

Giving in Oregon Survey: 2009 Mid-Year Update

November 2, 2009

Challenged by recession, nonprofits take steps to contain costs and continue to serve their communities

In August and September, 2009, The Oregon Community Foundation (OCF) surveyed 208 Oregon nonprofit organizations about the impact of the economic recession on donations, demand for services, and cost-saving measures. 134 nonprofits completed the survey. This report details the results.

Overview of Survey Responses

- Half of survey respondents said that private contributions are down so far in 2009 compared with 2008. 39% said that contributions are up, and 11% said that contributions stayed about the same. 61% of arts & culture organizations and 54% of social services organizations saw contributions decline in 2009, while only 41% of education and environment & civic engagement organizations saw contributions decline.
- 76% of Portland Metro and 60% of statewide organizations saw contributions decrease in 2009 compared with 23% of Central Oregon and 33% of Southern Oregon respondents.
- 100% (5 respondents) of organizations with operating budgets of \$15 million and over reported that private contributions declined, and 71% of organizations with operating budgets less than \$15 million but at least \$4 million said that contributions declined. In comparison, 37% of respondents with operating budgets between \$200,000 and \$1 million reported decreased contributions. More large respondents (by operating budget) are located in the Portland Metro region or serve the entire state compared with respondents from any other region.
- 78% of survey respondents have implemented cost-saving measures. Specifically, 30% have eliminated programs or services and 31% have laid off staff. Anecdotal comments suggest that some organizations are balancing the need to reduce expenses with the need to continue to provide services to the community. Other comments indicate that some nonprofits see the recession as an opportunity to communicate with current and potential donors and to plan for future fundraising.
- On average, demand for respondents' services has increased by 12% since July, 2008. Education and social services organizations reported the largest increases in demand, averaging 17%.

Implications

- Oregonians who are able to give are doing so. Comments from survey participants suggest that more donors are giving smaller amounts.
- Some donors have shifted support to different organizations in these hard economic times. For example, 61% of arts & culture organizations saw contributions decline while only 41% of education organizations that responded to the survey reported decreased donations in the first half of 2009 compared with the first half of 2008.
- Most nonprofit organizations are under some degree of fiscal stress, likely due in part to decreases in fee income and government payments as well as declines in private contributions. In response, nonprofits are cutting back, implementing cost-saving measures to continue to meet needs in their communities during the recession.
- Some nonprofit organizations have been able to increase contributions despite the recession, demonstrating both nonprofit leadership and Oregonians' willingness to step up in difficult economic times. Anecdotal comments suggest that some respondents quickly took steps to balance organizational budgets while continuing to provide services. We believe that this type of leadership can help nonprofits survive through a poor economy.
- Survey responses suggest that both large nonprofits and those located in the Portland Metro region, along with organizations that identify themselves as "statewide," have been among the most affected by the recession. Survey respondents with large operating budgets are more likely than other respondents to serve either the Portland metro region or the entire state.

Pages 3 through 9 include graphs and charts with additional data as well as quotations from survey respondents. For survey methods and limitations, please see Appendix A. For a partial list of survey respondents, please see Appendix B. For a copy of the survey, please see Appendix C.