

# **Economic Contributions** *and the* **State of the Sector**

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## Overview

Charitable nonprofits represent the best traits of the people of Idaho. Nonprofits keep our communities vibrant and healthy. They create and magnify public benefits, catalyze opportunities to participate in civic affairs, and enrich cultural life. Nonprofits are a powerful network of organizations and change agents creating positive systemic change. They provide much-needed services, address inequities, and create innovative solutions to community issues.

Nonprofits also generate significant economic impact in our communities. Idaho Nonprofit Center's 2020 State of the Sector & Economic Impact Report is designed to provide current and easily accessible data on the health of the public benefit nonprofit sector in Idaho. With over 7,600 charitable organizations registered in the state, Idaho's nonprofits work in every community and touch nearly every facet of our lives.

In the past the State of the Sector and our Economic Impact Reports were presented separately, however this year we felt that sharing both our impact and the state of the sector, with a section dedicated to the status of things in a COVID-19 world would be not only appropriate to do, but the best way to share the power and the impact of our amazing nonprofit sector

The report is divided into three sections:

- Economic Impact of Idaho Nonprofits
- Results of our 2019 State of the Sector survey conducted last September
- State of the Sector during the continuing COVID-19 outbreak

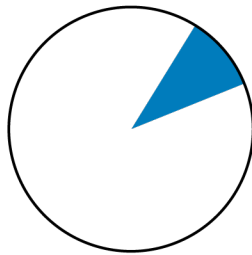
# **PART ONE**

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## **Economic Contributions Report**

# 64,073 JOBS

are estimated to be created by Idaho charitable nonprofit organizations



**10% of private sector jobs**

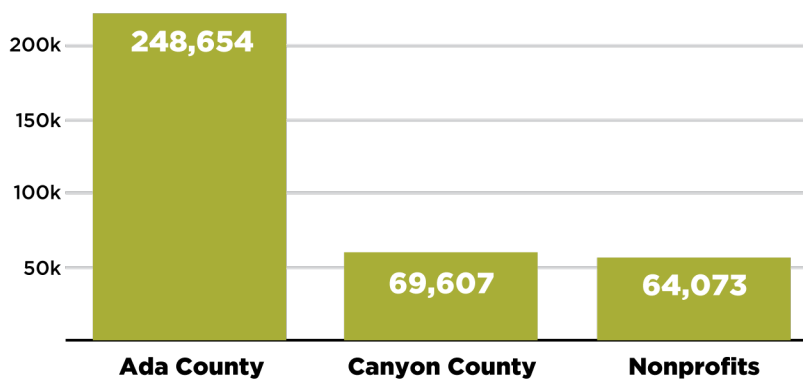
and 8.2% of all Idaho jobs covered by unemployment insurance

# \$4.25 BILLION

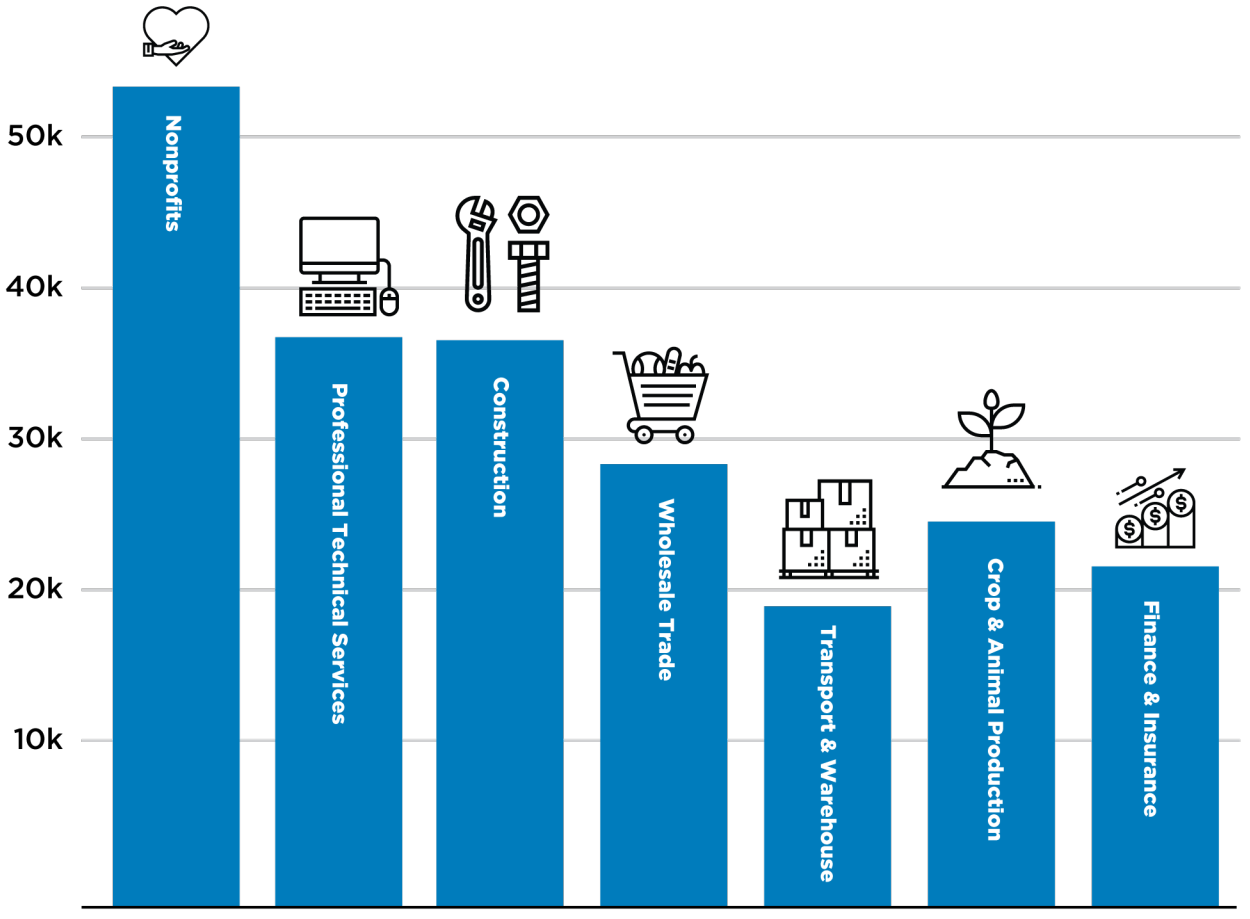
is paid by charitable nonprofits in total compensation<sup>1</sup>

Idaho's charitable nonprofits are ranked 6th in the state based on actual employment, and 6th in a broader measure of jobs that includes self-employment.<sup>2</sup>

# 6<sup>TH</sup>



In comparison to county economies in Idaho measured by 2019 employment, charitable nonprofits rank 3rd



Idaho charitable nonprofits directly employ more people than the above industries

Federal or out-of-state sources, to 56% of nonprofits, equal

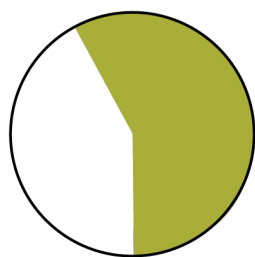
**\$4.1 BILLION**

The expenditures derived from federal and out-of-state revenues generate the following economic impacts, including the multiplier effects:

- **\$5.4 BILLION** in sales transactions
- **\$3.1 BILLION** in gross state product (4.3% of GSP)
- **\$2.5 BILLION** in total compensation (payroll)
- **43,618 JOBS**

# 7,600 NONPROFITS

- **REVENUE = \$7.27 BILLION**
- **ASSETS = \$7.57 BILLION**



## 55.5%

was spent on total compensation for an estimated 64,073 workers

The average compensation per worker across all nonprofits was

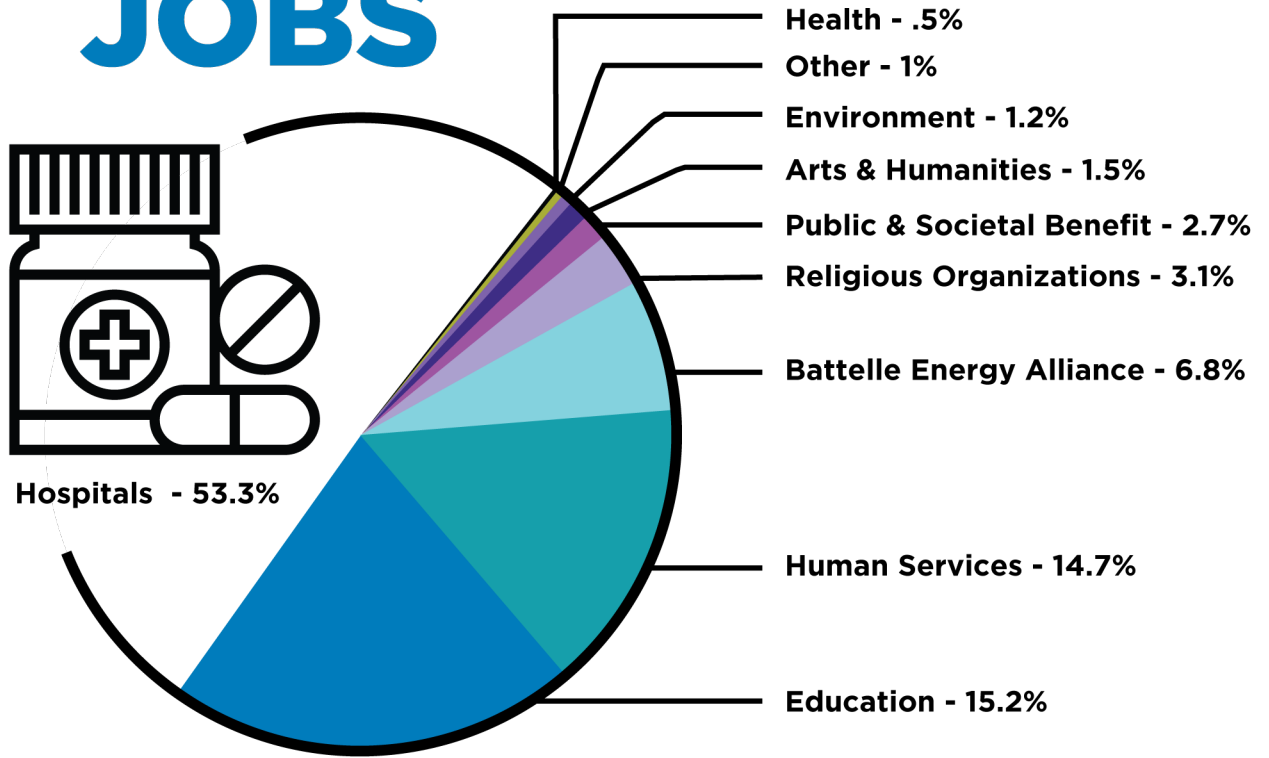
# \$66,373

- **\$157,580** per worker at Battelle Energy Alliance
- **\$17,128** per worker in the Arts, Culture, and Humanities

# \$121.1 MILLION in TAXES

is created from economic activities arising from federal/out-of-state revenues including indirect business taxes (i.e. sales taxes, property taxes, and excise taxes), personal income taxes, and corporate income taxes (from the direct, indirect, and induced tax impacts)

# JOBS



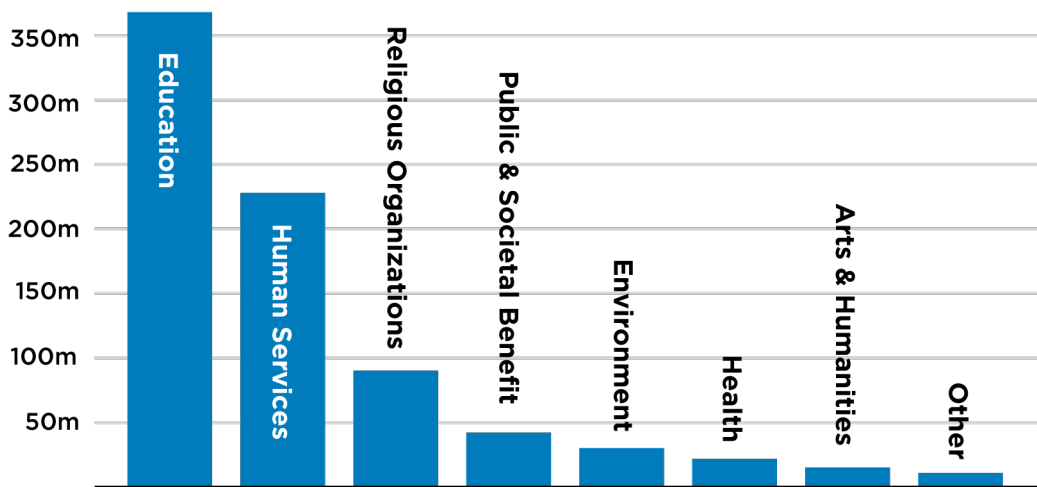
**HOSPITALS** make up

**53.3%**

of nonprofit jobs and

**\$2.7 BILLION**

of the total aggregate compensation



of total aggregate compensation



**493,161**

Idaho citizens volunteered in 2019

**48.6 MILLION**

hours of service

**37.9%**

of Idaho's labor force volunteers

**10<sup>TH</sup>**

in the nation

The total market value of volunteer labor hours equals

**\$1.1 BILLION**

Annualized, the total labor hours are the equivalent of

**23,365 JOBS**

## Overview of Study

This is an update of an economic contributions assessment of Idaho’s charitable nonprofit organizations. The original study was commissioned by the Idaho Nonprofit Center and completed in April 2012. The study has since been updated in 2014, 2015, 2016, 2017, and now 2020. The primary economic analysis is conducted using data from the charitable nonprofit organizations in Idaho which file 990 and 990EZ tax returns (“reporting nonprofits”).

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## Types of Nonprofit Organizations

The IRS recognizes 29 different classifications of nonprofit organizations. Public charities represent a substantial portion of the national nonprofit sector and constitute 62 of Idaho’s nonprofit organizations. Public charities receive their tax-exemption under subsection (3) of Section 501(c). The IRS defines these organizations as “charitable” because they serve broad public purposes, including educational, religious, scientific, and literary activities, among others, as well as the relief of poverty and other public benefits. Public charities are divided into two sub-categories: 1) Registered charities; and 2) Unregistered charities (revenues less than \$5,000). Registered charities are further classified as (a) those with revenues greater than \$25,000 annually, and (b) smaller charities with less than \$25,000 in revenues. Private foundations are also charitable organizations exempt under Section 501 (c) (3) but are not public charities. Most private foundations are created to distribute money to public charities or individuals. They must meet strict guidelines requiring distribution of a proportion of their assets each year.

Other nonprofit organizations include social welfare organizations (501(c)( 4 )), business leagues and trade associations (501( c)( 6)), and social and recreational clubs (501( c )(7)). All nonprofit organizations, regardless of their classification, are exempt from federal income tax. However, only those classified as a 501(c) (3) permit donors to make tax-deductible contributions to the organization. Although this report will touch on the economic role of all nonprofit organizations in the economy, its focus is on public charities.

## National Role of Nonprofits in the U.S. Economy

Nonprofits play a significant role in the U.S. economy at all levels. Nationally there are 1.56 million nonprofits of which 69% are public charities, other nonprofits (24%), and private foundations (8%). U.S.-based nonprofits employ about 12.3 million people, which constituted about 8.0% of the 2019 U.S. workforce. To put this in perspective, the total U.S. nonprofit employment was larger than the total employment individually of 48 states.

# 12.3 MILLION

employed by U.S. based nonprofits

## Idaho's Nonprofit Organizations

# 7,600

Idaho nonprofits

In 2019 Idaho had approximately 7,600 registered nonprofit organizations. Of these, public charities consisted of 5,200 organizations (filing form 990 or 990EZ) producing \$7.27 billion in revenues. In terms of the relative size of the revenues of charitable organizations, the largest sub-sector was health-related (\$4.84 billion) which constitutes 67% of total public charity revenues and 63% of assets. In second place ranking, excluding Battelle, was education, producing \$502.2 million in revenues, which constitutes 6.7% of total revenues and 15.4% of total assets.

## Methodology

An IMPLAN input-output model was used to estimate the direct employment and total compensation of Idaho's nonprofits. The National Taxonomy of Exempt Entities (NTEE) system is used by the Internal Revenue Service (IRS) to classify nonprofit organizations. Each nonprofit has a designation based on its function and activities. These entities were mapped to the North American Industrial Classification System (NAICS) code and entered into the IMPLAN model to estimate direct employment and total compensation.

The IMPLAN model was also utilized to estimate the economic contributions of Idaho nonprofits arising from federal and private donations originating outside Idaho (i.e. new monies to Idaho).

The \$7.3 billion revenues produced by Idaho public charities in 2019 and reported by the IRS are the source of operational spending and expenditures for each nonprofit. From our economic model we estimate that approximately 58.5% was spent on total compensation for an estimated 64,073 direct workers (totaling \$4.3 billion in total aggregate compensation). The average total compensation per worker was \$66,373 and ranged from \$157,580 per worker at Battelle to \$17,128 per worker in arts, culture, and humanities. Approximately 53.3% of total jobs are in the health care sector and 15.2% are in education (Figure 2).

## Actual (Direct) Employment from Idaho’s Charitable Organizations

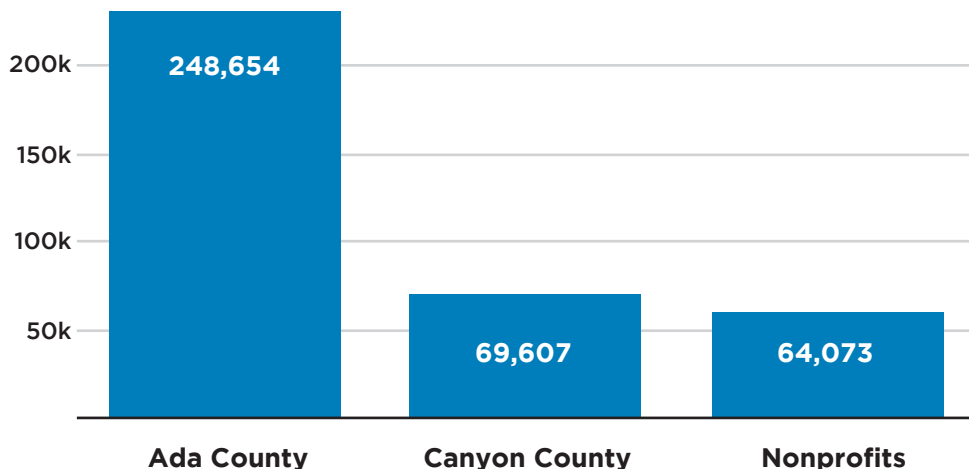
In terms of industry employment comparisons, the charitable nonprofits would rank in 6th place in Idaho using the most cited measure of employment (Quarterly Census of Employment and Wages-QCEW). It would also rank in 6th place using a wider measure of employment called the Bureau of Economic Analysis (BEA) includes an estimation of self-employed workers and includes other employment categories such as production agriculture not included in covered employment measures.

Idaho charitable nonprofits directly employ more people than professional and technical services (39,884), construction (49,888), wholesale trade (29,954), crop and animal production (27,003), finance and insurance (25,863), and transportation and warehousing (22,464).

In comparison to county economies in Idaho measured by 2019 employment, charitable nonprofits rank 3rd, behind only Ada County (248,654 jobs) and Canyon County (69,607 jobs).

**3rd**

In comparison to county economies in Idaho measured by 2016 employment, charitable nonprofits rank 3rd



**FIGURE 2**  
**Public Charities in Idaho, 2020**

NTEE Code	Type of Public Charity	Number	%	Total Revenues Spending	%	Total Assets	%
A	Arts, Culture, and Humanities	521	10.0%	\$63,278,773	.9%	\$152,476,030	2%
B	Education	751	14.4%	\$502,170,622	6.9%	\$1,164,795,843	15.4%
C	Environmental Protection, Beaut.	161	3.1%	\$40,364,438	0.6%	\$132,608,086	1.8%
D	Animal-Related	160	3.1%	\$33,202,826	0.5%	\$126,102,065	1.7%
E	Health	237	4.5%	\$4,841,353,267	66.6%	\$4,762,582,816	62.9%
F	Mental Health, Crisis Intervention	77	1.5%	\$17,512,544	0.2%	\$15,705,333	0.2%
G/H	Medical Research/Diseases, Disciplines	100	1.9%	\$27,156,179	0.4%	\$19,975,699	0.3%
I	Crime, Legal Related	66	1.3%	\$15,383,630	0.2%	\$12,016,986	0.2%
J	Employment, Job Related	35	0.7%	\$15,928,090	0.2%	\$17,450,285	0.2%
K	Food, Agriculture, and Nutrition	70	1.3%	\$49,971,300	0.7%	\$29,337,290	0.4%
L	Housing, Shelter	100	1.9%	\$60,578,193	0.8%	\$205,319,206	2.7%
M	Public Safety	94	1.8%	\$3,282,475	0.0%	\$7,719,933	0.1%
N	Recreation, Sports, Leisure, Athletics	490	9.4%	\$62,386,897	0.9%	\$94,383,955	1.2%
O	Youth Development	152	2.9%	\$35,518,719	0.5%	\$74,398,286	1.0%
P	Human Services - Multipurpose	430	8.2%	\$194,373,246	2.7%	\$215,503,486	2.8%
R	Civil Rights, Social Action, Advocacy	35	0.7%	\$9,238,592	0.1%	\$9,240,748	0.1%
S	Community Improvement	194	3.7%	\$40,083,412	0.6%	\$62,468,980	0.8%
T	Philanthropy, Voluntarism, and Grants	106	2.0%	\$39,399,146	0.5%	\$211,439,594	2.8%
U/V	Science, Social Science and Technology	33	0.6%	\$1,986,467	0.0%	\$2,528,117	0.0%
W	Public, Society Benefit	102	2.0%	\$9,301,505	0.1%	\$11,284,374	0.1%
X	Religion Related, Spiritual Development	1,196	22.9%	\$66,479,750	0.9%	\$154,495,493	0.2%
Q/Z/Y	Other including International	102	2.0%	\$48,220,659	0.7%	\$85,715,694	1.1%
	Battelle Energy Alliance	1	0.0%	\$1,089,177,000	9.0%		
<b>Total</b>		<b>5,213</b>	<b>100.0%</b>	<b>\$7,266,347,730</b>	<b>100.0%</b>	<b>\$7,567,552,300</b>	<b>100.0%</b>

Source: National Center For charitable Statistics

\* Not available

## Federal and Out-of-State Sources of Revenues

A significant portion of total charitable nonprofit revenues originate from either federal or out-of-state sources. The majority of these revenues are generated by health care facilities and hospitals. Nonprofits account for about 80% of the acute care hospitals in the U.S. Hospitals receive from 35% to 55% of revenues from Medicare, depending on their facility and its mission. Idaho hospitals also receive approximately 16.5% of their revenues from Medicaid (Idaho Hospital Association) of which approximately 12% comes from federal sources. Medicare is a federal program that provides health care for seniors and Medicaid is a federal/state partnership that provides health care to the poor.

From a careful evaluation of various indicators, we estimate that approximately 55% of Idaho hospital revenues come from federal Medicare or Medicaid sources. This alone constitutes about 37% of total Idaho charitable nonprofit revenues. The remaining sectors (excluding Battelle which is 100% federal/out- of-state funded) average about 23% in federal or out-of-state funds. Overall, we estimate that approximately 58% of charitable nonprofit revenues are from federal or out-of-state sources (including Battelle) , totaling approximately \$4.1 billion annually. The vast majority of these revenues and expenditures are spent on Idaho programs and activities.

The funding and revenues sources for nonprofits arise from diverse and complex organizational systems and a small percentage is spent on out-of-state programs. Alternatively, there are other sources of out-of- state funds for specific Idaho programs not included in reported nonprofit revenue totals. We assume these flows are offsetting.

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## **Economic Impacts Based on Federal/Out-of-State Revenues**

The IMPLAN input/output economic model was used to estimate the economic contributions of charitable nonprofits in Idaho. The IMPLAN model estimates the economic magnitude of the causal factors that generate economic activity and is focused on the portion of nonprofit funding originating from outside of Idaho. These represent new monies to the economy and our analysis is founded on economic base theory. Impacts are estimated from the portion of the nonprofit budgets arising from federal sources and out-of-state revenues. An economic contributions assessment estimates the portion of Idaho’s economy directly attributable to the nonprofit sector. If this sector did not exist, the analysis estimates the loss of economic activity that would occur to Idaho.

Nonprofit expenditures derived from out-of-region revenues generates approximately \$7.47 billion in sales transactions, \$4.46 billion in gross state product (value-added), and \$3.5 billion in total compensation to those employed in Idaho’s nonprofits, including the multiplier effects (Figure 3).

*The economic contribution estimates assume if the Idaho nonprofit organizations did not exist, their activities would not be replaced by other entities within Idaho.*

## FIGURE 3

### Total Direct Public Charity 2020 Spending and Direct Jobs Total

Public Charity Classification/Category	Direct	Gross State Product		Total	
	FED/Out-of-State	Sales	Value Added	Compensation	Jobs
Arts, Culture, and Humanities	\$12,655,755	\$25,096,337	\$10,499,406	\$6,914,241	311
Education	\$125,542,656	\$211,005,741	\$157,038,176	\$122,210,937	3,088
Environment	\$14,713,453	\$26,811,814	\$15,646,900	\$12,551,117	252
Hospitals	\$2,662,744,297	\$4,849,204,359	\$2,714,059,241	\$2,181,944,784	35,623
Health	\$15,063,135	\$27,387,542	\$15,260,614	\$11,375,273	218
Human Services	\$97,999,577	\$150,096,177	\$102,892,733	\$78,530,945	2,814
Public and Societal Benefit	\$22,701,258	\$39,740,174	\$24,127,811	\$16,415,030	539
Religious Organization	\$13,295,950	\$40,321,741	\$17,944,323	\$27,485,911	606
Other Public Charities	\$9,644,132	\$14,190,288	\$9,640,122	\$4,333,744	167
Battelle Energy Alliance	\$1,089,177,000	\$2,058,545,000	\$1,391,838,217	\$1,034,823,953	11,789
<b>Total (with Battelle)</b>	<b>\$4,063,537,212</b>	<b>\$7,472,399,173</b>	<b>\$4,458,947,543</b>	<b>\$3,496,585,935</b>	<b>55,407</b>
<b>Total (without Battelle)</b>	<b>\$2,974,360,212</b>	<b>\$5,413,854,173</b>	<b>\$3,067,109,326</b>	<b>\$2,461,761,982</b>	<b>43,618</b>

### Regional economic analyses have a specific language and terminology and are defined below:

**Direct effects (spending):** This represents the actual observed sales, income, and jobs from nonprofit operations.

**Economic Contributions:** Economic contributions measure the magnitude or importance of the expenditures of base (export) industries. Our economic model estimates multipliers for each industry. If you have a multiplier of 1.61, for example, every dollar of expenditures creates \$1.61 dollars of new spending in the community. The total multiplier has three components: direct effects, indirect effects, and induced effects.

**Indirect effects:** These are the downstream economic effects on sales, payroll, jobs, and indirect taxes that result from direct spending in the regional economy. For example, a nonprofit purchases community goods and services which supports other area businesses. These firms, in turn, purchase even more goods and services as the effects ripple throughout the economy. They are part of the overall multiplier effects.

**Indirect taxes:** All taxes generated from economic activity excluding personal and corporate income taxes. These consist of mostly sales taxes and property taxes. These are adjusted (i.e. reduced) for the tax exemption of nonprofit organizations. The economic activity including the downstream effects will generate considerable tax revenues despite the fact that these organizations are tax-exempt.

**Induced effects:** These are downstream economic effects of employee and consumer spending on the economy. They are part of the multiplier effects.

**Jobs:** Total employment resulting from economic activity. The economic model reports these as full-time

and part-time jobs.

**Sales:** Total dollar transactions from an increase in direct expenditures including the multiplier effects (i.e. direct, indirect, and induced economic activity).

**Total compensation:** Wage, salary, and other income payments including fringe benefits to individuals.  
**Value-added (value-output):** Value added is a measure of total net production and activity. This is a measure of gross domestic product at the local or regional level.

Based on the economic impacts of the 45,480 jobs arising from federal dollars and out-of-state revenues alone, the charitable nonprofits would rank in 6th place in the QCEW covered industry rankings and 11th by the BEA employment rankings. Idaho charitable nonprofits contribute 4.3% of Idaho’s GSP as measured economic impacts. They illustrate the effect of nonprofit expenditures and backward linkages on all of Idaho’s economic sectors.

## Value of Idaho’s Volunteers

**493,161**

**Idaho citizens volunteered in 2019**

According to National Service, 493,161 Idaho citizens volunteered in 2019, totaling 48.6 million hours of service. 37.9% Idaho residents are volunteers, ranking the state 10th in the nation.

Volunteer hours are not included in GSP calculations, but their implicit value can be estimated. The total market value of volunteer labor hours equals \$1.1 billion annually in wages and salaries which would be the equivalent of 1.4% of gross state product). Annualized, the total labor hours are the equivalent of 23,365 jobs.

## Tax Revenues Generated by Idaho’s Charitable Nonprofits

Idaho’s charitable nonprofits generate considerable tax revenues even though most nonprofit activities are exempt from income tax and nonprofits generally do not pay property taxes. The economic activities of these organizations create tax revenues in several important ways: 1) Some activities of charitable nonprofits are not tax exempt, 2) Employees of charitable nonprofits pay income taxes, property taxes, sales taxes, and excise taxes, 3) Contracting and outsourcing firms from charitable nonprofits pay taxes.

The magnitude of these tax revenues is substantial. The economic activities arising from federal/out-of-state revenues created \$94.1 million in indirect business taxes



in 2019, excluding Battelle. These are comprised of sales taxes (\$50.4 million), property taxes (\$36.7 million), excise taxes (\$7.1 million). They include the indirect, and induced tax impacts arising from the multiplier effects. In addition, the charitable nonprofits created \$27.0 million in Idaho personal and corporate income payments. In total, \$121.1 million in tax revenues were created (Figure 4).

**FIGURE 4**

**Total Tax Contributions from Idaho’s Charitable Nonprofits**

Includes the Indirect and Induced Impacts Includes

Idaho Taxes	
Sales Tax	\$50,345,190
Property Tax	\$36,691,020
Excise Taxes	\$7,051,767
Sub-Total Taxes	\$94,087,977
Idaho Income Taxes	\$27,043,468
Total Taxes	\$121,131,445

**Regional Economic Impacts of Idaho Nonprofits**

Regional IMPLAN economic models were constructed to estimate the regional contributions of Idaho nonprofits. Economic models were created for each of the five Idaho regions illustrated in Figure 5 below:

North	North Central	Southwest	South Central	Eastern
Boundary	Latah	Canyon	Lemhi	Clark
Bonner	Clearwater	Ada	Custer	Fremont
Kootenai	Nez Perce	Elmore	Camas	Jefferson
Benewah	Lewis	Owyhee	Blaine	Madison
Shoshone	Idaho		Butte	Teton
	Adams		Gooding	Bingham
	Valley		Lincoln	Bonneville
	Payette		Twin Falls	Bannock
	Gem		Cassia	Caribou
	Boise			Oneida
				Franklin
				Bear Lake

The economic contributions of nonprofits situated in each of the five regions are calculated and reported in Figure 6. Approximately 70% of the nonprofit employment is in the Treasure Valley or 44,894 workers. This is expected because the Treasure Valley the state’s largest economic region, the seat of the state government, a health care hub, and the corporate headquarters for many of Idaho’s firms. The direct employment for the other four regions is about 30% of the total or 19,179 jobs which creates a considerable economic footprint on these regional economies. The average compensation package per worker is the highest in Southeast Idaho due to Battelle’s robust salaries. Although there are considerable fluctuations among the nonprofits, on average, they pay living wages with benefits.

**FIGURE 6**  
**Total Tax Contributions from Idaho’s Charitable Nonprofits**

Region	Total Charity Spending	Total Aggregate Compensation	Total Direct Employment	% Jobs	Compensation Per Worker
North	\$228,630,749	\$142,774,524	2,564	4.0%	\$55,693
North Central	\$410,309,873	\$233,440,006	4,563	7.1%	\$51,157
Southwest	\$4,961,758,004	\$2,852,810,838	44,894	70.1%	\$63,546
South Central	\$203,292,221	\$117,286,772	2,841	4.4%	\$41,278
Eastern	\$1,462,356,883	\$906,396,266	9211	14.4%	\$95,403
<b>Total</b>	<b>\$7,266,347,730</b>	<b>\$4,252,708,406</b>	<b>64,073</b>	<b>100.0%</b>	<b>\$66,373</b>

Figure 7 reports the economic contributions by region arising from federal revenues and out of region private donations. The Treasure Valley has the largest economic footprint supporting 35,925 jobs. The other regions support 19,482 jobs which makes a considerable impact in their regional economies. The economic impact assessment represents the net new economic activity directly attributed to the nonprofit sector and measure the net economy-wide job contributions.

## FIGURE 7

### Total Tax Contributions from Idaho's Charitable Nonprofits

Region	Direct	Sales	Gross State Product	Total	Jobs
	FED/Out-of-State		Value Added	Compensation	
North	\$97,948,024	\$159,291,359	\$97,331,208	\$80,484,391	1,373
North Central	\$186,190,489	\$292,063,187	\$161,515,934	\$134,423,486	2,591
Southwest	\$2,459,391,448	\$4,580,973,978	\$2,590,517,731	\$2,068,355,899	35,915
South Central	\$68,356,676	\$106,377,902	\$6,144,827	\$50,520,132	1,119
Eastern	\$1,251,650,575	\$2,333,692,716	\$1,548,134,444	\$1,162,802,027	14,398
<b>Total</b>	<b>\$4,063,537,212</b>	<b>\$7,472,399,173</b>	<b>\$4,458,947,543</b>	<b>\$3,496,585,935</b>	<b>55,407</b>

Figure 8 reports the net tax contribution of the nonprofit sector by region. The key takeaway is that nonprofits contribute to Idaho's state and local tax coffers from the considerable economic activity they create.

## FIGURE 8

### Total Tax Contributions from Idaho's Charitable Nonprofits

Region	Property	Sales	Excise	Income	Total
North	\$1,094,783	\$1,429,391	\$194,480	\$633,387	\$3,352,042
North Central	\$4,400,897	\$2,075,317	\$381,676	\$1,033,459	\$5,691,349
Southwest	\$30,933,381	\$43,271,935	\$6,041,577	\$23,830,800	\$104,077,693
South Central	\$628,301	\$712,995	\$132,885	\$387,959	\$1,862,140
Eastern	\$1,833,658	\$2,855,551	\$301,149	\$1,157,863	\$6,148,221



**Jack Borton**



**Josh Wilson**



**Matt Kohlman**



**Steven Peterson**

# **PART TWO**

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## **State of the Sector**

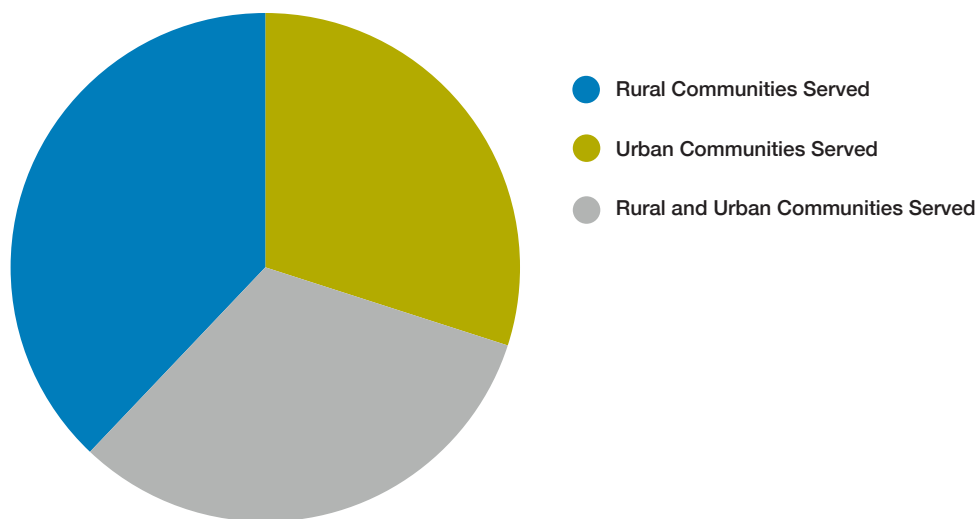
## About the State of the Sector Survey

This report was prepared based on the results of a survey distributed to Idaho nonprofits in October 2019 and administered jointly by Idaho Nonprofit Center and Nonprofit Association of Oregon. The data in this report only relates to and analyzes the information shared by the 228 Idaho nonprofit respondents. The data collected from the survey can be found at [IdahoNonprofits.org](http://IdahoNonprofits.org)

A big thank you to the 228 Idaho nonprofit leaders who took the time to participate in the survey. Your commitment and support of Idaho's nonprofit sector is much appreciated!

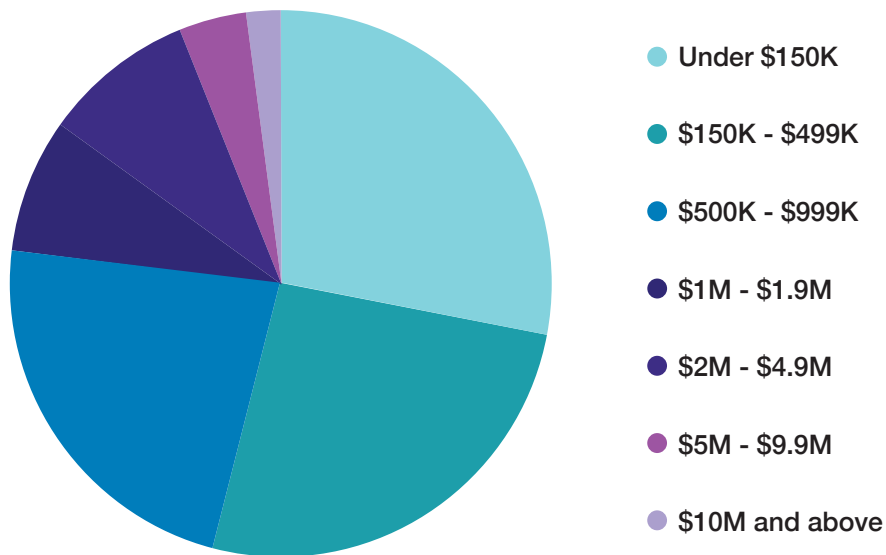
Chief executive officers and executive directors of 501(c)(3) organizations in Idaho were invited to participate in the survey. In the case where the nonprofit was all volunteer based, the board chair or president was asked to respond. Of the 228 respondents who completed the survey, the overwhelming response came from CEOs/EDs (74%) and board leaders (13%). Respondents reported that they employ a total of 1,477.37 full-time equivalent (FTE) staff in their 228 organizations.

30% of respondents serve both rural and urban communities, 32% serve urban communities and 38% serve rural communities. In total, 68% of responding nonprofits serve urban communities. This is not all that surprising given the geographic location of the Idaho Nonprofit Center and the % of INC members within the Southwest Idaho geography.



Of those that completed our survey the respondents were primarily from education, health, human service and environment related sub-sectors. The INC wants to note that it was a higher number than usual of environmental-related nonprofits responding to the survey, otherwise education, health/human services followed by arts & humanities (which was the next largest group of respondents) is typical.

Subsector Classification	% Response
Arts, Culture, and Humanities	8.6%
Education	11.21%
Environmental Protection, Beaut.	9.48%
Animal-Related	3.45%
Health	9.48%
Mental Health, Crisis Intervention	3.45%
Medical Research/Diseases, Disciplines	0.86%
Employment, Job Related	0.86%
Food, Agriculture, and Nutrition	5.17%
Housing, Shelter	0.86%
Public Safety	0.00%
Recreation, Sports, Leisure, Athletics	2.59%
Youth Development	4.31%
Human Services - Multipurpose	15.10%
Civil Rights, Social Action, Advocacy	4.31%
Community Improvement	6.03%
Philanthropy, Voluntarism, and Grants	1.72%
Science, Social Science and Technology	0.56%
Public, Society Benefit	6.03%
Religion Related, Spiritual Development	1.72%
Mutual and Membership Benefit	0.86%



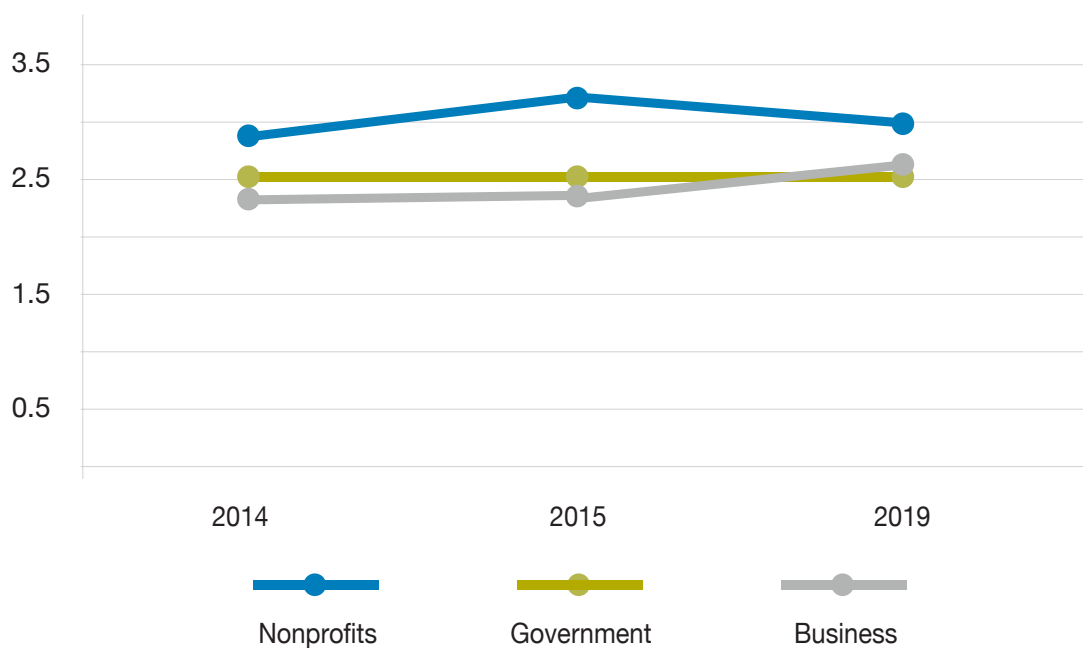
Respondents were asked to report the annual value of expenditures of their organizations as reported in IRS Form 990, Part I. The overall range of budgets varied from rural grassroots groups with small budgets to several organizations well over \$20 million in operating expense. The largest response rate was from organizations whose budgets are under \$150,000, closely followed by between \$150K - \$499K. This is pretty typical for the entire nonprofit sector in Idaho.

## Collaboration and Capacity

Collaboration across all sectors remains a challenge. Collaboration is critical to solving entrenched issues and creating systems change, yet this is a growth area for most nonprofits. Nonprofit business models tend to put nonprofits in competition for resources rather than bring them together for joint work. The line chart on page 4 presents an average rating for a series of questions asked over the three survey cycles (2014, 2015, and 2019) regarding nonprofit collaboration.

Based on responses, collaboration rates have not changed considerably over the last five years. There were modest increases where nonprofits collaborate with government compared to data in past years. Working together with other nonprofits and businesses remained relatively unchanged. We know that cross-sector collaboration can and will lead to stronger mission fulfillment.

Ratings of Collaboration and Collective Action (scale for 2014 and 2015 rating was converted from a 10-point scale. Line graph below compares responses from 2014 (n=189), 2015 (n=84) and 2019 (n=116) data:

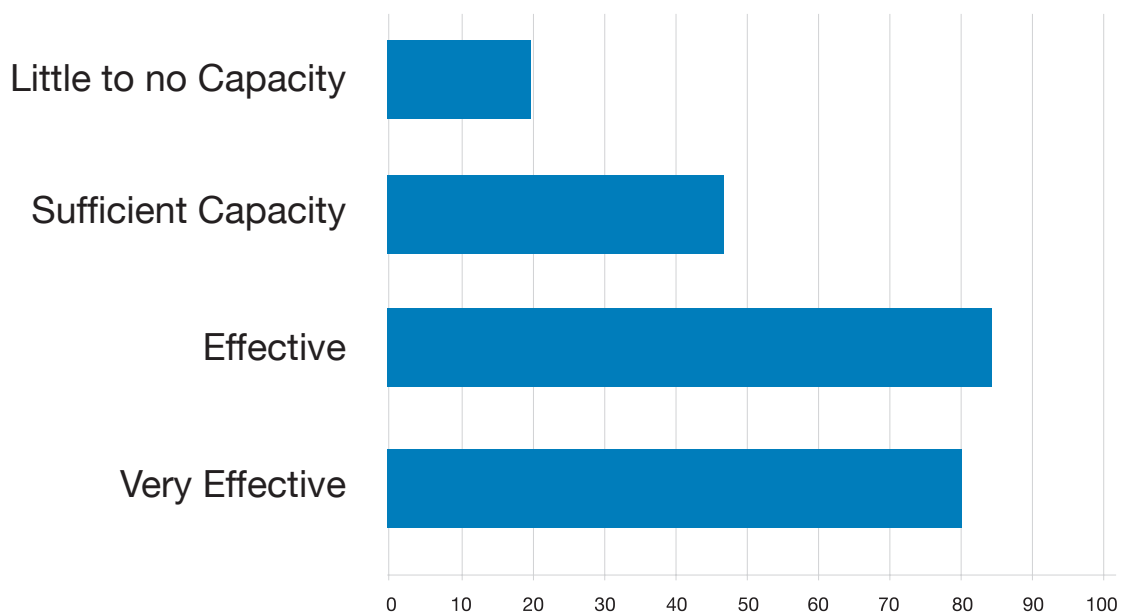




When we dug deeper into what inhibits collaboration, the overwhelming reason stated by respondents was a lack of time, followed by a lack of staffing resources and the third most often stated reason was the competition for resources felt between organizations.

When we asked what supports collaboration, the responses were incredibly mixed, though a few common themes emerged: a culture of trust, willingness to share resources and strong communication among collaborators. Additionally, a common goal or objective was mentioned as helping to encourage collaborators to come together.

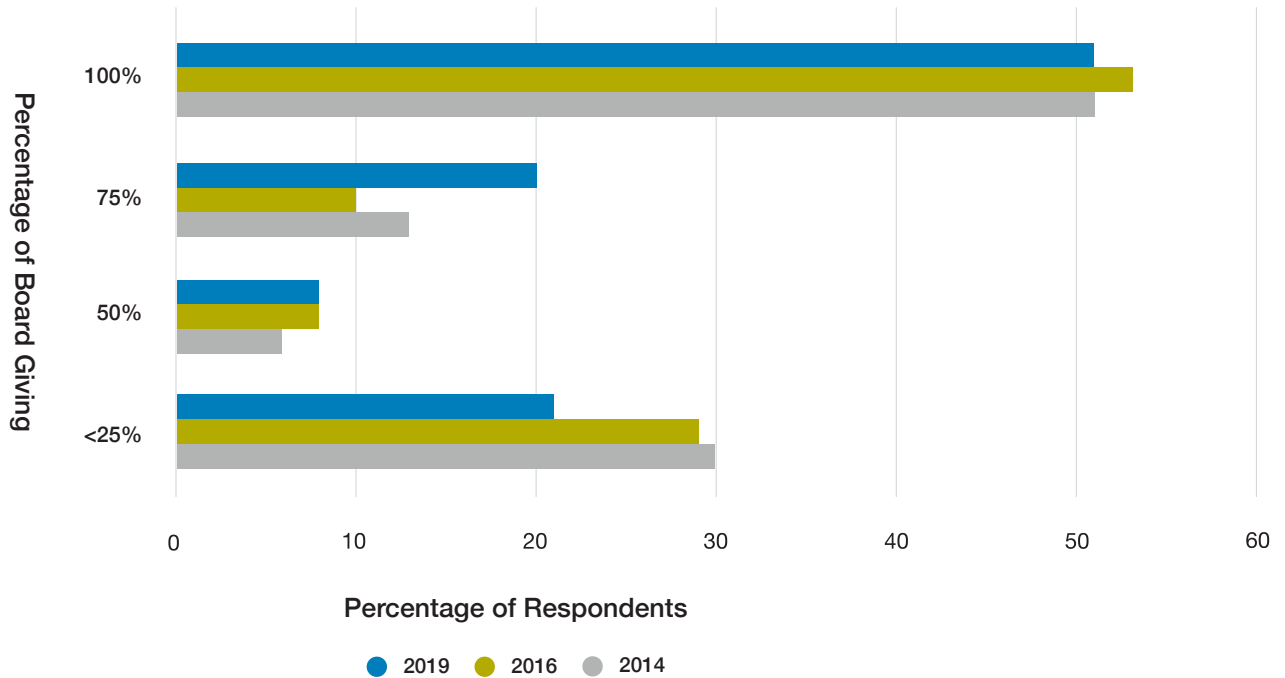
Organizational effectiveness and capacity are still at odds. As in previous years, respondents were asked to rate their effectiveness, capability, and capacity in service of their missions. The results clearly show a gap between how effective and capable nonprofits rank themselves and how they rank their capacity to deliver their missions. The tableau data dashboard can provide additional insights.



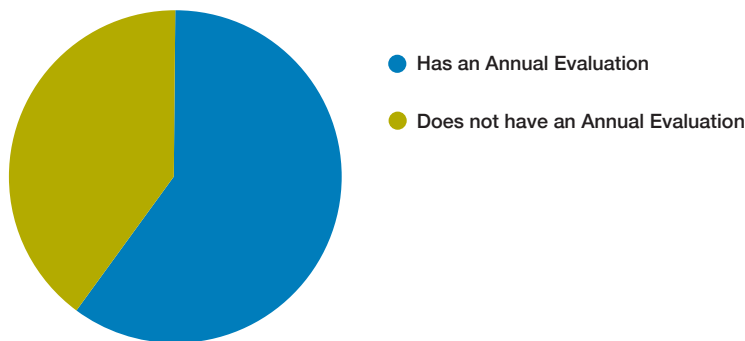
## Nonprofit Boards

While specific roles of board members may vary by organizations due to size and complexity of missions, staffing and business models, the way in which a board conducts its business has traditionally served as indicators of organizational health.

In addition to regularly attending meetings to guide their organizations, board members are expected to make a personal financial contribution to their nonprofits. This is both a measure of organizational leadership and board engagement. We noted that the lowest percentage of board members contributing to the organization is on the decline, which is noteworthy, in contrast there was a marked increase in the percentage of board members contributing in the 50% and significantly in the 75% range. There wasn't much change in 100% of board members giving category.

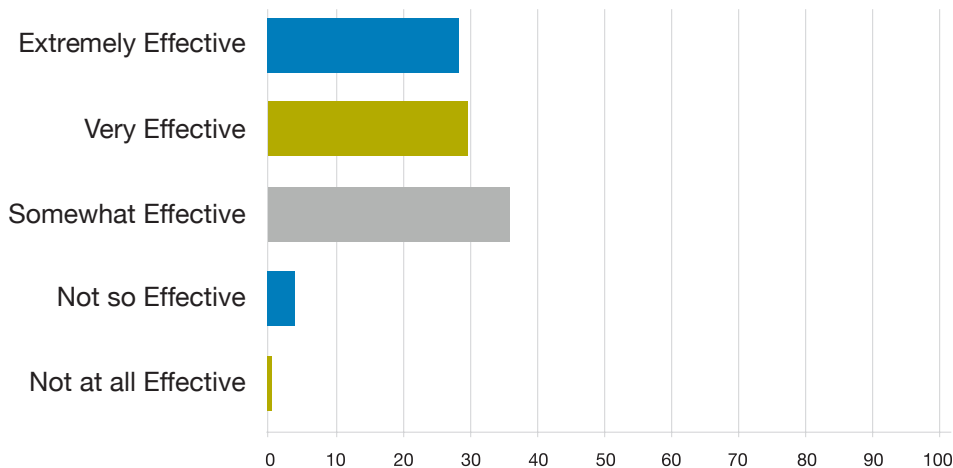


One of the ways in which a board can continue to evolve in a positive direction is regular evaluation of their work. In Idaho, 62% of reporting nonprofits indicated that their board does an annual evaluation. This is a positive sign.

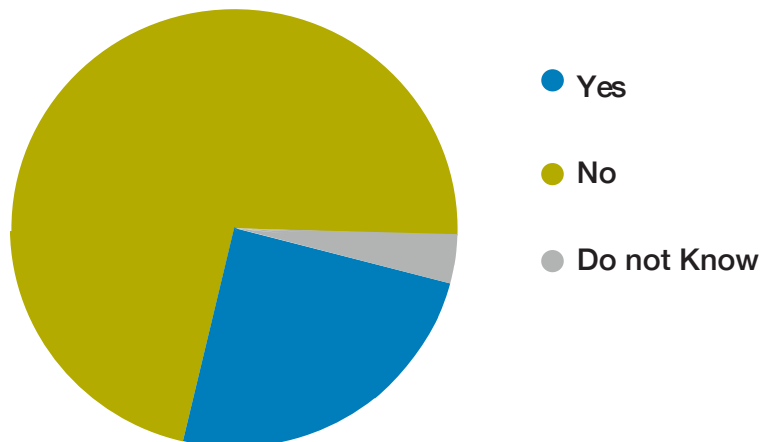


When we measured board engagement through board meeting attendance and the percent of nonprofits having to cancel, postpone or end a board meeting early due to lack of quorum, that number was 34%. The average number of times nonprofits have not been able to host or complete their meetings was 2, among those who reported canceling or postponing. Board attendance is directly linked to board engagement.

We are seeing boards who self evaluate but not always attend meetings and overall (59%) our reporting nonprofits feel that their board is effective in meeting the basic legal requirements of leading and providing oversight:



Organizations will also evolve in a positive direction when there is an annual evaluation of the organizations chief executive. In Idaho nearly 70% of reporting nonprofits indicated evaluating their executive director annually, which was up from roughly 63% in 2016.



Through our survey we also measured whether or not a nonprofit had a board development plan, and whether they felt what they had was useful. Ongoing board training and development is a strong best practice for any organization, building a plan with board approval and buy-in will almost always lead to a healthy, engaged board that knows their role and fulfills their responsibilities.

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## Financial Health and Fundraising

Nonprofits rely heavily on charitable giving and earned revenues. As the saying goes, “you’ve seen one nonprofit, you’ve seen one nonprofit.” Business models of nonprofits are often very specific to the missions they serve and services they provide. That said, there are some common sources of funding that nonprofits often share.

Findings show that nearly all organizations in the survey (90%) receive individual charitable gifts; yet, this source of revenue is the second largest percentage of their budgets at just over 31%. Earned income is the largest percentage of funding (32%).

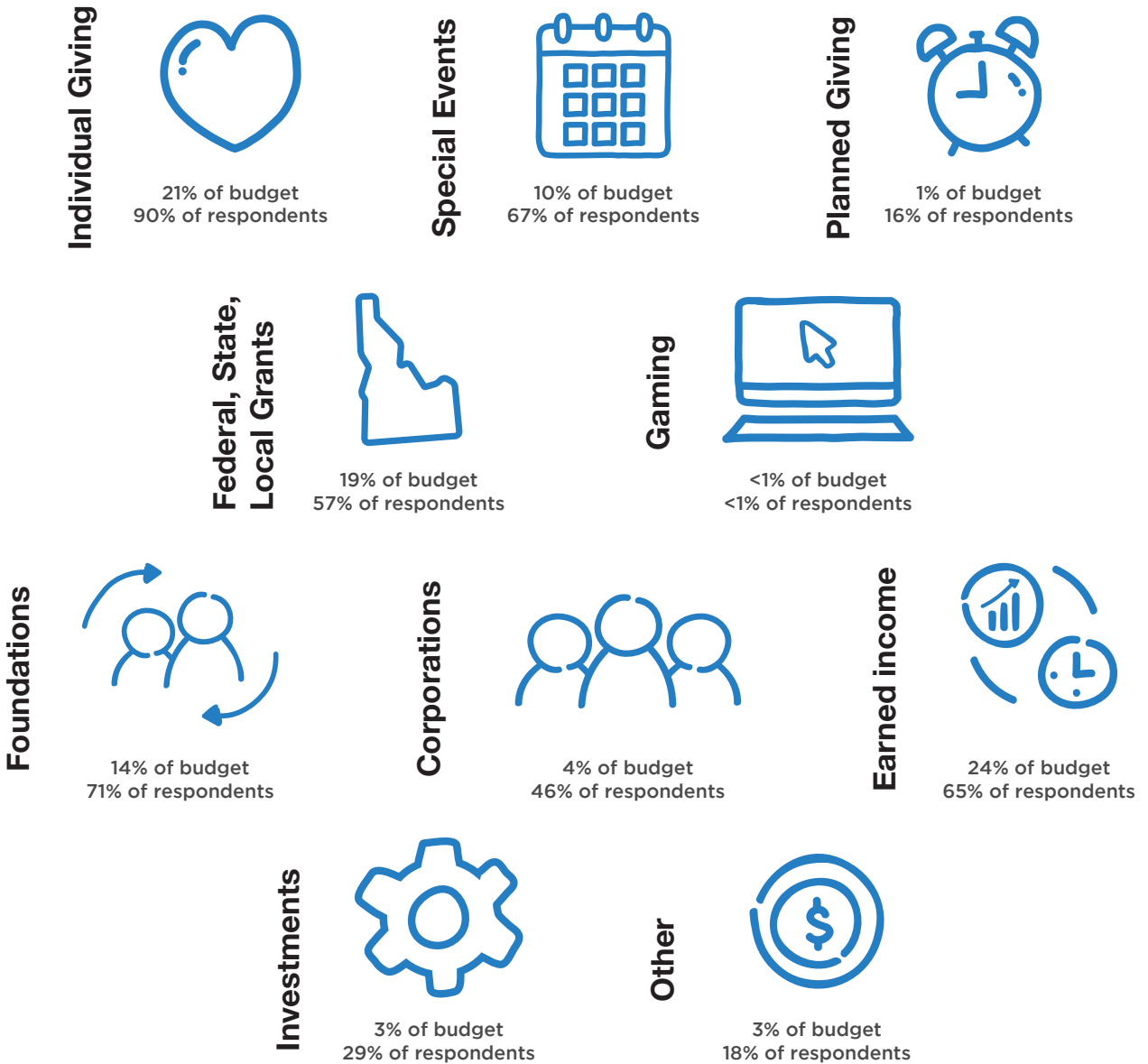
Federal, state, and local grants were the third largest source of revenue at 22% followed by foundations and special events, each at 17%. The Tableau data dashboard can provide more insight into the reliance on federal, state, and local grants by rural vs urban served communities.

Planned gifts and bequests, as well as gaming comprise very small percentages of the budgets of respondents, reported at 2% or less.

Only 43 organizations reported having an endowment fund or other investments for long-term funding, or 37% of respondents. 12% of nonprofits reported no reserves on hand, 24% reported 2-3 months and 29% reported 4-6 months of reserves. We recommend reviewing our Tableau data dashboard to see how these changes are impacted in rural vs urban and also by subsector.

## Revenue Sources

The icons below represent the average percent of budget (top number) identified as a revenue source (e.g. Individual Giving) by survey respondents for their organizations. The bottom number is the percent of respondent organizations that received that source of revenue.



When asked about confidence in reaching FY 2020 fundraising goals, 55% of reporting nonprofits reported feeling extremely or very confident, followed by 30% in the somewhat confident category. As we have noted multiple times, the onset of the COVID-19 pandemic has likely altered the way we do business, our confidence in fundraising abilities and the way in which we access critical capital to fulfill our missions. It has also had dire consequences for special event revenue.

## Reserves

Reserves held by nonprofits are not improving. The cash reserves that a nonprofit has on hand is one measure of financial sustainability and organizational resiliency. Like their private sector counterparts, nonprofits need cash for changes in programs and funding streams, unexpected financial shortfalls, and to invest in new work and activities. It is generally accepted practice for nonprofit organizations to have cash reserves equivalent to a minimum of three months of operating expenses. Larger and more complex organizations will often have six months to a year or more of reserves.

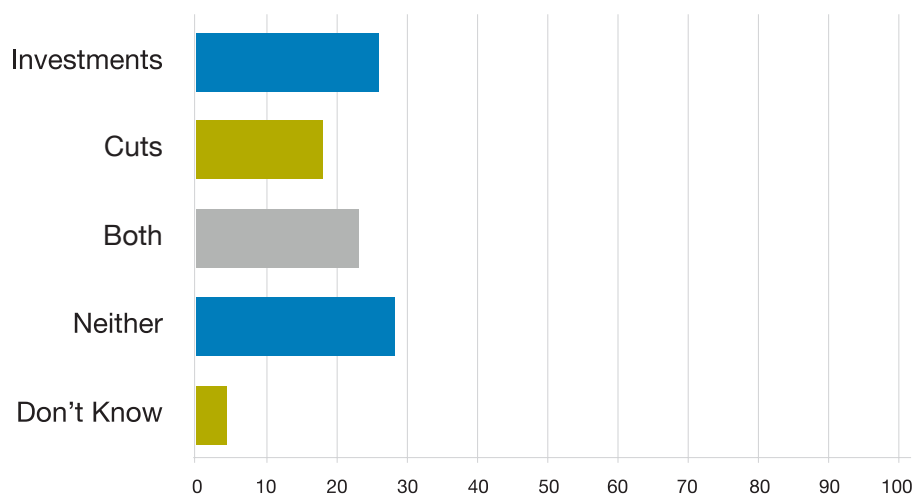
In 2016 51% of responding nonprofits reported 4-12 months of operating expense in reserves, in 2019 that percentage shrunk to 49%. Additionally 12% reported no reserves compared to just 7% in 2016. The COVID pandemic has likely impacted this number even further.

## Budgets

One of the most important tasks of any functioning nonprofit is to have strong fiscal management. When asked if they had an annual written budget, nearly 88% reported that they do, and of those who reported that they have a budget 91% of them said it was budget approved and 86% were actually using it. Only 73% reported that the budget was useful.

Of those who have a written budget 88% of them reported regularly comparing actual income and expense to the budget. 5% of reporting nonprofits say they don't have a budget at all.

Nonprofits are often hard-pressed to think and function like a small business, largely based on a lack of reliable income, but some are able to make strategic financial decisions and actually make investments (25%), cuts (18%) or both (28%) in order to increase the financial strength of their organizations.



We were also interested to know if nonprofits in general were planning for an increase or decrease in available funding for the upcoming fiscal year. We believe that most of this has dramatically changed since the onset of the COVID-19 pandemic, however it is worth noting where nonprofits felt they stood going into 2020.

Available Funding Plans	% Response
Increase above last fiscal year	56.03%
Decrease down from last fiscal year	13.79%
Same as last fiscal year	28.45%
Unsure	1.72%

## Plans and Strategy

Planning is critical to a high-functioning nonprofit. As previously noted a large number of respondents have written annual budgets and they find these effective, though only 88% of respondents have one, whereas 92% have a strategic plan and 89% have a fundraising plan as previously noted.

We also asked how many organizations have the following: equity lens, equity statement and/or an equity plan. We were pleased to see that 80% of reporting nonprofits have an equity statement, 69% have an equity plan and 64% use an equity lens. We will continue to monitor growth in this area as this has also been identified as a priority area for the Idaho Nonprofit Center. Through our work we hope to see these numbers improve in the next few years.

In addition to asking what kinds of plans organizations have in place, we asked if they were board approved, in use and effective. What is interesting to us is how many have plans in place but either don't have them board approved or find them useful (or use them). For example, 89% have a fundraising plan, yet only 58% of them have it approved by their board and only 56% find it useful.

We ask the question, if you have a fundraising plan and expect board members to be engaged and support fund development efforts, would the usefulness of that plan increase with board approval? When we looked at how many of these plans were board approved versus their perceived efficacy we saw some correlations to an increase in usefulness when the board is more engaged.

## SURVEY QUESTION:

Which of the following written plans does your organization have?

Plan Type	Written plan	Board approved	In use	Is It Useful
Annual Budget	87.96%	90.74%	86.11%	72.22%
Annual Plan	85.25%	68.85%	81.97%	62.30%
Board improvement/development plan	87.50%	68.75%	65.63%	46.88%
Communication Plan	83.33%	40.48%	85.71%	52.38%
Contingency/emergency plan	82.35%	67.65%	67.65%	38.24%
Equity lens	64.29%	50.00%	42.86%	42.86%
Equity statement	80.00%	75.00%	65.00%	70.00%
Equity plan	69.23%	46.15%	46.15%	46.15%
Executive Transition Plan/Succession Plan	86.11%	66.67%	61.11%	41.67%
Fundraising plan	89.39%	57.58%	78.79%	56.06%
Theory of Change	87.50%	58.33%	66.67%	50.00%
Strategic plan	92.11%	81.58%	84.21%	71.05%

When we compared responses to key plans over the course of the last two reports we noted some improvement in reporting nonprofits having critical written plans in place:

Plan Type	2019	2016	2014
Annual Budget	88%	81%	87%
Communication Plan	83%	27%	16%
Executive Transition Plan/Succession Plan	86%	19%	9%
Fundraising plan	89%	58%	37%
Theory of Change	88%	11%	8%
Strategic plan	92%	48%	57%

## Use of Data and Evaluation

One of the hallmark indicators of successful, sustainable nonprofits who are effective in fulfilling their missions use data to drive business decisions, evaluate programs, improve their organization overall and most importantly to measure the efficacy of programs and services as they relate to their own missions.

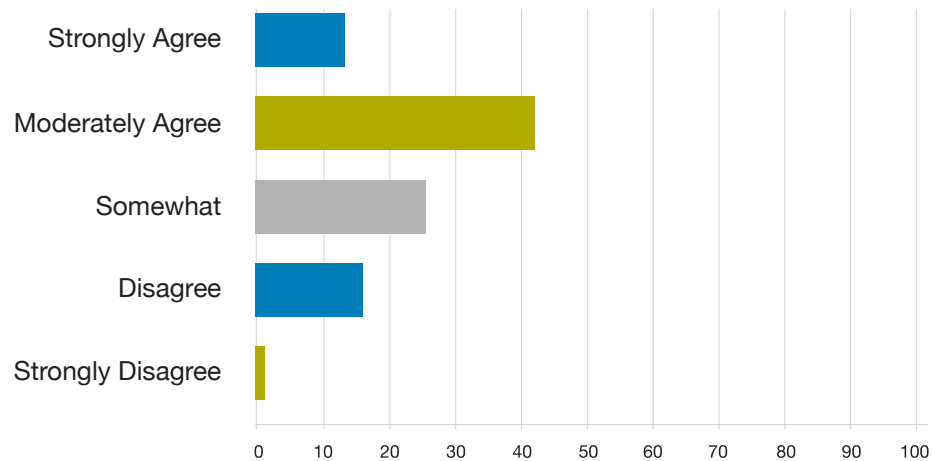
When asked if they evaluated any part of their work, 81% of responding nonprofits responded with a yes. Of those 74% used evaluation findings to report to their Board of Directors, 68% used them to plan/revise programs and 56% reported using them to plan/revise strategies.



We also gave respondents an opportunity to rate their own effectiveness with using program data. Only 33% reported that they felt extremely or very effective, 47% reported feeling somewhat effective and 19% said not so or not effective at all.

This highlights another fairly significant capacity gap, one that the Idaho Nonprofit Center along with our partners can work to address.

The concept of using program evaluations to promote a culture of continuous improvement also seems to be gaining traction with 60% of reporting nonprofits selecting agree or strongly agree to the question.



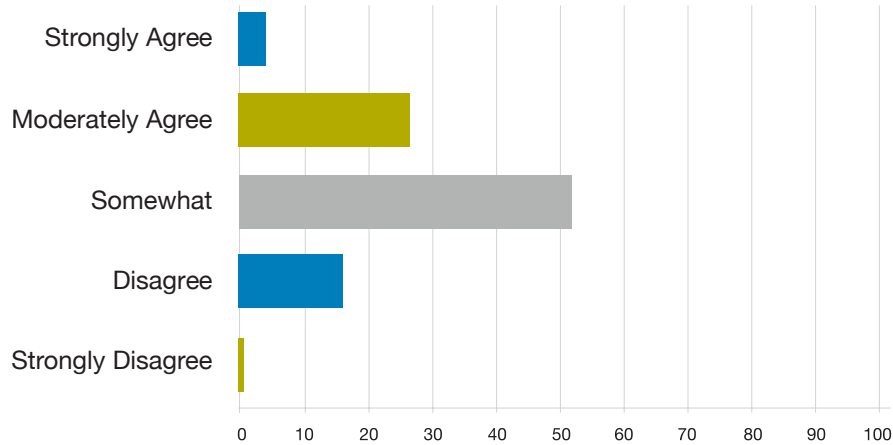
## Value, Policy, and Advocacy

Nonprofits play an important part in policy and advocacy work. Often, there's policy that is either in the way, needs to be improved, or drafted that could be a game-changer in how nonprofits are able to fulfill their missions.

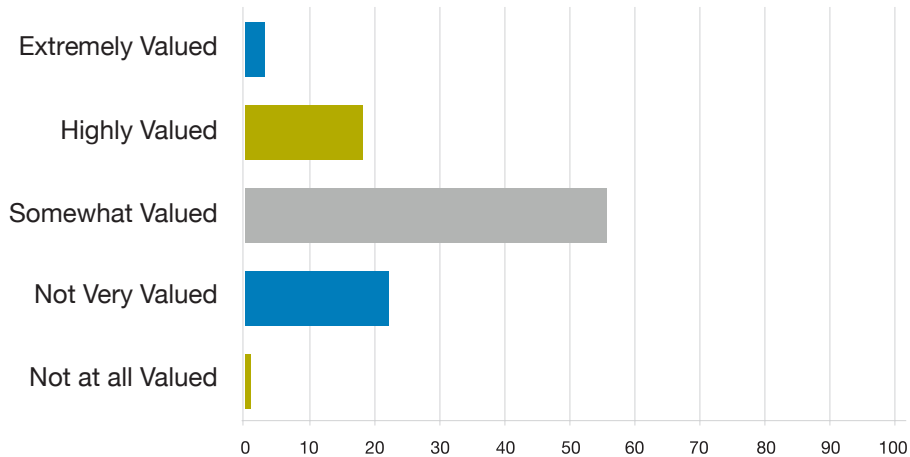
Part of any nonprofits advocacy work is creating value in their own community. We asked nonprofits how they perceive the nonprofit sector is valued in their community, and we are happy to report that **nearly 58% of respondents indicate they perceive nonprofits are extremely or highly valued.** In light of the COVID-19 pandemic, we anticipate that has shifted public perception even higher as our response as a collective sector was absolutely critical in maintaining and expanding needed programs, services and support throughout the pandemic (which rages on).

We also wanted to measure nonprofits' perception that nonprofits have a voice and a role in the public policy decision making process. This also clearly identified a knowledge and skills gap that is part of our mission to fill:

Do you agree that nonprofits have a VOICE in the public policy decision-making process?



How valued are nonprofits' ROLE in the public policy decision-making process?



Nonprofits have data and influence, which gives them a voice and by virtue of that voice an opportunity to provide a critical role in policy-making at the state AND local levels. We hope this data point trends upwards in the coming years.

## Capacity Gaps Aside from Funding

When asked what nonprofits need most, they will more than likely respond with “funding” as an answer. We wanted to measure what other capacity gaps they might have. We generated a wordle from their responses (below) but the top needs



for nonprofits were volunteers, staff, facilities and board members.

In light of the COVID pandemic volunteers, staff and funding have been amplified as massive capacity gaps for most, if not all, nonprofits in Idaho.

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## **In Conclusion**

Nonprofits across Idaho serve the public in so many ways, and we know that their great work cannot simply be reduced to numbers and charts. These findings are only part of the story, but they provide important insights into the health of Idaho's nonprofit sector and illuminate the internal and external challenges that nonprofits face.

The information and trends that this report spotlights can lead us to opportunities for enhancing nonprofit effectiveness. We are encouraged that progress is being made on critical indicators of nonprofit organizational and leadership health. We also know that there is still work to do. In particular, our findings call for increased attention to succession planning, equity and inclusion work, and deeper collaboration.

The INC will be using this data in our programs, resources, advocacy work, and convening events to assist INC members and all nonprofits in closing the gaps and being the best nonprofits we can be.

We deeply appreciate the candid responses of respondents and their willingness to share their nonprofit challenges and struggles through their participation. Learning is a process. Part of learning requires us to address issues that we may not understand or feel comfortable with. Part of learning is knowing when to ask for help and the Idaho Nonprofit Center is here to support your efforts. We know that across the state, Idahoans are being positively impacted every day by our nonprofit sector and we look forward to working with all of you for even greater impact in our communities. Thank you all for the work that you do to enrich the lives of all Idahoans.

A more detailed look at the data collected from the survey can be found at: [IdahoNonprofits.org](http://IdahoNonprofits.org)

The Idaho Nonprofit Center would also like to thank the Nonprofit Association of Oregon (NAO) and the Predictive Analytics class students in the College of Business and Economics at Boise State University for their work on the analysis and cross-tabulation of data for the State of the Sector report.

Special thanks go to Jim White, Executive Director of NAO and Dr. Christie Fuller, Assistant Professor, Boise State University.

# **PART THREE**

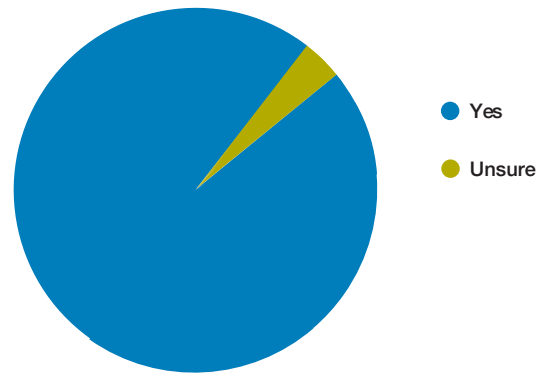
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## **Nonprofit Capacity and Impacts of COVID-19**

## An Update

On March 13, 2020 around 4:00 pm mountain time, our media and the state health department announced the first officially diagnosed case of COVID-19 in Idaho. Within a matter of a few days, schools were closed, offices were shuttered, businesses closed, many employees were sent to work remotely and the economy began it's slow descent.

The Idaho Nonprofit Center deployed the first of three surveys meant to measure both the already realized and perceived future impacts on the nonprofit sector, the impact of canceled events to annual income and the financial sustainability of our nonprofits, and to better understanding the knowledge capacity gaps we all face as there appears to be no end in sight to the pandemic.



Our first survey, dated March 22 asked the following questions:

Have you been or expect to be impacted by the spread of the coronavirus? 96% reported yes, no one said no.

We then asked what impacts were happening or anticipated:

Type of Impact	% Response
Cancellation of programs of events and corresponding reduced revenue	82.35
Disruption of services to clients and communities	69.61
Increased and sustained staff and/or volunteer absences	54.90
Disruption of supplies or services provided by partners	33.33
Increased demand for services/support from clients and communities	39.22
Budgetary implications elated to strains on the economy	72.55
Other	12.75

The greatest and most common impacts have all been tied to the financial health and well-being of the nonprofit. Our State of the Sector report highlighted the challenges nonprofits face, particularly those who are small and/or based in rural communities. COVID-19 did not create new financial constraints, but it certainly amplified them significantly.

Most nonprofits experienced an increased demand on their services while sustaining a decrease in reduced income/revenue.

We also asked nonprofit to estimate the level of severity that any of these impact are or were predicted to have on their programs, services or general operations. Not surprisingly 68% reported high (significant) impact and 28% reported a moderate impact or disruption.

We also wanted to get a sense of how our nonprofit sector might respond to the spread, keeping in mind we asked these questions on March 22, but even early on we all knew we would be faced with canceling or rescheduling events, moving work and meetings to remote, updating sick leave policies (this was before the CARES Act) and taking it upon ourselves to remain informed.

Event Impact	% Response
Rescheduling or canceling programs and events	84.47
Changing in-person events to virtual events using video software	75.73
Revising remote work and sick leave polices	59.22
Encouraging employees who feel sick to stay at home	84.47
Encouraging proper hygiene (hand washing, cough/sneeze/etc.)	88.35
Staying informed via news, CDC, and state of Idaho	90.29
Other	27.18

In the fall of 2019 we asked nonprofits to tell us what, if any, emergency contingency plans they had in place. 82% reported having a plan at that time. On March 22 we asked about very specific plans that nonprofits could have in place. We asked the question to not only reinforce best practices but to identify capacity gaps that the Idaho Nonprofit Center could work to fill.

The results of this question were stunning. 50% had remote work policies in place for staff and 63% had technology infrastructure in place to support remote work. 41% reported having health care benefits and 43% had an emergency communications plan. 48% reported having 3-6 months of operating expense in a savings account.

Emergency Contingency Plans	% Response
Finical Contingency Plan	23.33
Emergency Contingency Plan	28.89
Remote Work Policy for Staff	50.00
Technology Infrastructure	63.33
3-6 Months Operating Expense in Savings	47.78
Short Term Investments	21.11
Long Term Investments	28.89
Risk Management Policy	23.33
Health Care for Staff	41.11
EAP Plan for Staff	21.11
Telehealth Benefits	16.67
Current Donor Stewardship Plan for Current Conditions	21.11
Event Contingency Plan	24.44
Emergency Communications Plan	43.33

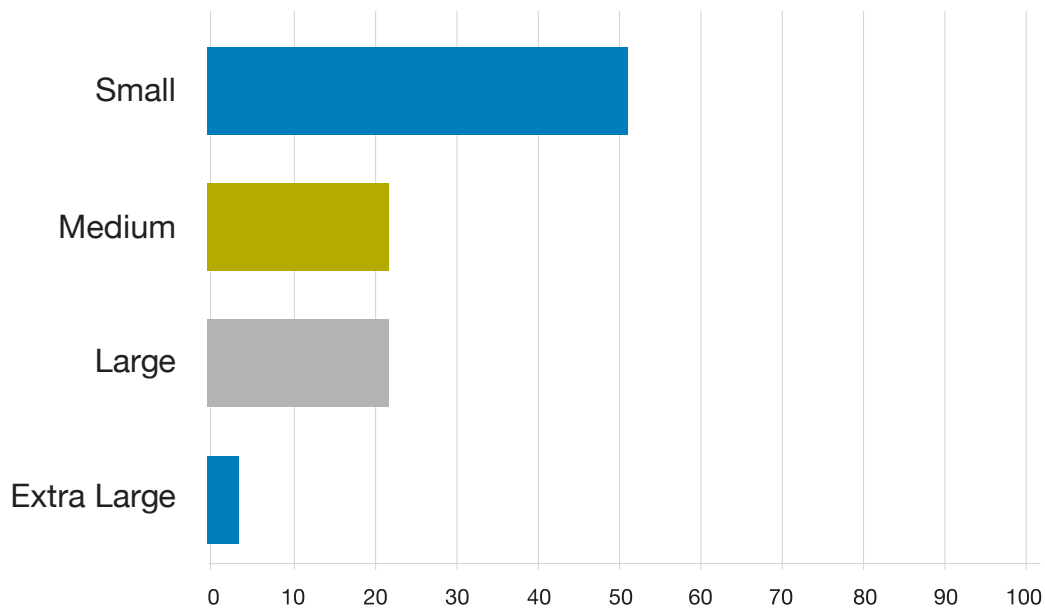
The Idaho Nonprofit Center worked quickly to build knowledge capacity in many of these areas and at some point we'd like to go back and measure the efficacy of our efforts, but the nonprofit sector feels, collectively and rightfully so, that we're everyone's research project. Over surveyed, over analyzed and under appreciated for how we, collectively, have risen to this challenge and shown what intelligent, compassionate and creative problem solving leaders our entire sector represents.

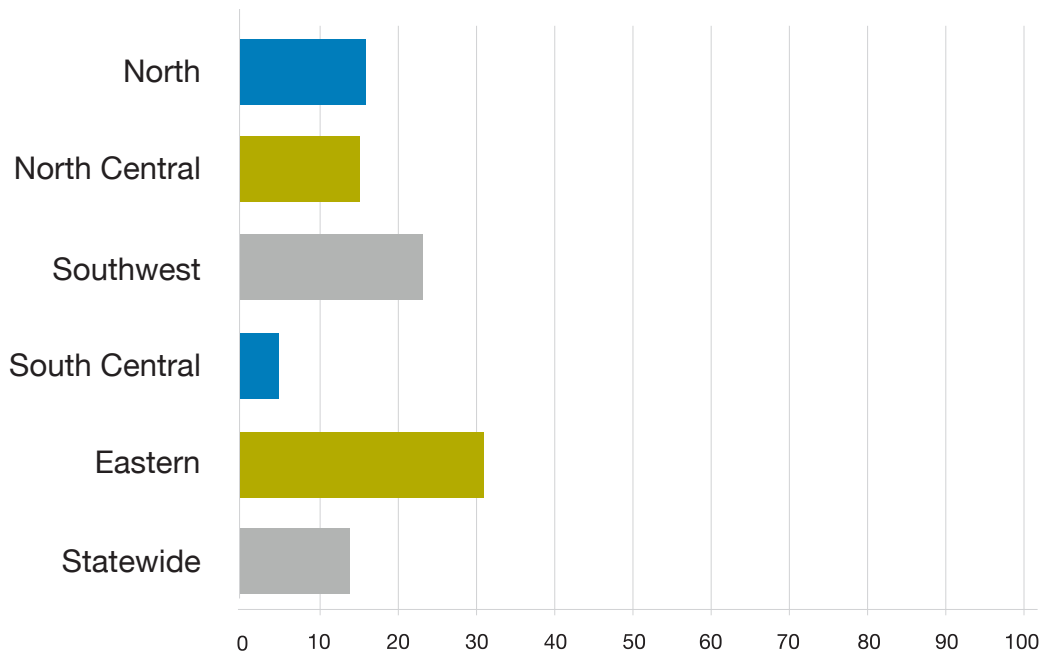
## Nonprofit Sector Needs in the “New Normal”

On April 19 the Idaho Nonprofit Center sent an additional follow up survey, less than a month after our Governor issued our “stay home” order. We wanted to better understand, on a deeper level, how we could support the nonprofit sector by organization size and by region. What we found were very few nuanced differences no matter how we sliced and diced the data. In other words, we really are all in this together. We are tied together not only by our desire to make our communities safer, healthier and better, but by the challenges we all face.

Just over half of the responses to our survey are what we consider small nonprofits, those with a budget of under \$250,000. Medium and large organizations represented 22% each with the rest falling into the over \$5 million category.

Surprisingly regional representation was skewed slightly to the east:





We also wanted to know the sub-sector representation, and it seemed to fall in line with where most of our nonprofits are categorized proportionately, with 42% falling under the health and human services category:

Subsector Classification	% Response
Arts, Culture, and Humanities	11.94
Education	8.96
Environment and Animals	6.72
Health	16.42
Human Services	42.54
International, Foreign Affairs	0.00
Public, Social Benefit	8.96
Religion Related	2.24
Mutual and Membership Benefit	2.24

As we thought more deeply about the challenges we were facing in our own organization, we also wanted to make sure that we had a broader understanding of the entire sector’s concerns. We asked specifically where nonprofits saw their own knowledge capacity gaps.

The responses correlated to every other survey we’ve done and tied back to our state of the sector survey: fundraising and fund development will always be an area of growth opportunity for our entire sector.



The need for volunteers (as reported in the SOS) also did not change, but how we engage with volunteers did. Suddenly we needed to know how to engage volunteers in a virtual setting, which included engaging board members in a virtual meeting and beyond.

Other areas of need were (and still are) making difficult decisions, building a strong office culture in a virtual office environment and virtual staff management and supervision.

Potential Challenges	% Response
Fundraising	59.70
Fund Development	54.48
Virtual Meetings	32.84
Virtual Board Engagement	35.82
Board Meeting Legalities	29.85
Difficult Decision Making	23.13
Nonprofit Mergers	11.94
Surplus Investment Options	14.93
Virtual Volunteering	38.06
Office Culture in Virtual World	27.61
Inexpensive Health Benefit Options	24.63
Virtual Management	35.07
Other	7.46

## Impact of Canceled Events on the Nonprofit Sector

As we discussed in the State of the Sector report, nonprofits can play a critical role in policy decisions being made and the local, state and federal level. Part of our mission at the Idaho Nonprofit Center is to serve as the voice for the sector on issues that impact our ability to fulfill our missions.

When the first case was announced in Idaho hundreds of nonprofit fundraising events were either canceled or postponed, which left a critical cash flow gap for most of those organizations who were impacted. As we noted in the SOS not every nonprofit has money in the bank, and if they do it's only a few months of expense. Fundraising events are usually positioned to bolster income during certain parts of the year so the organization can sustain its operations. Suddenly you cancel your event, losing money spent on facility rental, marketing and the staff time to prepare which could have been redirected to mission fulfillment.

As the state formed their coronavirus advisory task force, we were able to partner with a critical member of that committee to provide information and data to ensure our nonprofits had a voice at the table.

As a result, we were asked to collect some data on the true impacts of event cancellations on the nonprofit sector and share that with the Governor and his task force. Again, this all ties back to the State of the Sector report as events are a significant revenue source for our nonprofits. The ripple effect of the impact of canceled or postponed (or events that have gone virtual) will be felt for years to come.

Generally (not always) the larger nonprofits in more urban areas are better resourced. Their events may drive up to 10% of their revenue but they have larger budgets. The impact is significant, but not to the same degree as in a smaller more rural community.

Nonprofits in our regions tend to have smaller budgets and events can drive anywhere from 25 – 75% of their annual budgets, often times their budgets are under \$100,000.

Not all events are created equal. Some events lend themselves well to changing over to a virtual event, others such as large concert series, art/music festivals and outdoor athletic events are difficult, if not at times impossible to change. Speaking from experience, even changing a racing event to a “virtual” one while reducing production costs on the one hand, dramatically decreases event participation as part of the experience of the event is being in person.

Churches are impacted as well, each week that they do not pass the collection plate in person during their service reduces the amount of operating income they receive. Though many churches are set up for credit card giving weekly, monthly or annually, it is not something all of them will either offer or have the capacity to effectively promote and manage. Additionally, like all of us with the economy struggling that also means a decrease in giving as it is.

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## Event Types Most Commonly Reported

- Church services (ex: 22,000 on weekends for mass – missing collections with no parishioners)
- Large summer concert series
- Fun Runs/athletic events
- Outdoor festivals (art, music, food, beverage, etc)
- Golf tournaments
- Monthly or biweekly revenue generating events (CCG, FoH)
- Conferences
- Fundraising galas/auctions/etc

## Statewide Summary of Impacts

Total estimated\* net revenue loss from reporting nonprofits: \$18,880,986

- \$82,449 average loss per reporting organization
- 290 events reported, 990 average attendance
- Smallest reported event:
- 20 attendees Largest: 50,000

\*we asked respondents to base their estimated lost revenue based on 2019 actual event net revenue VS projections or budgets for 2020

What percent of the organization’s annual budget to large events support:

Annual Budget to Large Events	% Response
Up to 10%	31.90
10 to 25%	25.86
25 to 50%	19.40
50 to 75%	14.22
75 to 100%	8.62

These results are a little bit nuanced, in smaller and rural communities reliance on fundraising events is greater. When we looked at north Idaho specifically, we noted that more than 50% of reporting nonprofits rely on events for 50 - 100% of their annual budget. The largest reported event from north Idaho was also over 5000 attendees, with the smallest at 75.

## Summary of COVID Capacity Report

Nonprofits are resilient, creative small businesses who consistently deliver the quality of life we all enjoy here in Idaho. COVID-19 pandemic aside, the capacity gaps we identified after March 13, 2020 were not new to us. This pandemic amplified some, identified even more, but overall has given the nonprofit sector a chance to shine. We’ve been able to deliver on our missions, more than ever before despite our funding, staff and volunteer limitations.

We cannot estimate how long this pandemic will impact our sector, at this stage there is no end in sight. However, we know that nonprofits not only know what their gaps are but in addition to working tirelessly to fulfill their missions, they are accessing the resources, training and support they need to do what they do best.