

Minnesota Nonprofit Economy Report

COVID-19 IMPACT UPDATE 3.0

December 2020





COVID-19 IMPACT AND CIVIL UNREST UPDATE EXECUTIVE SUMMARY

Overview of 2020 Surveys of Minnesota's Nonprofit Economy

This is the third and final report in a series of 2020 assessments of challenges to Minnesota's nonprofit economy, with over 1,000 respondents across three surveys. The principal use of these research reports is for individual organizations to put their situation in perspective for decision-making and communications with their governing board, supporters, and employees.

The first survey was part of a national survey of nonprofits MCN co-sponsored on April 9 by the Federal Reserve Bank to assess the impact of COVID-19 shutdowns on the work of the nonprofit section of the U.S. economy. That report was issued on May 8 ([available here](#)).

MCN distributed a second survey to Minnesota nonprofits on May 21, tracking the impacts of developing events on Minnesota's nonprofits and the communities they serve. That report was issued on July 31 ([available here](#)).

MCN distributed the third survey on September 23. Key survey results and related developments include:

- While a majority of organizations report ongoing disruption, an increasing share are reporting the level of disruption is manageable (42 percent). Arts organizations continue to report the highest levels of disruption (76 percent reporting significant levels of disruption)
- For the most part nonprofits have adapted to this constrained environment, with four most common management changes: augmented programming or service delivery (54 percent), a reduction in programming (48 percent), reduction in budget (42 percent), and increased fundraising (38 percent).
- Only 2 respondent organizations ceased operations in the previous 3 months (1 percent of respondents), and only 14 organizations reported ceasing operations in the July survey. 5,300 Minnesota nonprofit organizations received forgivable Paycheck Protection Program loans from the Small Business Administration through the CARES Act, which provided crucial support and for the Spring and Summer offset a substantial amount of otherwise catastrophic revenue loss.
- Out of a total Minnesota nonprofit workforce of 391,850 at the end of 2019, by the end of September 2020, 153,000 had filed an initial claim for unemployment insurance with the Minnesota Department of Employment and Economic Development (DEED), which is equivalent to 40 percent of the nonprofit workforce. (Filing an initial claim for unemployment could mean reduced hours or temporary furlough and not necessarily a total job loss.) DEED reported just over 350,000 nonprofit employees at the end of June, a 10 percent reduction in the overall nonprofit workforce from the first to the second quarter of 2020.
- Nonprofit managers are increasingly concerned that government agencies and private philanthropies will not have the ability to carry through on funding levels in an upcoming recession.



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TOP CONCERNS OF AND OPPORTUNITIES FOR MN'S NONPROFIT SECTOR

Two questions address the top-level concerns of and opportunities for Minnesota's nonprofit sector in the near term:

1. What do you see are the top three issues or challenges that the state of Minnesota needs to confront now and over the coming three years?

One respondent succinctly summarized the most consistent themes: "Addressing systemic racism; Ensuring funding and financial support gets to the agencies and partners that are best positioned to serve the communities who need it most; Shortfall in federal and state funding - how do we make it up?"

Analysis of qualitative responses showed the following were the most commonly cited issues or challenges facing the state of Minnesota:

- Health (public health, access to health care, COVID-19) (68 percent)
- Equity (61 percent)
- Racial Equity, Systemic Racism (57 percent)
- Adequate Funding for Community Services (29 percent)
- Education (17 percent)
- Housing (13 percent)

Of top concern is the public's general health, and in particular, racism as a public health crisis facing Minnesota. The nonprofit sector has an important role as part of a society-wide effort to address systemic racial disparities and remove structural barriers to health and economic well-being in Black communities, Indigenous communities, and communities of color.

The COVID-19 pandemic has elevated what has already been established, and vigorously declared by Black, Indigenous, and people of color (BIPOC): that the fundamental elements needed to thrive – health, safety, economic security, the ability to influence the decision-making of institutions that impact one's family and community – are unequally available.

2. As you look to 2021, what do you foresee is the outlook for your nonprofit organization and communities most impacted by your work?

Increased Demand and Funding Unpredictability

- "Demand for our services will increase while our ability to respond will decrease due to dwindling financial resources."
- "The need for our services continues to increase, and fundraising becomes more important"
- "Funding is a concern and being able to continue providing our services with a potential increased need for scholarships and decrease of funding."



TOP CONCERNS OF AND OPPORTUNITIES FOR MN'S NONPROFIT SECTOR (continued)

Disparate Population Impacts

- “It will be bleak for our communities, who are largely immigrants, BIPOC, and those living in poverty. We will continue to try to meet the basic needs of individuals in our communities, despite pushing a rock up a hill. We know that there are systemic barriers and policies that will continue to perpetuate these inequities, which is why we have a new strategic focus to make policy and advocacy a part of our organization.”
- “The communities most impacted by our work — Black, Indigenous & People of Color — are struggling, and will continue to do so. COVID is exacerbating existing, deeply entrenched racial disparities.”
- “We are leaving a whole demographic behind due to a lack of digital literacy or English skills.”

Anticipating that 2021 will be even more challenging

- “I believe 2021 will be tougher than 2020.”
- “I am not sure our organization will be around beyond early 2021.”
- “We are still working through 2021 budget forecasts, but we anticipate a reduction of funding around 25-50 percent.”
- “Concerned we will not have growth in 2021, but we may be able to survive. 2022 could be an issue if no changes.”
- “We are even more concerned about 2022.”
- “Our plan is to reopen to the public in May 2021, but I’m beginning to doubt the feasibility of that.”



LEVELS OF REPORTED DISRUPTION AND FINANCIAL DISTRESS

MCN’s three surveys assessed several aspects of overall financial health and stress both for the sample as a whole and for five major nonprofit activity areas. 531 Minnesota nonprofits responded to the first survey, 259 to the second (distributed 4 days before the murder of George Floyd), and 207 to the third.

In response to the first question — **At this point in time, what level of disruption is COVID-19 having on your organization?** — a majority of organizations continued to report significant disruption, yet a growing percentage began to see it as more manageable.

Nonprofits report high levels of disruption of operations, in-person service delivery, and revenue generating activities, with over half indicating the current levels of disruption are significant and 42 percent saying the disruption is manageable.

	Statewide (531 responses) April 9 - 13	Statewide (259 responses) May 21 - June 21	Statewide (207 responses) September 23 - October 14
No disruption	-	1%	1%
Minimal disruption	1%	1%	5%
Some disruption, but manageable	18%	32%	42%
Significant disruption, but expect to bounce back quickly after things settle	41%	24%	30%
Significant disruption, expect recovery to be difficult	40%	42%	22%
Unknown	1%	-	-

Performing arts organizations continue to report the highest levels of disruption anticipating recovery will be difficult (41 percent), followed by education (27 percent). Many arts organizations rely on public gatherings for performances, and many education nonprofits such as colleges and universities rely on board income from residential students.

	Arts 1.0 (60)	Arts 2.0 (39)	Arts 3.0 (34)
No disruption	-	-	-
Minimal disruption	-	-	-
Some disruption, but manageable	7%	21%	24%
Significant disruption, but expect to bounce back quickly after things settle	27%	10%	35%
Significant disruption, expect recovery to be difficult	67%	69%	41%



LEVELS OF REPORTED DISRUPTION AND FINANCIAL DISTRESS (continued)

Disruption by activity area continued from previous page.

	Education 1.0 (53)	Education 2.0 (20)	Education 3.0 (15)	Human Services 1.0 (287)	Human Services 2.0 (85)	Human Services 3.0 (60)
No disruption	-	-	-	-	-	2%
Minimal disruption	2%	-	-	1%	1%	5%
Some disruption, but manageable	17%	30%	60%	19%	35%	48%
Significant disruption, but expect to bounce back quickly after things settle	43%	40%	13%	45%	25%	30%
Significant disruption, expect recovery to be difficult	36%	30%	27%	34%	39%	15%
Unknown	-	-	-	1%	-	-

	Health 1.0 (44)	Health 2.0 (18)	Health 3.0 (15)	Public Society Benefit 1.0 (63)	Public Society Benefit 2.0 (16)	Public Society Benefit 3.0 (15)
No disruption	-	-	-	-	13%	-
Minimal disruption	-	-	7%	2%	-	13%
Some disruption, but manageable	34%	39%	53%	19%	50%	60%
Significant disruption, but expect to bounce back quickly after things settle	30%	39%	27%	43%	31%	20%
Significant disruption, expect recovery to be difficult	48%	22%	13%	35%	6%	7%
Unknown	-	-	-	1%	-	-



LEVELS OF REPORTED DISRUPTION AND FINANCIAL DISTRESS (continued)

Each survey asked participants to describe how demand for services, staffing, and expenses have shifted, and how they anticipate five major revenue sources changing. Organizations have consistently indicated that demand for services has increased (39 percent) while ability to provide services has decreased (44 percent).

	Demand for Services 1.0	Demand for Services 2.0	Demand for Services 3.0	Ability to Provide Services 1.0	Ability to Provide Services 2.0	Ability to Provide Services 3.0
Decreased	26%	30%	27%	50%	49%	44%
Anticipated Decrease	8%	7%	6%	19%	17%	15%
No Change	10%	14%	15%	12%	18%	20%
Anticipated Increase	19%	15%	11%	10%	8%	7%
Increased	36%	32%	39%	8%	8%	12%
N/A	1%	2%	3%	1%	1%	1%
TOTAL	100%	100%	100%	100%	100%	100%

	Staffing Levels 1.0	Staffing Levels 2.0	Staffing Levels 3.0	Expenses 1.0	Expenses 2.0	Expenses 3.0
Decreased	31%	24%	27%	10%	19%	19%
Anticipated Decrease	18%	10%	11%	15%	16%	13%
No Change	42%	56%	43%	31%	24%	21%
Anticipated Increase	3%	5%	4%	21%	16%	16%
Increased	4%	5%	11%	22%	24%	30%
N/A	2%	-	3%	1%	-	1%
TOTAL	100%	100%	100%	100%	100%	100%



LEVELS OF REPORTED DISRUPTION AND FINANCIAL DISTRESS (continued)

Nonprofit demand continued from previous page.

	Fee for Service 1.0	Fee for Service 2.0	Fee for Service 3.0	Philanthropic Funds 1.0	Donations from Individuals 2.0	Donations from Individuals 3.0
Decreased	25%	26%	17%	20%	22%	20%
Anticipated Decrease	14%	12%	7%	31%	29%	18%
No Change	29%	26%	36%	16%	18%	25%
Anticipated Increase	5%	3%	5%	20%	9%	11%
Increased	2%	2%	5%	7%	15%	19%
N/A	24%	30%	30%	6%	6%	7%
TOTAL	100%	100%	100%	100%	100%	100%

	Grants from Foundations or Corporate Giving 2.0	Grants from Foundations or Corporate Giving 3.0	Government Funds 1.0	Government Funds 2.0	Government Funds 3.0
Decreased	17%	19%	7%	13%	15%
Anticipated Decrease	27%	18%	14%	14%	11%
No Change	24%	24%	27%	24%	20%
Anticipated Increase	11%	9%	28%	10%	9%
Increased	16%	21%	6%	19%	25%
N/A	5%	10%	18%	19%	20%
TOTAL	100%	100%	100%	100%	100%

Comparing nonprofit activity area responses from past three surveys: April 9-13 responses, May 21 – June 1, 2020 responses, and September 23 – October 14 respectively



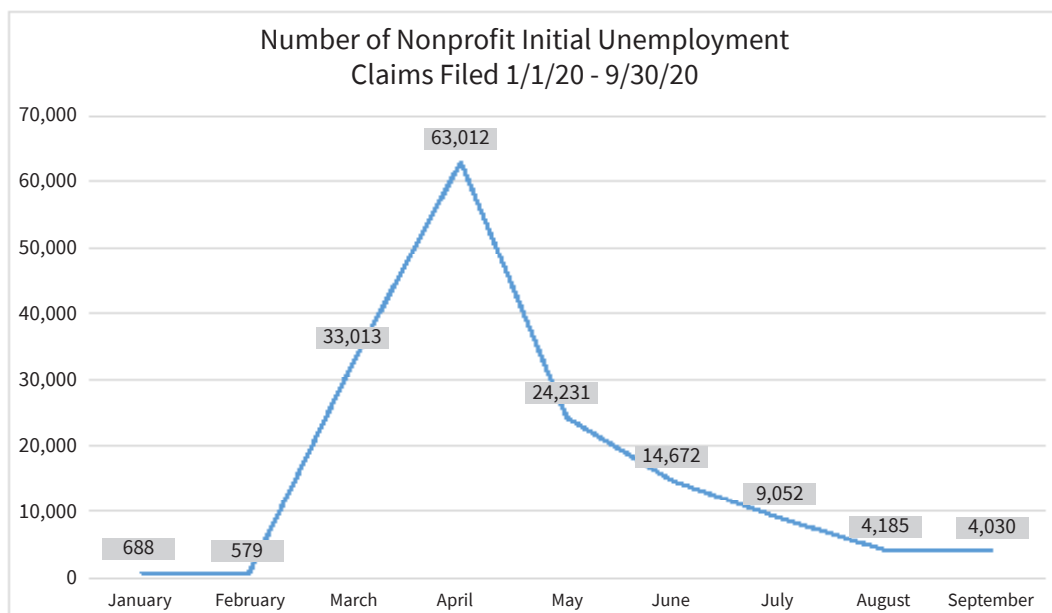
IMPACTS ON NONPROFIT EMPLOYMENT

Minnesota Governor Tim Walz issued Emergency Executive Order 20-20 on March 26, 2020, mandating that employees work from home if they were able to do so, in response to the COVID-19 pandemic. This action was recommended by public health experts for the health and safety of the state’s population, and began a scramble by all employers to assess what services could continue, and how, with each organization’s ability to continue productive use of their workforce varying based on their particular activity area.

The Bureau of Labor Statistics reported that by September 22.7 percent of employed persons in the U.S. teleworked for pay specifically because of the coronavirus pandemic. It appears that a similar proportion of nonprofit workplaces are working remotely, and an increasing number of small organizations are converting permanently at the end of their leases.

Out of a total Minnesota nonprofit workforce of 391,850 at the end of 2019, by the end of September 2020 more than 153,000 had filed an initial claim for unemployment insurance with DEED (the Minnesota Department of Employment and Economic Development). In other words, 40 percent of nonprofit employees experienced an employment event that qualified them to file an initial claim for unemployment at some point between March and September (such as reduced hours, temporary furlough, or job loss).

Overall DEED employment numbers indicate a 10 percent reduction in the nonprofit workforce from the first to the second quarter of 2020, with just over 350,000 nonprofit employees remaining at the end of June. These layoffs, along with overall employment uncertainty, work from home orders, school age and children of employees kept home, and risks of COVID-19 infection for front line workers have contributed to stress and morale issues.



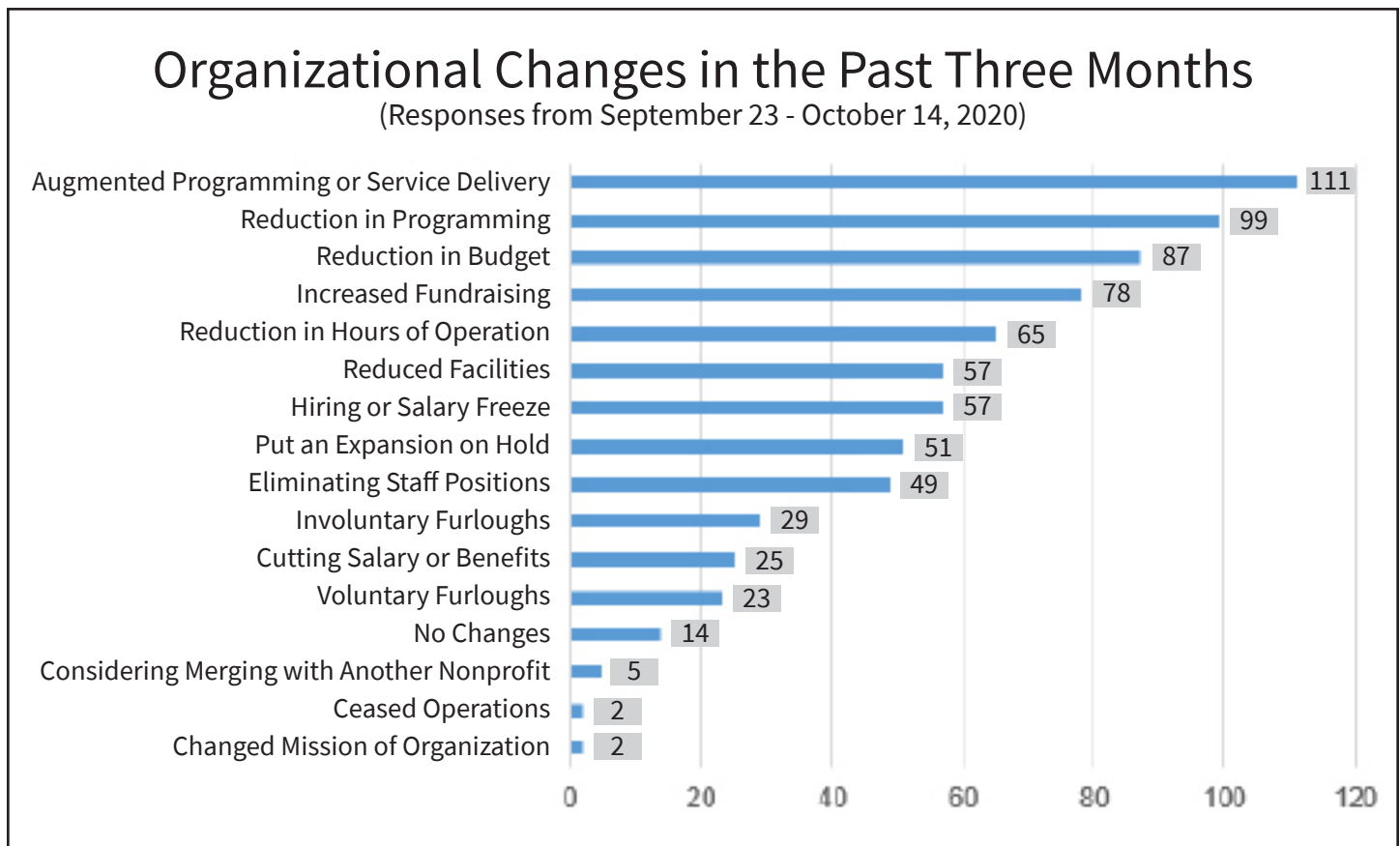
Graph depicts the number of nonprofit-employee initial claims filed for unemployment insurance in Minnesota, based on data provided by the Minnesota Department of Employment and Economic Data



PROGRAMMATIC AND MANAGEMENT CHANGES

The third survey asked organizations to indicate what changes to programming or methods of service delivery they made in the previous three months (such as converting in-person services to online). Top changes reported:

- Augmented Programming or service delivery (54 percent)
- Reduction in Programming (48 percent)
- Reduced budget (42 percent)
- Increased fundraising (38 percent)
- Reduced hours of operation (31 percent)



The third survey also asked organizations to describe changes to programming or methods of service delivery in the last three months. The following examples illustrate the main themes of remote work, reconfigured reimbursement mechanisms, and client interaction:

- “Converted some services to online. Have adjusted and expanded hours to serve youth all-day during distance learning. Serving additional meals. Increased staffing ratios.
- “All of our programs are planned to be online through March 2021.”

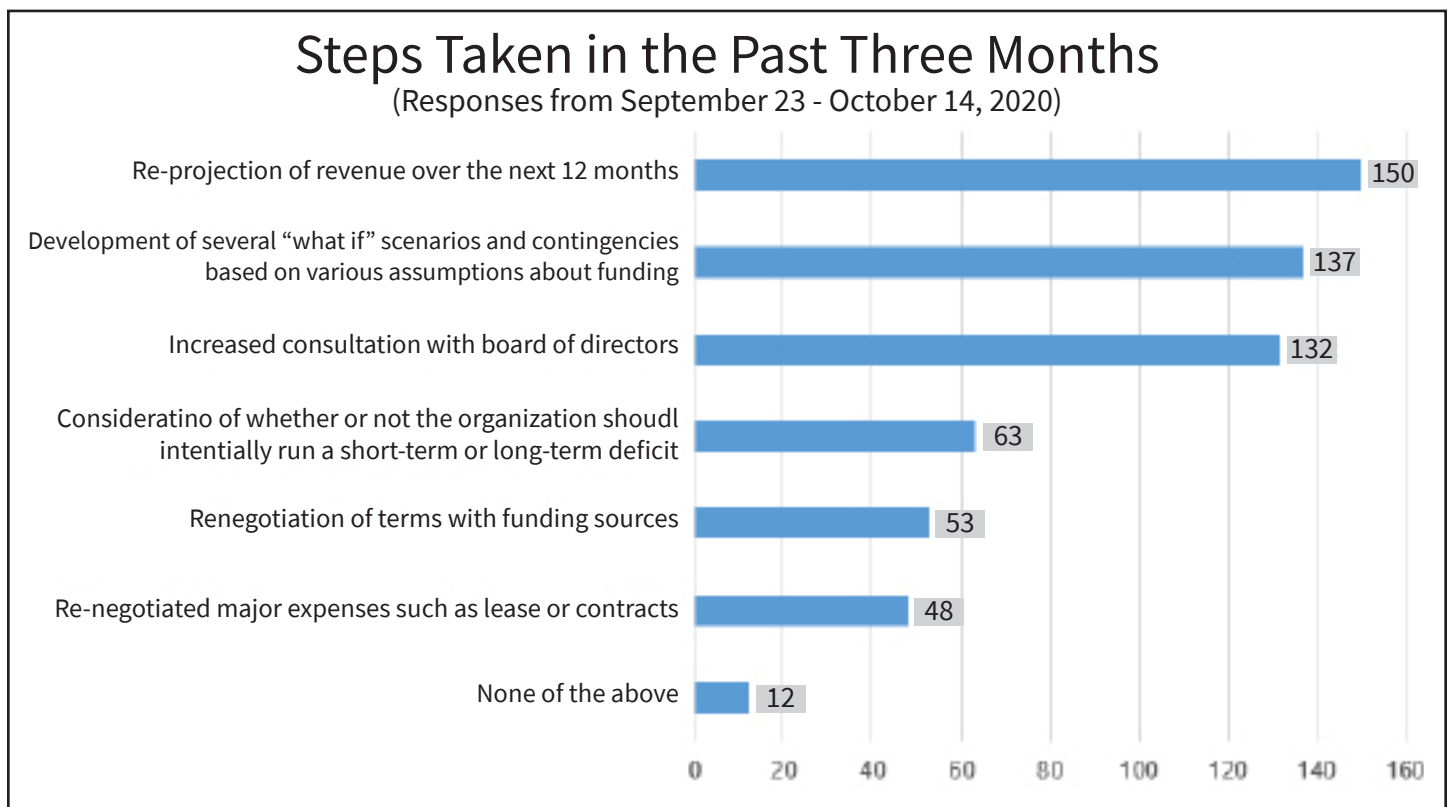


PROGRAMMATIC AND MANAGEMENT CHANGES (continued)

- “We have shut down all programming except essential services like case management and advocacy, we have reduced the occupancy of our [domestic violence] shelter to 50%, we have gone online with our Indigenous First gift shop, we can now only do limited transportation, our children’s program is disrupted.”
- “We are still limited by state mandates on the % of occupancy for most areas of our business.”
- “One of the challenges for us is to figure out how we can run our programs at a smaller capacity while basically maintaining the same operating costs. It’s not viable long-term. The majority of our costs are salaries and wages and if we start to cut pay and/or let more people go, we won’t be able to deliver our programs (and what we’ve promised to funders) once COVID impacts are lessened.”

When asked what steps have been taken in the past three months, nonprofit respondents indicated:

- Re-projection of revenue over the next 12 months (72 percent)
- Development of several “what if” scenarios and contingencies based on various assumptions about funding (66 percent)
- Increased consultation with the board of directors (64 percent)
- Consideration of whether or not the organization should run a short-term or long-term deficit (30 percent)
- Renegotiation of terms with funding sources (26 percent)





ADJUSTMENTS BY GOVERNMENT AND PHILANTHROPIC FUNDERS

The second and third surveys asked respondents to describe supplemental funding or additional flexibility implemented by government agencies, which fell into reduced application or reporting requirements, extended deadlines, and greater flexibility for grant conditions. For organizations reporting supplemental funding or additional flexibility from government funders, the most commonly cited source was federal CARES Act funding, especially Paycheck Protection Program loans through the Small Business Administration.

- Respondents reported some flexibility in the timeline in which the funding is spent and reduced complexity of applications, but the reporting requirements are still burdensome in terms of information demands and time
- Some respondents reported receiving additional or supplemental funding from state and federal agencies beyond PPP loans.
- “There has been a notable simplification of the application processes to state departments, sometimes alarmingly so.”
- “We have received supplemental funding from government and foundations, but most of it is extremely restricted by time and purpose with burdensome application and reporting requirements. The time required to report back to funders is significantly inhibiting our ability to plan for the future and coordinate with large-scale efforts. We eventually stopped applying for CARES Act funding even though we were a good fit because the expectations to quickly ramp up services, end by 12/31/2020, and manage invoicing and reporting requirements were too much.”

The second and third surveys also asked respondents to describe supplemental funding or additional flexibility they’ve received from foundation sources, which fell into five main areas: Conversion to general operating funds from grants with particular conditions, time extensions, new grant funding (including through newly established disaster recovery funds), accelerated payout of existing grant commitments, and flexibility on complying with grant conditions. Three responses illustrate these changes:

- “We’ve received multiple new grants from national and state foundations to assist with our capacity to respond to housing stability threats during the pandemic.”
- “Multiple grantors have provided ‘covid relief’ grants that were not planned.”
- “We’ve also had smaller family foundations make new or additional gifts.”

Respondents identified 13 Minnesota funders that streamlined processes: 3M Foundation, the Blue Cross Blue Shield Foundation, Butler Family Foundation, Delta Dental Foundation, Duluth Superior Area Community Foundation, Greater Twin Cities United Way, Initiative Foundation, McKnight Foundation, Medica Foundation, Minneapolis Foundation, Pohlada Family Foundation, Saint Paul & Minnesota Foundation, and the U.S. Bank Foundation.



NONPROFIT PROSPECTS AND STRATEGIES FOR RECOVERY

The Federal Reserve survey and this series of reports were designed to provide snapshots of the developing situation confronting nonprofits as a result of the COVID-19 pandemic. Like the rest of the economy, nonprofit organizations continue to face an unknown scale and breadth of a recovery period with limited resources, and the situation of each individual organization varies greatly.

The first two reports identified four massive challenges for nonprofit leadership and management attention (epic uncertainty, financial crisis, racial inequity and altered nonprofit role), to which we now add a fifth serious accountability, health of the nonprofit workforce.

- 1. Epic uncertainty:** The sheer volume and breadth of missing information has forced nonprofit managers and governing boards into unfamiliar territories of crisis decision making, taking significant decisions based on inadequate time, data or community input. Abrupt shifts raise expectations of timely information sharing across all of the organization's stakeholders, often disappointing internal and external audiences. Reducing uncertainty is in the interest of leadership to better inform available responses and explain actions. Yet much of the crucial information about everything from returning to large public events to changes in donations will be unknown for months. Information tracking, analysis and sharing is an essential organizational function. While not a cure to uncertainty, openness about what information is available, and increased board interaction, staff consultation and appropriate community engagement.
- 2. Financial crisis:** Bringing revenue and expenses in line is an obvious shared duty of nonprofit boards and managers, which the sudden drop in earned income again forced to top of mind. Depending on the organization, a wide range of financial adjustments are being implemented across the sector, including the PPP loans, use of reserves, disaster grants, layoffs, rent abatements, and more. Resource dependency on outside sources of income is a fact of life for many organizations, needing to satisfy conditions attached to funding. One encouraging response to COVID-19 has been a loosening of restrictions on funding by a number of institutional philanthropies and agencies of state and local government.
- 3. Racial Inequity:** Minnesota's historic disparities between white and Black people, Indigenous people, and people of color (BIPOC) residents in income, wealth, educational achievement and law enforcement carry over to many aspects of the nonprofit sector, including organizational assets, real property ownership, revenue sources and government contracts. In one of MCN's briefings with the Governor and Lt. Governor's office, Lt. Governor Peggy Flanagan said that the goal for recovery should not be to restore Minnesota to the status quo, but to make the state better. Addressing gaps in leadership resources and working capital will be essential to connect the recovery to communities most disproportionately affected by lost income, employment and housing stability.
- 4. Altered nonprofit role:** Within each activity area — arts, human services, health, community service, youth development — organizations will be assessing how changed circumstances can put forward field



NONPROFIT PROSPECTS AND STRATEGIES FOR RECOVERY (continued)

specific responses and adaptation. The recovery period will challenge organizational leaders and their supporters, including foundations, to explore options without easy answers, and not expect digital conversion, mergers or social enterprise to enchantingly pop into place. Organizations that set out to change the world are themselves confronting a less stable world with unclear shifts in community needs and available resources. Public policy advocacy will take on increased importance in this new situation, as an essential First Amendment contribution to democracy by bringing nonprofit experience and connecting community voices to public decision making.

- 5. Health of the nonprofit workforce:** Unemployment claims by 153,000 nonprofit employees, along with overall employment uncertainty, work from home orders, school age children of employees kept home, risks of COVID-19 infection for front line workers, and COVID-19 infections (and, in some cases, deaths) among the nonprofit workforce and their friends and family have contributed to significant workforce stress and morale issues. Remote workers are juggling conflicting demands and seemingly endless Zoom meetings. Employers are struggling to support employees working under difficult conditions, experimenting with increased flexibility, paid time off, increased support from supervisors and colleagues. As case numbers continue to grow in Minnesota, these challenges will likely become more pronounced in the coming months. Opportunities for information sharing, connection, and peer support among nonprofit leaders hold the promise of shared insight, meaning making, and some relief.

As follow-up to this report and survey, MCN will continue to track evolving conditions affecting nonprofits by surveying the field, reporting on the sector's recovery strategies, and convening nonprofit community conversations.

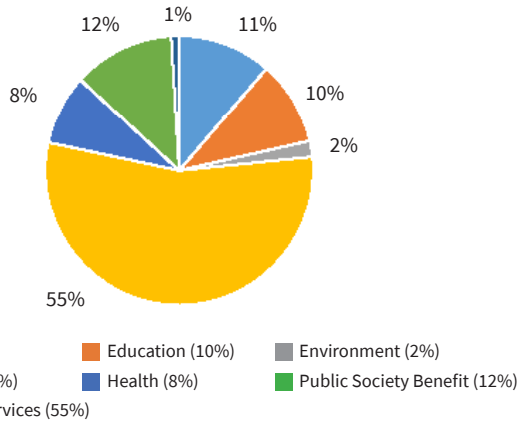


RESPONDENT UNIVERSE

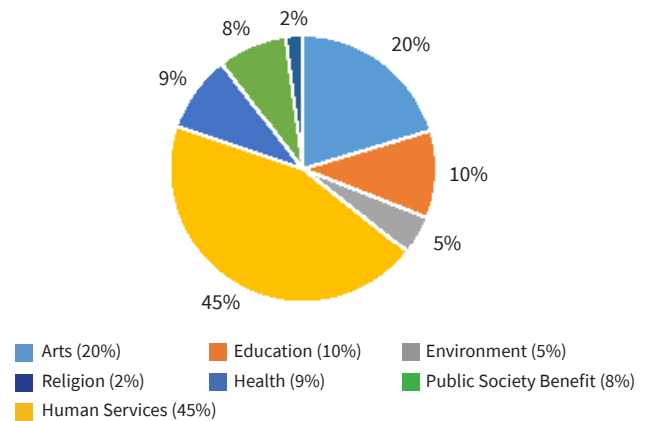
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MCN distributed a second survey to Minnesota nonprofits on May 21-June 1 and garnered 259 responses. Respondents to all three surveys represent Minnesota’s nonprofit sector in terms of distribution by activity areas, budget sizes, and geography and therefore offers an insightful window into current impacts on the nonprofit sector.

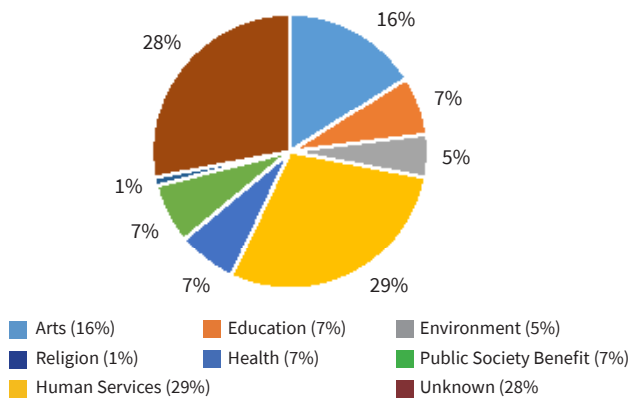
Activity Areas of Respondents (1.0)



Activity Areas of Respondents (2.0)



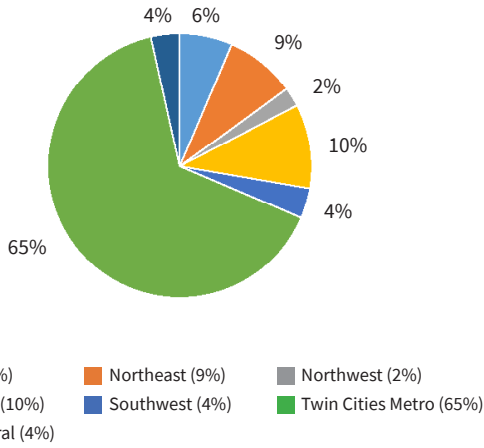
Activity Areas of Respondents (3.0)



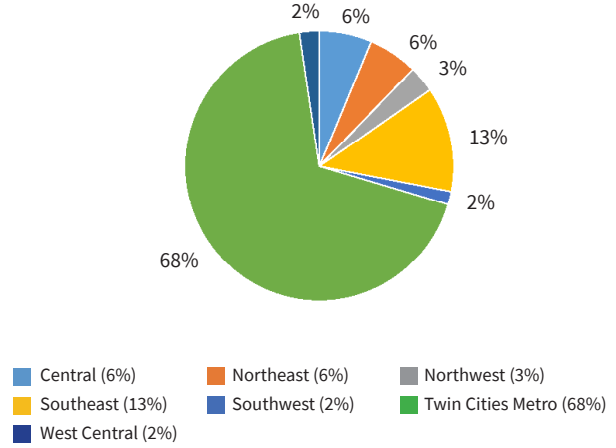


RESPONDENT UNIVERSE (continued)

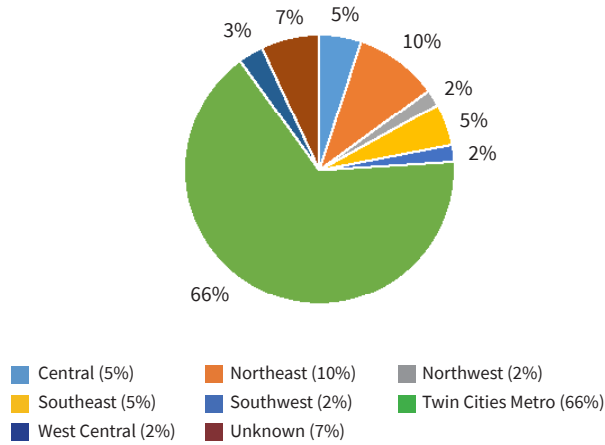
Geographic Regions of Respondents (1.0)



Geographic Regions of Respondents (2.0)



Geographic Regions of Respondents (3.0)





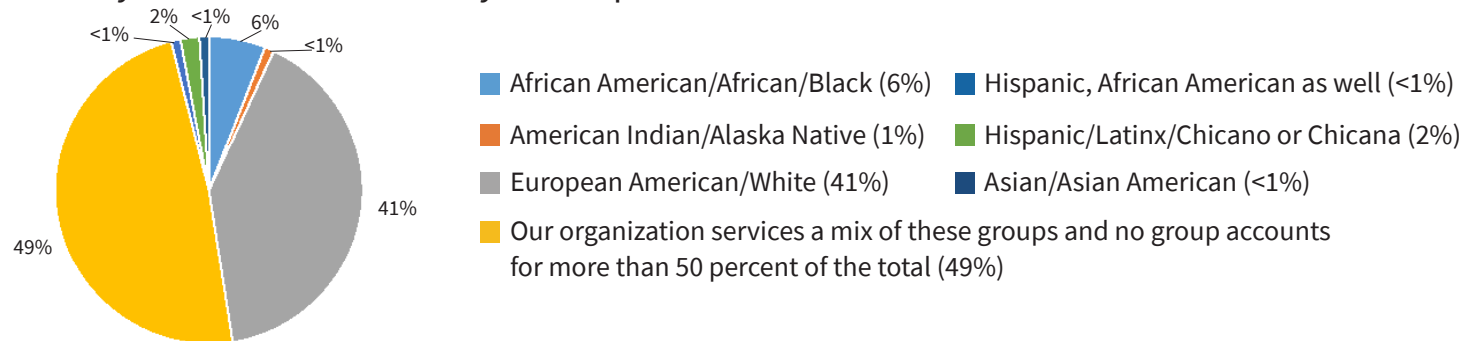
RESPONDENT UNIVERSE (continued)

Distribution of respondents by activity areas and geographic regions are similar across all surveys and generally reflective of the broader nonprofit sector in Minnesota. The second and third surveys asked additional questions to offer insight on who the organization’s primary beneficiaries are and the racial/ethnic identity of the organization’s executive leader.

Primary Beneficiaries of Survey 2.0 Respondents

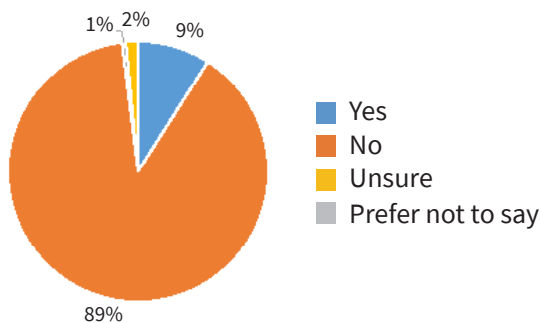


Primary Beneficiaries of Survey 3.0 Respondents

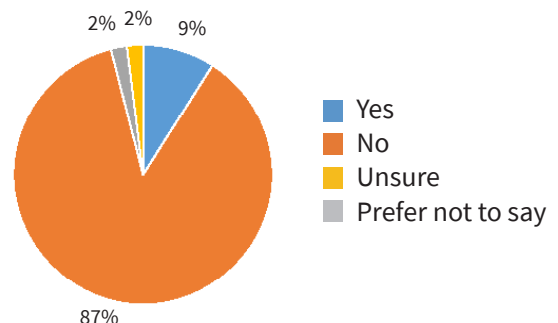


Is your organization BIPOC-led (meaning the organization’s executive director/cheif executive officer and/or themajority of the board are Black Indigenous or Person of Color)?

Survey 2.0



Survey 3.0





ABOUT THIS REPORT

For decades nonprofit organizations in Minnesota have been a steady source of economic growth in every region of the state and played an important role in Minnesota's communities – providing vital services, employing local residents, and improving the quality of life. The Special Edition Minnesota Nonprofit Economy Report Series (SE: MNER) is designed to complement the Minnesota Council of Nonprofits (MCN)'s Minnesota Nonprofit Economy Report (MNER), an annual study that analyzes public data on nonprofit employers, employment, wages, and finances to describe the role nonprofit organizations play in the state's economy. The goal of both of these reports is to understand the role of the nonprofit sector in Minnesota's economy, and now the impact of the novel coronavirus on nonprofit organizations and the communities they serve.

The Minnesota Council of Nonprofits continues to work in partnership with groups across the state to support the nonprofit sector's response to the pandemic. For more information and resources (such as a free special edition of the Minnesota Grants Directory, virtual training opportunities, and resources on how to access federal relief programs) visit www.minnesotanonprofits.org/covid-19-what-nonprofits-should-know.

Data sources

Data in this report comes from the 2018 Minnesota Nonprofit Economy Report, the 2019 Minnesota Nonprofit Economy Report, Minnesota Department of Employment and Economic Development, Quarterly Census of Employment and Wages, the Internal Revenue Service exempt organizations business master file, the Small Business Administration, and results from the April 9, 2020 Federal Reserve Bank COVID-19 impact survey and MCN's May 21, 2020 COVID-19 impact survey. Additional information about the nonprofit sector is available MCN's website at www.minnesotanonprofits.org.

MCN offers special thanks to the Federal Reserve Bank of Minneapolis - particularly Alene Tchourumoff, Michael Grover, and Libby Starling - for their partnership and support in the first impact survey distribution and data collection (April 2020).

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The Minnesota Council of Nonprofits (MCN) is the statewide association of more than 2,300 Minnesota nonprofit organizations. Through its website, publications, workshops and events, cost-saving programs and advocacy, MCN works to inform, promote, connect and strengthen individual nonprofits and the nonprofit sector.

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