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FOURTH EDITION

Nonprofit Trends Report

Nonprofit employees worldwide share their greatest challenges and opportunities ahead

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Introduction

The ongoing pandemic has led to worldwide uncertainty in every sector. Lockdowns, a sudden, massive shift from in-person to virtual operations, declines in individual health and wellbeing, the urgent need for technology solutions to meet the demands of remote work – organizations have been dealt a tough blow since spring 2020. Nonprofits were doubly challenged, acting as first responders to the pandemic crisis by providing aid and support to struggling communities while at the same time adapting their entire operations virtually overnight.

The issues that were of greatest concern for global nonprofit employees included:

- Controlling expenses
- Adapting to remote/virtual programs
- Hosting in-person events
- Implementing new technology tools and solutions
- Hosting, creating content, and promoting virtual/online events
- Retaining volunteers
- Changing the size of the organization to meet increased demand for services

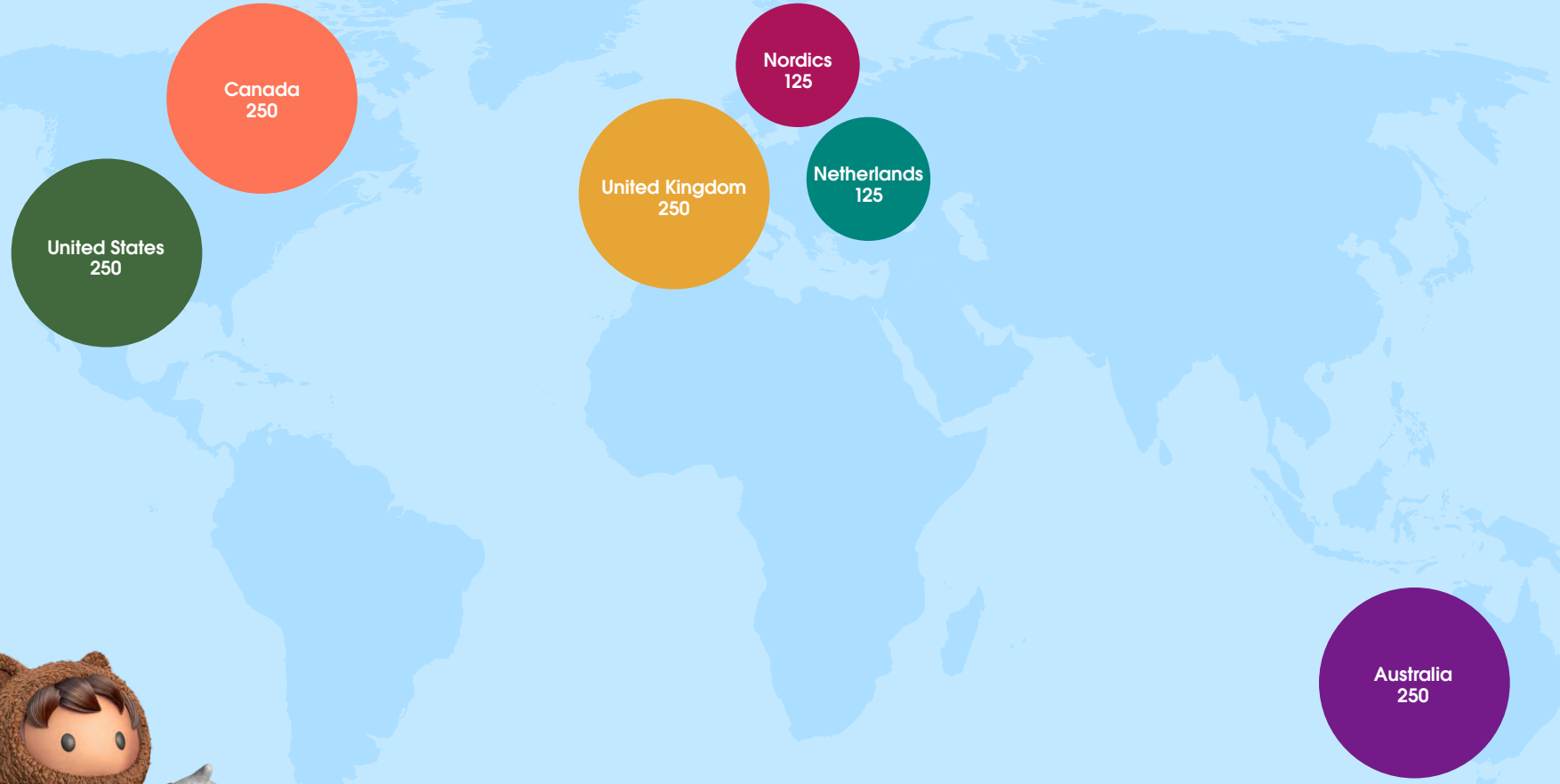
These challenges are not going away anytime soon.

But there is good news: Even amid the pandemic, the nonprofit employees we surveyed said their organizations managed to achieve over 75% of their goals across program delivery, fundraising, diversity initiatives, and even staff wellbeing and retention.

How did they do it? Their success lies in trying new approaches to current processes, measuring success and recalibrating as needed. Read on to find out how the most nimble nonprofits continue to thrive no matter what external circumstances come their way – through good planning practices, leveraging partnerships, building strong connections with employees, and creating an organization and culture that thrive.

About the Survey

We collected data from online surveys during June and July from nonprofit employees with a role of manager or higher who had responsibility for programs, fundraising, grants management, technology, HR/office functions or marketing. For details, please see the Appendix.



Revenue and Size:

Organizational size is categorized based on annual revenue, as follows:

Small	Less than $1M
Medium	$1M–$5M
Medium – Large	$5.1–$10M
Large	More than $10M

1,250 nonprofit professionals

10 countries

Digital Maturity

Digital maturity is defined as an organization's ability to leverage data to inform decision-making, reach new audiences, personalize communications, and forecast fundraising income. In order to evaluate how advanced nonprofits are when it comes to using data for their work, we created the Digital Maturity Index in the 3rd edition of the Nonprofit Trends Report, asking nonprofits to self-assess the extent to which data guides their operations. To create the Digital Maturity Index, we combined the responses to the following five areas:

1. We make decisions based on data and evidence.
2. When there is a problem to solve that involves different departments across my organization, it is easy to find and share data.
3. We design our programs and services using information about and engagement with the recipients of our programs/services.
4. We are able to personalize messages to specific subgroups of our supporters with our digital communications.
5. We are able to accurately forecast income from our fundraising campaigns.

Based on survey responses, we categorized organizations into three groups: low digital maturity, medium digital maturity, and high digital maturity. After nonprofits rated themselves on a scale of 1 to 5 across these five questions, we created average scores to categorize them. An average of less than 3.0 indicates low digital maturity, an average between 3.0 and 4.5 indicates medium digital maturity, and an average over 4.5 indicates high digital maturity.

See page 15 for detailed findings on nonprofit digital maturity.

SECTION 1

In Diversity, Equity, and Inclusion, Perception and Reality are Disconnected

Diversity as well as mental health and wellbeing are hot topics across all business sectors. Businesses are tackling these issues head-on – from wellbeing days to add-on mental health services for employees; annual diversity reports to diversity, equity, and inclusion (DEI) programs; and even employee resource groups that provide safe spaces for diverse groups to connect – there are a myriad of ways that organizations are beginning to hold themselves accountable.

Respondents were asked to rate the importance of ensuring gender and racial diversity across all levels of the organization, making sure their organization is hiring from across the gender spectrum as well as all racial and cultural backgrounds for all positions including appointing a similar mix to the organization's board of directors. **While 87% of respondents agree that it's important to do so and 61% say their organization has made commitments to advance DEI, perception and reality often clash.** And, the hot-button issue of executive diversity is no exception.

Perception:

When asked where their organization stands at various levels when it comes to DEI, most respondents rated their diversity across all stakeholders (board of directors, executives/leaders, managers, and staff) with high marks. In fact, 80% said their organization's board of directors was diverse.

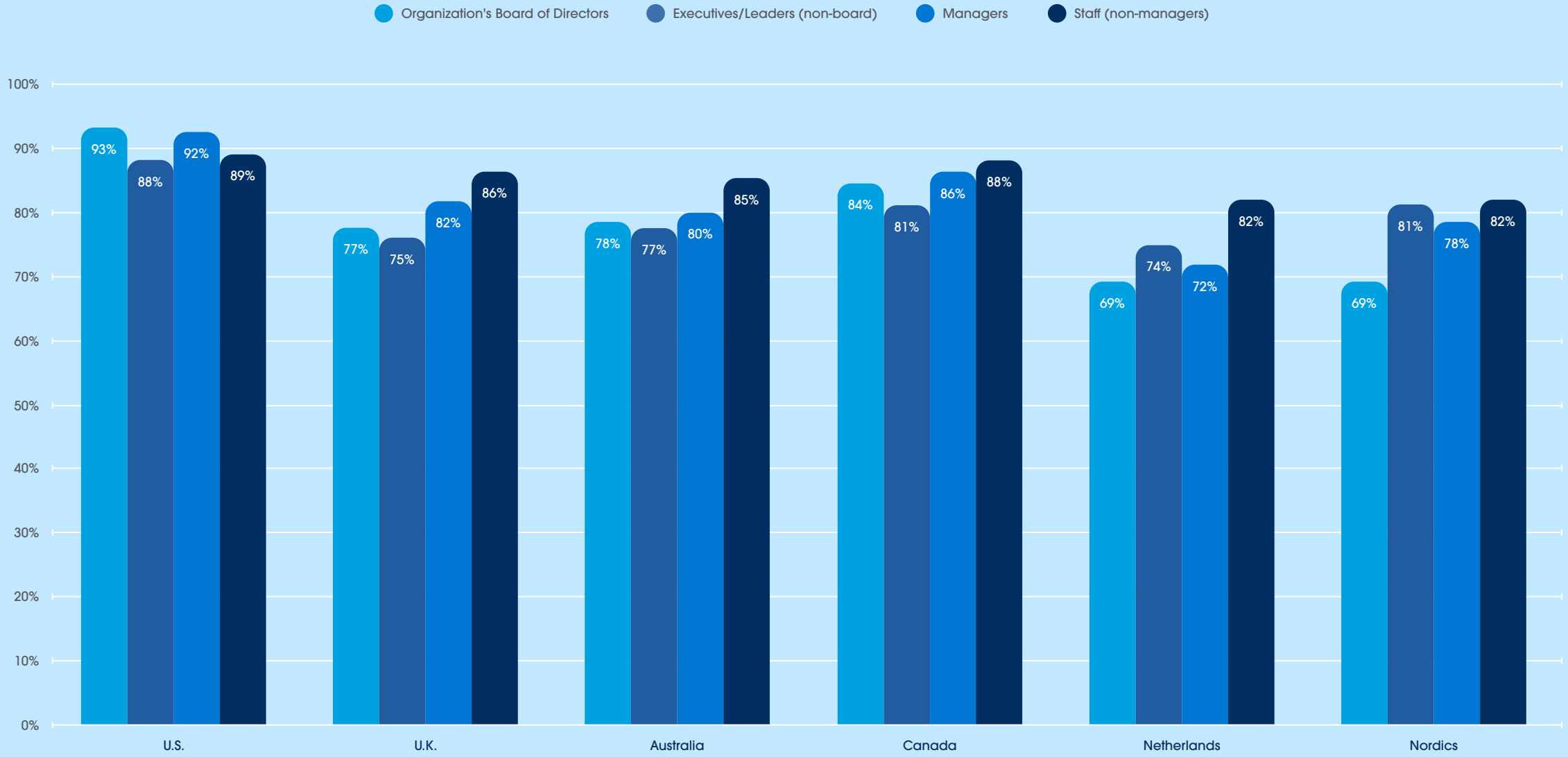
Reality:

While boards might be getting slightly more diverse, they are far from representing the communities they serve, according to BoardSource. Governing bodies studied by BoardSource in 2019 included a higher percentage of people of color than the previous study (22% versus 16% in 2017). Only 38% of executives felt their boards represented the communities they serve, and 66% expressed dissatisfaction with their boards' racial and ethnic diversity. Only 29% of board chairs felt their boards represented the communities they serve, and 45% expressed dissatisfaction with the boards' racial and ethnic diversity.

The good news is that 49% of nonprofits said that over the past 12 months their organization has changed its approach to DEI and 85% said they met or exceeded their goals in this area. Some of the changes include 37% actively increasing board diversity, 43% increasing organization/leadership diversity, and 35% increasing their staff diversity. And while it might not be perfect, it is a step in the right direction.*

* See appendix for more detail.

Respondents Who Rated the Following Groups Within Their Organization as Very or Somewhat Diverse



SECTION 2

Nonprofit Staff Face Increased Challenges with Mental Health

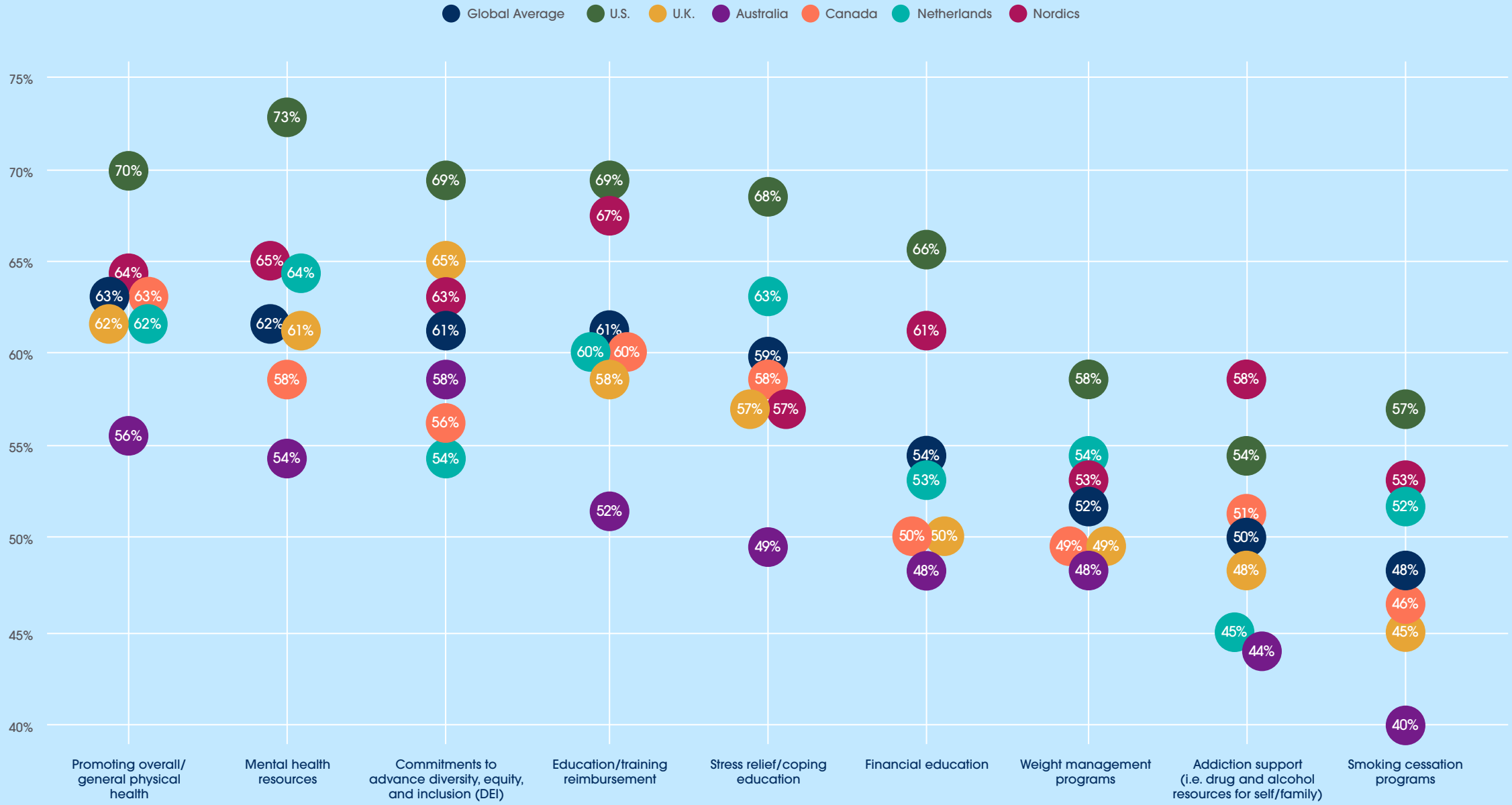
Nearly one-third (32%) of all nonprofits surveyed said ensuring the mental health and wellbeing of their employees was a major issue for them over the past year, with 38% of nonprofits with revenues of more than $10M rating it a major issue compared to only 28% of those with revenues below $1M.* The even greater challenge is that **35% anticipate it will be increasingly more challenging in the coming year.** And although we have seen an influx of online options for mental health services pop up, the demand far outweighs the supply.

While supporting DEI helps foster a sense of inclusion, and emotional intelligence (EQ) can help leaders build strong working relationships where everyone feels valued, offering programs and services that support mental health and overall wellbeing can help organizations to engage and retain top talent. When asked if their approach to employee wellbeing had changed during the previous year, a slight majority of respondents (54%) acknowledged a change.

The U.S. is leading the way in offering these types of services; however, variations in government delivery of healthcare may account for some variances across countries. The health system in the U.S. is much more driven by employers, while socialized medicine and government provisioning of healthcare services in other countries might suppress the need for it to be offered by a nonprofit employer.

* See appendix for more detail.

Respondents Who Say Their Organization Provides the Following Services



Mental health and wellbeing can significantly impact employee churn, and nonprofit staffing has gone through a sea change at every level. C-suite turnover at U.S. nonprofits is at an unprecedented pace. For example, the Leadership 18 organizations – an alliance of 21 CEOs leading some of America's largest nonprofits – are undergoing dramatic changes with more than one-third either seeking a new CEO, operating with a chief executive that has been in place less than a year, or working with a boss with an interim title.

Other U.S.-based research found that employer-provided health coverage is important for employee retention. According to research by Luntz Global Partners, 56% of U.S. adults with employer-sponsored health benefits indicated that liking their health coverage was a key factor in staying at their current job.

Understanding what your employees need to maintain a healthy work-life balance will be integral to retaining top talent now and in the future. **Seventy-six percent of respondents said their nonprofit offers support services to help with mental health and wellbeing.** Offering a myriad of options that allows your staff to opt in to products and services that positively impact them and their families is a small step towards creating the right synergies across the organization.

SECTION 3

The Workforce Is Facing a Historic Shift in How Work Gets Done

Remotely managing employees and volunteers was a major issue for one-third of organizations this past year. And, it's not projected to get easier, with 84% of respondents saying it will remain a challenge or become increasingly more difficult over the next 12 months. Coupled with the fact that **85% of those surveyed say staff retention will continue to or increasingly become a challenge,** organizations will need to face this issue head on.

A Harvard Business Review article found that people are feeling tired and lonely at work – and its impact extends to the organizations where they work. The article notes that 50% of people across professions are burned out and loneliness is actually not a result of social isolation, but rather from the emotional exhaustion of workplace burnout.

Experts and companies alike struggle to counter this growing level of burnout.

Many recommendations focus on relieving stress, teaching mindfulness, and/or reducing workload – all of which treat burnout as an individual condition. But the links between burnout and loneliness suggest that greater human connection may also be key to solving the problem.

Leaders and managers can play a pivotal role in helping employees and volunteers feel less lonely, and therefore, less burned out. Actions like promoting a workplace of empathy and inclusion, encouraging employees to build networks that can provide emotional support, and celebrating collective success that fosters a sense of belonging are a great start.

From burnout to the need to lay off or furlough workers to upgrading technology to meet the needs of the new digital-first landscape, leaders are under an immense amount of pressure to keep their organizations afloat.

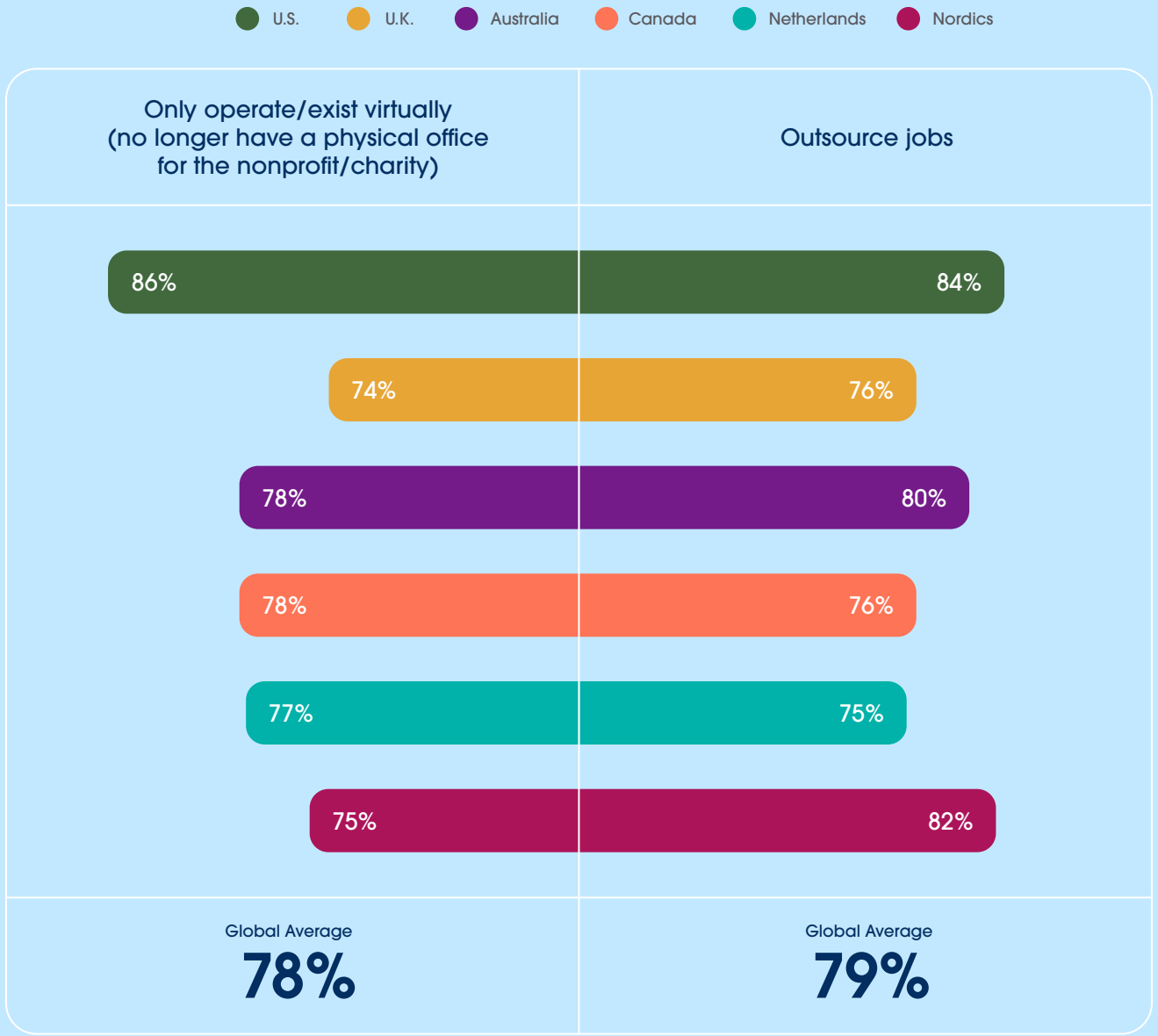
Staffing and Bridging the Skills Gap Are Top Challenges

About one-third (33%) of organizations changed their size based on the increased demand for services while nearly another third (30%) changed their size based on reduced demand. It isn't surprising then that a complete shutdown was a major concern for 32% of all respondents. Nearly one-third of nonprofits (30%) reported laying off or furloughing staff over the past 12 months. Of those who had to lay off or furlough staff, they reported an average workforce reduction of 30%. COVID-related lockdowns in the U.S., U.K., and Australia likely spurred this spike.

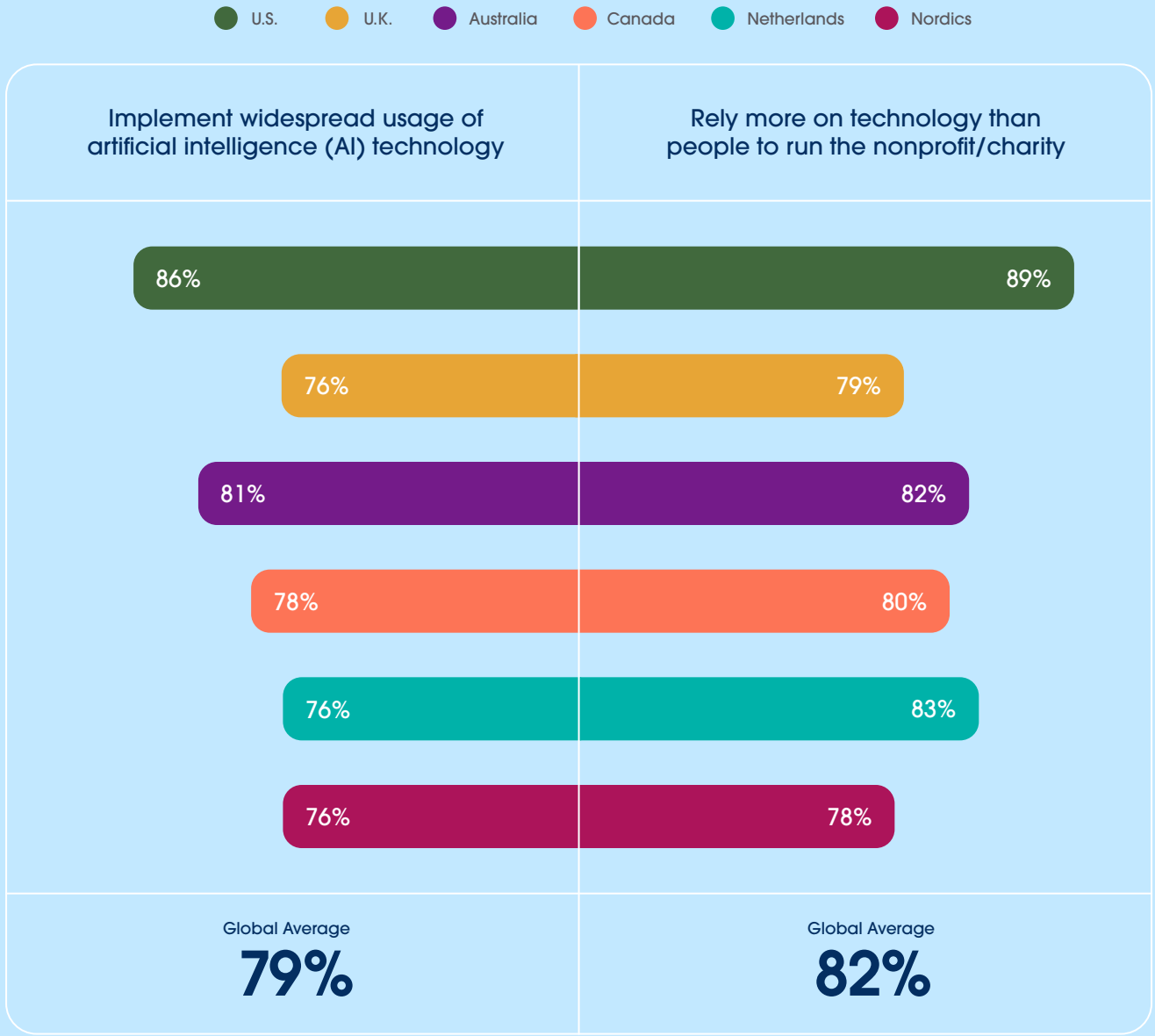
* See appendix for more detail.

Regardless of whether a nonprofit had to lay off or furlough employees, the good news is that nearly half (48%) expect to add headcount or staff within the next 12 months (U.S.: 72% vs. Australia: 36%).* With this anticipated increase in headcount, nonprofit leaders need to both embrace and effectively manage the new work-from-anywhere landscape.

In the U.S. alone, 86% of respondents said going virtual was likely (above the global average of 78%). So if the office no longer exists, it is almost certain that more organizations will use remote or outsourced staff to provide services and office functions. **When asked, 79% of respondents said it was likely their organization would outsource jobs in the next three years.**



* See appendix for more detail.



These unprecedented times also created a retention conundrum – 33% of nonprofits say staff retention was a major issue over the past year. And although retaining staff during the pandemic was ranked lower on the list of challenges they face, 40% of U.S. nonprofits rated it as a major issue compared to 31% of nonprofits globally. Thirty-one percent are grappling with the harsh reality that their employees' skills no longer fit the needs of their organization.* The shift to remote work and the need to upskill employees creates an increased reliance on technology to bridge the gap.

Nonprofits may be looking to technology to automate time-consuming manual processes that have often plagued their ability to remain agile including donor management, gift processing, payroll, financial reporting, and more. And with so many struggling to retain staff, they may be looking to upend their current staffing models. **With so many struggling to retain staff, they may be looking to upend their current staffing models and 79% expect to implement widespread usage of artificial intelligence (AI) technology in the next three years.**

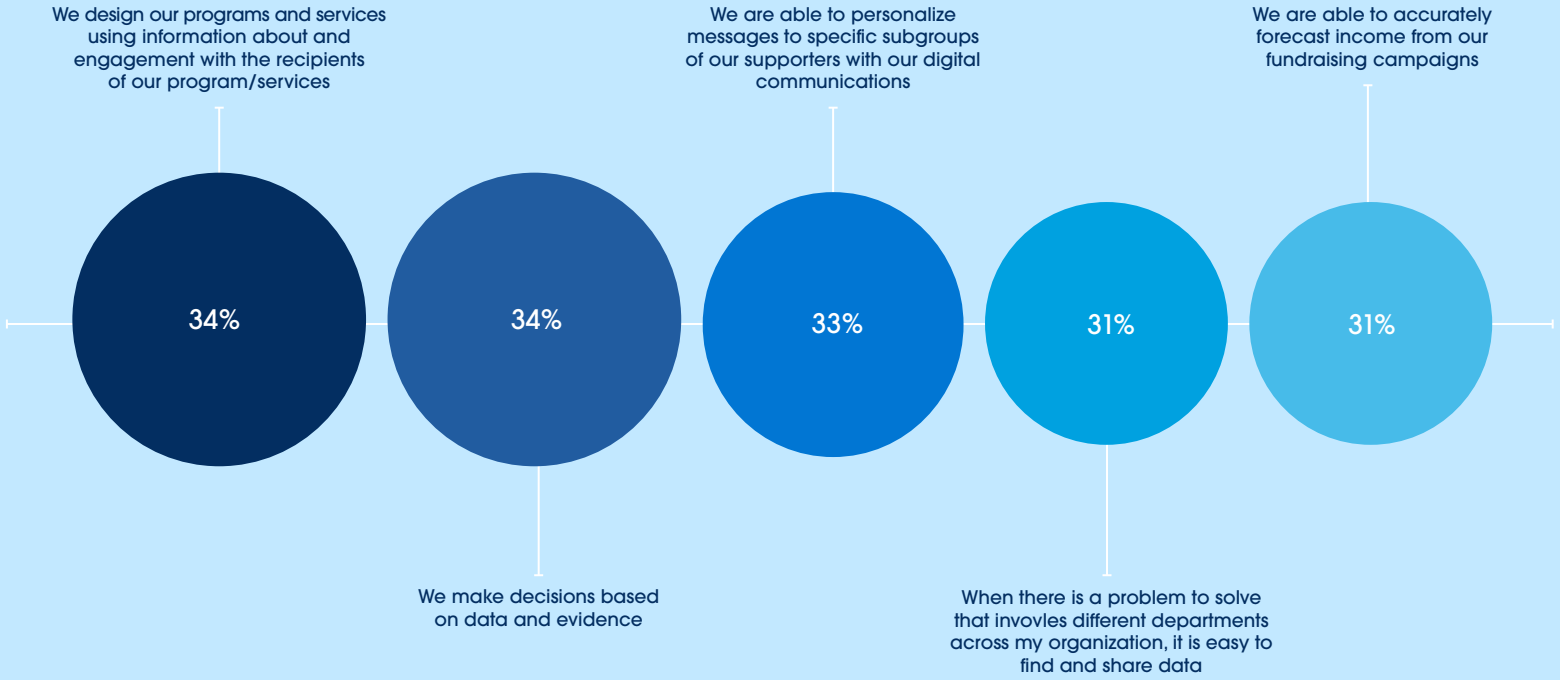
* See appendix for more detail.

Technology Is Driving Process and Management, But Not Everyone Is Ready

While technology is instrumental in shifting to a work-from-anywhere culture, three in 10 nonprofits struggle with data management across the business. Only 34% reported always making decisions based on data and evidence as well as designing programs and services using information about and engagement with recipients. And since less than one-third said it was easy to find and share data when there is a problem involving different departments, that means 69% find sharing data across departments to be difficult.

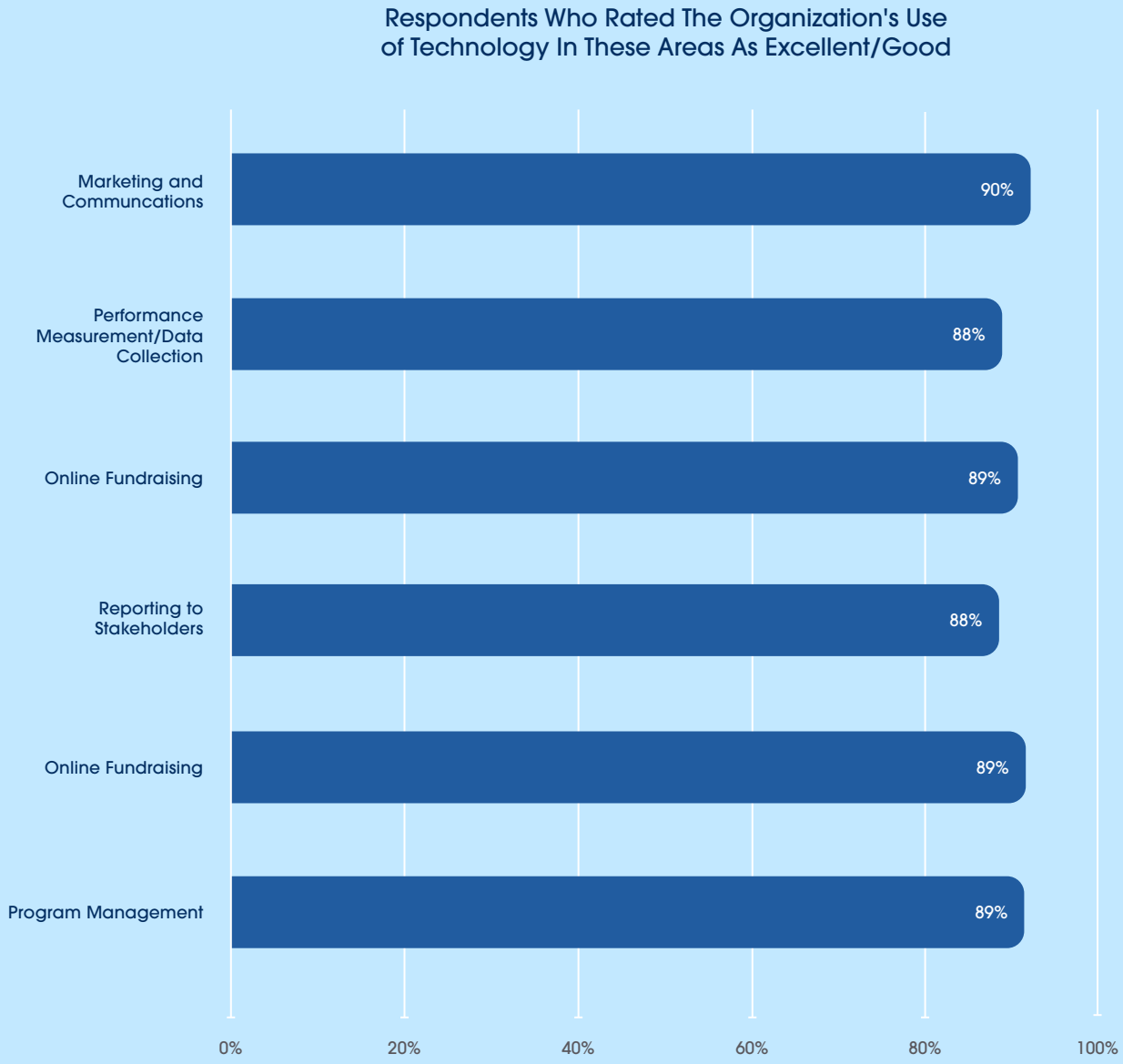
Nonprofits Who Report Always Doing The Following

The questions in the chart are associated with digital maturity.



A Digital-First Shift Is Changing How Nonprofits Operate

Nine in 10 respondents evaluated their organization's use of technology as excellent/good across all areas, yet only 22% fell into the high digital maturity bucket. **Seventy-six percent of nonprofits said they need to develop a data strategy for their organization and those with a high digital maturity are 1.4x more likely to acknowledge this compared to those with a low digital maturity.**

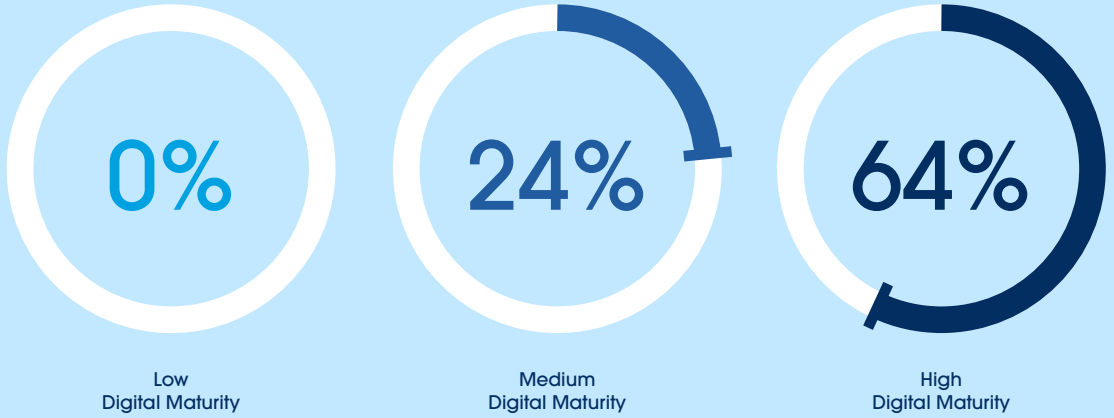


Bridging the digital divide has proven to be a challenge for many nonprofits, impacting their ability to forecast fundraising campaigns, a cornerstone to success. In fact, only 31% globally say they are always able to accurately forecast income from fundraising campaigns. The comparisons are stark when you take into account an organization's digital maturity – 64% of those with a high digital maturity are able to do so, only 24% of those with a medium digital maturity can, and none of those within the low digital maturity are able to always accurately forecast income from fundraising campaigns.

Within three years, the majority of nonprofits surveyed expect to be doing the majority of their work online. This potentially includes outsourcing jobs, relying on technology to run their operations instead of people, and fundraising 100% online. In order to accomplish this feat, their adoption of technology and data acumen must hasten.

This monumental shift to a digital-first approach will likely dramatically change the nonprofit sector landscape: testing the donor journey, evolving from peer-to-peer and in-person events, offering donors access to information on-demand. To maintain success, nonprofit leaders will need to ensure alignment across the organization and create connected experiences that make their donors feel like they are making an impact without the need for face-to-face interactions.

Percent of Nonprofits Who Say They're Always Able to Forecast Income by Digital Maturity

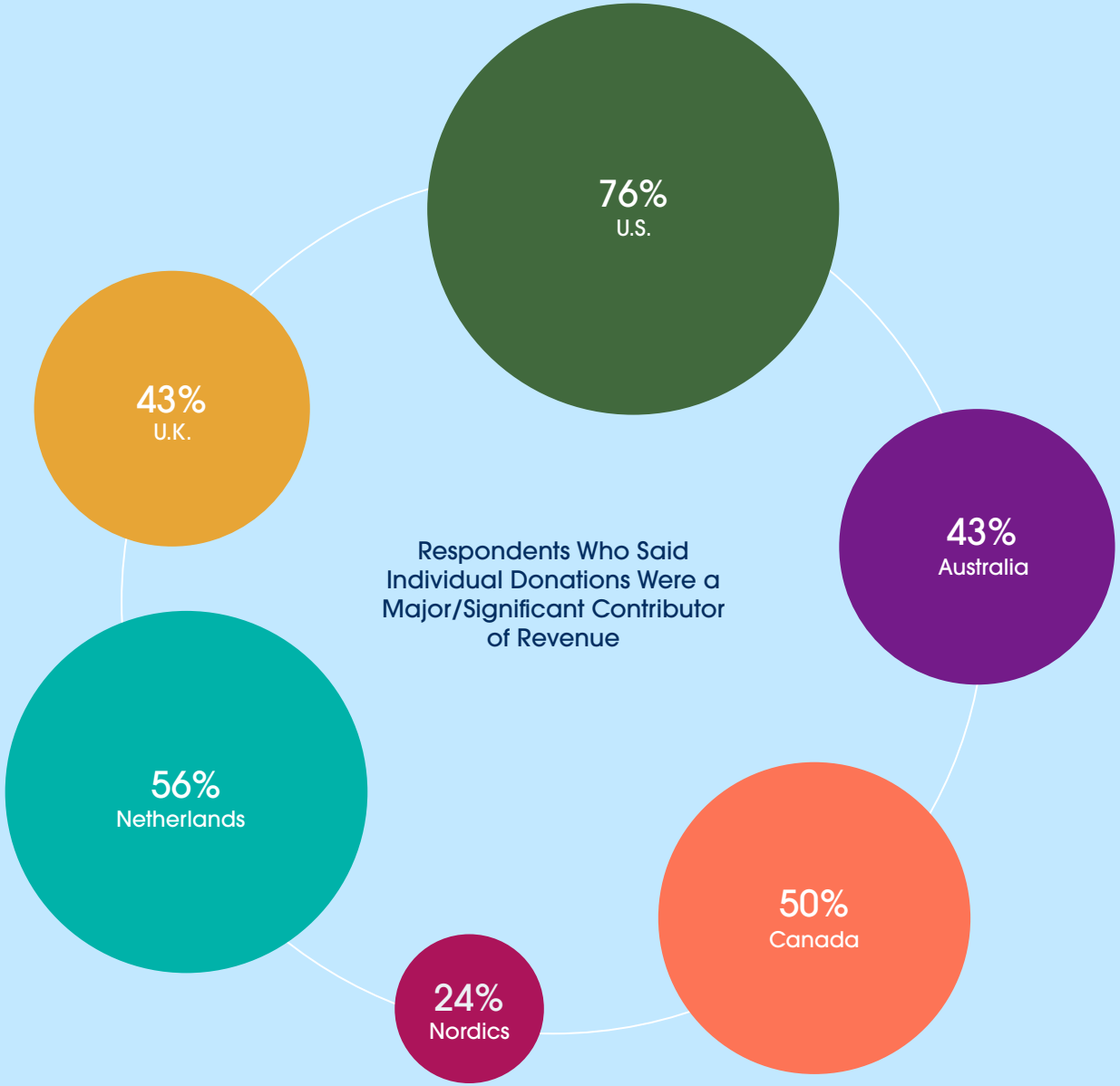


SECTION 4

Fundraising and Marketing Are Changing Permanently

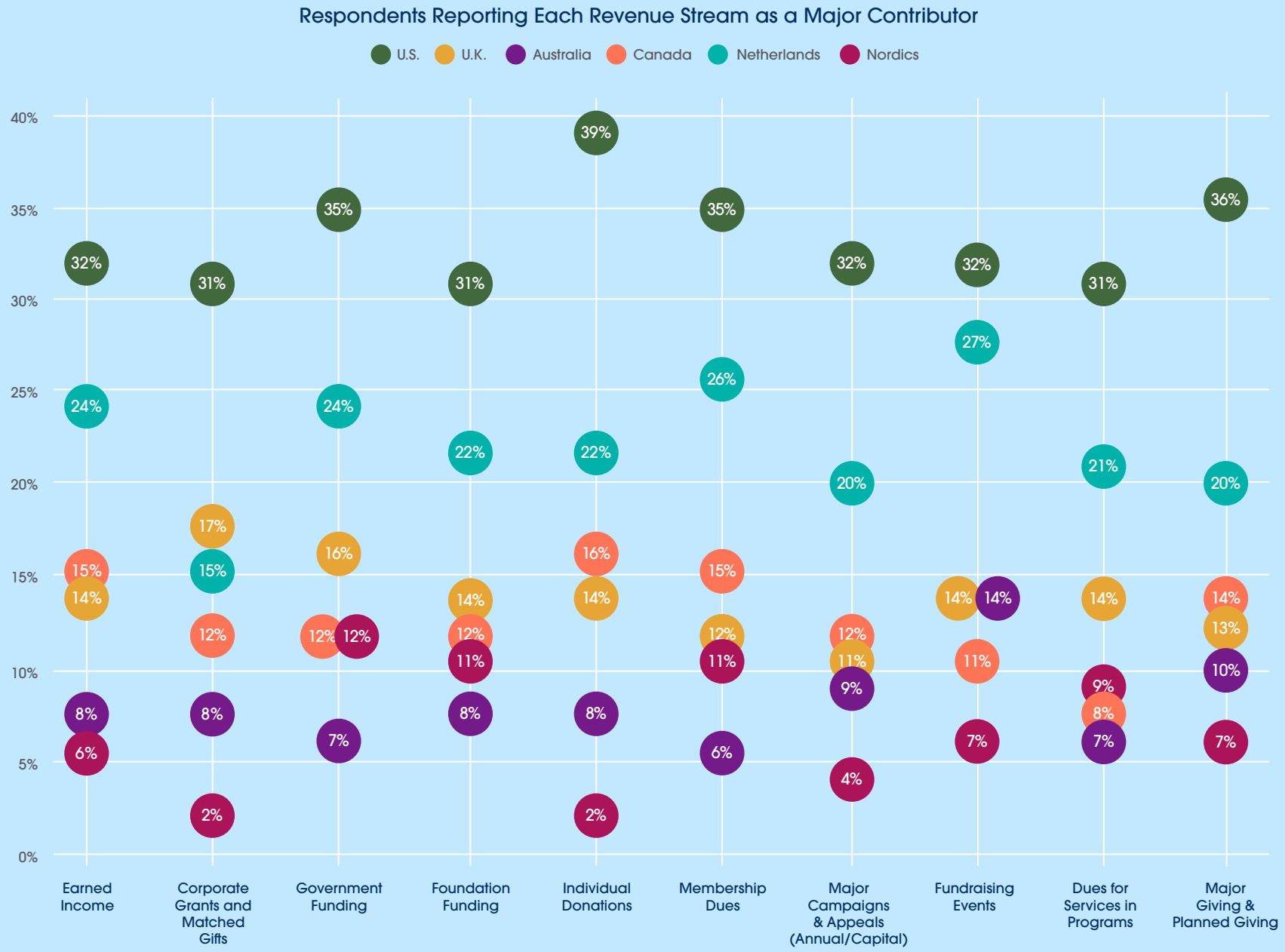
Globally, organizations use individual donations to keep themselves afloat, with 50% of respondents attributing individual donations as a major or significant contributor to revenue generated over the past fiscal year. And while that number varies significantly by country, it is a fact that individual donors are the backbone of nonprofit success and need to be cultivated as we move into a digital-first fundraising culture.

But don't expect constituents to hand over their hard-earned money without something in return. Much like an annual report shows them where their donation is being spent, **72% of respondents say their donors expect remote access to key impact performance metrics (KPIs)** and the same percent have plans to show real-time KPIs on their website within the next year.



Many organizations are being more transparent, with **31% saying that over the past 12 months they've provided existing and prospective donors online access to a dashboard showing impact measurements of their donations in action. Of those who have made this change, 86% say it was impactful.** Looking at those in fundraising, 44% say they've permanently added this functionality to their fundraising approach and 15% have permanently replaced their previous approach altogether.

While a small donation is always appreciated and starts the donor's journey, major and planned giving are aggressively sought. U.S. nonprofits say it is their second major source of funding behind individual donations. See how each revenue stream ranked in the chart provided.

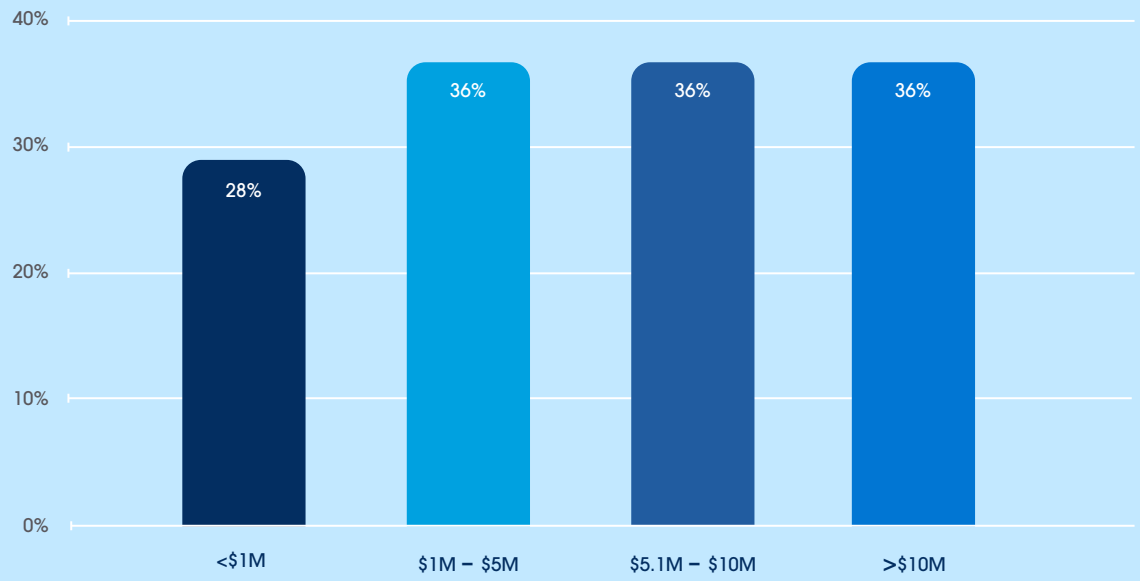


Digital Channels Are the Linchpin to Future Marketing and Fundraising Success

It is hard to separate marketing from fundraising in the modern nonprofit world. In both cases, technology appears to be the cornerstone for success. Fundraising generates considerable income but delivery of programs impacts both clients and the bottom line. While 36% of respondents said delivery of remote, virtual, and adapted programs was a major issue they've faced over the past year, that task seemed less daunting at organizations with smaller revenues.

The donor journey – with advocates and supporters transitioning to receiving information via a preferred digital channel – could very well be the key in making the transition to digital-first fundraising and marketing. **Forty-two percent of respondents in marketing roles said staff at their organizations have built or explored the development of supporter journeys** through connected experiences between web, social media, email, etc.

Respondents Rating Remote, Virtual, or Adapted Program Delivery as a Major Issue Over the Past Year by Revenue

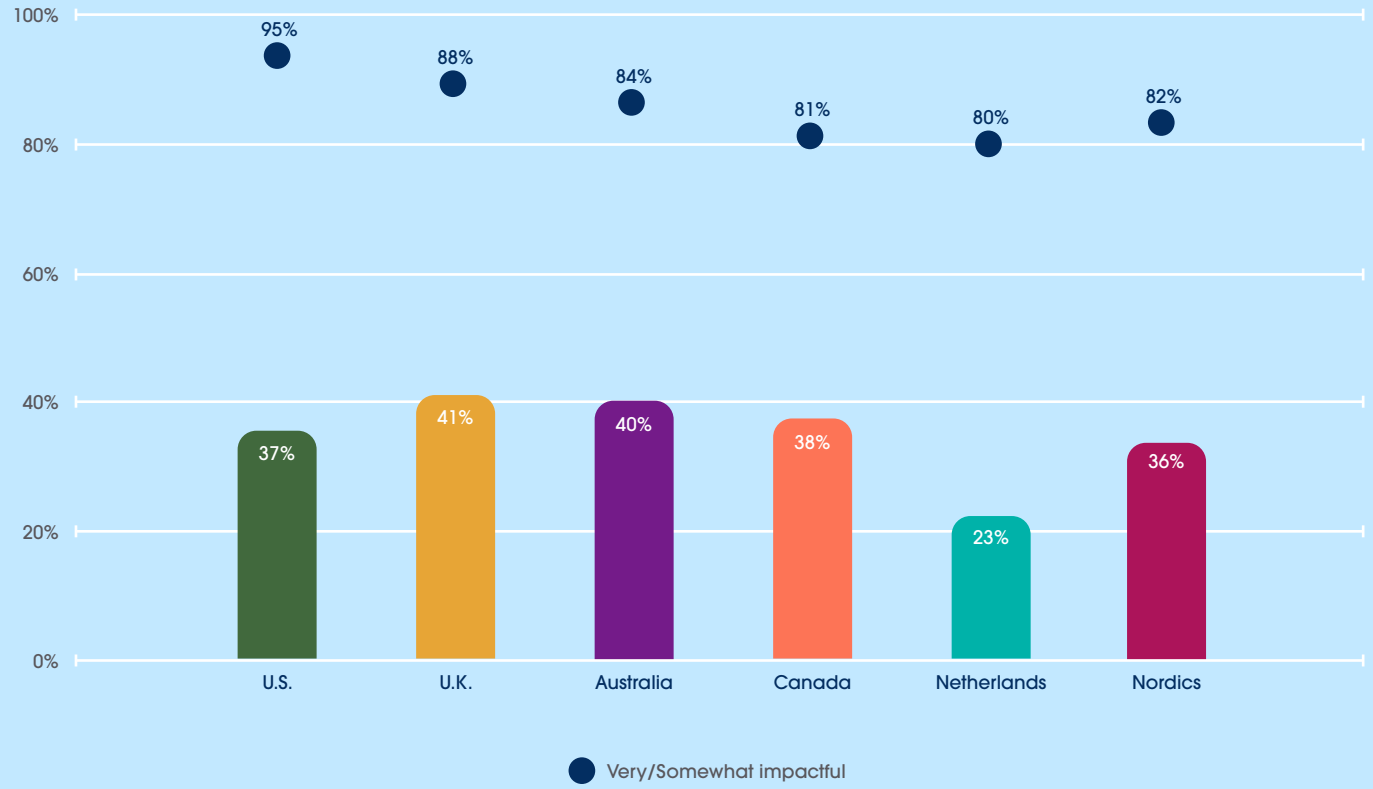


Additionally, 38% of those marketers said they adjusted their social media strategy with new platforms like TikTok and changes in content strategy. Organizations with less than $1M in revenue embraced these approaches more than those with larger revenues. Of those who made the shift, 86% reported the change to have been impactful.*

* See appendix for more detail.

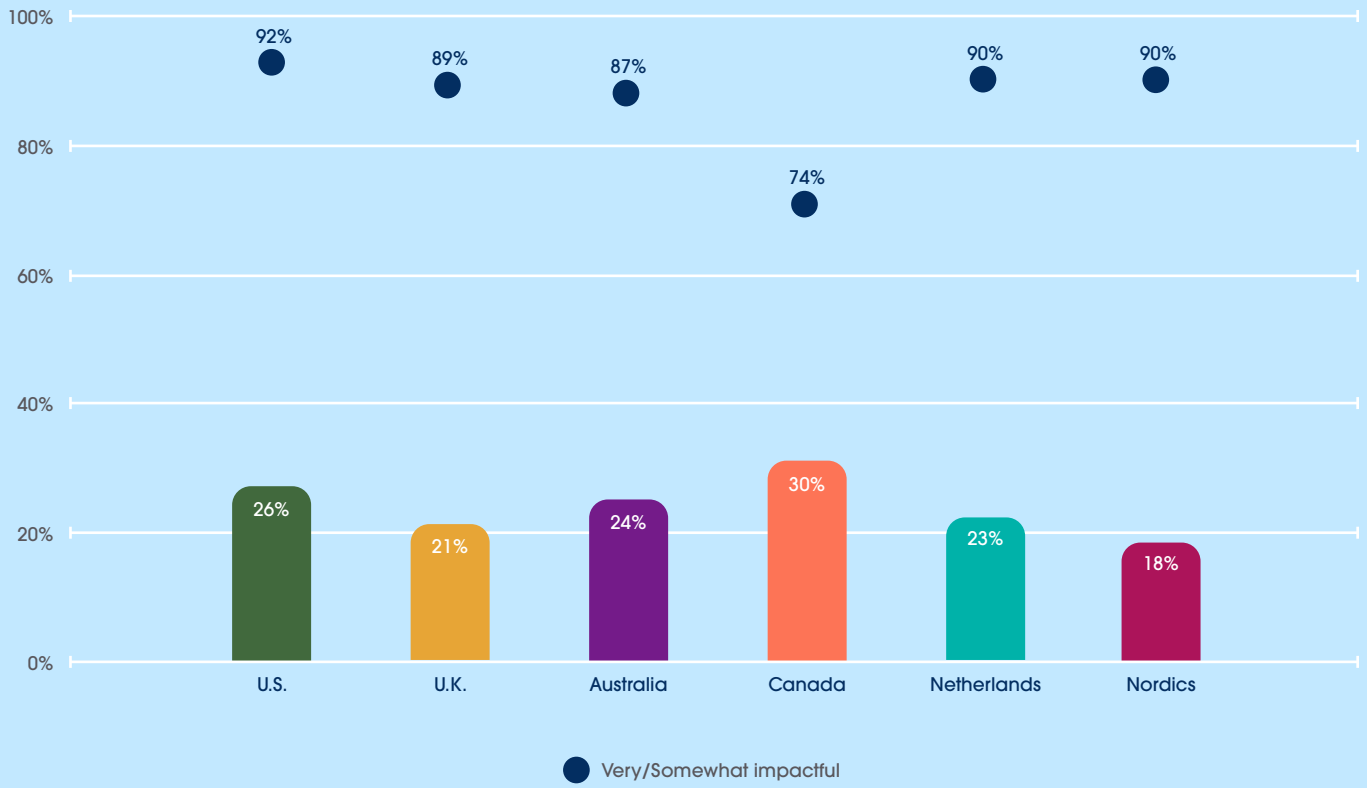
Marketers at Nonprofits Who Adjusted Their Social Media Strategy Over the Past 12 Months and the Resulting Impact

Adjusted social media strategy (i.e., added new platforms like TikTok, changed content strategy)



Marketers at Nonprofits Who Used Templates to Help with New Content Creation Over the Past 12 Months and the Resulting Impact

Used templates to help with new content creation



Marketers are also beginning to use templates to help with new content creation and of those who embraced this change, 82% said it was impactful.

Finding New Donors Has Become a Global Challenge

Even when pandemic restrictions relax, fundraising will continue to be a major challenge. According to the Lilly Family School of Philanthropy at IUPUI, one out of two American households donated to charity in 2018 compared with two out of three in 2000.

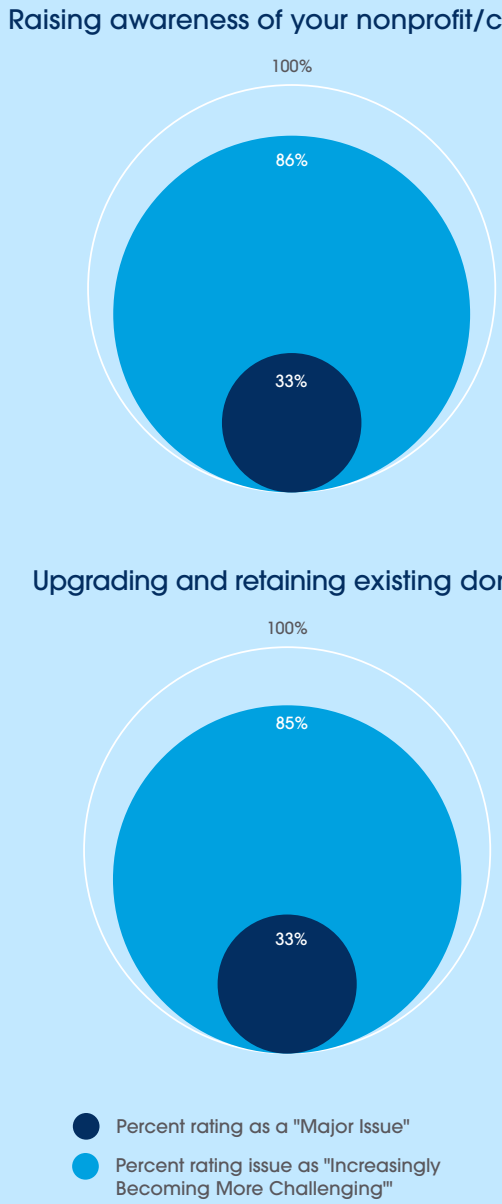
Finding new donors as well as retaining existing ones is a top concern for many organizations and it starts with awareness. When asked how concerned they were, 33% of respondents said raising awareness of their organization and upgrading or retaining existing donors is a major challenge and the majority believe these issues will persist or become increasingly more challenging over the next year.

Across the board, respondents seemed to believe that even as COVID-19 restrictions begin to ease, fundraising challenges will persist.

As retaining donors has become more challenging, many organizations are trying new fundraising strategies. For some nonprofits this means a more collaborative approach: **24% of nonprofits report changing their fundraising approach to partner with other nonprofits or companies, and of those, 62% say they will add this to their fundraising approach permanently.** Additionally, 28% of nonprofits shifted from in-person to online events and 58% plan to permanently add or replace in-person with online events as part of their fundraising approach.

The Winterberry Group's November 2020 Brand Marketer survey indicated that 81% of organizations in the U.S and 70% in the U.K. are either currently sharing or intend to share data, showing a market that is moving fully in the direction of collaboration. Based on the findings, researchers believe the shift in the U.K. is being driven by better options for collaboration and a more limited amount of regulatory resistance.

But partnerships and collaborations present even more challenges to the modern day nonprofit – data privacy laws and honoring donors' need for privacy.



Organizations Must Balance Data Privacy and the Overall Donor Experience

As staffing changes and shifts in donor bases upended nonprofits' status quo, tracking donor data in a new way has become an imperative for many. Consequently, 21% of organizations started tracking donor data within one system over the past 12 months with 89% saying the results were impactful to their fundraising approach, ultimately leading 61% to make this a permanent addition or replacement to their current approach.

And with governments around the world continuing to clamp down on how businesses use personal data – like the U.K.'s General with the General Data Protection Regulation (GDPR) rule, the California Consumer Privacy Act, the Virginia Consumer Data Protection Act, and China's Personal Information Protection Law – more nonprofits will need to ensure their processes stand up to the scrutiny.

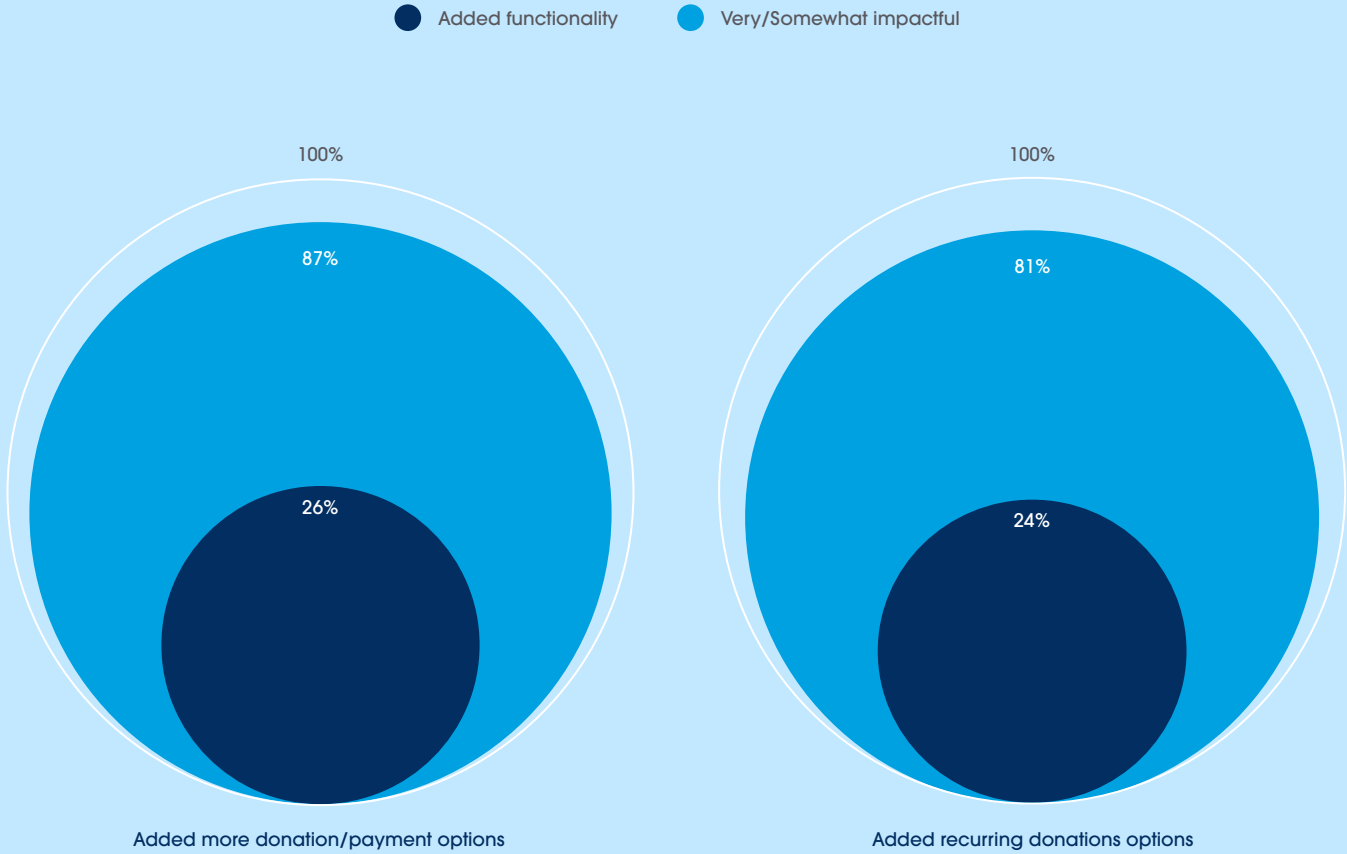
Winterberry Group recently published a white paper focused on major shifts in data-driven marketing in the U.S. and Europe during 2021 and beyond. The data explored ways for brands, agencies, and data providers to collaborate in the areas of sharing, protecting, activating, and monetizing privacy-compliant data assets. Challenges included the revolution against third-party cookies, increased data privacy regulation, and concerns about the provenance of third-party data. The findings suggest the path to success lies in moving the entire digital ecosystem towards collaborative, permission-based, privacy-compliant data solutions.

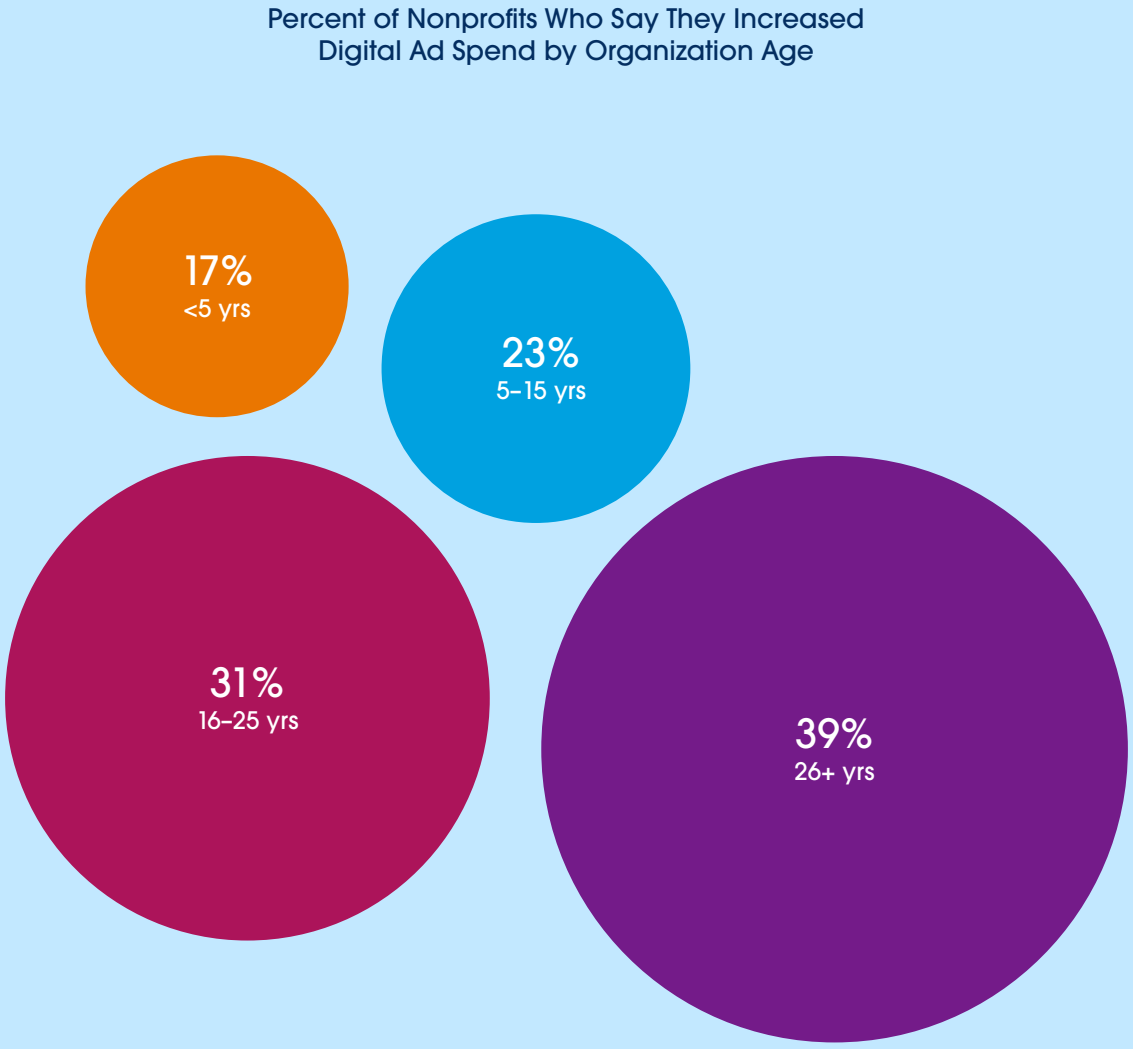
Taking these new restrictions into account, 25% of Nonprofit Trends Report survey respondents said they've taken steps to restrict employee access to donor information by donor level (i.e. only senior executives had visibility to detailed information about major donors, etc.). Of those, **61% said that over the past 12 months they've permanently added or replaced processes to restrict employee access to donor information by donor level.**

The post-cookie era is forcing a transformation on how best to optimize revenue and deliver consistent interactions across channels and it is clear that the pandemic has permanently altered fundraising forever. With face-to-face gatherings cancelled, donors moved online, requiring major shifts for those in the nonprofit sector. **Over the past 12 months, 36% of respondents report they invested in new technology such as a CRM, collaboration/productivity tools, analytics, AI, and automation, with 87% reporting it as impactful.** Of those making tech investments, 60% reported making permanent adjustments to fundraising related to investing in these new technologies.

Thirty-three percent of respondents felt the online fundraising and payment experience was a major issue. As such, 24% of organizations added recurring donation options – such as direct withdrawal or automated reminders with one-button donation authorization – to their fundraising approach over the past 12 months. Twenty six percent added more payment methods such as Venmo, PayPal, Apple Pay, and cryptocurrencies, with the majority saying they were impactful.

Nonprofits Who Added the Following Donor Options Over the Past 12 Months and the Resulting Impact





Marketing Spending Going Digital

When it comes to marketing changes, 27% increased digital ad spend and 36% built or explored the development of supporter journeys (connected experiences between web, social, email, etc.) over the past year. Organizations with over 26 years in operation increased digital ad spend at a higher rate than those under five years old (39% and 17% respectively).

Thirty percent of marketing respondents said they began using technology and data to create donor profiles over the past 12 months with 90% reporting it to be impactful. Consequently, 63% of those who'd made the switch said their organizations permanently added or replaced their previous approach altogether.

Data from Wiland, Inc., the largest independent cooperative database platform of donors in the U.S., shows that overall media spend by larger U.S. nonprofits increased by just 3% year-over-year with digital media spend increasing by 120%, representing 7.4% of all media spending during 2019. Paid online search was the top digital marketing spend followed by social media. So while things were trending digital before the pandemic, it continues to accelerate.

SECTION 5

Nonprofits Are Concerned About Expenses, Yet Outperformed in Fundraising

The top challenges that nonprofits faced were similar to those across almost every industry, with the biggest challenge being controlling expenses. The diverging responses to COVID-19 (i.e., lockdowns and mandates) can be seen in the impact on revenue projections over the next 12 months, with controlling expenses becoming increasingly challenging for 45% of respondents in the U.S. and 26% in Australia. For example, the U.S. was slow to implement lockdowns and even then it was not universal. In Australia, the lockdown was nearly complete, including entrance and exits to and from the nation, basically creating a self-containing bubble.

Amidst these challenges, **80% of respondents still rated their organization's fundraising efforts as more successful than other nonprofits** and 77% rated their marketing efforts similarly. Though they may rate their successes higher than others, many are reaching out to their competitors for opportunities to partner and collaborate, which we explore in section 3.

And, technology will play a pivotal role in tracking and ensuring nonprofit organizations overcome not only the challenges that are most pressing today but also those that will persist into the future – everything from staff and organizational wellbeing, to diversity, and fundraising/marketing goals.

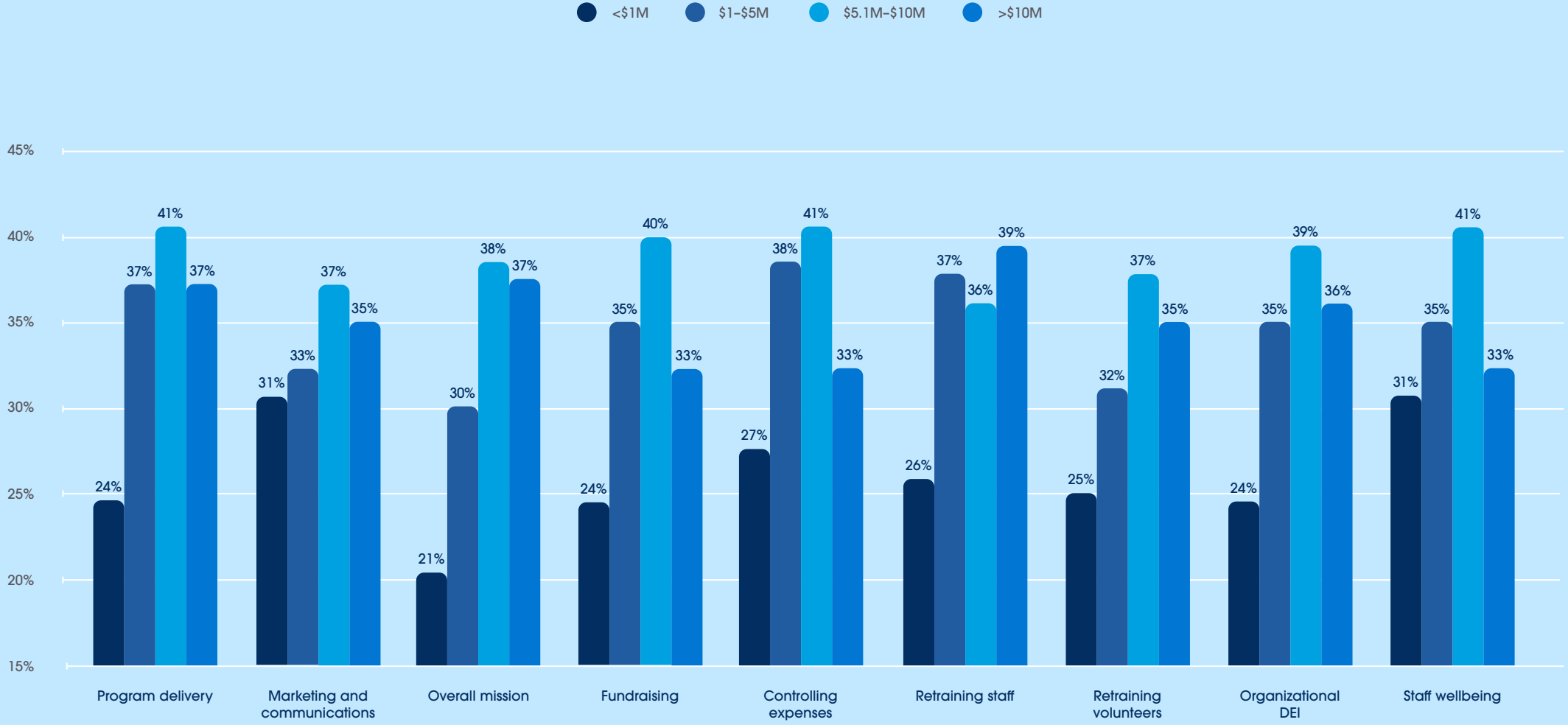
* See appendix for more detail.

SECTION 6

Many Large and Mid-Sized Nonprofits Exceeded Goals Despite Challenges

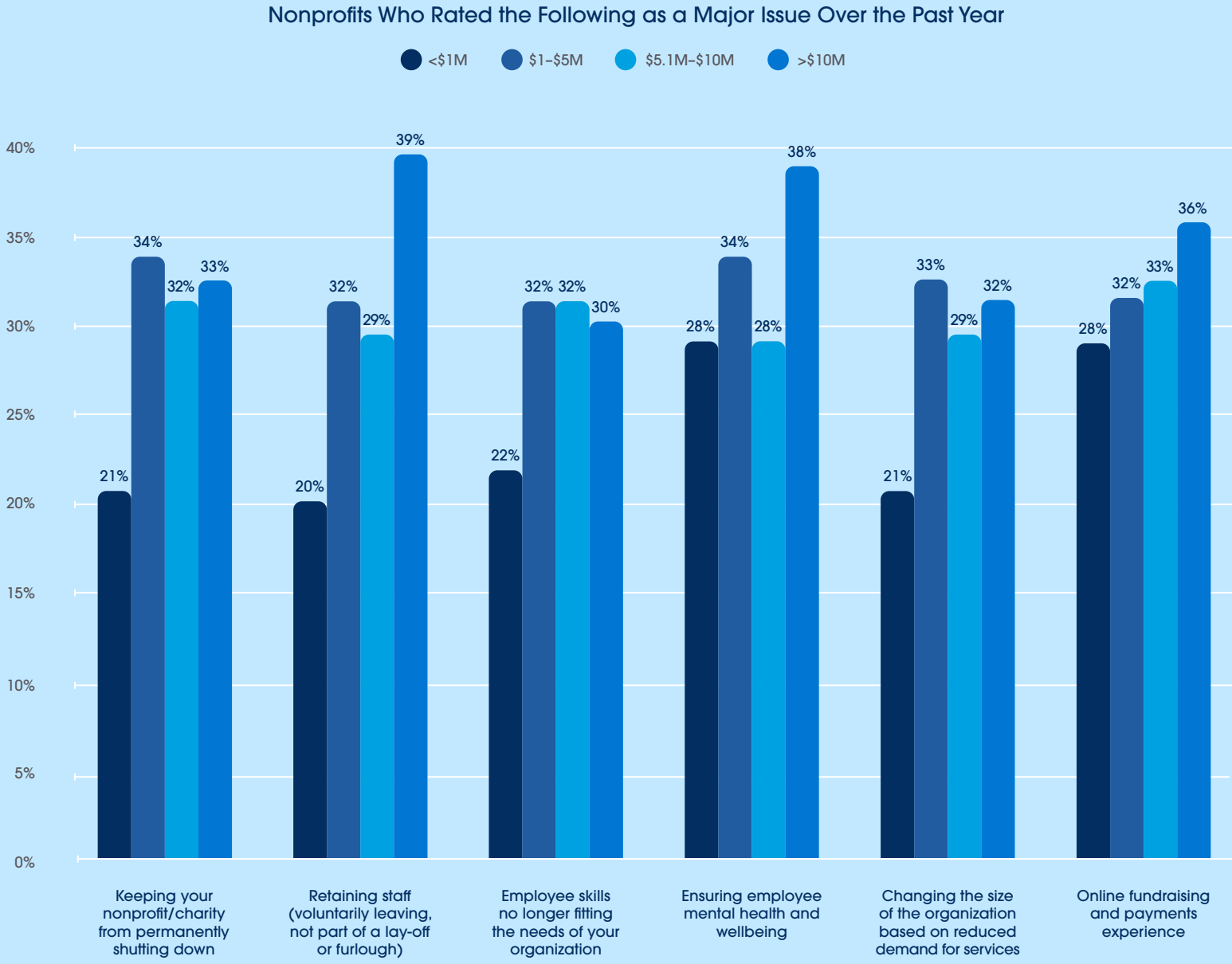
The good news is that, on average, one-third of large- and mid-sized nonprofit organizations exceeded the goals they set out to achieve in the past 12 months.

Nonprofits Who Reported Exceeding Their Goals on Various Aspects of Their Mission

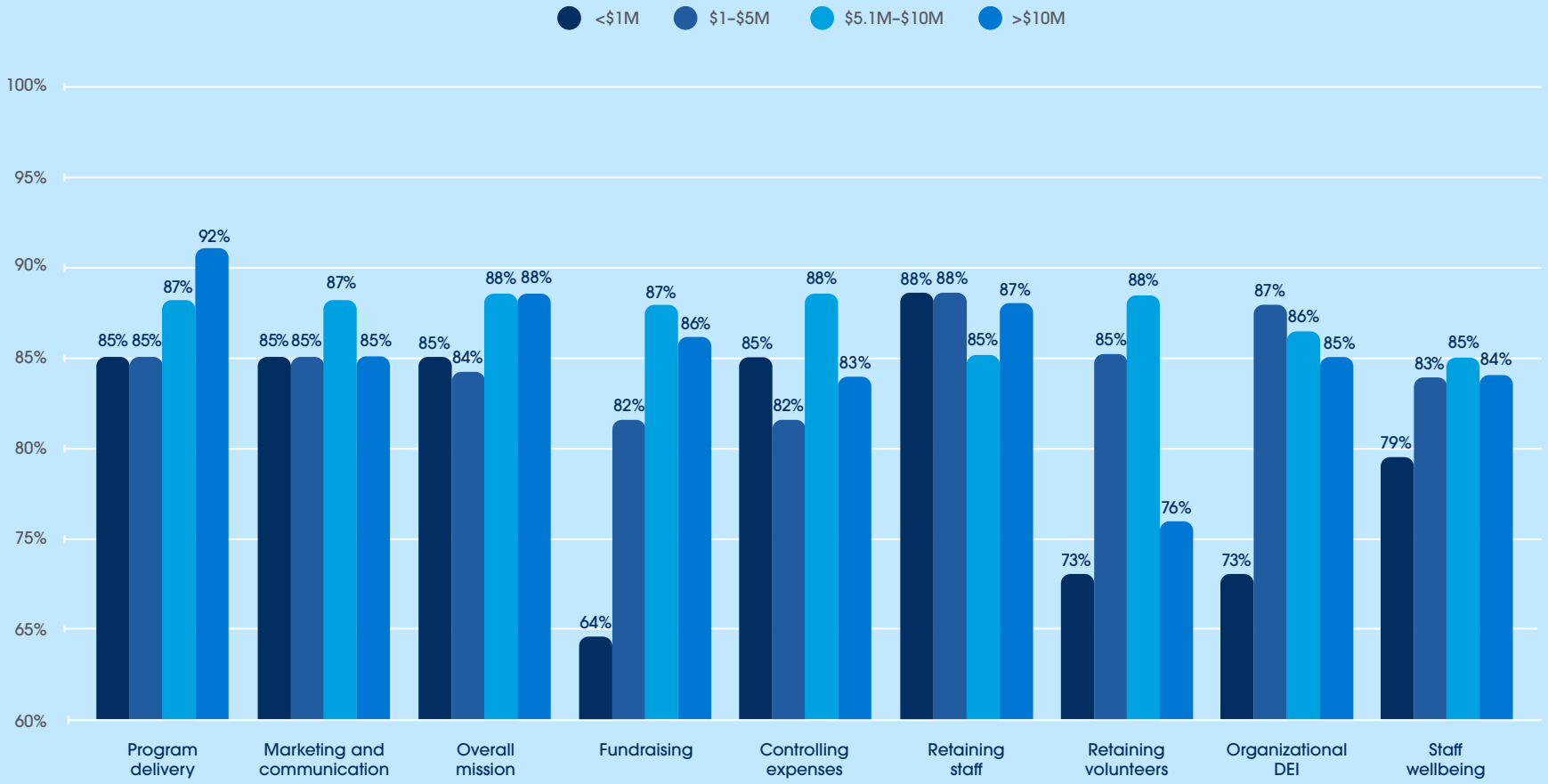


However, the challenges that nonprofits face depend on so many factors including the type of services they provide or causes they support, how long they've been in operation, revenue size, and more. Below we've highlighted a few of the challenges large- and mid-sized nonprofits have faced over the past year that will likely persist 12 months from now.

Compared to nonprofits with revenues below $1M, keeping their nonprofit from permanently shutting down weighed more heavily on large- and mid-sized nonprofits. This may correlate with the fact that the largest nonprofits (those with more than $10M in revenue) were more likely to cite staff retention as a major issue. Large nonprofits also were more likely to face the need to change the size of their organization based on reduced demand for their services. Lastly, the online fundraising and payments experience fell into the top five biggest challenges large nonprofits faced this past year.



Nonprofits Who Reported Meeting or Exceeding Their Goals on Various Aspects of Their Mission



And while implementing new technology tools and solutions landed in the top 5 challenges for three of the four revenue sizes (less than $1M, $1–$5M, and more than $10M), the more revenue a company has, the more difficult it will be to scale their solutions. In fact, 38% of nonprofits with revenue over $10M said it will be increasingly challenging over the next year to implement new technology tools/solutions and 49% said the challenges will remain the same.

And while larger organizations reported exceeding their goals, even smaller ones met their goals, bringing them into close parity when making comparisons by meeting or exceeding organizational goals, with the exception of fundraising and organizational DEI, where they continue to lag behind those with bigger revenues.

Conclusion

What's Next for Nonprofit Professionals

Successfully managing through the pandemic is nothing short of spectacular. Whether your organization has revenues topping $10M or is in the process of building your revenue streams, having a plan for when the unexpected strikes will help you manage through the chaos. Know your action plan so that you can pivot quickly regardless of the circumstances: know what resources you can fall back on to get you through to the next chapter.

Create synergies and partnerships with for-profit partners. For example, GAVI, the Global Alliance on Vaccines, leveraged both Salesforce technology and donations to distribute the COVID-19 vaccines globally with the COVAX program. Find partners that align with your mission and values.

Offer free training to upskill your workers with resources like Trailhead. Build genuine connection with your staff, have ongoing conversations, and get buy-in on organizational performance and your vision to ensure near- and long-term sustainability. Have empathy and provide resources so each member of your team knows you care not only about the viability of your organization but that you care about them as an individual.

To create success, organizations must try new approaches to their current processes, then measure their successes and recalibrate as needed. Create an organization and culture that others look to as the gold standard across every part of your business – across operations, integrated technology, fundraising, volunteer and employee retention, DEI, and more.

Appendix

Survey Population and Methodology

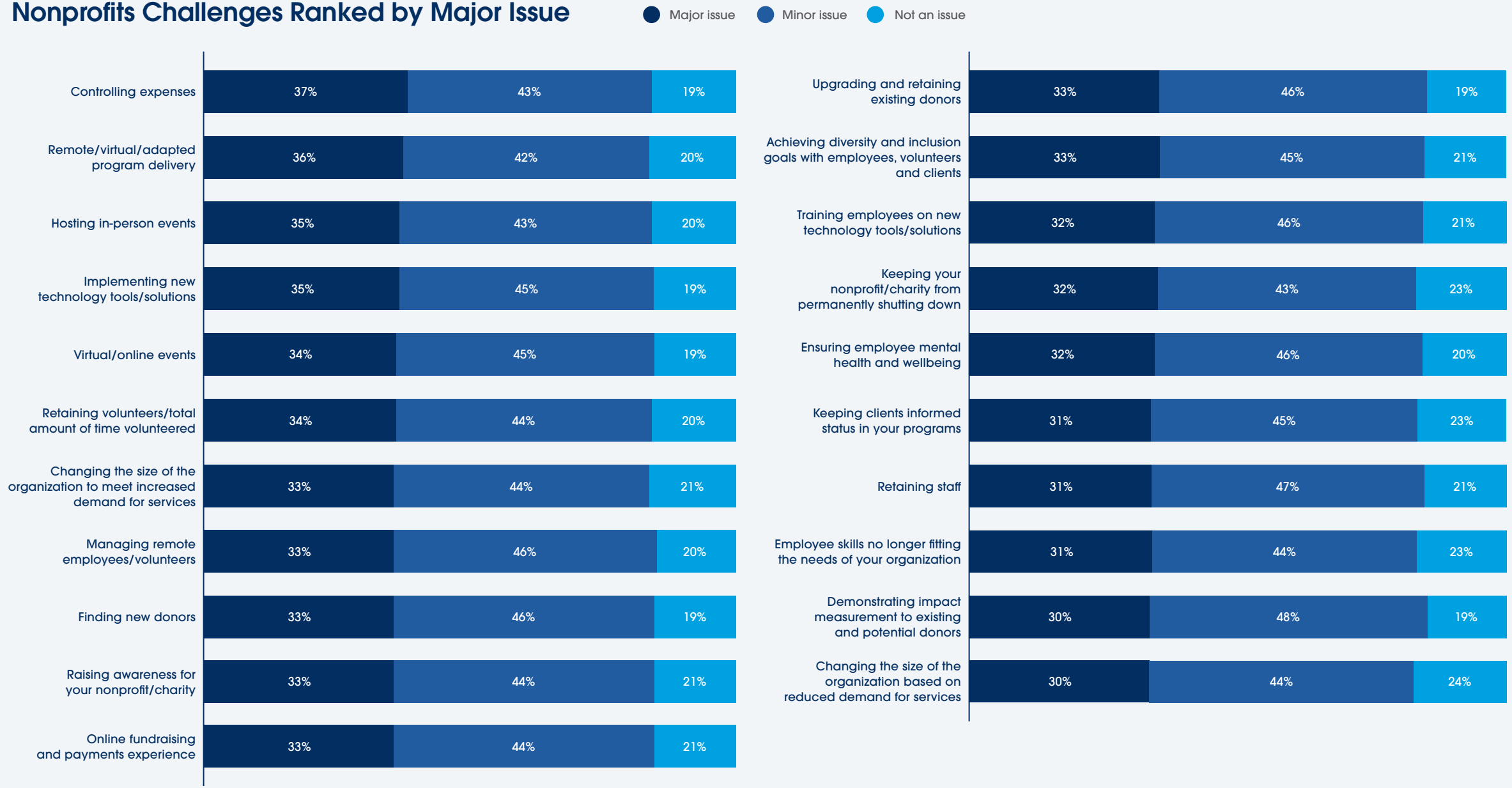
Salesforce.org – in partnership with Ipsos Research – surveyed 1,250 nonprofit employees to discover:

- the biggest challenges nonprofits face today and in the future,
- trends in diversity, equity, and inclusion,
- and how they are traversing the extreme shifts in the workforce.

The survey took an average of 15 minutes to complete. All respondents are third-party panelists (not limited to Salesforce customers).

Due to rounding, not all percentage totals in this report equal 100%. All comparison calculations are made from total numbers (not rounded numbers). Where appropriate, scores for the top two options at each end of a scale question were combined.

Nonprofits Challenges Ranked by Major Issue



Top 5 Major Challenges by Country

Total

1. Controlling expenses
2. Remote/virtual/adapted program delivery
3. Hosting in-person events
4. Implementing new technology tools/solutions
5. Virtual/online events (*hosting, creating content, promoting, etc.*)

Australia

1. Controlling expenses
2. Virtual/online events (*hosting, creating content, promoting, etc.*)
3. Implementing new technology tools/solutions
4. Managing remote employee/volunteers
5. Ensuring employee mental health and wellbeing

Canada

1. Achieving diversity and inclusion goals with employees, volunteers and clients
2. Online fundraising and payments experience
3. Retaining staff (*voluntarily leaving, not part of a lay-off or furlough*)
4. Demonstrating impact measurement to existing and potential donors
5. Training employees on new technology tools/solutions

Netherlands

1. Controlling expenses
2. Hosting in-person events
3. Remote/virtual/adapted program delivery
4. Implementing new technology tools/solutions
5. Keeping clients informed about their status in your programs

Nordics

1. Retaining volunteers/total amount of time volunteered
2. Employee skills no longer fitting the needs of your organization
3. Changing the size of the organization to meet increased demand for services
4. Remote/virtual/adapted program delivery
5. Finding new donors

U.K.

1. Remote/virtual/adapted program delivery
2. Hosting in-person events
3. Controlling expenses
4. Virtual/online events (*hosting, creating content, promoting, etc.*)
5. Keeping your nonprofit/charity from permanently shutting down

U.S.

1. Remote/virtual/adapted program delivery
2. Upgrading and retaining existing donors
3. Retaining volunteers/total amount of time volunteered
4. Changing the size of the organization to meet increased demand for services
5. Online fundraising and payment experience

Top 5 Major Challenges by Digital Maturity Level

Low Digital Maturity

1. Employee skills no longer fitting the needs of your organization
2. Raising awareness for your nonprofit/charity
3. Hosting in-person events
4. Virtual/online events (hosting, creating content, promoting, etc.)
5. Controlling expenses

Medium Digital Maturity

1. Controlling expenses
2. Hosting in-person events
3. Remote/virtual/adapted program delivery
4. Implementing new technology tools/solutions
5. Managing remote employee/volunteers

High Digital Maturity

1. Upgrading and retaining existing donors
2. Implementing new technology tools/solutions
3. Remote/virtual/adapted program delivery
4. Retaining volunteers/total amount of time volunteered
5. Controlling expenses

Changes Made to Increase Diversity

Has your organization made changes in the past 12 months to actively increase diversity across all levels, including the board and leadership?

	Percent Who Made Board Changes	Percent Who Made Organization/ Leadership Changes (non-board)	Percent Who Made Staff Changes	Percent Who Were Already Diverse	Percent Who Have Not Made Changes
Global Average	37%	43%	35%	11%	13%
Australia	35%	37%	36%	9%	19%
Canada	34%	59%	44%	9%	5%
Netherlands	38%	40%	43%	10%	12%
Nordics	26%	27%	34%	17%	16%
U.K.	33%	42%	31%	15%	19%
U.S.	51%	46%	28%	7%	6%

By Country

U.S. U.K. Australia Canada Netherlands Nordics

	Percent of Nonprofits That Had to Lay Off or Furlough Staff in the Past 12 Months by Country	Percent of Nonprofits That Plan to Add Headcount or Staff Within the Next 12 Months by Country	Percent of Nonprofits Who Say Employee Skills No Longer Fit the Needs of Their Organization is a Major Issue by Country
Australia	24%	36%	30%
Canada	26%	49%	28%
Netherlands	15%	45%	33%
Nordics	20%	40%	38%
U.K.	34%	40%	25%
U.S.	50%	72%	37%

By Years in Operation

	Percent of Nonprofits Who Say Employee Skills No Longer Fit the Needs of Their Organization is a Major Issue by Years in Operation
<5 yrs	46%
5–15 yrs	34%
16–25 yrs	30%
26+ yrs	19%

By Revenue Size

<$1M $1-$5M $5.1M-$10M $10.1M+

	Percent of Nonprofits Who Reported Ensuring Employee Mental Health and Wellbeing as a Major Challenge by Revenue Size	Percent of Nonprofits Who Say They Adjusted Their Social Media Strategy by Revenue Size	Percent of Nonprofits Who Say They Built or Explored the Development of Supporter Journeys by Revenue Size	Percent of Nonprofits Who Say They Increased Digital Ad Spend by Revenue Size
<$1M	28%	48%	40%	25%
$1M–$5M	34%	31%	34%	25%
$5.1M–$10M	28%	34%	35%	26%
>$10M	38%	38%	40%	32%

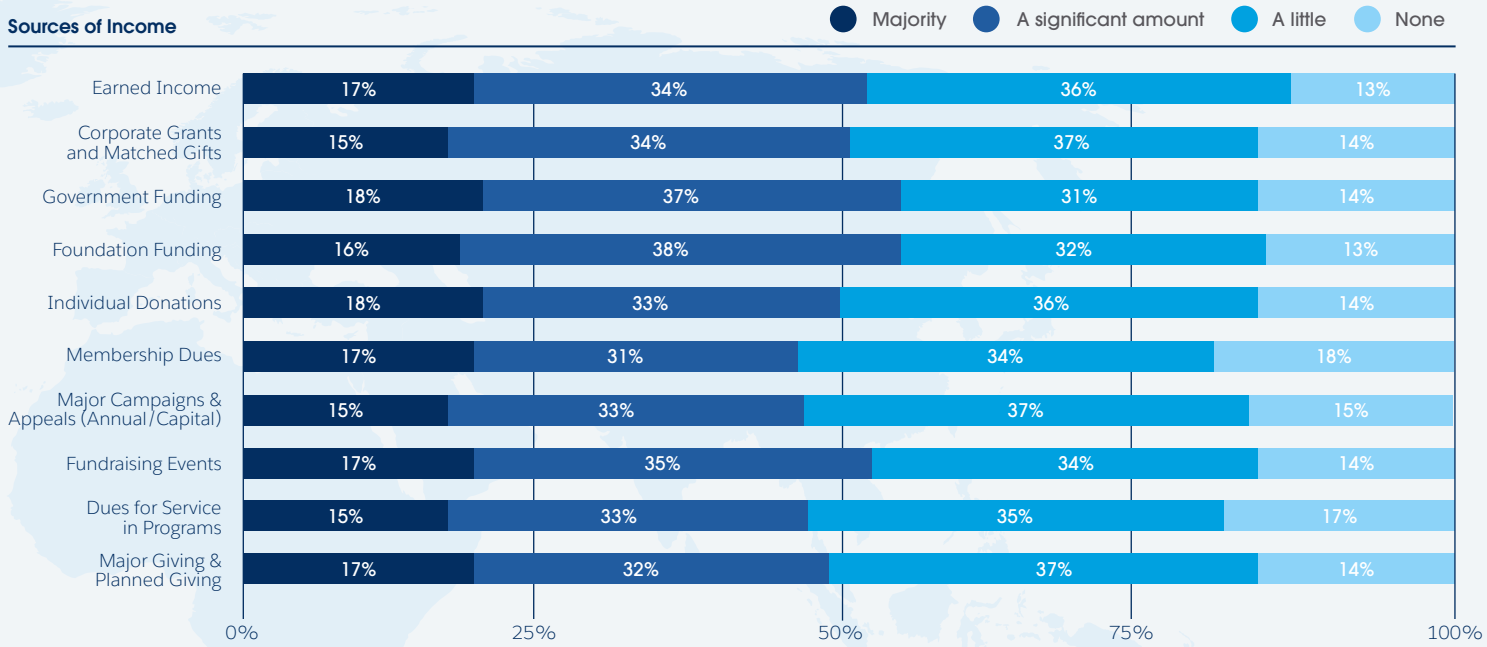
Demographics

Global

Organization Sizes, Causes, Department Details, Countries & Sources of Income

Cause Area	Base	Percent
Arts, culture, and humanities	45	4%
Education and youth development	165	13%
Environment and animals	146	12%
Food service/free food distribution	121	10%
Religion related	113	9%
Foundations	75	6%
Health	108	9%
Human services	252	20%
International development	35	3%
Humanitarian aid	48	4%
Public and societal benefit	134	11%
Other	8	1%

Sources of Income



Department	Base	Percent*
Programs	595	48%
Fundraising	696	56%
Grants Management	604	48%
Technology	456	37%
HR/Office	455	36%
Marketing	470	38%
Other	26	2%

Countries	
United States	250
United Kingdom	250
Australia	250
Canada	250
Netherlands	150
Nordics (*Denmark, Finland, Norway, or Sweden*)	150

Years in Operation		Percent
Less than 5 years	11	1%
5–15 years	747	60%
16–25 years	360	29%
More than 25 years	132	11%

Organization Revenues (U.S. Dollars)		Percent
Less than 1M	81	7%
1M–5M	399	32%
5.1M–10M	560	45%
More than 10M	210	17%

*Percents do not sum to 100 since respondents had multiple job responsibilities.

Australia

Organization Sizes, Causes, & Department Details

Cause Area	Base	Percent
Arts, culture, and humanities	2	1%
Education and youth development	22	9%
Environment and animals	46	18%
Food service/free food distribution	20	8%
Religion related	27	11%
Foundations	20	8%
Health	31	12%
Human services	40	16%
International development	9	4%
Humanitarian aid	14	6%
Public and societal benefit	19	8%
Other	0	0%

Department	Base	Percent*
Programs	149	60%
Fundraising	185	74%
Grants Management	148	59%
Technology	113	45%
HR/Office	113	45%
Marketing	146	58%
Other	2	1%

Organization Revenues (U.S. Dollars)	Base	Percent*
Less than 1M	5	2%
1M–5M	117	47%
5.1M–10M	100	40%
More than 10M	28	11%

Years in Operation	Base	Percent
Less than 5 years	0	0%
5–15 years	140	56%
16–25 years	94	38%
More than 25 years	16	6%

*Percents do not sum to 100 since respondents had multiple job responsibilities.

Canada

Organization Sizes, Causes, & Department Details

Cause Area	Base	Percent
Arts, culture, and humanities	16	6%
Education and youth development	22	9%
Environment and animals	30	12%
Food service/free food distribution	23	9%
Religion related	35	14%
Foundations	12	5%
Health	19	8%
Human services	49	20%
International development	4	2%
Humanitarian aid	9	4%
Public and societal benefit	28	11%
Other	3	1%

Department	Base	Percent*
Programs	126	50%
Fundraising	154	62%
Grants Management	143	57%
Technology	97	39%
HR/Office	136	54%
Marketing	93	37%
Other	6	2%

Organization Revenues (U.S. Dollars)	Base	Percent*
Less than 1M	12	5%
1M–5M	68	27%
5.1M–10M	120	48%
More than 10M	50	20%

Years in Operation	Base	Percent
Less than 5 years	1	0%
5–15 years	149	60%
16–25 years	75	30%
More than 25 years	25	10%

*Percents do not sum to 100 since respondents had multiple job responsibilities.

Netherlands

Organization Sizes, Causes, & Department Details

Cause Area	Base	Percent
Arts, culture, and humanities	7	6%
Education and youth development	11	9%
Environment and animals	9	7%
Food service/free food distribution	18	14%
Religion related	12	10%
Foundations	7	6%
Health	8	6%
Human services	32	26%
International development	7	6%
Humanitarian aid	3	2%
Public and societal benefit	10	8%
Other	1	1%

Department	Base	Percent*
Programs	43	34%
Fundraising	55	44%
Grants Management	48	38%
Technology	43	34%
HR/Office	44	35%
Marketing	28	22%
Other	3	2%

Organization Revenues (U.S. Dollars)	Base	Percent*
Less than 1M	7	6%
1M–5M	32	26%
5.1M–10M	53	42%
More than 10M	33	26%

Years in Operation	Base	Percent
Less than 5 years	0	0%
5–15 years	59	47%
16–25 years	47	38%
More than 25 years	19	15%

*Percents do not sum to 100 since respondents had multiple job responsibilities.

Nordics

Organization Sizes, Causes, & Department Details

Cause Area	Base	Percent
Arts, culture, and humanities	5	4%
Education and youth development	17	14%
Environment and animals	13	10%
Food service/free food distribution	11	9%
Religion related	14	11%
Foundations	8	6%
Health	5	4%
Human services	22	18%
International development	4	3%
Humanitarian aid	4	3%
Public and societal benefit	22	18%
Other	0	0%

Department	Base	Percent*
Programs	59	47%
Fundraising	69	55%
Grants Management	62	50%
Technology	29	23%
HR/Office	33	26%
Marketing	39	31%
Other	4	3%

Organization Revenues (U.S. Dollars)	Base	Percent*
Less than 1M	9	7%
1M–5M	38	30%
5.1M–10M	58	46%
More than 10M	20	16%

Years in Operation	Base	Percent
Less than 5 years	1	1%
5–15 years	58	46%
16–25 years	44	35%
More than 25 years	22	18%

*Percents do not sum to 100 since respondents had multiple job responsibilities.

United Kingdom

Organization Sizes, Causes, & Department Details

Cause Area	Base	Percent
Arts, culture, and humanities	3	1%
Education and youth development	31	12%
Environment and animals	24	10%
Food service/free food distribution	28	11%
Religion related	16	6%
Foundations	14	6%
Health	27	11%
Human services	60	24%
International development	6	2%
Humanitarian aid	12	5%
Public and societal benefit	26	10%
Other	3	1%

Department	Base	Percent*
Programs	116	46%
Fundraising	169	68%
Grants Management	150	60%
Technology	78	31%
HR/Office	78	31%
Marketing	107	43%
Other	6	2%

Organization Revenues (U.S. Dollars)	Base	Percent*
Less than 1M	25	10%
1M–5M	71	28%
5.1M–10M	123	49%
More than 10M	31	12%

Years in Operation	Base	Percent
Less than 5 years	1	0%
5–15 years	159	64%
16–25 years	56	22%
More than 25 years	34	14%

*Percents do not sum to 100 since respondents had multiple job responsibilities.

United States

Organization Sizes, Causes, & Department Details

Cause Area	Base	Percent
Arts, culture, and humanities	12	5%
Education and youth development	62	25%
Environment and animals	24	10%
Food service/free food distribution	21	8%
Religion related	9	4%
Foundations	14	6%
Health	18	7%
Human services	49	20%
International development	5	2%
Humanitarian aid	6	2%
Public and societal benefit	29	12%
Other	1	0%

Department	Base	Percent*
Programs	102	41%
Fundraising	64	26%
Grants Management	53	21%
Technology	96	38%
HR/Office	51	20%
Marketing	57	23%
Other	5	2%

Organization Revenues (U.S. Dollars)	Base	Percent*
Less than 1M	23	9%
1M–5M	73	29%
5.1M–10M	106	42%
More than 10M	48	19%

Years in Operation	Base	Percent
Less than 5 years	8	3%
5–15 years	182	73%
16–25 years	44	18%
More than 25 years	16	6%

*Percents do not sum to 100 since respondents had multiple job responsibilities.

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