

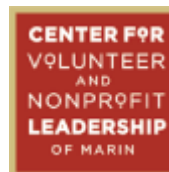
**Marin Nonprofit Economic Impact Survey
January - March 2009**



Has your organization's revenue changed during the last quarter (January 1 - March 31, 2009) compared to the same period last year?		
Answer Options	Response Percent	Response Count
Revenue increased more than 10%	5.5%	3
Revenue increased slightly 0-9%	7.3%	4
Revenue remained level	16.4%	9
Revenue decreased slightly 0-9%	29.1%	16
Revenue decreased more than 10%	41.8%	23
	answered question	55
	skipped question	0

What specific changes in funding did you experience during this three month period? (Choose all that apply)		
Answer Options	Response Percent	Response Count
Increase in donation by individuals	13.2%	7
Decrease in donations by individuals	54.7%	29
Increase in state and local government funding	1.9%	1
Delay in receiving committed state grants due to the delay in the approval of California State Budget	13.2%	7
Decrease in state and local government funding	24.5%	13
Increase in federal government funding	5.7%	3
Decrease in federal government funding	7.5%	4
Increase in corporate and foundation giving	9.4%	5
Decrease in corporate and foundation giving	47.2%	25
Increase in fees and other earned income	9.4%	5
Decrease in fees and other earned income	26.4%	14
Other (please specify)	15.1%	8
	answered question	53
	skipped question	2

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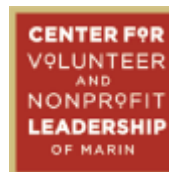
Which of the following changes have you and your organization's governing board already made (in last 9 months) or are you considering making? Check all that apply

Answer Options	Response Percent	Response Count
Reduce staff hours	46.3%	25
Dedicate more staff time to fundraising	27.8%	15
Increase board's fundraising activities	51.9%	28
Eliminate programs	16.7%	9
Reduce services	20.4%	11
Increase services in response to increased demand	14.8%	8
Reduce non-personnel expenses	46.3%	25
Tap lines of credit	7.4%	4
Use reserve to cover current budget	31.5%	17
Review or reallocate our financial assets and investments	22.2%	12
Look for new streams of revenue	63.0%	34
Delay planned initiatives	24.1%	13
Planning no actions, our revenue looks good	7.4%	4
Merger or close	0.0%	0
Other (please specify)	11.1%	6
	answered question	54
	skipped question	1

During the last nine months, has your organization experienced an increase in demand for services that you would attribute to the economic downturn?

Answer Options	Response Percent	Response Count
Yes, we have experienced a significant increase in demand	18.5%	10
Yes, we have seen a small increase in demand	27.8%	15
No, demand has remained unchanged	46.3%	25
No, demand for our services has declined	7.4%	4
	answered question	54
	skipped question	1

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If you have experienced an increase in demand, has your organization been able to meet the demand?		
Answer Options	Response Percent	Response Count
Yes	54.8%	17
No	45.2%	14
	answered question	31
	skipped question	24

Describe your feeling or forecast about the overall prospects for your organization in 2009.		
Answer Options	Response Percent	Response Count
Very optimistic	1.8%	1
Optimistic	72.7%	40
Pessimistic	25.5%	14
Very pessimistic	0.0%	0
	answered question	55
	skipped question	0

Categorize your organization's primary area of service (select one)		
Answer Options	Response Percent	Response Count
Arts, Culture, and Humanities	14.5%	8
Education	7.3%	4
Environment and animals	9.1%	5
Foundations, Supporting Organizations, Giving Programs	1.8%	1
Health	12.7%	7
Human services	27.3%	15
International	0.0%	0
Mutual/membership benefit	1.8%	1
Public and Societal Benefit	5.5%	3
Religion	5.5%	3
Other	14.5%	8
	answered question	55

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What specific changes in funding did you experience during this three month period?

- State bond freeze put \$500,000 of project funding for second half of fiscal year on hold. An additional \$200,000 of funds are frozen for projects completed in November and December 2008 creating additional cash flow issues.
- Unable to find foundation grants
- Donations remained the same, though this is not a heavy donation period for us.
- Delay in receiving committed foundation funds
- Delay in receiving state funding that is owed to us
- Delay in receiving MCF Grant.
- No applications for government grants ever are made

Which of the following changes have you and your organization's governing board already made (in last 9 months) or are you considering making?

- Reduced benefits costs- medical & vacation days
- Not doing fall gala this year because we don't feel we can raise enough sponsorship funding to make it worth while. Focusing instead on cultivating individual donations.
- Didn't fill vacant positions.
- Ranking expenditures based on strategic plan priorities
- no changes
- Eliminate a middle management position