



State of Nonprofits 2025

What Funders Need to Know



THE CENTER FOR
EFFECTIVE PHILANTHROPY

STATE OF NONPROFITS 2025

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ABOUT THE CENTER FOR EFFECTIVE PHILANTHROPY

CEP provides data, feedback, programs, and insights to help individual and institutional donors improve their effectiveness. We do this work because we believe effective donors, working collaboratively and thoughtfully, can profoundly contribute to creating a better and more just world.

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McKNIGHT FOUNDATION



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This report is based on CEP's independent data analyses. CEP is solely responsible for its content, which does not necessarily reflect the individual views of the funders or others named in this report.

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INTRODUCTION

Nonprofit organizations play an important role in addressing many of society's most urgent challenges — from delivering essential services to advancing long-term systems change. Yet this critical work often takes place amid ongoing constraints, including limited resources and sudden shifts in operations driven by external pressures. In [2023](#) and [2024](#), in the Center for Effective Philanthropy's (CEP) annual *State of Nonprofits* reports, nonprofit leaders shared that their organizations continued to experience the lingering effects of the COVID-19 pandemic and reported persistent staffing difficulties while working to maintain financial stability.¹

This year, leaders describe operating in an environment that has only grown more complex. Nonprofits are facing new pressures that test their ability to work effectively, such as actions taken by the new presidential administration and future economic uncertainty.² A number of foundations have responded by issuing public statements, increasing payout levels, and offering additional support.³ These actions reflect a growing recognition of the need to support nonprofits as they navigate an increasingly unpredictable context, one that will likely continue to evolve in the months ahead.

In our *2025 State of Nonprofits* report, we aim to elevate the perspectives of nonprofit leaders and provide a clearer understanding of the pressures they are facing. Our goal is to inform both institutional and individual funders about how they can more effectively support and strengthen the nonprofit sector. The findings in this report are based on survey responses from leaders participating in CEP's Nonprofit Voice Project — a sample of U.S.-based nonprofits that is broadly representative of organizations receiving at least some foundation funding. In February 2025, we surveyed 893 nonprofit leaders and received responses from 585 organizations, representing a 66 percent response rate. (See Methodology for more information.)⁴

¹ Phil Buchanan, Lauren Broder, and Christina Im, *State of Nonprofits 2023: What Funders Need To Know* (Cambridge, MA: Center for Effective Philanthropy, 2023), https://cep.org/wp-content/uploads/2023/06/NVP_State-of-Nonprofits_2023.pdf; Christina Im, Seara Grundhoefer, and Elisha Smith Arrillaga, *State of Nonprofits 2024: What Funders Need To Know* (Cambridge, MA: Center for Effective Philanthropy, 2024), https://cep.org/wp-content/uploads/2024/06/NVP_State-of-Nonprofits_2024.pdf.

² Carl Willis, "DC Has Over 13,000 Registered Nonprofits, Many of Them Bracing for Federal Tariffs Impact," *ABC 7News*, April 3, 2025, <https://wjla.com/news/local/nonprofit-tariffs-federal-worldwide-trump-impact-youth-after-school-jobs-risk-endowment-inflation-recession-sector-jobs-hortons-kids-pandemic-preparation?photo=2>; Rasheeda Childress, "Tips To Maintain Your Well-Being Amid Tariffs, Layoffs, and Recession Talk," *The Chronicle of Philanthropy*, April 8, 2025, <https://www.philanthropy.com/article/tips-to-maintain-your-well-being-amid-tariffs-layoffs-and-recession-talk>.

³ Phil Buchanan, Molly Heidemann, and Kevin Bolduc, "A Wave Forming? Funders Taking Action in Response to a Challenging Context," *Center for Effective Philanthropy* (blog), March 25, 2025, <https://cep.org/blog/a-wave-forming-funders-taking-action-in-response-to-a-challenging-context/>; Stephanie Beasley, "Nonprofits Are Struggling. These Emergency Funds Are Offering Help," *The Chronicle of Philanthropy*, March 28, 2025, <https://www.philanthropy.com/article/nonprofits-are-struggling-these-emergency-funds-are-offering-help>.

⁴ Between December 2024 and January 2025, CEP reconstituted the Nonprofit Voice Project sample by inviting a new representative group of nonprofit leaders to participate.

Nonprofits Represented in This Research

Data used in this report were obtained through CEP's Nonprofit Voice Project (NVP). CEP created the NVP (formerly known as the Grantee Voice Panel) in 2012 to elevate nonprofit experiences to both institutional and individual funders, as a way of informing their giving and effectiveness. The NVP is a panel of U.S. nonprofits representative of the national landscape of nonprofits receiving funding from at least one foundation giving \$5 million or more annually.

Nonprofits in this sample represent a diverse group of varying organizational sizes, issue areas, and geographic regions. CEP refreshes this sample with new nonprofit leaders every two to four years.

KEY FINDINGS

FINDING

1

Nonprofit leaders describe difficulty pursuing their missions effectively in an environment that presents multiple significant challenges to their ability to operate.

FINDING

2

As in 2024, most nonprofits achieved a balanced budget or a surplus in the last fiscal year and, despite challenging circumstances, anticipate the same for this fiscal year. At the same time, leaders express uncertainty about future funding and concerns about increased costs.

FINDING

3

Perhaps in light of these pressures, nearly all nonprofit leaders express concern about their own burnout and report that burnout is affecting their staff.

FINDING

1

MULTIPLE OBSTACLES

Nonprofit leaders describe difficulty pursuing their missions effectively in an environment that presents multiple significant challenges to their ability to operate.

Nonprofit leaders report navigating an increasingly challenging environment shaped by a polarized and unpredictable political climate — one that poses risks to their funding, organizational mission and values, and the communities they serve. They find that these pressures are compounded by persistent staffing challenges, including difficulties with hiring and retaining staff, managing staff capacity, offering competitive compensation, and maintaining staff morale. (See Figure 1.) “As the pandemic waned, we anticipated returning to some form of ‘new normal,’ but the current political climate, inflation, decrease in individual giving, and societal changes leave us with little choice but to be reactive rather than proactive,” describes one nonprofit leader. As another leader comments, “We are going into a period of uncertainty given what is going on at the federal level, but the need for our staff and programs are growing, and we’re struggling to support our staff.”

FIGURE 1. Challenges Most Frequently Reported by Nonprofit Leaders (N=551)



Impact of the political climate
(e.g., government actions, backlash)



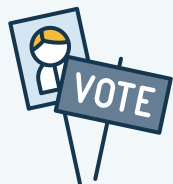
Staffing
(e.g., recruitment and retention)

IMPACT OF THE POLITICAL CLIMATE

Most nonprofit leaders report that the political climate in early 2025 is negatively affecting their organizations and expect it to continue to affect their work moving forward (see figures 2 and 3). Most commonly, leaders indicate that actions by the federal government are affecting their work, either through the outcomes of the 2024 U.S. federal elections or through changes in federal government funding.⁵

⁵ Data on the political climate were previously published in a research snapshot CEP released in March 2025. Ellie Buteau, *Challenging Times: How U.S. Nonprofit Leaders Are Experiencing the Political Context* (Cambridge, MA: Center for Effective Philanthropy, 2025), https://cep.org/wp-content/uploads/2025/03/CEP_Research_Snapshot_Series_Challenging_Times.pdf.

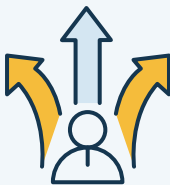
FIGURE 2. Top Three Most Frequently Reported Elements of the Early 2025 Political Climate Affecting Nonprofits' Work (N=572)



**Outcomes of 2024
U.S. federal elections**
(71%)

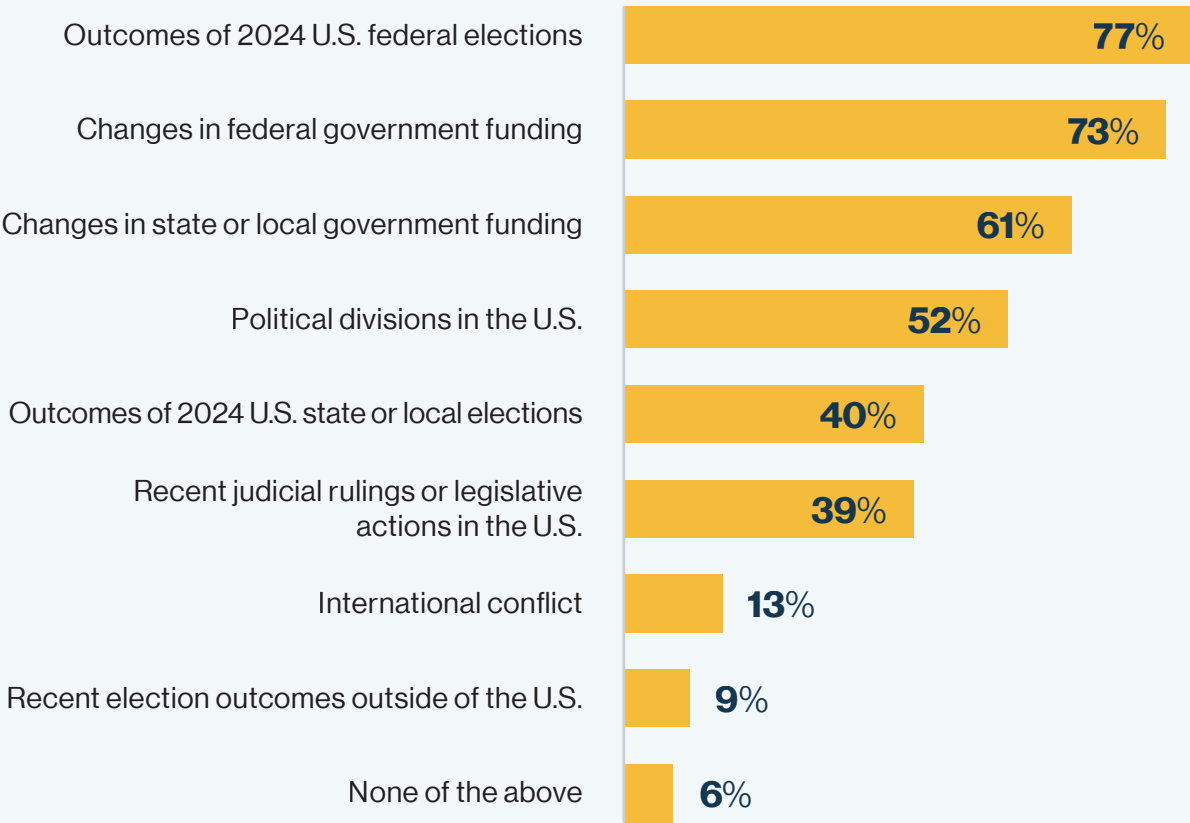


**Changes in federal
government funding**
(62%)



**Political divisions
in the U.S.**
(50%)

FIGURE 3. Elements of the Early 2025 Political Climate That Will Very Likely Affect Nonprofits' Future Work (N=577)



Note: Percentages add up to more than 100 because respondents could select all that apply.

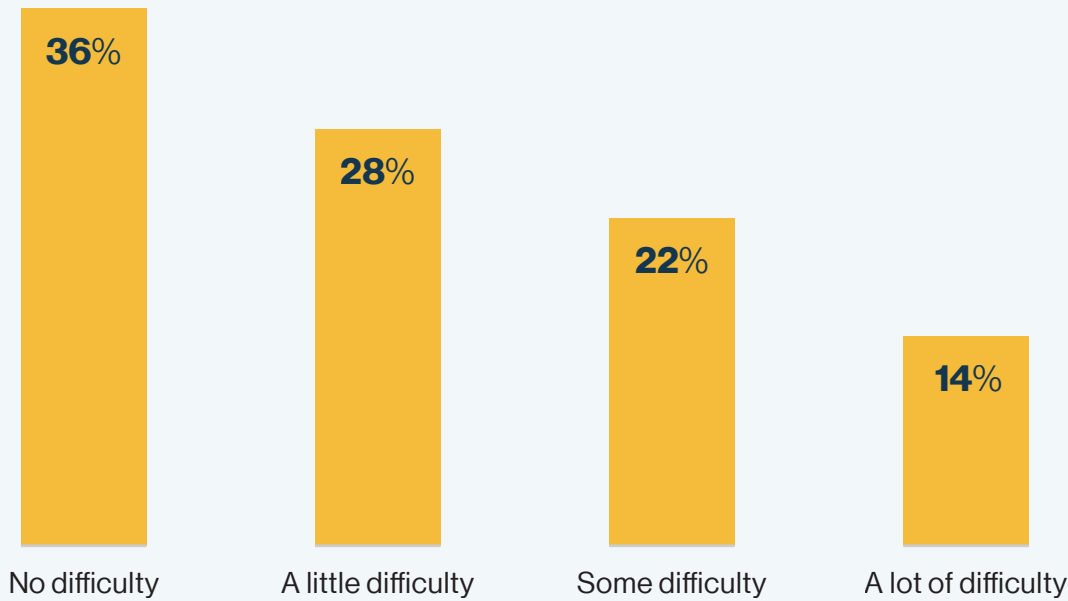
FINDING 1

Many nonprofit leaders comment about the challenges of working in a volatile political climate and express concerns about the safety and well-being of the communities they serve. “The individuals we serve are all within marginalized communities that are being directly impacted by the executive orders, so we are concerned about their safety and livelihoods,” one leader shares. Leaders also find that “social and cultural divisions are increasingly making our work polarizing” and that “the lack of communication from government funders has created a high level of stress and additional work in assessing risk, contingency planning, and internal communications.” One leader reflects on how best to respond to the current moment, saying, “It is tough to do business as usual when our world and our core values are being challenged at every turn. How loudly should we raise our collective voices if doing so puts people at risk, and how might we channel the activism of the past and care for our communities responsibly and for the long haul?”

STAFFING CHALLENGES

Nearly half of nonprofit leaders cite staff-related issues — such as recruitment or retention — as a significant challenge facing their organization, and nearly two thirds of nonprofit leaders report experiencing difficulty filling staff vacancies in the past year (see Figure 4). These findings mirror those from the 2023 and 2024 *State of Nonprofits* reports, as staffing remains a persistent concern for organizations across the nonprofit sector.⁶

FIGURE 4. Nonprofit Leaders’ Levels of Difficulty Filling Staff Vacancies (N=583)



⁶ Buchanan, Broder, and Im, *State of Nonprofits 2023: What Funders Need To Know*; Im, Grundhoefer, and Smith Arrillaga, *State of Nonprofits 2024*.

More than half of nonprofit leaders report that their organization's biggest staffing challenges stem from insufficient funding to recruit, retain, and support their staff. "The loss of pandemic-related funding and changes in the funding landscape have made it difficult to provide opportunities for growth and additional resources for staff," explains one nonprofit leader. More specifically, close to a third of leaders report that the compensation they offer is not competitive with similar roles at other organizations. One nonprofit leader notes that "it is difficult for us to continually meet inflation and cost-of-living demands," while another leader expresses that "I worry about the ability of our staff to continue being undercompensated; if some have to leave for their own financial well-being, we would not be able to replace them at our current salary levels."

Suggestions for Foundation Funders

As they contend with these challenges, some nonprofit leaders suggest that flexible funding from their foundation funders would be most helpful in supporting their work. Many leaders comment that flexible support for core operations — including staff salaries and organizational infrastructure — is critical to their ability to operate effectively, and that larger and less restricted grants can help them manage immediate challenges and plan for the long term. As one nonprofit leader says, "Flexible funding allows organizations to sustain critical programs, respond to policy changes, and invest in infrastructure without constant financial uncertainty."

FINDING

2

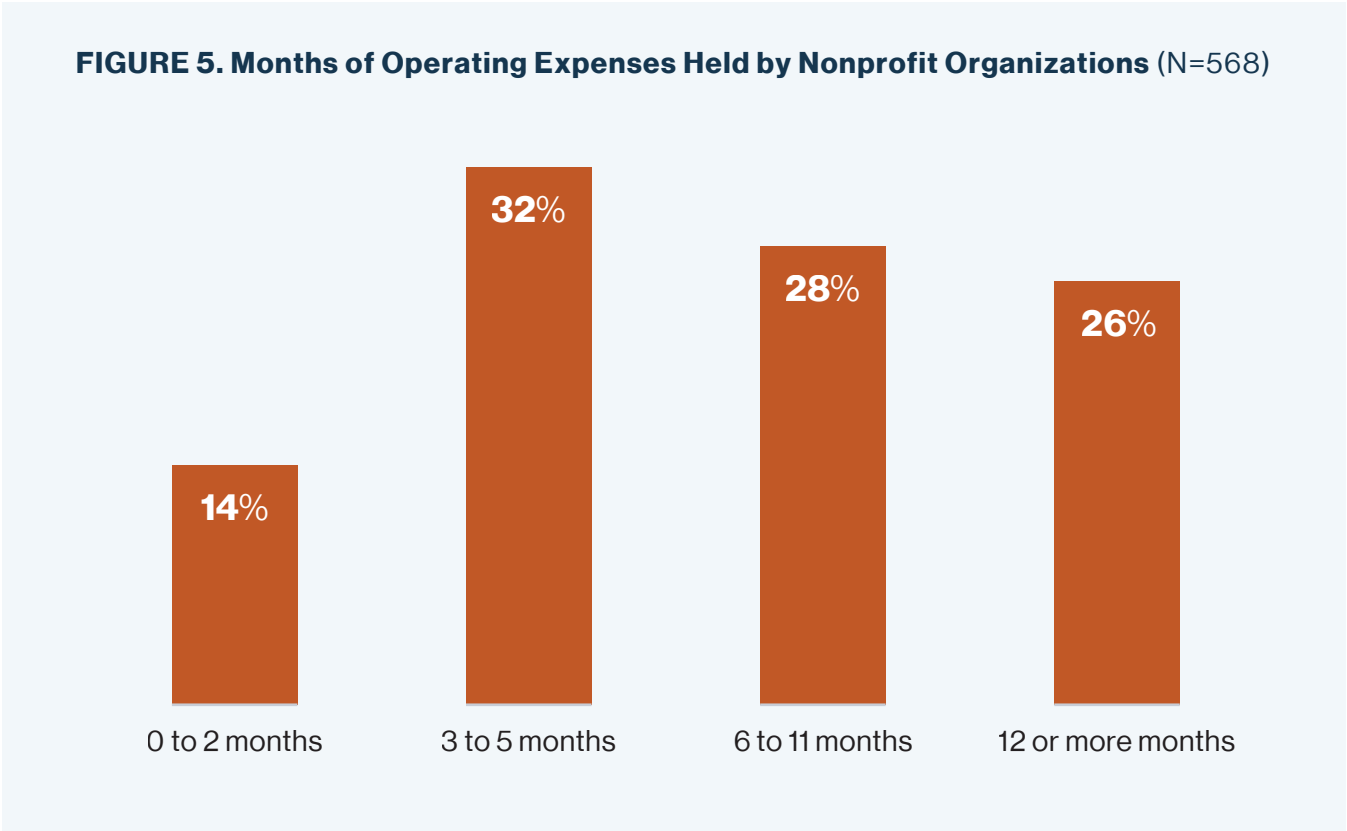
STABLE FINANCES, FUTURE UNCERTAINTY

As in 2024, most nonprofits achieved a balanced budget or a surplus in the last fiscal year and, despite challenging circumstances, anticipate the same for this fiscal year. At the same time, leaders express uncertainty about future funding and concerns about increased costs.

While most nonprofit leaders report having stable finances in the near term, many are concerned about their organization’s long-term financial sustainability.

CURRENT FINANCIAL OUTLOOK

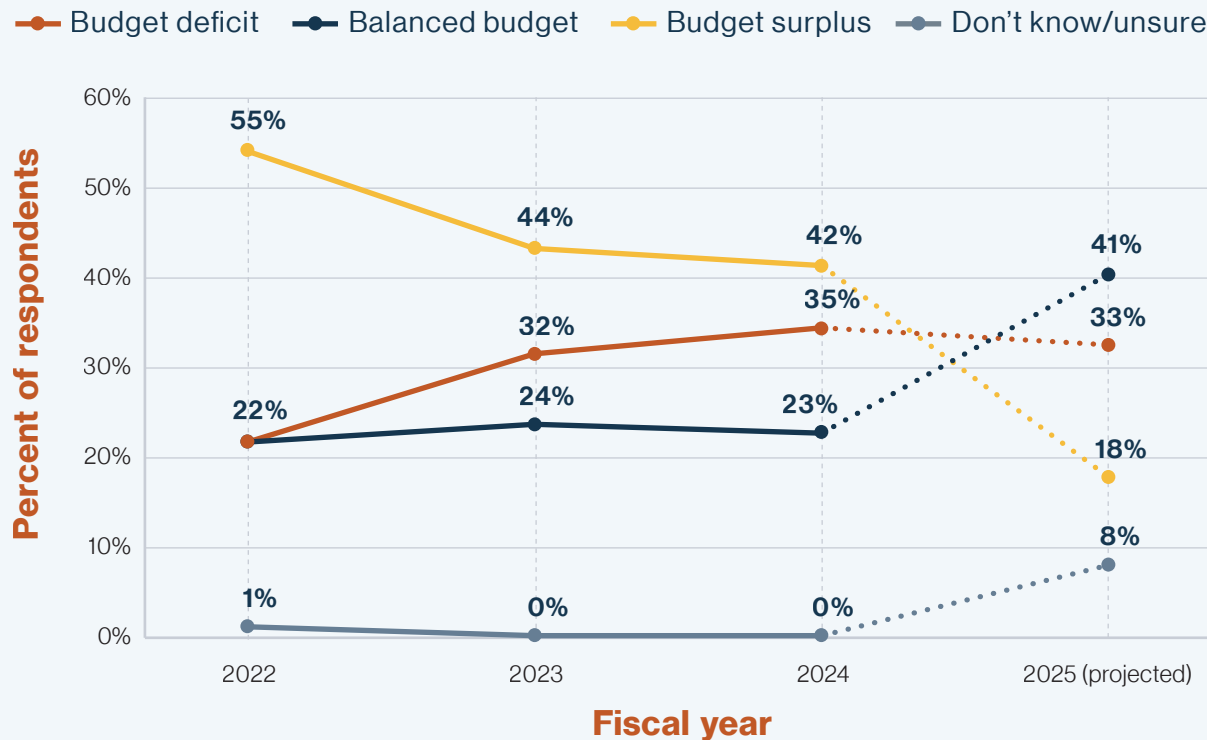
More than half of nonprofit leaders report that their organization has at least six months of operating expenses, which can provide the organization with more flexibility in facing future challenges or opportunities (see Figure 5).



Only about a third of leaders indicate having had a budget deficit in the last fiscal year, with a similar percentage expecting the same in the current fiscal year (see Figure 6).⁷ This pattern is consistent with fiscal outcomes observed in the 2023 and 2024 *State of Nonprofits* reports.

⁷ Budget data from fiscal years 2022 and 2023 are from previous *State of Nonprofits* reports; see Im, Grundhoefer, and Smith Arrillaga, *State of Nonprofits 2024*.

FIGURE 6. Trends in Fiscal Year Budget Status 2022-2024 (Ns=239-583)



** In 2023 and 2024, one to two organizations responded "Don't know/unsure," which rounds to zero percent.*

The majority of nonprofit leaders indicate that, in the past fiscal year, revenue from foundations, individual giving, and fee-for-service sources met or exceeded their organization's projections (see Figure 7).

FIGURE 7. Nonprofit Revenue Performance in the 2024 Fiscal Year (Ns=570-582)**Among nonprofit leaders,**

61% REPORT FOUNDATION REVENUE
met or exceeded expectations



58% REPORT INDIVIDUAL GIVING
met or exceeded expectations

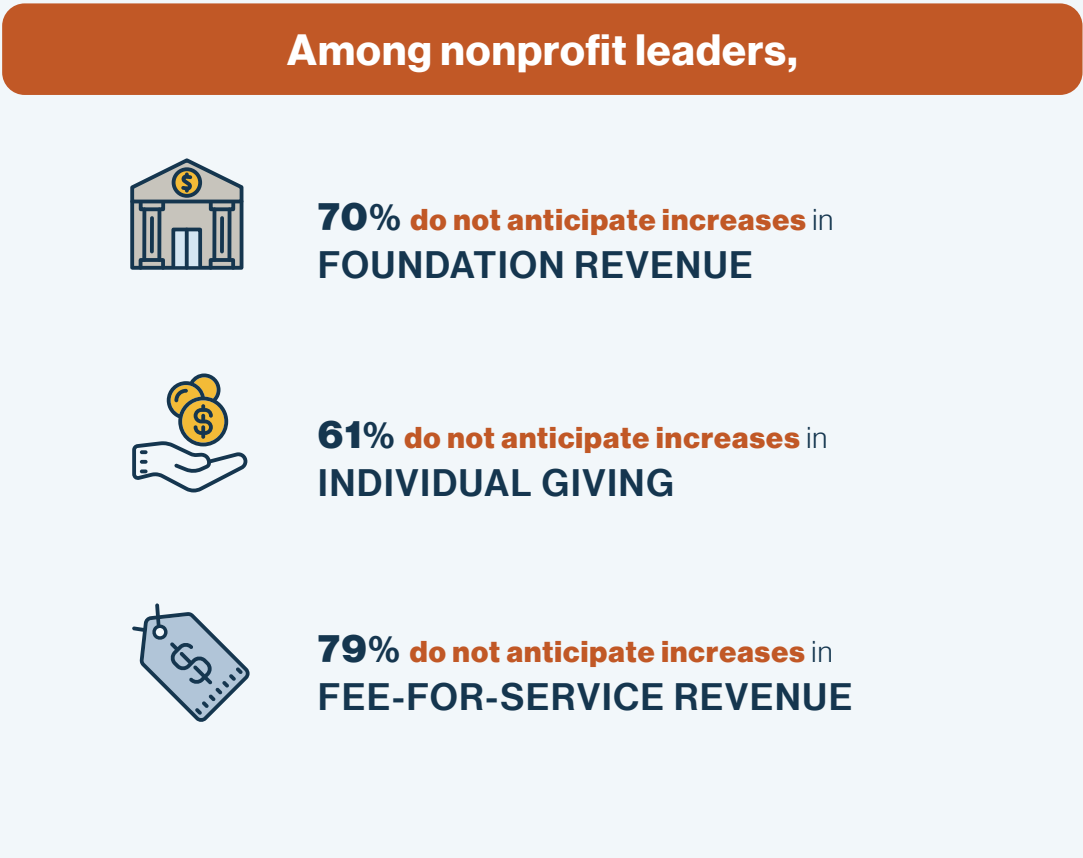


**56% REPORT FEE-FOR-SERVICE
REVENUE**
met or exceeded expectations

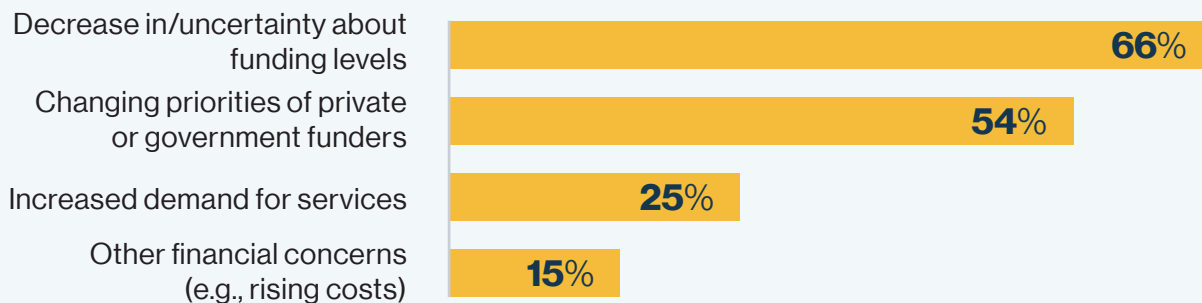
FUTURE FINANCIAL UNCERTAINTY

Looking ahead, however, nonprofit leaders express concerns about their financial outlook. The majority predict that their organizational costs will increase in the current fiscal year. At the same time, most leaders do not anticipate increases in their revenue (see Figure 8). “We do not need more funds for new projects; we need funds for regular day-to-day work and staff time as costs rise with inflation,” says one nonprofit leader. Another leader observes, “Our private funders and individual donors are spread thin, with many causes needing their attention, in addition to concerns about inflation and the potential for economic chaos.”

FIGURE 8. Projections for Nonprofit Revenue Performance in the 2025 Fiscal Year (Ns=567-583)

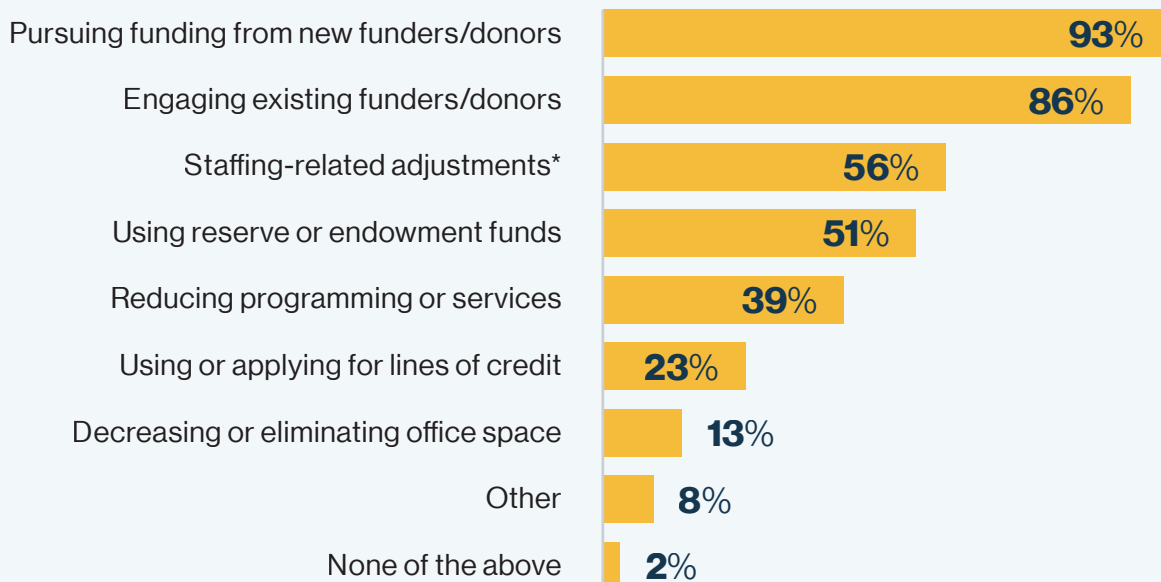


Many nonprofit leaders also express concern about how the political climate may affect their funding (see Figure 9). In response to actions taken by the federal government this year, leaders say that “we are actively seeking measures to untangle ourselves from public funding,” but “we simply do not know whether private foundation grants will keep up.” As one leader states, “Maintaining clarity of mission and financial sustainability over the next few years, in the current political climate, will be an existential challenge.”

FIGURE 9. Nonprofits' Most Pressing Financial Concerns Related to the Political Climate (N=572)

Note: Percentages add up to more than 100 because respondents could select all that apply.

Nonprofit leaders who have concerns about their organization's financial stability are most likely to consider pursuing new sources of funding or strengthening their relationships with existing funders or donors (see Figure 10). Just over half are also considering reducing staff-related costs or drawing from their reserves or endowments.

FIGURE 10. Actions Nonprofit Leaders Are Considering Given Financial Concerns (N=557)

Note: Percentages add up to more than 100 because respondents could select all that apply.

**Note: This category includes reducing staff positions, pausing benefits or compensation, and/or postponing planned increases in staffing-related costs (e.g., compensation increases, hiring).*

FINDING

3

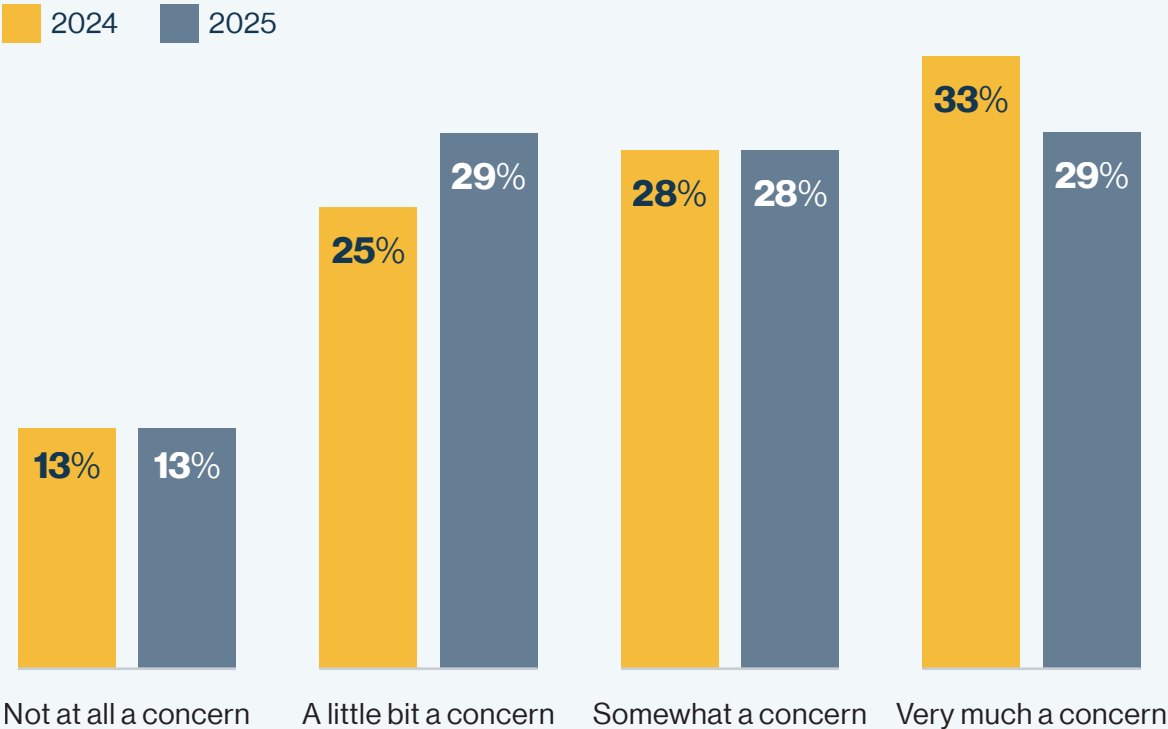
BURNOUT AMONG LEADERS AND STAFF

Perhaps in light of these pressures, nearly all nonprofit leaders express concern about their own burnout and report that burnout is affecting their staff.

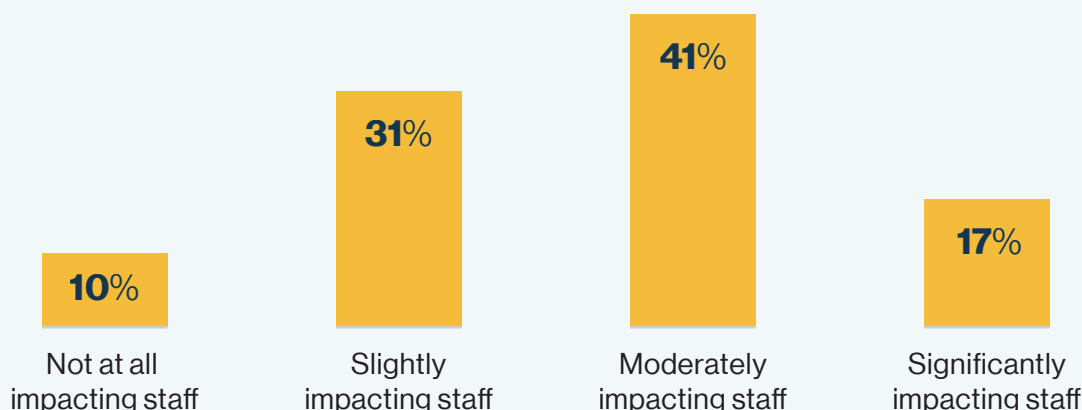
FINDING 3

Given the challenges nonprofit leaders report encountering — including ongoing financial uncertainty, staffing difficulties, and a volatile political climate — it is perhaps unsurprising that many leaders are concerned about burnout. Nearly 90 percent of leaders report some level of concern about their own burnout (see Figure 11). This percentage remains essentially unchanged from 2024. A similar percentage note that burnout is affecting their staff (see Figure 12). “The need for our services far outweighs our ability to meet the need in a way that does not completely overwhelm our staff and burn them out,” says one leader.

FIGURE 11. Nonprofit Leaders’ Levels of Concern About Their Own Burnout
(N=239-584)



Note: Percentages may not add up to 100 due to rounding.

FIGURE 12. Extent to Which Burnout Is Currently Impacting Nonprofit Staff (N=584)

Note: Percentages may not add up to 100 due to rounding.

Nonprofit leaders explain how burnout can stem from both the direct pressures of day-to-day work as well as the broader political climate. “Staff at social and racial justice organizations are tired. The intensity of trying to protect communities during COVID rolled into trying to protect those communities from a rising right-wing backlash,” says one leader. “This goes beyond burnout — it is a psychic and physical drain on folks’ ability to function.” Another leader reflects that “prior to November election results, our biggest challenge was just the day-to-day operations of running our organization; the day after the election, even though we are a nonpartisan organization, the greatest challenge became staff trauma.”

Leaders also describe how burnout affects their organizational capacity and ability to serve their communities. “There is a high level of burnout in the social services and early childhood education field, which leads to a certain level of turnover,” notes one nonprofit leader. “For our direct service staff, it is hard for us to have capacity for enough planning and reflection time for the staff to be able to feel supported and able to carry out their work.” Other leaders comment that “[b]urnout from the 2016-2020 presidential administration and COVID, as well as having to constantly hire and train staff, has created an internal strain that makes it difficult to address the rapid response needs coming out of the current presidential administration” and that “a good number of effective community leaders will have to leave nonprofit work to protect their own health.”

While burnout is affecting nonprofits across the sector, some leaders report experiencing its effects more acutely. Leaders identifying as people of color are slightly more likely to indicate that burnout is significantly impacting their staff and that their own burnout is very much a concern.⁸ Nonprofit leaders also voice concerns about the well-being of staff members who identify as members of historically marginalized communities. “The majority of my staff is women and people of color, with many immigrants and several transgender team members; their identities are being attacked everywhere in

⁸ These statistical relationships are of a small effect size.

the media,” describes one nonprofit leader. Another leader says, “Our biggest challenge is the morale of our staff and partners as they are trying to keep work moving forward when many feel like their identity is being threatened.”

These findings underscore the ways in which broader sociopolitical pressures can intensify burnout for nonprofit leaders and staff, especially those whose identities may be directly under attack.

IN THEIR OWN WORDS: HOW BURNOUT AFFECTS NONPROFITS

Nonprofit leaders share many reflections on how burnout affects their organizations, such as those below:

“A big challenge is not having enough time for staff and board members to reflect, assess, plan, dream, and celebrate victories. This constant daily grind and inability to come up for air and contribute to the organization’s vision and mission creates burnout and a revolving-door environment.

“We are doing our best to find innovative partnerships to meet gaps in service and funding. However, these can be difficult to sustain over time. I do worry about staff, and even donor, morale if the overall need in our community continues to grow and our ability to meet it does not.

“Staff burnout and retention are concerns due to heavy workloads and grant-dependent positions. Project grants are wonderful, but each new initiative increases the demand on staff and resources.

“With funding cuts over the past several years and uncertainty around funding through our government grants, we are unable to fill open positions or make needed technology updates. We are asking staff to do much more and do not have the financial resources to invest in technology that would enable our staff to be more efficient. These stressors are compounded by the fact that we are seeing more clients that need more services. While we have a great culture and little turnover, I am concerned about employee burnout.

CONCLUSION

The nonprofit sector is being called upon to meet rising needs in a time of profound uncertainty. In early 2025, nonprofit leaders report navigating an increasingly complex landscape shaped by political forces, funding concerns, and staffing challenges. While most nonprofits achieved a balanced budget or surplus last year, many leaders anticipate rising costs without corresponding increases in revenue. To prepare, they are considering difficult tradeoffs — including drawing from reserves and reducing staff-related costs. Leaders also express concern about burnout among both staff and leadership, especially for those who identify as members of historically marginalized communities.

In light of these challenges, funders and donors have a critical opportunity to reflect on how they can best support nonprofit organizations as they work to address some of society's most pressing issues. Proactive communication, flexible funding models, and support for well-being can be instrumental in helping nonprofit organizations navigate this evolving environment.

We hope the insights in this report contribute to a deeper understanding of the realities nonprofit leaders are facing and help inform conversations and decisions that shape the future of the sector.

APPENDIX A: METHODOLOGY

The findings presented in this report are based on survey data collected, analyzed, and interpreted by the Center for Effective Philanthropy (CEP). Leaders of 585 nonprofit organizations completed the survey. Information detailing the process for collecting and analyzing the data is below.

SAMPLE CHARACTERISTICS

In February 2025, CEP invited 897 nonprofit leaders from the Nonprofit Voice Project to participate in a survey exploring their experiences in the past year and their outlooks on the coming year.⁹ Completed surveys, defined as having at least 80 percent of the core questions answered, were received from 575 nonprofit leaders, and partially completed surveys, defined as having at least 50 percent of the core questions answered, were received from 10 leaders (see Table 1). In appreciation for their time, each survey respondent was provided with a \$30 gift card to a retailer of their choice.

Table 1. Survey Response Rates

Survey period	Number of eligible respondents	Number of completed/partial responses	Survey response rate
February 3, 2025 – February 21, 2025	893	585	66%

SURVEY ADMINISTRATION

The survey was fielded online for a three-week period, from February 3 to February 21, 2025. Nonprofit leaders were sent an email a week before the launch of the survey to introduce them to this research study. On the survey launch date, participants were sent a brief email that included a description of the study’s purpose, a statement of confidentiality, and an individual link to the survey, preventing respondents from completing the survey more than once.¹⁰ The survey was distributed in English and was administered through Qualtrics. Participants were sent up to five reminder emails.

ORGANIZATION DETAILS

More than 60 percent of the responding organizations have a local geographic scope, and more than 80 percent have a direct service component. Leaders represented organizations that averaged 42 staff members but ranged from one to 2,500 staff members. The areas tied with the highest number of organizations represented (29 percent of the responding organizations each) were the South and West U.S. census regions.¹¹

⁹ We did not use a probability methodology to construct this sample. See the full details on the sample population and sample creation process on our website [here](#).

While the survey was being fielded, four leaders were removed from the list of eligible respondents due to their departure from the organization or their being on extended leave/sabbatical throughout the survey period.

¹⁰ Participants were also informed that a screen reader option was available if needed.

¹¹ U.S. Census Bureau, “Census Bureau Regions and Divisions With State FIPS Codes,” https://www2.census.gov/geo/pdfs/maps-data/maps/reference/us_regdiv.pdf.

Leaders were invited to select all that apply for their organization's key focus areas. The top focus areas were the following:

- Human services (44 percent)
- Education (41 percent)
- Public, societal benefit (27 percent)
- Social justice (27 percent)

Table 2. Organizations’ Operating Budgets in the Last Fiscal Year (N=571)

	Mean	Median	Minimum	Maximum
Operating budget	\$5,947,668	\$1,900,000	\$45,000	\$300,000,000

RESPONSE BIAS

Characteristics of responding and nonresponding leaders and organizations were analyzed to determine whether participants were more likely to answer the survey based on staff size, annual expenses, annual revenue, the geographic region where their organization is located, the gender of the nonprofit leader, or whether the nonprofit leader identified as a person of color.¹² The only statistically significant difference identified between survey respondents and nonrespondents was that nonprofit leaders who identified as a person of color were slightly less likely to respond to our survey compared with those who did not identify as a person of color.¹³

SURVEY INSTRUMENT

This research was part of a larger survey that included other topics, including staffing, finances, and relationships between nonprofits and foundation funders. The survey contained 40 items.

A copy of the survey instrument can be found on our website [here](#).

QUANTITATIVE ANALYSIS OF SURVEY DATA

The unweighted quantitative survey data from nonprofit leaders were examined using descriptive statistics and chi-square tests. An alpha level of 0.05 was used to determine statistical significance for all testing conducted for this research. Effect sizes were examined for all analyses. Unless otherwise noted, only analyses with medium or large effect sizes are reported.

¹² Chi-square tests were used to compare respondents and nonrespondents, and effect sizes were calculated.

¹³ This statistical relationship is of a small effect size.

QUALITATIVE ANALYSIS OF SURVEY DATA

Thematic and content analyses were conducted on the responses to the open-ended items in the survey. A codebook was developed for each open-ended item with more than 300 responses by using Claude, a large language model developed by Anthropic, to create a preliminary list of themes based on response text. Those themes were then checked for accuracy and edited, if needed, by a member of CEP's Research team. All final decisions about codebook themes were made by a member of CEP's team. Each coder used the codebook when categorizing responses, to ensure consistency and reliability. Using MAXQDA, a software program for qualitative and mixed-methods data analysis, one coder coded all responses to a survey question, and a second coder coded 15 percent of those responses. An average interrater reliability (IRR) level of at least 80 percent was achieved for each codebook. Our IRR across items ranged from 93 percent to 95 percent.

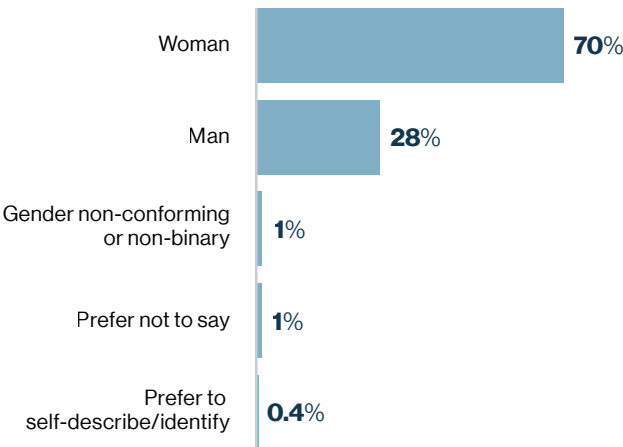
Quotations from the open-ended survey responses are included in this report. These quotations have been selected to be representative of themes in the data.

RESEARCH LIMITATIONS

As is true of survey research in general, it is not possible to draw causal conclusions from these data. We are not able to know whether the leaders who chose to respond to this survey represent organizations that have spent more time thinking about the topics covered in this report. This should be kept in mind when generalizing these findings.

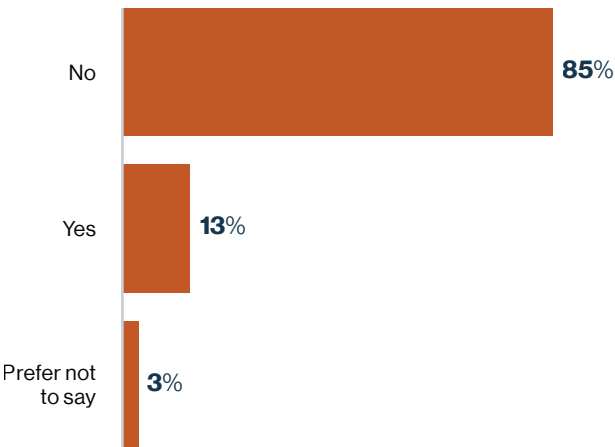
APPENDIX B: SURVEY RESPONDENT DEMOGRAPHICS

How do you describe yourself? (N=566)



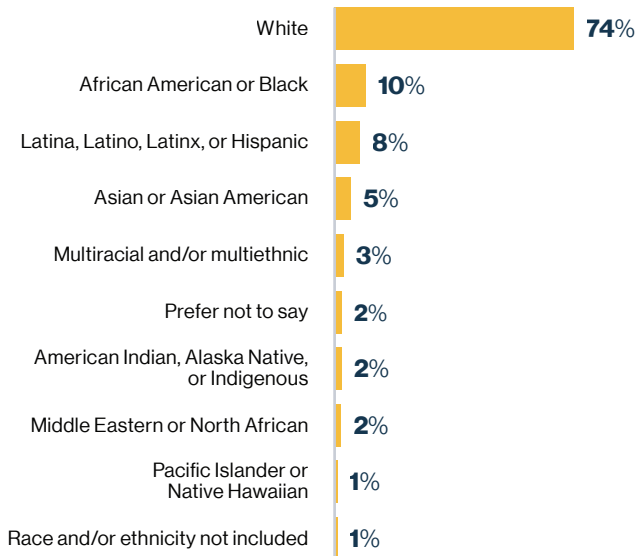
Note: Percentages add up to more than 100 because respondents could select all that apply.

Do you identify as a member of the LGBTQ+ community? (N=568)



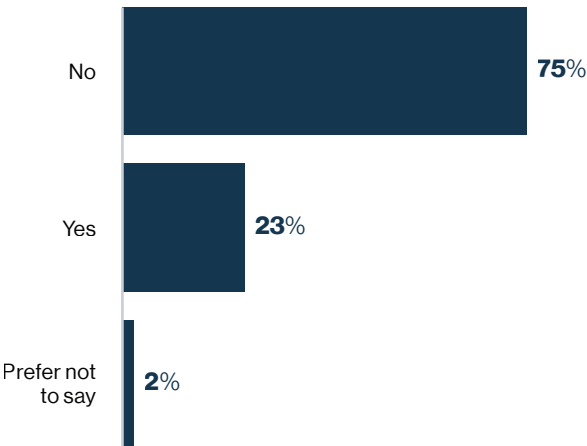
Note: Percentages may not add up to 100 due to rounding.

How would you describe your race and/or ethnicity? (N=566)



Note: Percentages add up to more than 100 because respondents could select all that apply.

Do you identify as a person of color? (N=564)





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