

THE IMPACT OF COVID-19 ON THE SOCIAL SECTOR

La Piana Consulting surveyed our social sector contacts, receiving 433 responses, painting a picture of the current impact of COVID-19. We will request your input again as this crisis develops in the coming months, so we can further understand trends to share with the sector. . . The results are astounding:

MARCH 2020

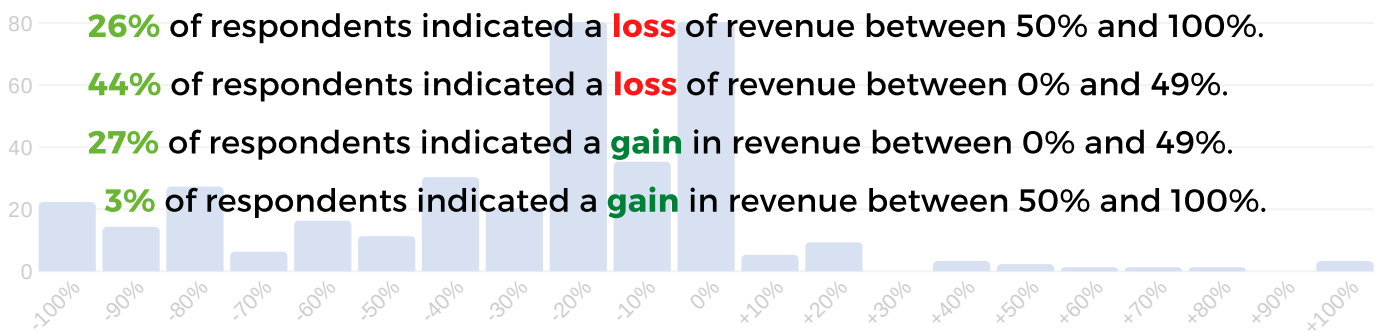
93% OF RESPONDENTS HAVE BEEN FORCED TO CURTAIL SERVICES OR ADAPT HOW THEY HAVE PROVIDED THEM THUS FAR:

ON AVERAGE, RESPONDENTS HAVE HAD TO LAY OFF OR FURLOUGH 19% OF THEIR STAFF.

ON AVERAGE, RESPONDENTS HAVE MOVED 83% OF THEIR OPERATIONS TO A WORK FROM HOME ARRANGEMENT.



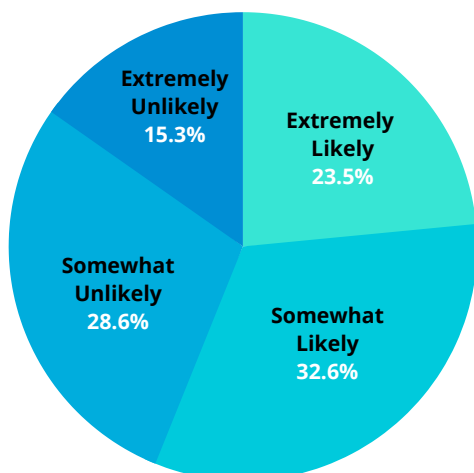
CURRENT AVERAGE IMPACT ON REVENUE:



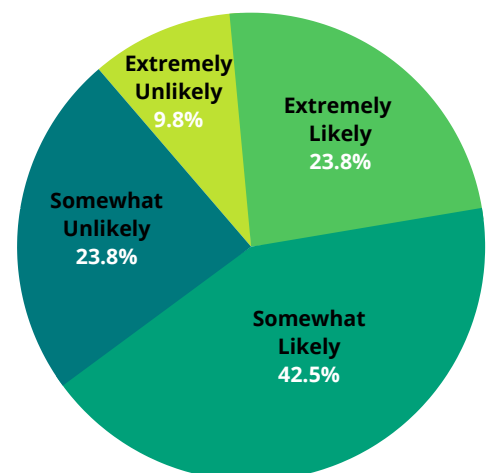
79% OF RESPONDENTS HAVE MOVED SOME OR ALL OF THEIR PROGRAMS / SERVICES TO AN ONLINE OR OTHER DIGITAL DELIVERY METHOD.

STRONG MAJORITIES EXPECT TO MAKE FURTHER REDUCTIONS IN THE NEAR FUTURE:

LIKELIHOOD THAT RESPONDING ORGANIZATIONS WILL MAKE (FURTHER) REDUCTIONS IN STAFF:



LIKELIHOOD THAT RESPONDING ORGANIZATIONS WILL MAKE (FURTHER) REDUCTIONS IN SERVICES:



INSIGHTS FROM THE SECTOR

We asked respondents to share their thoughts on the impact of the coronavirus on their organization. We summarized those responses:

MARCH 2020

This is a time of incredible uncertainty. Much of the sector faces an existential threat from service shutdown, revenue loss, and the unknown duration of the pandemic.

Most responding school-based and arts & culture organizations are completely closed, many are experiencing 100% loss of revenue.

Many respondents self-insure for unemployment, causing another wave of crisis.

Respondents are being incredibly resourceful in adapting to remote operations and service delivery, where possible. But many services rely on personal connections now lost or hindered.

THIS IS CHANGING EVERYTHING.

The digital divide is on full display. Many vulnerable populations lack an appropriate computer device, an internet connection, or both.

There are opportunities for those that can adapt, and for those providing services such as food, support for the homeless, housing / rental assistance, or other income supports.

Staff are experiencing extreme stress and uncertainty. Respondents are grappling with how to continue delivering programs while supporting staff in an incredibly challenging time.

Many funders are being flexible, even in light of significant endowment losses. They are accelerating grant awards, removing restrictions, and identifying additional funds to make available.



“Brutal. The impact will be felt for a long time.”

“It may put us out of business.”

“The toll on staff should be lifted up more. People are stressed, worried, and while work is helpful to keep busy, there's an underlying palpable anxiety.”

“We have already cut 100% staff and 100% programs.”

“We have no revenue and without grants to cover our costs, we don't have a way to recover.”

“It's a major threat to our ability to survive as an organization.”

“Most chaotic and threatening situation in my 40-year career.”

“We anticipate significant negative impact on fundraising.”

“HR issues are a nightmare.”

“When we get to the other side, we will need to be mindful of the new way of living and reflect that in our programs and services. New learnings in an extraordinary time. We must stick together and support each other.”



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