

THE NONPROFIT  
ASSOCIATION OF  
OREGON

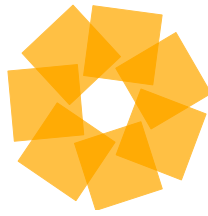
*Good works. Together.*

# *Oregon Nonprofit Sector Report*

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## PRESS KIT

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**FOR IMMEDIATE RELEASE**

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## ***Oregon Nonprofit Sector Report Offers Insider's View to Nonprofit Climate***

**Portland, OR, May 1, 2012**—The Nonprofit Association of Oregon (NAO) and Portland State University's (PSU) Institute for Nonprofit Management (INPM) have collaborated to publish the *Oregon Nonprofit Sector Report* (ONSR) that will inform key decision makers in the public, nonprofit, and private sectors about the economic relevance of the nonprofit sector. This comprehensive report examines the sector as a whole—including a description of the size and scope of the sector, the current condition of nonprofits and clues about their economic and social relevance, and social impact of the nonprofit sector in Oregon.

The ONSR provides crucial information for public policy decision makers, philanthropists, and nonprofit leaders in their attempt to reorganize relations between nonprofits and government while dealing with the consequences of recent financial crises—the effects of which greatly influence Oregon's state budget cycle and consequently the budget of many of the state's 22,000+ nonprofit organizations. NAO Executive Director, Carrie Hoops says, "This inaugural report will be an important tool for raising the awareness about and importance of Oregon's nonprofit sector. The report reveals the sobering reality our nonprofit organizations face every day while they work to build strong communities and contribute to the state's economic vitality with shrinking resources and internal capacity."

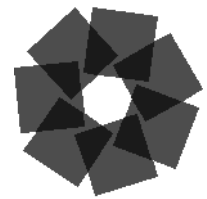
In addition to educating people on challenges nonprofit leaders face—facing economic downturn, meeting growing organizational needs—the report specifically:

- presents the size and scope of Oregon's nonprofit sector;
- describes and analyzes data on nonprofit employment and wages to assess the economic relevance of the sector;
- analyzes aspects of the sector that are relevant contributions to the current public policy debate in Oregon;
- describes and analyzes the current, relative health of nonprofit organizations in key areas like leadership and fundraising and;
- interprets and frames existing data to develop a language for the social and economic impact of Oregon's nonprofit sector.

Support for this project has been generously provided by the Collins Foundation, the M.J. Murdock Charitable Trust, the Oregon Community Foundation, the Nonprofit Association of Oregon, and Portland State University. Access to a downloadable PDF of the report will be available at [www.nonprofitoregon.org](http://www.nonprofitoregon.org).

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The Nonprofit Association of Oregon works in partnership with nonprofits, policy makers, philanthropists, and government agencies to ensure nonprofit success. Through training, consulting, executive transition services, and advocacy, the Nonprofit Association of Oregon helps build strong nonprofits which help build strong and vibrant communities. For additional information about the Nonprofit Association of Oregon, its programs and services, and its membership, visit [www.nonprofitoregon.org](http://www.nonprofitoregon.org).



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# About the Report

## PROJECT PARTNERS

### INSTITUTE FOR NONPROFIT MANAGEMENT

The Institute for Nonprofit Management (INPM) at Portland State University (PSU) has established itself as the Northwest's premier educational center for research, study, and continuing professional education of nonprofit sector leaders. The Institute offers a comprehensive certificate program in nonprofit management and graduate-level classes in nonprofit leadership. Through high quality educational and training programs, INPM supports the development of a strong, informed, and effective nonprofit sector. INPM's educational and training programs teach people how to build community through management and leadership in nonprofit organizations. A main goal is to build the nonprofit sector by offering practical skills and lifelong learning to nonprofit professionals and volunteers.

INPM also serves as a regional resource center for nonprofit education, research, job information, and community service. The Institute provides a forum for the exchange of ideas about vital issues affecting the nonprofit sector and the practitioner community. Faculty members are experienced professional practitioners from the nonprofit community who present a philosophy of practical, experiential education which extends throughout the academic offerings of the Institute.

### NONPROFIT ASSOCIATION OF OREGON

The Nonprofit Association of Oregon (NAO), formerly known as TACS, is a statewide network of nonprofits, foundations, business partners, and individuals dedicated to supporting Oregon's nonprofit sector. NAO serves as a resource for nonprofit organizations and a central source of information about the nonprofit sector. The organization connects nonprofits of all sizes, missions, and geographic locations, and offers programs and services that enhance the capacity of nonprofits to fulfill their essential missions. While NAO's role as a statewide membership association is a relatively new one, the organization has over 30 years' experience providing consulting and training to nonprofit leaders, staff, and volunteers.

NAO's specific programs and services span:

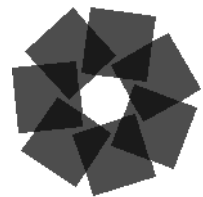
- Trainings, workshops, webinars, and conferences
- Organizational development consulting
- Technology consulting
- Executive Transition Services
- Information and resources on nonprofit practices
- Public policy monitoring, reporting, and advocacy
- Membership benefits and discounts

## HISTORY OF PARTNERSHIP

The *Oregon Nonprofit Sector Report* has provided a promising opportunity to create a strong partnership between INPM and NAO as resource hubs for nonprofits in Oregon.

Based on the work of this report, NAO and PSU will be better equipped to serve as information hubs and advocates for Oregon's nonprofit organizations. PSU's Institute for Nonprofit Management has conducted the research that is informed by NAO's insight on current priorities and conditions of the nonprofit sector. The research directly informs NAO's public policy and advocacy efforts and research results can be used to make the case for nonprofit needs in the public discourse. In the future, NAO and PSU together can create stronger intermediary services that support nonprofits in Oregon with information, training, and consultancy services.

**Project Sponsors:** *The ONSR project has been generously provided by the Collins Foundation, the M.J. Murdock Charitable Trust, the Oregon Community Foundation, the Nonprofit Association of Oregon, and Portland State University.*



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# Executive Summary

## *Oregon Nonprofit Sector Report*

### Project Goals

The *Oregon Nonprofit Sector Report (ONSR)* is the outcome of a collaboration between the Nonprofit Association of Oregon (NAO) and Portland State University's (PSU) Institute for Nonprofit Management (INPM), which is part of the Center for Public Service. The report is intended to inform decision makers in the public, nonprofit, and private sectors about the present economic status and relevance of the nonprofit sector.

The *ONSR* should specifically help public policy decision makers, philanthropists, and nonprofit leaders better understand the organizational and financial health of the state's nonprofits. Nonprofit organizations are dealing with the consequences of recent financial crises—the effects of which greatly influence Oregon's state budget cycle and the budgets of many of the state's 22,000+ tax-exempt organizations.

This comprehensive report examines the sector as a whole—including a description of the size and scope of the sector (e.g., number of organizations, expenditures, regional distribution, number of employees and volunteers, regional distribution of volunteers, forms of volunteering, number of foundations); the current condition of nonprofits (e.g., clues about their economic viability and social relevance, relative health in key areas such as leadership, fundraising, outlook); and the contributions, social impact, and future of Oregon's nonprofit sector.

### Methodology

To compile this report, the team developed and executed a survey instrument that collected data from over 600 participating nonprofit leaders/organizations comprising a representative sample for regional and subsector distribution of nonprofits. The team also analyzed and interpreted data on Oregon's 10,429 actively filing public charities listed in the Oregon Department of Justice database and compared it with data in other state of the nonprofit sector reports to identify gaps, inconsistencies, and best practices.

*The ONSR aims to provide basic, current, and easily accessible data on the nonprofit sector in Oregon to help inform the public about the social impact of nonprofit organizations in Oregon. This report is a starting point for ongoing research and data collection to learn more about how Oregon nonprofits relate to government, for profit firms, one another, their clients, and society as a whole. The ONSR team hopes there will be ongoing efforts to continue this important work for and about Oregon's nonprofit sector.*

## Key Findings

Total revenue of the 10,429 active charitable nonprofits (reporting year beginning 2010) in Oregon was approximately \$13 billion, with total assets of \$16 billion. Nonprofit organizations in Oregon provide 166,130 jobs, which represents 13% of Oregon's private sector employment. Oregon's largest nonprofit employers are hospitals, accounting for 51,000 employees.

It is clear that nonprofits play an increasingly vital role in supporting the state. The *ONSR* provides critical details about the sector's scale, health, and impact. Some key findings about the Oregon-based public charities who responded to the survey include:

- The sector is predominantly female and white: 76% of employees are women; 28% are people of color.
- Overall, employment in nonprofits has stabilized after the recent financial crises: 35% of respondents reported an increase in paid staff, and over one-quarter increased volunteers.
- In 2011, 54% of nonprofits reported increased revenue, 26% reported flat revenue, and 20% reported decreased revenue compared to 2010.
- Sixty-five percent of nonprofits reported increased demand for services in 2011, comparable to national data, while 28% reported that demand stayed about the same.
- Twenty-six percent of nonprofits reported that they had to scale back programs, and 51% had to turn away clients.
- Fifty-seven percent of nonprofits do not have enough unrestricted operating reserves to cover three months of operating expenses, compared to 46% to 48% of organizations nationally. Almost one in four (24%) reported they are operating with less than one month worth of reserves.
- Sixty percent of nonprofits reported increased fundraising (in 2011 compared to 2010), which is 19% higher than in the US overall. Fundraising efforts were increased through more foundation grant applications (57%), greater attention to major individual donors (52%), and the addition of special events (49%).
- Eighty-six percent of nonprofits collaborate with each other. Those who most collaborate are agencies and organizations within the Housing and Shelter (97%), Healthcare and Counseling (91%), and Human Services and Community Improvement and Capacity Building (tied at 89%) subsectors.
- Meeting with public officials ranked highest among nonprofits' advocacy activities (56%); nearly one-third participated in coalitions that attempt to influence public policy.
- For fiscal year 2012, Oregon's nonprofits expect the percentage of total revenue from most sources to increase; government revenue is mostly expected to stay the same. The majority expects their organizations to grow moderately over the next one to three years; one-third expects substantial organizational growth over the next five years.