How do they define it?
- How much of available foundation dollars are granted locally?

WHAT HAPPENS NEXT?

The Foundation wants to hear from you. If you have additional research questions, please email Julie Rocco at julie@healthystpete.foundation and put "Nonprofit" in the subject line. Julie will catalogue your ideas and we will announce future research initiatives.

ACKNOWLEDGMENTS

As the nonprofit assessment methodology and measurement tools were developed, the Foundation and NLC consulted with regional funders, including the Community Foundation of Tampa Bay, Pinellas Community Foundation, United Way Suncoast, Allegheny Franciscan Ministries, and JWB, to determine their input on the project. We wish to thank these organizations for their insight and support for this project.

The nonprofit survey was created and administered by staff teams at the Foundation for a Healthy St. Petersburg and Nonprofit Leadership Center, and consultants AAJ Research, Community Connectivity Consulting, Inc., and Marketing & Business Solutions, LLC. The Nonprofit Assessment Report was copy edited by Cheryl Segal and designed by Katie Jo Howell.

The Pinellas County Nonprofit Assessment Report can be downloaded at healthystpete.foundation/research.



