



A report presented to the Board of Directors
for the Community Foundation of the Ozarks

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Executive Summary

In Winter-Spring 2021, Habitat Communication & Culture executed a research project commissioned and guided by the leadership of the Community Foundation of the Ozarks' (CFO) charge to investigate the feasibility of creating a capacity-building organization (CBO) in the Ozarks and Southern Missouri region. Using a 4-pronged research approach, including a review of existing literature and documentation, conversations with existing CBO professionals, focus-group style interviews with area non-profit leaders, and a 60+ item survey provided to the CFO's member network, the research team answered the specific charges provided to them.

1. A CBO in the Ozarks and Southern Missouri region could effectively serve a range of needs for Non-Profit groups, including growing their abilities for
 - a. Development and fundraising
 - b. Raising awareness about their service(s) and mission
 - c. Finding and retaining volunteer and paid workforce
2. Target users would seek and employ the services of a CBO
 - a. At least 50% of respondents would use all potential service areas at least once annually. A CBO could, based on responses to the survey, expect to fulfill a need for 60-70+% of groups in almost all potential service areas at least once or twice yearly.
 - b. At least 50% of respondents would seek all potential service(s) areas from a CBO, rather than a different service provider. More than 90% of respondents were more likely to seek grant-writing, development, and consulting services from a CBO, rather than a different service provider.
3. A CBO located in Springfield, MO may limit its use by a portion (13-33%) of non-profit groups, although respondents were very willing to receive services completely virtually, with 62% willing to receive many or all services virtually and 91% willing to receive at least some services virtually.
4. Non-profit groups' reported likely usage of a CBO differed according to their characteristics, including the group's evolution from more simple to more complex, such that simpler groups expressed different needs from larger, more complex groups.

The research team also uncovered a number of insights relevant to creating a CBO, including

1. Non-profit groups' level of trust in the CFO increases their likelihood of using a CBO's services, especially if the CBO is affiliated with the CFO.
2. A CBO can offer unique support to potential users by serving as a hub for fostering collaboration/coordination among member groups with shared/similar interests. These groups often experience, sometimes unnecessarily or unknowingly, competition for finite resources that could be shared in a strategic partnership of aligned missions.
3. A range of potential early models of a CBO, based on prioritized user needs and efficiency of operations.

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Background

In Fall 2020, the Community Foundation of the Ozarks' (CFO) leadership commissioned Habitat Communication & Culture to provide research-based insights on the feasibility of establishing a capacity-building organization (CBO) to serve the non-profit organizations (NPO) in the Ozarks and Southern Missouri region. The CFO guided the research direction with a number of charges, including

ANSWERING THE FOLLOWING QUESTIONS

- In what areas do non-profit groups need more help?
- To what extent would network partners (i.e., non-profit groups in the geographic region) use the services offered by a capacity-building organization?
 - ▶ What service area(s) are the highest need for network partners?
 - ▶ What service area(s) would receive the highest amount of use?
- To what extent would network partners not use a capacity-building organization because of
 - ▶ The non-profit organization's geographic location
 - ▶ The virtual (as compared to in-person) delivery of services
- How might answers to the questions above differ, according to the characteristics of the non-profit organization receiving the service?

GATHERING INFORMATION FROM

- Knowledgeable leaders and managers of existing capacity-building organizations in other cities
- As many of the network partners as possible, in order to include the most representative collection of perspectives.
- Qualitative, dynamic interviews with typical, likely users
- Quantitative, widely distributed survey responses among the non-profit member network

Based on this charge, in the Winter and Spring of 2021, Habitat Communication & Culture completed a multi-pronged, phased approach to researching the feasibility of a capacity-building organization in the Ozarks and Southern Missouri region. A full description of the methods can be found in this report. Along with providing this report, Habitat Communication & Culture presented the results of this research effort to the Board of the Community Foundation of the Ozarks in June 2021.



Methods

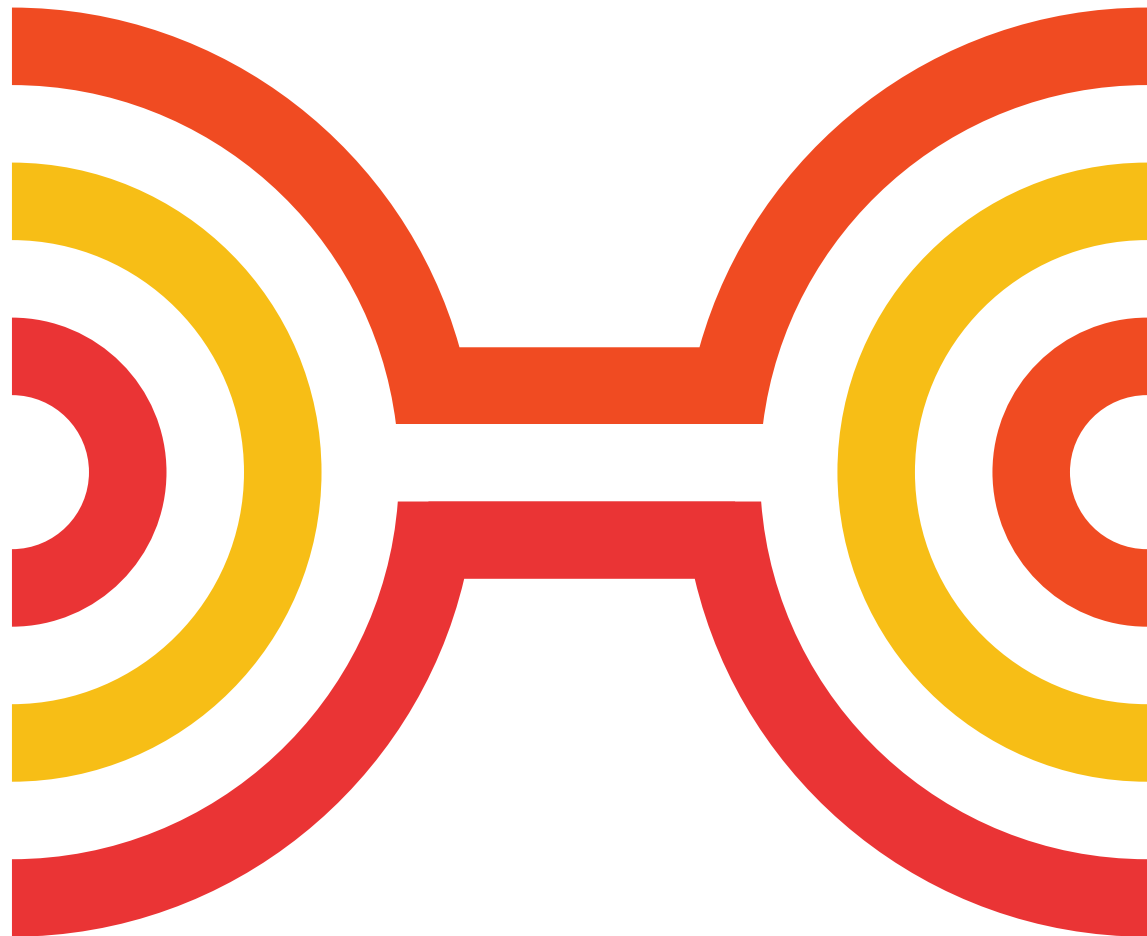
Habitat Communication & Culture's research team conducted four major types of research in addressing the charge. Each type of research added unique value to the overall effort, and a summary of each method is presented below.

1. Searching and reviewing available, existing literature on the needs for increased capacity among non-profit organizations, based on non-profit leadership and management texts.
 - a. Relatively little text was available to address this specific question, as capacity-building organizations are a seemingly recent resource offered to non-profit communities.
 - b. This process yielded a clear conclusion: non-profits are experiencing increasing challenges to do more with less, to operate more like businesses without sacrificing the prioritization of for-good/pro-social missions, and to embrace more opportunities for partnerships and new relationships to meet these challenges.

2. 60-90 minute conversations with leaders of existing, successful capacity-building organizations.
 - a. These conversations revealed how capacity-building organizations may grow from inception to fully operational, serving hundreds (if not thousands) of user organizations, featuring multiple organizational divisions and operational specialties.
 - b. These leaders discussed the types of services offered, and their view of the relative needs of their user groups.

3. Focus-group-style (i.e., semi-structured) 30-45 minutes interviews with 11 non-profit organization leaders from the Ozarks and Southern Missouri region
 - a. These conversations are valuable in adding rich texture to the quantitative data gathered in other research methods, and participants were given ample opportunity to expand on their specific needs and challenges.
 - b. These conversations illuminated a central need for a capacity-building organization as a facilitator for non-profits to learn about and collaborate on mutual grant opportunities.

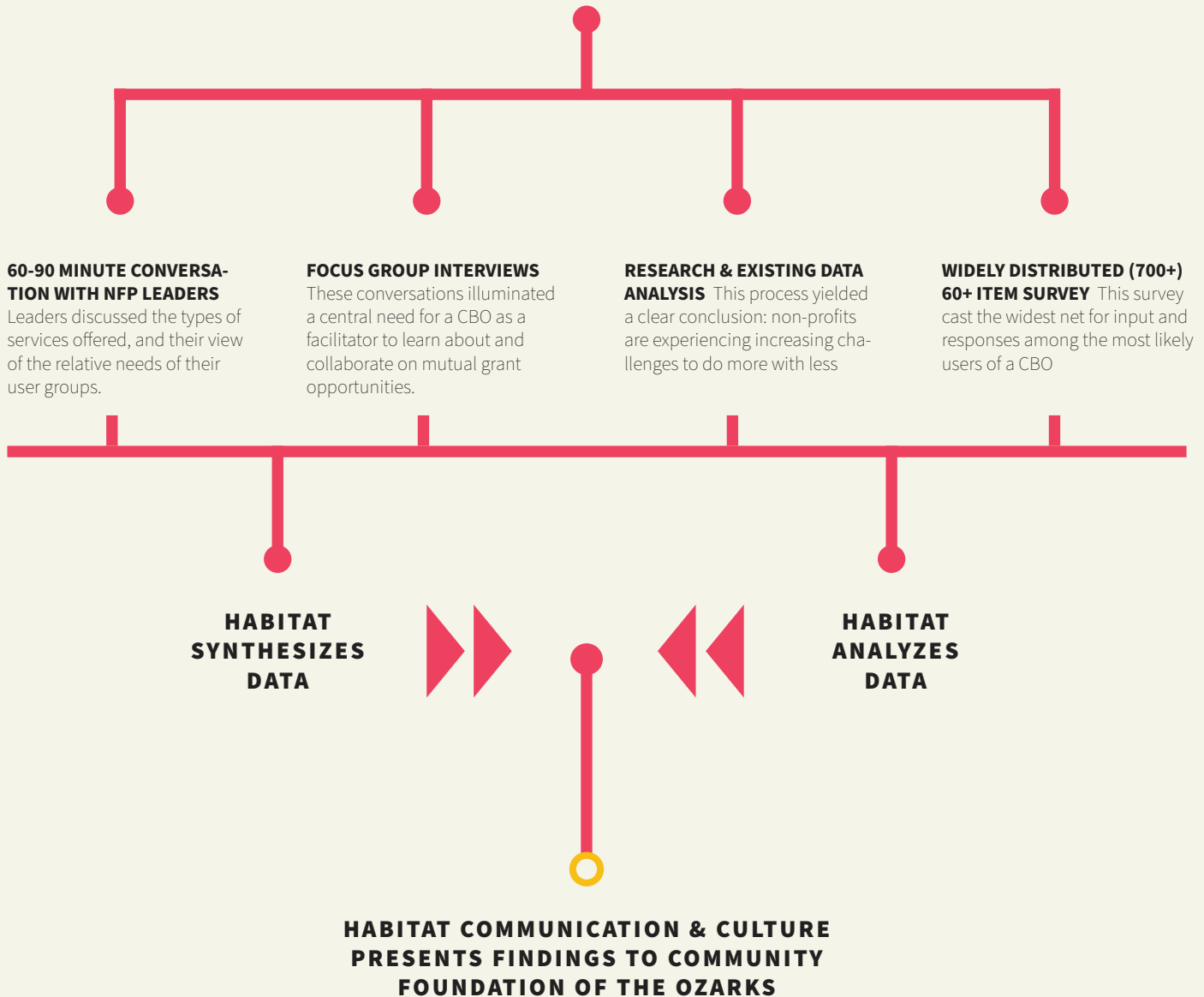
4. A widely distributed (700+ recipients) 60+-item survey asking a targeted set of questions related to the charge of the research effort.
 - a. Primarily, this survey gathered responses related to a list of 13 service areas that a capacity-building organization could offer, which were generated from insights provided by a review of existing literature, conversations with capacity-building organization leaders, and input from the Community Foundation of the Ozarks' leadership.
 - b. This survey cast the widest net for input and responses among the most likely users of a potential capacity-building organization in the region.
 - c. 144 respondents served in non-profit groups operating across the target geographic area, including 42% from Greene County, 12% from Jasper County, and remaining respondents concentrated in the 417-region but also spreading into other regions of Missouri and bordering states.
 - d. These quantitative results provided a more objective glimpse into the reported needs and likely usage behaviors of network partners related to a capacity-building organization.



Flow of Data

HABITAT COMMUNICATION & CULTURE DEFINES & CONDUCTS RESEARCH

Charged by CFO



Capacity-Building Service Categories

Broadly, Habitat Communication & Culture sought to learn more about a non-profit organizations' orientation to, including the significance of need and willingness to use and/or pay for, the following 13 types of services that a capacity-building organization could provide.

- STAFFING & TALENT (HIRING, PERF. MANAGEMENT)
- EMPLOYEE BENEFITS (PAYROLL, HEALTH INSURANCE)
- HR COMPLIANCE (LEGAL COMPLIANCE, DEI, CULTURAL CONSCIOUSNESS)
- ORG. GOVERNANCE (BY-LAWS, BOARD MANAGEMENT/ COMPOSITION, BOARD DEVELOPMENT)
- IT SUPPORT (CYBERSECURITY, TECH. SUPPORT, SOFTWARE ACCESS)
- IT RESOURCES (EQUIPMENT, STORAGE/CLOUD/SERVER)
- ORGANIZATIONAL DEVELOPMENT (BUILDING DONOR RELATIONSHIPS FUNDRAISING BRANDING/MARKETING PLANNED GIVING/ESTATES)
- GRANT WRITING
- CONSULTING FOR NON-PROFITS (EXECUTIVE DIRECTOR/ LEADERSHIP COACHING STRATEGIC PLANNING IMPLEMENTATION)
- VOLUNTEER MANAGEMENT
- INSURANCE/RISK MANAGEMENT
- ACCOUNTING/FINANCIAL CONSULTING
- SECURITY/DISASTER PLANNING



The specific results of all relevant research efforts to determine the importance and/or likely use of these services are covered in detail in the following pages, which also include key insights and uncovered by Habitat Communication & Culture in the course of this research



Results

Habitat Communication & Culture internally drafted more than 70 pages to document findings uncovered by this research effort. The research team considers actionable results more valuable for the Community Foundation of the Ozarks than a dense, comprehensive report. The research team welcomes requests for answers or specific insights not provided by this results section, but they begin with responses to the key questions established at the beginning of this process along with high-level insights before presenting summative results of survey data.

QUESTION

FINDING

In what areas do non-profit groups need more help?

Across 10 possible areas, groups reported the greatest need for help

1. Obtaining more funding and, more broadly, development assistance
2. Raising awareness about their service/mission
3. Finding/retaining volunteers & staff

To what extent would network partners use the services offered by a capacity-building organization?

Across 13 service areas

1. At least 50% of respondents report they would use every service at least once yearly if it were offered by a CBO.
2. At least 50% of respondents report they would be likely or certainly seek every service from a CBO, rather than a different vendor

What service area(s) are the highest need for network partners?

Obtaining funding, or other forms of development, emerged as the most consistent, and highest-importance need among respondents.

What service area(s) would receive the highest amount of use?

Resources for obtaining and retaining workforce—both volunteer and paid—was also a high-priority for respondents

To what extent would network partners not use a capacity-building organization because of

Resources related to obtaining funding, including grant-writing, or other forms of development, were most likely to receive the highest amount of use. Non-profit consulting and IT support/resources were also reported as higher-frequency usage areas.

QUESTION	FINDING
<p>To what extent would network partners not use a capacity-building organization because of</p>	<p>Support for non-profit groups' governance, leadership, and volunteer management also emerged as likely high-use areas for a CBO</p>
<p>The non-profit organization's geographic location</p>	<p>NPOs operating in a rural (as compared to sub-urban) location reported a somewhat lower likelihood of using some CBO services (HR compliance, consulting) and a greater likelihood of using others (IT support/resources, accounting/financial Support)</p> <p>66% reported a CBO physically located in Springfield, MO would limit their use "Not at all" or "A little" and 13% reported this location would limit their use of a CBO "A lot" or "A great deal".</p>
<p>The virtual (as compared to in-person) delivery of services</p>	<p>91% of respondents reported they would receive at least some of the listed service areas virtually, with 62% willing to receive any service virtually.</p>
<p>How might answers to the questions above differ, according to the characteristics (e.g. operating budget, number of employees) of the non-profit organization receiving the service?</p>	<p>Reported frequency, utility, and need of service areas differed, intricately, to a number of group characteristics, including:</p> <ul style="list-style-type: none"> • Groups' annual operating budget • Volunteer and paid workforce volume • Existing relationships with a relevant service provider/vendor • Groups' history of receiving a grant from the CFO <p>Inferences drawn from these differences are presented below, in the common themes and insights sections.</p>



Key Inferences

Money Matters

Funding and budgetary concerns surfaced repeatedly. Within survey responses, interviews, and focus group conversations, non-profit organizations clearly want to maintain viability and prioritize monetary resources—and securing reliable sources of funding—as a primary opportunity for growing their capacity.

Doing More with Whom?

Non-profit organizations vastly range in their sizes—as counted by the number of people they rely on for achieving their mission—further complicated by the volunteer and/or paid composition of these workforces. As a result, groups experience many of the internal headaches and needs of any organization related to finding and acquiring talent, coordination of work for efficiency, and retaining and motivating those in their ranks. These are complicated by

- An internally felt, externally enacted pressure to maximize the organization's budgeting towards its for-good mission. This pressure leads non-profit organizations to spend less (as compared to for-profit organizations) on internal costs, like compensation, training, selection, and employee/staff relations. A capacity-building organization, as a cost-saving center maximizing economies of scale among many groups (by, for example, creating some shared resource/talent pools) can hopefully provide a large impact in these areas of internal need.
- Leaders in these groups, often themselves unpaid or underpaid and without specific managerial training, face daunting challenges of how to efficiently complete organizational aims with minimal support staff and without abusing goodwill of volunteers or employees.

This research effort observed what appears to be a well-known reality of leading and managing non-profit organizations: more resources, more wisdom, and more guidance can help tremendously. However, faced with urgent operational (*e.g.*, completing a critical task/project) and viability concerns (*e.g.*, securing or growing funding), non-profit leaders and workforce members may possess less time and motivation to seek and receive support in areas like Human Resources or Organizational Effectiveness.

Despite this tension, many groups, especially more developed organizations expressed high likelihood of frequently using these types of services from a capacity-building organization.

Organizational Evolution

If one considers any organization as a single entity, like an organism operating and seeking to survive and advance in an environment, then each organization experiences recognizable phases of progression from simpler to increasingly more complex. This research revealed the importance of a non-profit organization's evolution in the types of services a group would use and the frequency and intensity of their need or likely use of those services.

For example, groups with greater annual operating budgets reported greater need for support in staffing concerns (paid & volunteer), and a higher likelihood of frequently receiving HR compliance support from a CBO, but a lower willingness to seek support from a capacity-building organization for IT resources/support, and accounting/financial consulting. Similarly, groups with larger paid staff reported a lower likelihood of frequently seeking support from a capacity-building organization in areas of development, grant writing, and accounting/financial help, but a greater willingness to seek support from a capacity-building organization in areas of employee benefits.

As a result, a CBO would be well-advised to closely consider how to choose which services to offer and how to appeal to all of its network members, given the following possible priorities:

1. More developed groups often possess greater budgetary resources, which will be critical in generating revenue for using CBO services.
 - a. These groups report they are more likely to seek services like HR assistance and less likely to seek services like grant-writing & development.
 - b. This preference set is the complete opposite of those reported by less-developed groups, reporting a high likelihood for grant-writing and development, and the least likelihood of seeking HR assistance.
2. More developed groups may also be centered closer to Springfield, or nearby (as compared to Southeastern Missouri), so a CBO located in Springfield would likely serve more of these groups.
3. Lesser developed groups may more urgently need help, building capacity can more dramatically impact their effectiveness, and shaping a CBO to serve these lesser developed groups' needs may provide a broader impact across more of the capacity-building organization's network region.

Trust in the Community Foundation of the Ozarks

Among focus group participants, people expressed the central role of their trust in the Community Foundation of the Ozarks in their willingness to use a capacity-building organization.

Survey respondents who, in the past, have received a grant from the CFO reported, generally, a

greater likelihood of more frequently using CBO-offered services. This, despite grant-recipients not expressing a greater need for services than their non-grant-recipient counterparts. This group characteristic—having received as compared to not having received a CFO grant in the past—also yielded differences in other responses.

For example, among non-grant-recipients, employing a greater amount of volunteers was linked to a lower likelihood of using CBO services. However, among grant-recipients, employing a greater amount of volunteers was not linked at all, or slightly positively linked, to a greater likelihood of using CBO services. That is, the relationship between volunteer workforce and likelihood of using CBO services differed according to whether or not the group had or had not received a grant from the CFO. Differences like these, in the relationships between group characteristics and reported usage likelihood, between grant and non-grant-recipients may reflect the groups' trust in the CFO. Grant recipients, as a function of their trust in the CFO, may be more receptive to a CBO championed by the Community Foundation of the Ozarks.

Comparatively, non-grant-recipients may possess less trust—not negative views—than grant-recipients due to lack of similar firsthand CFO experiences.

In creating a capacity-building organization and encouraging its use by network members, then, the Community Foundation of the Ozarks may see more early success by

1. Appealing to network members who have received grants/other types of direct support from the CFO.
2. Inquiring and recording what past interactions a group has had with the CFO, to better determine how the existing relationship with the CFO may inform the CBO usage behaviors of members.
3. Exploring how to brand the potential CBO to leverage the trust network members hold in the CFO.
4. Better understanding what limitations prevent network members from having received grants from the CFO to bypass those limitations' effect, if possible, on those members' usage of a CBO.

¹ Alternatively, grant-recipients may possess a disposition more receptive to seeking and receiving external resources, like grants, which also makes them more likely to seek support from a CBO. Non-grant-recipients disposition may be less receptive/motivated to seeking and receiving external resources, like grants, which makes them less likely to seek support from a CBO.



Revealed Insights

Although these were not targeted by this research effort, the research team uncovered a number of important insights in exploring the feasibility of a capacity-building organization for the Ozarks and Southern Missouri region.

Competition Harms Capacity.

In a focus group conversation, a non-profit leader stated “a capacity-building organization could make the most impact by bringing non-profits with similar missions to the table and facilitating their collaboration for mutual grant resources, rather than relying on all of us to continue competing for the same resources.”

One of the most impactful ways for a central entity to build the capacity and increase the impact of non-profit organizations in the target region would be a central decision-making entity who recognizes how multiple groups—with similar or aligning missions/interests—may mutually benefit from shared resources. This coordination function would ideally live within a single role at a CBO, and the role would require:

1. A broad (not necessarily deep) knowledge of the member network.
2. A formal organizational mechanism for regularly receiving information on NPOs pursuits/interests, perhaps organized into major categories of service/mission areas.
3. A creative, proactive approach to forming strategic partner efforts between and among NPOs.

Potential Early Models of a CBO in the Ozarks/Southern Missouri Region.

Considering this collaboration-conduit role at a CBO and in reflecting on all of the information gathered in this research effort, Habitat Communication & Culture offers a number of potential early versions a capacity-building organization in the Ozarks and Southern Missouri Region may take.

1. DEVELOPMENT/FUNDRAISING + SERVICES HUB. A meaningful volume of NPO respondents in the area expressed greatest need for, willingness, and likely frequency to use services related to development, fundraising, and/or securing more sources of funds. A minimalist approach

to a CBO could include a single professional whose primary responsibilities and competencies resembled:

- a. Development and fundraising resource(s) for users (comprising something like a 40-60% of full-time equivalent duty-time)
- b. Collaboration-conduit resource for users (comprising something like a 10-15% of full-time equivalent duty-time)
- c. Field and refer user-initiated requests for services to designated service vendors (comprising something like a 25-50% of full-time equivalent duty-time)

In this model, the CBO would primarily be a hub, a first-stop for capacity-building, that NPO groups would contact. When the contacting group required development services or collaboration opportunities, the CBO would be equipped to provide those. Otherwise, the CBO would maintain a list of preferred service vendors (e.g., an accounting service vendor) that groups could use. The CBO and service vendors may, in this model, provide a centralized mechanism to use efficiencies of scale for reduced pricing of services to members.

2. PROCEDURAL EXPERT. If a CBO expanded beyond the minimalist first model, a designated expert in non-mission-specific business/organizational processes, broadly, could serve much of the remaining volume of needs. Rather than being a specialist in a given area of service (e.g., accounting), this operations professional would serve a greater volume of groups as a generalist, with a fundamental knowledge-base of areas like accounting, governance, staffing, HR compliance, tax/agency compliance. At this early stage, staffing a CBO with a specialist with deep-level expertise in a single area—other than fundraising—would be premature, given the unclear usage patterns/needs of members.

However, a generalist, who could provide support to many different groups by contributing in many different areas of their needs, could serve to ramp up an early-generation CBO until a market for usage habits can be better determined and CBO staffing and specializations can be built to match.

3. NON-PROFIT CONSULTING HUB. Finally, information produced by this research indicates non-profit groups need more customized, advisory services related to their organizational leadership and effectiveness. Among survey respondents, 90% indicated they would likely (53%) or certainly (37%) seek this type of consulting service from a CBO, rather than a different service provider. After workforce planning to meet the broad-scale suite of organizational processes outlined above, a CBO could offer non-profit user groups consulting-type services, including leadership coaching, strategic planning and implementation, and organizational development.

This research made evident that non-profit groups face similar challenges to for-profit groups, but they often face these with more hindrances and fewer resources. Simply, although NPOs can benefit from the models and practices employed by for-profit groups, NPOs qualitatively differ and they would benefit from models and practices developed and created for them, not adapted to them. The current research effort and report, for example, could inform groups like the CFO who seek to amplify and support the impact of their region's non-profit groups. Although CBOs exist

in other locations and resources like BoardSource can inform high-level leadership, our research yielded few guiding elements for creating and maintaining a CBO.

What if the CBO incubated and housed a Center for Non-Profit Insights, an organizational area specifically designated to understand, document, and disseminate real-world lessons and wisdom—originating in NPOs—for CBOs and NPOs to use?

As a first contribution to the national network of non-profit work, such a Center could create guidance and expertise specific to CBOs, for example, by identifying all CBOs across the country to create a network of these entities whose collective wisdom, along with reports like these, could inform and catalyze the more efficient maintenance or creation of CBOs in the US. The research resources devoted to the current project, then, could extend their utility.

The Center could benefit from the tremendous resource pool of local universities (including a large university with a formal Public Affairs mission featuring a pillar of Community Engagement), through strategic partnerships with different colleges and faculty members, who are required to produce research, to serve their communities, and to provide rich, learning experiences for students. These learners, as soon-to-be/current professionals, can contribute to non-profit's organizational needs while they gain real experiences in their career field, all under the supervision of talented faculty with advanced training in specialty areas.

² This need for consulting-type services fell below the urgency and volume of need for the other services. In descending order, these needs are: development, organizational procedures, consulting.

Survey Results

THE SURVEY FEATURED 3 MAJOR SECTIONS OF QUESTIONS

- 1. 13 SERVICE CATEGORIES:** Respondents provided 3 different types of responses to a list of 13 possible service categories that a CBO may offer.
 - a. How frequently would you use each of the following service categories, if it were offered by a CBO? (1=Never; 5=More than one time every month)
 - b. How willing are you to seek each service from a CBO, rather than seeking it from a different vendor? (1=Would certainly seek from CBO; 4=Would certainly seek from different vendor)
 - c. Please order the 13 categories, where 1 is the service category you're most willing to pay for (not necessarily pay the most), and 13 is the service category you're least willing to pay for (not necessarily pay the least).
- 2. AREAS OF NEED:** Below is a list of challenges, please indicate how much you agree or disagree with each statement about your group's need for help meeting that challenge (1=Strongly Disagree; 5=Strongly Agree)
- 3. QUESTIONS ABOUT GROUP'S CHARACTERISTICS:** Respondents answered approximately 15 items about their group's characteristics, including workforce size, years of operation, presence of designated development/fundraising staff, and the extent of COVID-19's impact on their funding and felt need for their services.

13 Service Categories

For each of the following three presented result sets, respondents were considering the following list of service categories, numbered consistently throughout all results.

1 STAFFING & TALENT (HIRING, PERF. MANAGEMENT)

2 EMPLOYEE BENEFITS (PAYROLL, HEALTH INSURANCE)

3 HR COMPLIANCE (LEGAL COMPLIANCE, DEI, CULTURAL CONSCIOUSNESS)

4 ORG. GOVERNANCE (BY-LAWS, BOARD MANAGEMENT/ COMPOSITION, BOARD DEVELOPMENT)

5 IT SUPPORT (CYBERSECURITY, TECH. SUPPORT, SOFTWARE ACCESS)

6 IT RESOURCES (EQUIPMENT, STORAGE/CLOUD/SERVER)

7 ORGANIZATIONAL DEVELOPMENT (BUILDING DONOR RELATIONSHIPS FUNDRAISING BRANDING/MARKETING PLANNED GIVING/ESTATES)

8 GRANT WRITING

9 CONSULTING FOR NON-PROFITS (EXECUTIVE DIRECTOR/LEADERSHIP COACHING STRATEGIC PLANNING IMPLEMENTATION)

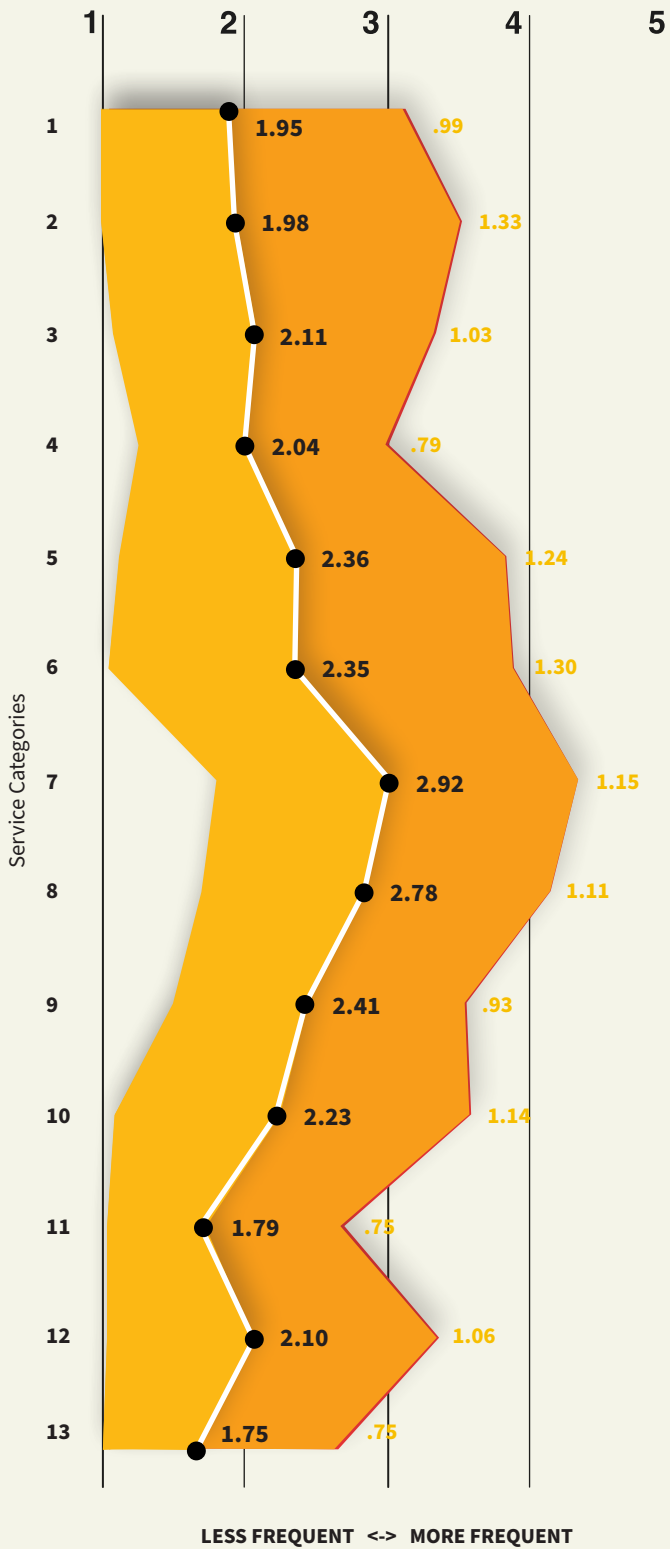
10 VOLUNTEER MANAGEMENT

11 INSURANCE/RISK MANAGEMENT

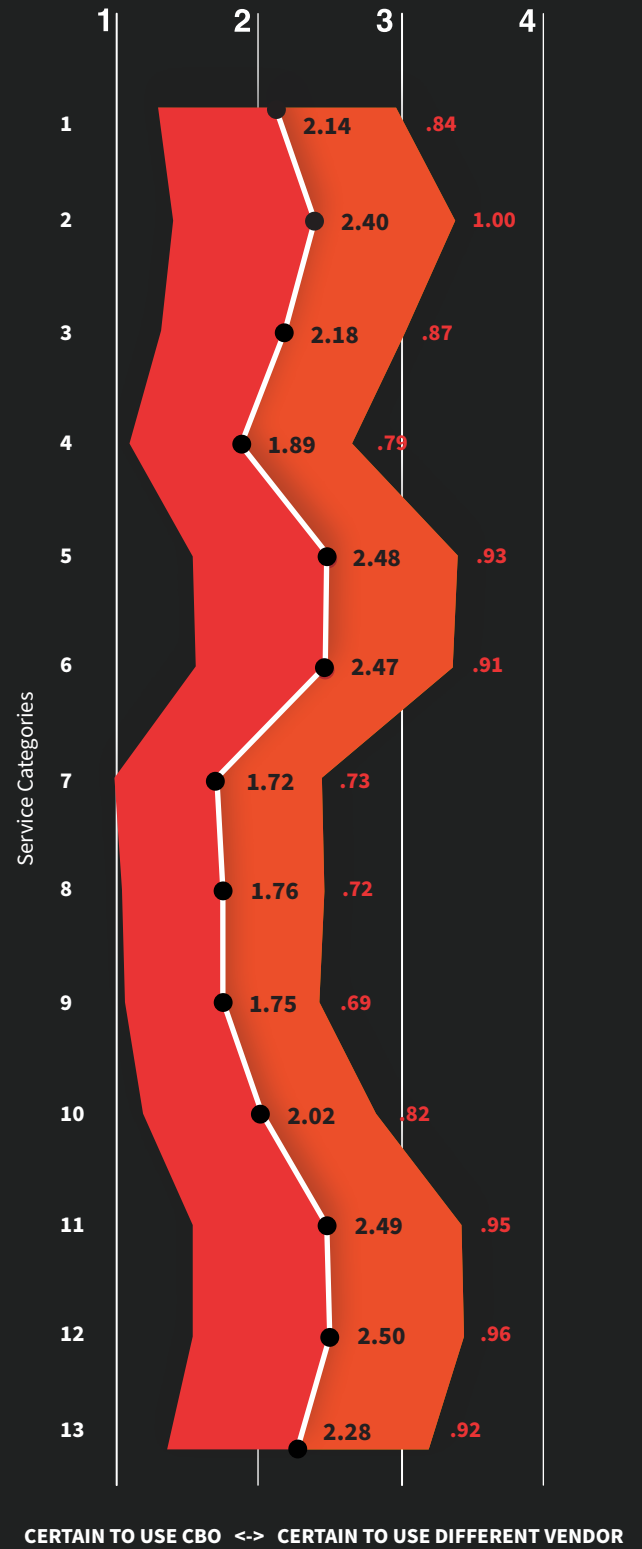
12 ACCOUNTING/FINANCIAL CONSULTING

13 SECURITY/DISASTER PLANNING

Frequency of Use



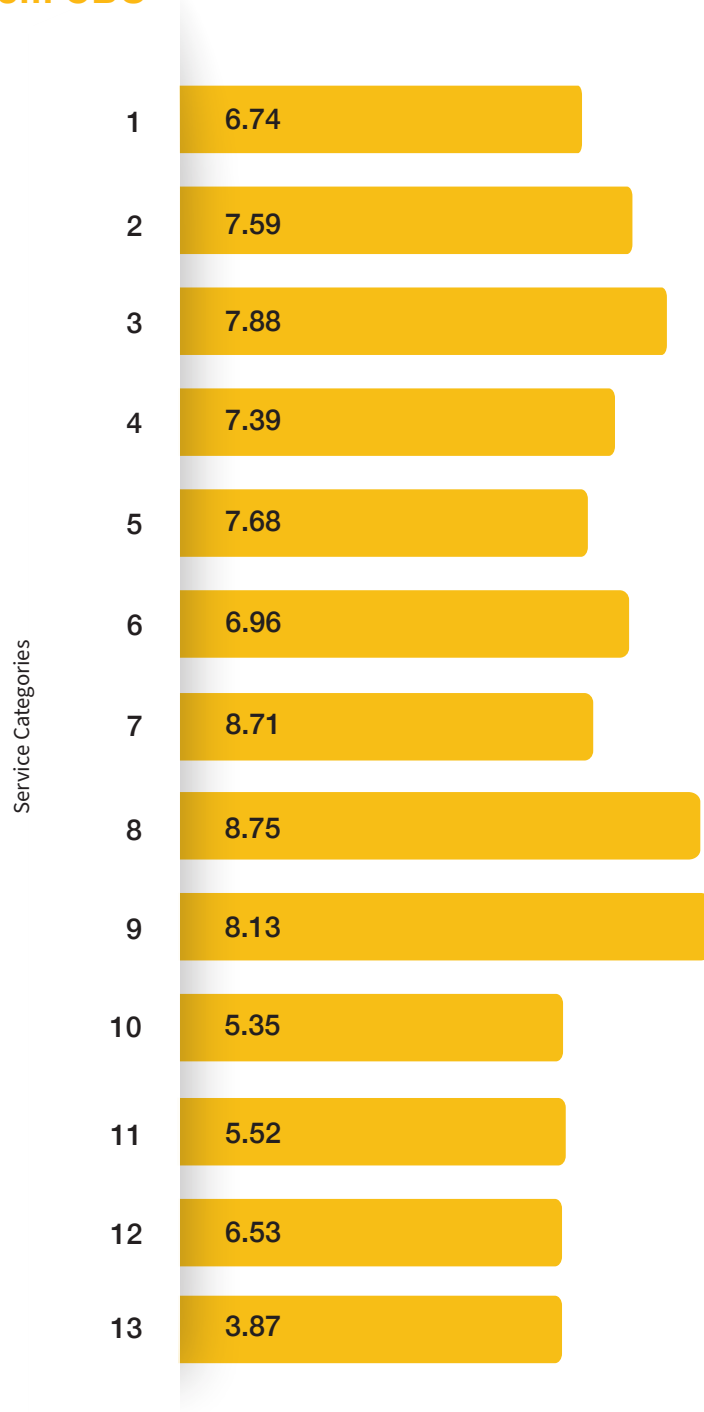
Willingness to Use CBO as Compared to a Different Vendor



= Standard Deviation
 = Mean Frequency Level

= Standard Deviation
 = Mean Willingness Level

Most Willing-Least Willing to Pay for Service from CBO



Responses were weighted, where the service categories respondents were most likely to pay for are reflected by a higher number and the service categories respondents were least likely to pay for are reflected by a lower number.

Areas of Need

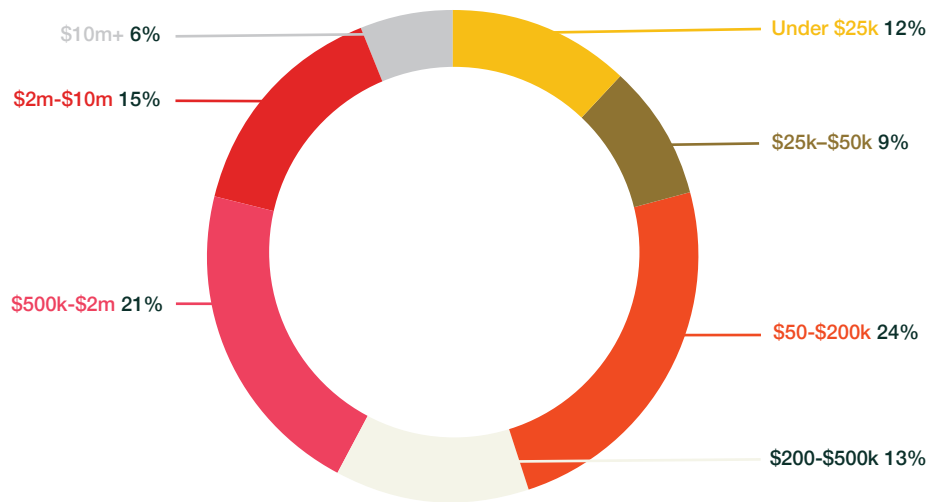


Group Characteristics

Across April 2021, the research team partnered with the CFO to request responses to the described survey. Starting with a master list of more than 700 email addresses for the CFOs network of members, the research team requested responses to surveys in a series of 3 emails, sent weekly with responding contacts removed from each subsequent request. The resulting sample featured 144 respondents, whose reported characteristics are presented below:

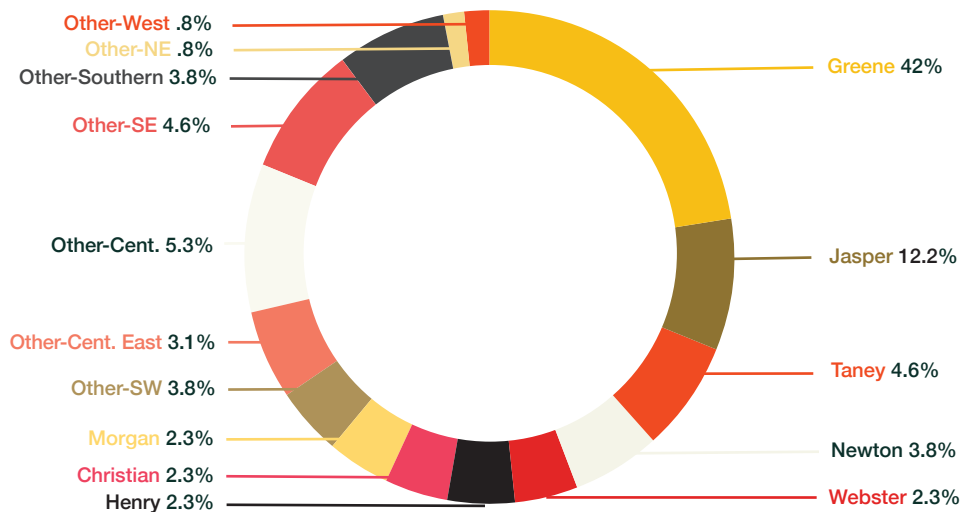
Annual Operating Budget

- Under \$25,000 12%
- \$25,001 to \$50,000 9%
- \$50,001 to \$200,000 24%
- \$200,001 to \$500,000 13%
- \$500,001 to \$2 million 21%
- \$2 million to \$10 million 15%
- More than \$10 million 6%



County Representation

- Greene 42.0%
- Jasper 12.2%
- Taney 4.6%
- Newton 3.8%
- Phelps 3.1%
- Polk 2.3%
- Webster 2.3%
- Henry 2.3%
- Christian 2.3%
- Morgan 2.3%
- Other-SW 4.6%
- Other-Cent. East 3.1%
- Other-Cent. 5.3%
- Other-SE 4.6%
- Other-Southern 3.8%
- Other-NE 0.8%
- Other-West. 0.8%

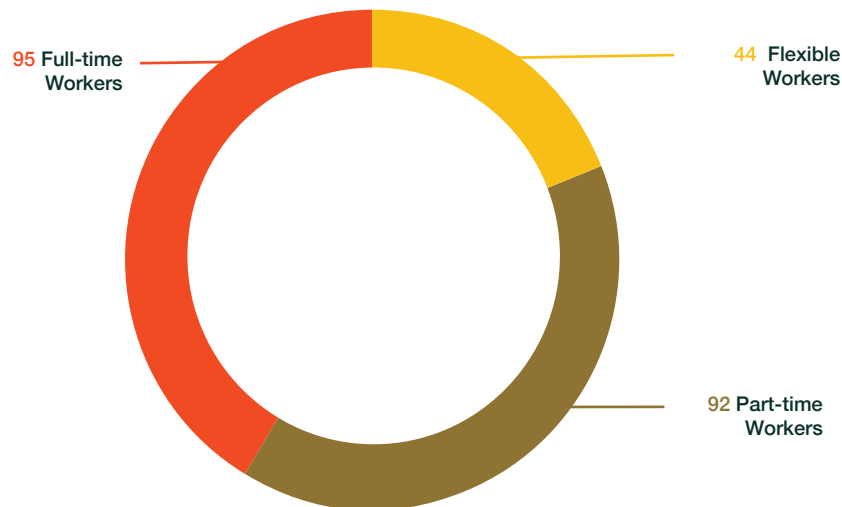




Volunteer Workforce

75% of respondents' groups rely on volunteers of some type

- 77% of groups rely on occasional volunteers
- 79% of groups rely on regular volunteers
- 67% of groups rely on event-specific volunteers



Paid Workforce

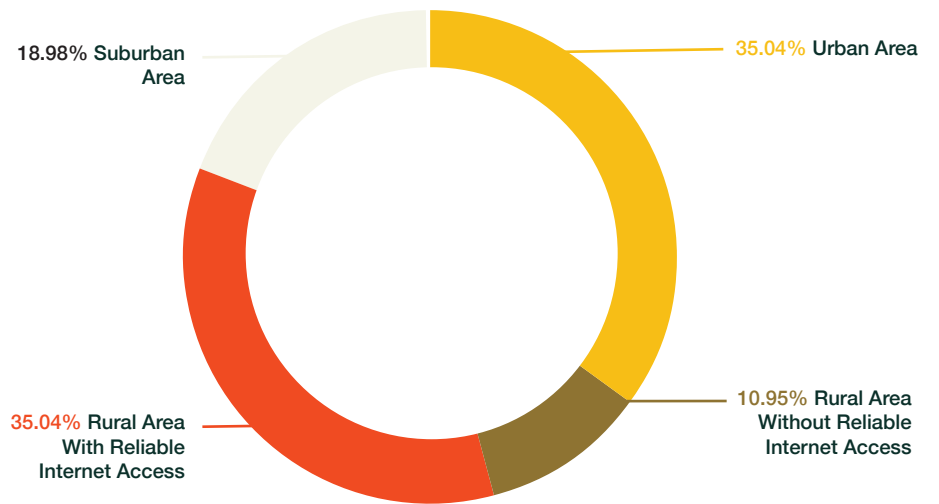
77% of respondents' groups employ, or have employed, at least one paid staff member

Staff volume ranged from 1-225 employees

- 44 groups employed flexible workers
- 92 groups employed Part-time workers
- 95 groups employed Full-time workers

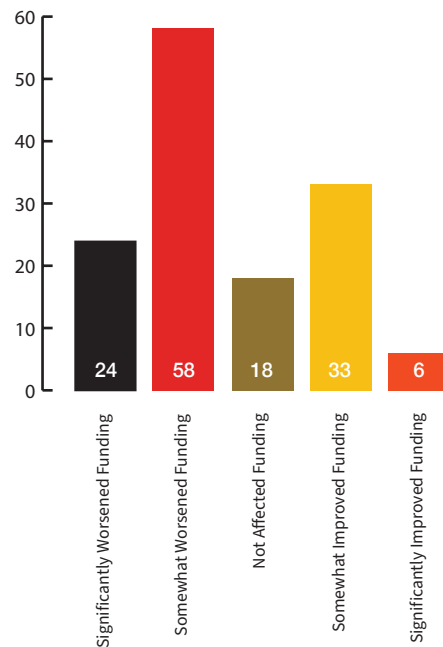
Location & Access to Internet

Urban Area 35.04%
 Rural Area Without Reliable Internet Access 10.95%
 Rural Area With Reliable Internet Access 35.04%
 Suburban Area 18.98%



Effects of COVID-19

REPORTED EFFECT OF COVID-19 PANDEMIC ON GROUPS' FUNDING LEVELS



REPORTED EFFECT OF COVID-19 PANDEMIC ON DEMAND FOR GROUPS' SERVICES

