



## SOCIAL SECTOR

### Summary

The social sector is a broad ecosystem of service providers (e.g., human service nonprofits, government social service departments, and some faith-based organizations), funders (e.g., philanthropic organizations, corporate, and individual donors), and partner organizations (e.g., transit agencies, libraries, and hospitals). Together, these entities work to address the needs of residents, communities, and organizations that are unmet by private, federal, and state resources. Despite a strong recovery in Central Ohio following the Great Recession, the need for supports was still increasing as a function of population growth, a widening income gap, and persistent disparities for the region's people of color.

The social sector was experiencing overall growth, but not without great hurdles to keeping nonprofits running. Furthermore, nonprofit organizations have necessarily focused on programmatic spending over operational investments, which contributed to lower resiliency in emergency situations.

The COVID-19 pandemic exacerbated both the need for community-based human services and the precarity of supports for the nonprofit sector. This "perfect storm" of challenges punctuated the need for long-term strengthening of the systems that support the region's most vulnerable residents. Many improvised solutions emerged that may serve as valuable seeds of change for a more equitable, resilient social sector going forward.

### Key Issues

High un- or underemployment has contributed to an **increased need for individual supports**, by and large adding new financial hurdles for low-wage households.

The social sector fills a critical role in meeting community needs responsively, but with many small nonprofits doing this work and low investments in operations, the pandemic emergency catalyzed **instability in the nonprofit sector**.

Much needed temporary supports for nonprofits came from federal relief packages and increases in individual giving have supported part of the need, but these **funding stream shifts** were not enough to offset the increased operational costs and loss of funds from other sources.

**Emergency delivery of human services** presented a host of challenges, especially as nonprofits had to reduce capacity and respond to a rapidly changing and a sustained high volume of needs. The sector came together to innovate during the crisis, while unearthing new opportunities for more collaborative, effective service delivery in the future.

# INCREASED NEED FOR INDIVIDUAL SUPPORTS

In the 2010s, Central Ohio experienced strong recovery from the Great Recession, including slow but steady declines in the number of residents in poverty. Even still, in 2019 there were 140,000 households living at the poverty line or below (around \$25,000 annually for a household with two adults and two children), and 40% of those households earned only half of the defined income threshold for poverty (Figure 1). Compounding the need for individual supports around mental and physical healthcare, approximately 150,000 Central Ohioans lacked health insurance in 2019.

Strong economic growth in Central Ohio presents clear benefits, but it is also paired with challenges as the cost-of-living increases, raising the bar for those with lower earnings. Reflecting the widening gap for Central Ohioans, those in the highest earnings quintile saw an increase in income ten times greater than those in the lowest quintile from 2010 to 2019 (Figure 2). The nonprofit sector, in conjunction with traditional government assistance programs, play a key role in administering assistance to residents.

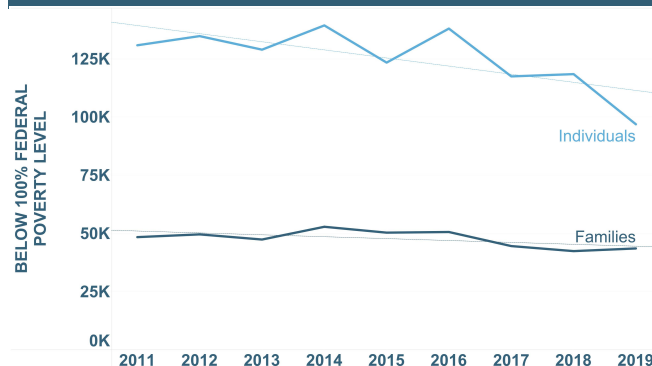
The pandemic heightened demand for basic needs, including food, shelter, and mental and physical healthcare. This affected people with low-wage jobs, hit the hardest by the pandemic shutdowns, either by expanding their existing needs for social supports, or in some cases introducing the need for supports for the first time.

Interviews with leaders from the Central Ohio social sector highlighted the value of direct financial assistance to individuals, such as federal stimulus payments and enhanced unemployment benefits, to efficiently meet basic needs. While the cash assistance was a critical support, there were still more Central Ohioans seeking traditional government assistance than before the pandemic. For example, in April 2020, Central Ohio saw a sudden increase in food assistance recipients (19,000 more households than March 2020). More children than adults were living in these households, pointing to a likely prevalence of single parent households among those seeking assistance from the state (Figure 3).

In 2019 in the Columbus MSA, a disproportionately high number of families with 3 or more people were receiving benefits like food assistance, and 55% of households below the poverty level were single mother households compared to just 13% of households overall.<sup>1</sup>

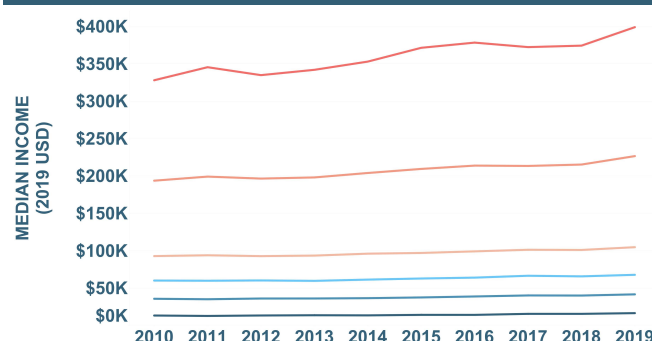
Furthermore, survey data from the U.S. Census Bureau suggests that one out of every three adults in Ohio are having a somewhat or very difficult time keeping up with usual household expenses in March 2021. These Ohioans are less likely to have maintained their pre-pandemic income, which indicates loss of employment as a major factor contributing to their difficulty keeping up with expenses. They are more likely to be using state-run assistance programs (e.g., Supplemental Nutritional Assistance Program), and they are more likely to be paying bills by borrowing money from friends and family, using credit cards or loans, using savings, or selling assets (Figure 4).

**Figure 1. Poverty**  
Columbus MSA, 2011 - 2019 (Annual)



SOURCE : U.S. Census Bureau American Community Survey

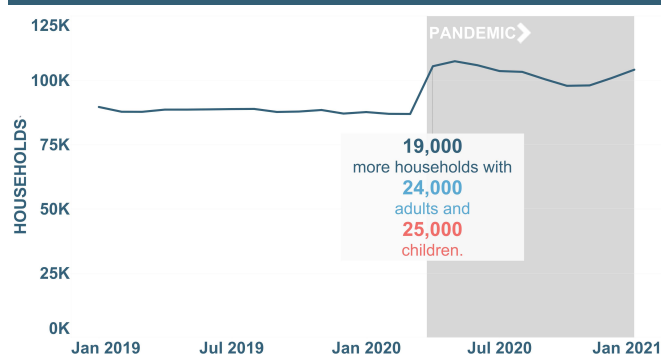
**Figure 2. Quintile Median Income**  
Columbus MSA, 2011 - 2019 (Annual)



INCREASE FROM 2010 TO 2019					
Top 5 Percent	Highest Quintile	Fourth Quintile	Third Quintile	Second Quintile	Lowest Quintile
\$71,023	\$32,878	\$11,919	\$7,687	\$5,917	\$3,179

SOURCE : U.S. Census Bureau American Community Survey

**Figure 3. Households Receiving Food Assistance**  
Central Ohio Counties\*, 2019 - 2021(Monthly)



SOURCE : Ohio Department of Job and Family Services

\* Delaware, Fairfield, Fayette, Franklin, Knox, Licking, Logan, Madison, Marion, Morrow, Perry, Pickaway & Union counties

According to analysis from the Urban Institute, more Central Ohio residents in most counties are taking out payday loans, a form of debt that is usually short-term and high interest, than before the pandemic. Some of the more rural Central Ohio counties have experienced increases in the share of the population behind on car or mortgage payments, and more residents have subprime credit scores than before the pandemic shutdowns started.<sup>2</sup>

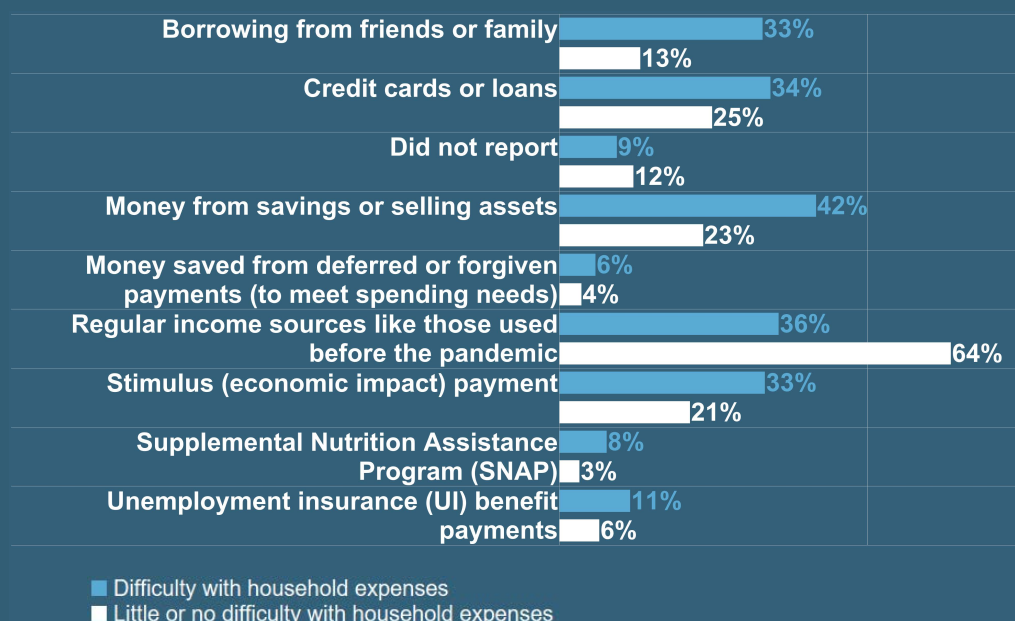
Ohioans who are having the greatest difficulty keeping up are disproportionately residents who are younger, Black or Asian, single or divorced, low-income, high school educated or less, or with children under 18 living in the household.<sup>3</sup> These disparities are a marker of the so-called "K-shaped" recovery. Residents who were better off than others before the pandemic had more resilient structures in place (e.g., remote work options and digital access) compared to those who were worse off before the pandemic. The structures that support low-income residents and especially people of color are simply less resilient.

Interviews with Central Ohio social sector leaders echoed the Census Bureau data in the disparate effect of the pandemic on certain groups of the population. Black and brown residents were hit hardest both economically and by the health impacts of the pandemic, as were low-wage workers in essential service industry roles (e.g., restaurants and childcare). Low-wage jobs, which are prevalent in the service industry, are disproportionately held by people of color.<sup>4</sup>

Beyond the insights highlighted by data from the Census surveys, interviewees suggested that women were hit harder due to challenges with increased unpaid labor responsibilities while schools and daycares are closed. They also noted that older adults and residents with mobility limitations faced increased social isolation, residents with limited English proficiency faced expanded challenges accessing resources, and undocumented residents or those with uncertain legal statuses were concerned about interacting with the health and social service systems.

The uneven impact of the pandemic is certainly measured by individuals' ability to access what are usually thought of as the 'basic needs' (e.g. shelter, food, and healthcare). The pandemic also revealed the importance of other needs as elemental to thriving in contemporary society. Gaps in access to broadband, technology, and digital literacy (discussed in greater detail in the Technology & Broadband Access brief) have contributed disparities in job loss, which were further compounded by the increasing reliance on access to virtual organizations for finding support and resources, reskilling for a changing job landscape, effective use of remote education, and maintaining social ties.

Concurrent with the pandemic's alarming magnification of inequities nationwide, the death of George Floyd and ensuing protests have ignited institutions and organizations involved in social service delivery to take a more overt stance on tackling racism in their communities. Adding to the increased need for nonprofit and state-run human services from the pandemic, the developing racial justice movement created new needs for support from social sector organizations, like legal defense and bail funds; diversity, equity, and inclusion training; and community organizing.



**Figure 4.**  
**Funds Used to**  
**Meet Recent**  
**Spending**  
**Needs**

Ohio  
Mar 3 - Mar 15, 2021

SOURCE: U.S. Census  
Bureau Household  
Pulse Survey



# ■ INSTABILITY IN THE NONPROFIT SECTOR

In 2017, 1,700 nonprofit organizations in the Columbus metro employed 95,000 people, making up 11% of total employment in the region. 1,000 of those nonprofits, employing 63,000 people, were in health and social services. The nonprofit sector experienced strong growth and recovery in Central Ohio during the 2010s following the Great Recession, expanding both assets and revenues for human services, education, and the arts.<sup>5</sup> Growth was strong during this period, but so too were challenges for nonprofits working to maintain funding to meet their service delivery objectives. Additionally, nonprofits have historically struggled to invest in operational improvements as they often prioritize funds to programming.

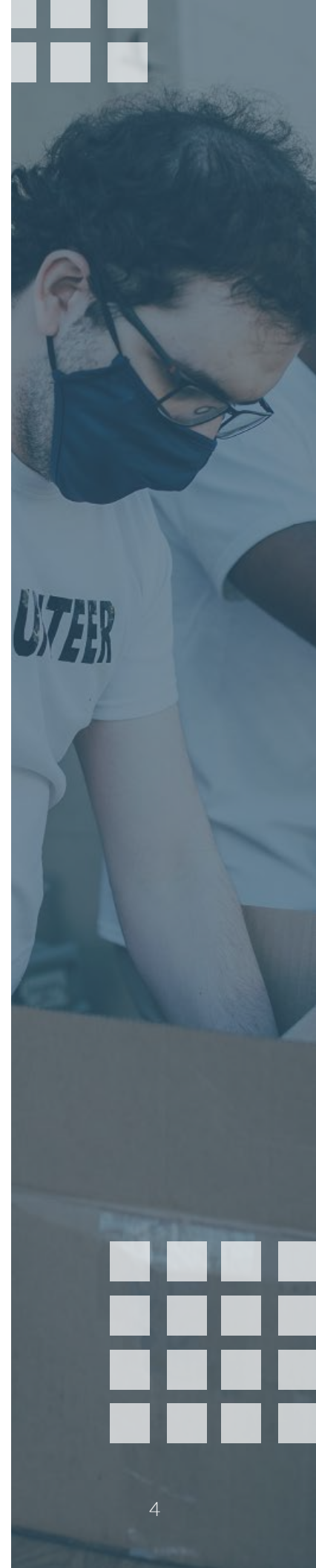
Not only do nonprofits play a key role in the region's economy, they are an essential vehicle for programmatic delivery of social support services. Nationwide, nonprofits play a critical role in community-based human services delivery. Locally, nearly all jobs in social advocacy, civic, and social organizations are in the nonprofit sector. Nonprofits also represent most jobs in key human service industries like education, individual, and family services, and in work supporting residents with developmental disabilities, mental health, and addiction.<sup>6</sup>

A smaller, but not insignificant share of the arts, entertainment, and recreation industry (19%) is represented by nonprofits in Central Ohio. Nationally, this industry within the nonprofit sector was hit harder than any other, facing a 37% employment reduction over the course of 2020. In interviews, representatives from the arts community highlighted the need for operational supports for arts organizations, ranging from sustaining basic operations to having performance and recording space during and after the pandemic for artists to create content. Arts and culture nonprofits were faced with technological hurdles, looking for ways to engage the community in a virtual setting. These issues are discussed in greater detail in the Technology and Broadband Access brief.

In times of crisis and economic hardship, there is an inevitable double-edged sword—more people need services and resources, while the stability of nonprofit organizations tasked with delivering those services is threatened. Nationwide, nonprofits have been severely impacted by the pandemic—by December 2020, the sector had lost nearly one million jobs, a 7% decline from February 2020, according to the Johns Hopkins Center for Civil Society Studies.<sup>7</sup>

In a recent survey of Ohio nonprofits, 14% of respondent organizations remained unable to provide any programs or services, and 61% reported either moderate (28%) or severe (33%) reduction in services. Furthermore, diminished funding and operational challenges have initiated contraction and consolidation of the nonprofit sector. An estimated 18% of Ohio nonprofits, mostly smaller organizations, have either already (8%) or plan to (10%) shut down operations indefinitely, and 7% have already or plan to merge with another organization.<sup>8</sup>

In many ways, nonprofits are like small businesses, but with additional restrictions on how to spend resources (e.g., grants with tight caps on operational expenses and onerous reporting requirements). Funders in Central Ohio have taken measures to introduce flexible grantmaking in response to the surging and rapidly shifting needs of both nonprofits and the communities they serve. They have also worked to intentionally enhance the accessibility of grant dollars, removing hurdles that would otherwise deter some small, lesser-known nonprofits from applying. Offering grant agreements that allow nonprofits greater flexibility or unrestricted use of funding, extending grant timelines, and offering opportunities to roll programmatic funds into operational budgets are some strategies that have been employed, and that may present a solution for sustained recovery of the sector, especially small nonprofits. Simplified and shared expectations for reporting and data collection among funders will also create efficiency and remove a burden for non-profits without sacrificing accountability.





Locally, these flexible grantmaking efforts have been successful in eliminating some barriers for small nonprofits receiving grants from emergency relief funds. United Way of Central Ohio (UWCO), for instance, awarded nearly \$400,000 in grants to small nonprofits with no previously established relationship to UWCO by allowing organizations to apply for smaller amounts of funding that fit the scale of their organizations' capacities, and waiving requirements in the application process for new nonprofits that might otherwise deter them from applying.

The Columbus Foundation introduced application process adjustments as well. These include reduced application length, simplified application questions, significantly faster turnaround from application to receipt of grant payment (to as little as 2 weeks), and minimal reporting requirements.

Interviews with social sector leaders suggest that although most nonprofits saw a reduction in resources, some service providers, such as food banks and pantries, saw a large influx of resources to help meet needs. In these cases, the challenges were less centered on a lack of resources, but more so on the unpredictable fluctuations created by changing closures and safety guidelines (e.g., after-school programs and recreation centers). Funding and supports for organizations to adapt to the changing environment are critical.

A challenge throughout 2020 was figuring out how to leverage the variety of federal, state, local, and philanthropic resources that became available at different times throughout the year, with different levels of flexibility and deadlines for expenditure. As federal resources continue to flow in 2021, the challenge of taking advantage of all possible funding streams will become even greater.

Central Ohio leaders understood the importance of bolstering the social sector when the pandemic crisis hit. While none of the dollars from the CARES Act were specifically earmarked for nonprofits, local governments like the City of Columbus and Franklin County, and even the State of Ohio, channeled those dollars to nonprofits throughout the region. The government response paired with a surge of generosity from philanthropic entities, businesses, and individual donors was so successful, in fact, that Mackenzie Scott passed up Columbus when deciding how to spend billions in COVID-19 relief donations.<sup>9</sup>

Social sector leaders are hopeful that funders will permanently adopt more proactive and less reactive investments and see the value and return on investment of a well-funded and well-resourced social sector in our community. 2021 federal funds from the American Relief Plan (ARP) will be significantly greater than CARES Act dollars with fewer restrictions and have the potential to serve as a resource to enhance the Central Ohio social sector, injecting much needed and long-awaited funds into the organizations that fill the gaps in federal and state-run social service programs.

# FUNDING STREAM SHIFTS

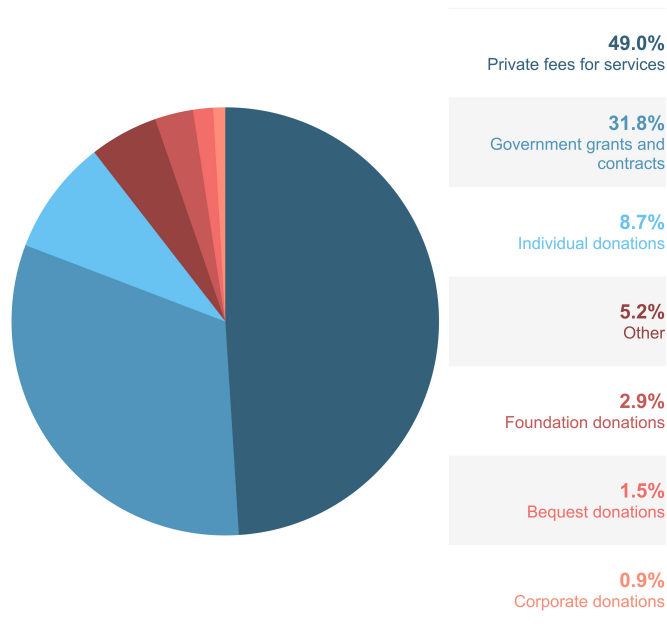
According to the National Council of Nonprofits, sector-wide, more than 80% of charitable nonprofit revenues come from private fees for services, or government contracts. While each individual nonprofit has its own funding profile, about 14% of nonprofit revenues come from charitable giving and philanthropy across the sector (Figure 5).<sup>10</sup> Arts organizations differ from this norm, relying more heavily on giving (about 50% of revenues) than on programmatic funds.

In Ohio, a survey of nonprofits suggests that these organizations are feeling revenue impacts of the pandemic, with 80% of respondents reporting reductions in revenues of greater than 10%, and just under half expecting revenue reductions of about 50%. Cuts appear across the board for organizations' revenue profiles—from major funding sources like fees for services and government contracts and grants, to smaller sources like individual and corporate giving (Figure 6). According to interviews with local social sector leaders, Central Ohio nonprofits are uncertain about their 2021 revenue streams. Many have used their contingency funds for 2020 and are trying to operate as efficiently as possible to work with their budgets and meet their missions in 2021 and beyond. In January and February 2021, Central Ohio health and human service nonprofits reported \$74 million in unrealized revenues and \$25 million in incurred expenses due to COVID-19.

While fund reductions are an issue across organizations, some strategies have bolstered nonprofit budgets. Some CARES Act dollars were channeled to nonprofits by local governments (as will funding from the American Rescue Plan Act), and The Columbus Foundation and United Way of Central Ohio each established emergency relief funds (ERF). The region's local governments and philanthropic organizations have an opportunity to learn from the successes and challenges of the 2020 federal funding distribution process to simplify application for funds and get dollars awarded quickly.

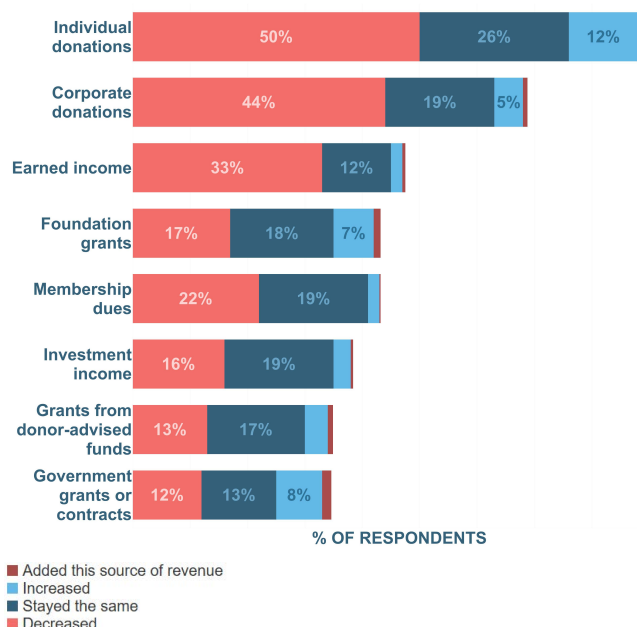
Some nonprofits applied for and received money from the Paycheck Protection Program (PPP). About 4% of PPP loans (\$40 million) protected nonprofit jobs (7,000), whereas about 96% of Central Ohio PPP dollars (\$1 billion) sheltered 185,000 jobs in the private sector (Figure 7).<sup>11</sup> While a relatively small share of the PPP loan program was utilized by nonprofits, they had enormous value for the organizations that used the funds, and interviews with social sector leaders suggest that many human service nonprofits applied for and received these supports. A survey of local health and human services organizations suggested that 80% of the 76 respondents applied for and received PPP loans.<sup>12</sup>

**Figure 5. Sources of Nonprofit Funding**  
United States, 2019



SOURCE : National Council of Nonprofits

**Figure 6. Nonprofit COVID-19 Funding Impacts**  
Ohio, 2020



SOURCE : Philanthropy Ohio



Typically, non-emergency funds for human services are channeled through state and municipal-run programs, as well as human service nonprofits. However, the economic impacts of COVID-19 have the potential to stifle these revenues in the long run, in the absence of continued relief. Nationally, the impact of revenues that would translate to funds distributed to state, local, tribal and territorial governments is projected at \$555 billion over state fiscal years 2020 – 2022.<sup>13</sup> This projection has drawn national interest toward assistance specifically targeting stability of vital services these funds typically support, which include funds for critical human services.

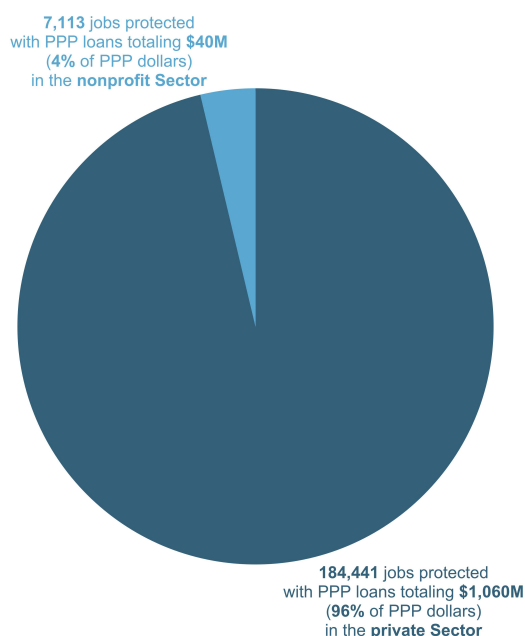
Philanthropic giving generally makes up a small but vital share of overall nonprofit funding streams, but it can offer more flexibility and responsiveness to immediate or changing community needs. These sources have experienced some encouraging increases as the pandemic continued. The Columbus Foundation 2020 ERF grant distribution was over \$7.2 million and represented a combination of drastic reallocation of grant funding and increased corporate and individual giving.<sup>14</sup> The Big Give raised \$32.5 million for nonprofits in 2020, an increase of 81% from the previous Big Give in 2017.<sup>15</sup> UWCO ERF grant distribution was \$2.4 million as of August 2020 (Figure 8).<sup>16</sup>

Nationally, there was an increase in contributions to donor-advised funds and #GivingTuesday contributions (both up more than 20% over 2019), which show the commitment of individual donors to addressing the COVID-19 economic fallout.<sup>17</sup> Emergency response giving is an important piece of the nonprofit funding puzzle, but is not necessarily enough to keep struggling nonprofits afloat on its own—other interventions will still be necessary in what promises to be a long, slow recovery.

The COVID-19 pandemic provides a rallying point for giving and philanthropy in the community, and community members have been generous to specific causes. Yet, the community leaders interviewed anticipate that tax revenue will be down, and philanthropic giving may not be enough to meet all the need. In the City of Columbus, municipal income tax is the primary revenue stream for the general fund (76%) which is expected to take a hit if there are long-term shifts to remote work (read more on this in the Economic and Community Development brief) or sustained employment reductions in at-risk industries (more on this in the Employment and Small Business brief).<sup>18</sup> One person mentioned the possibility of levies to help meet social service demands on systems. Another suggested redistribution of local government budgets. The region will have to prioritize needs, communicate effectively, and coordinate efficiently to come close to meeting social needs as the community and individual residents work to recover from the pandemic.

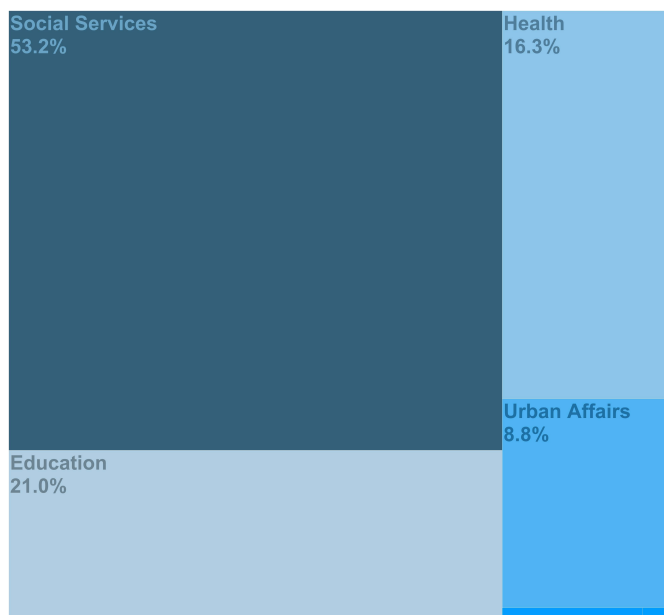
**Figure 7. Paycheck Protection Program (PPP) Loans**

Columbus MSA, As of March 2021



SOURCE : Small Business Administration

**Figure 8. Emergency Relief Funds**  
Distribution of Dollars Awarded by Category 2020



SOURCE : The Columbus Foundation & United Way of Central Ohio  
Categories not labeled : Conservation (0.5%); Arts & Humanities (0.1%)

# ■ EMERGENCY DELIVERY OF HUMAN SERVICES

Delivery of human and social services by community-based nonprofits presents an opportunity to meet the nuanced needs in communities. Community foundations and social service institutions are positioned at the heart of this work, looking across the ecosystem of service needs to coordinate and prioritize the distribution of philanthropic funds. With the region's strong growth comes an increasing demand for services and resources.

The pandemic catalyzed steep declines in human service delivery. In July 2020, 70% of nonprofit programs were either halted or operating with limited capacity (Figure 9). Service delivery reductions paired with increased service demand sparked an “all-hands-on-deck” response from the health and human services community. Especially where critical needs emerged (e.g., food pantries, behavioral health, homelessness and housing supports), nonprofits adjusted quickly and effectively either through implementing safer in-person service delivery, or by embracing technological approaches like telemedicine. All of this illuminated opportunities for improvement around strategic coordination of resource delivery to increase operational agility and enhance the efficacy of the sector.

Central Ohio social sector leaders say they hope that novel adaptations will become permanent operational improvements. These improvements did not come without growing pains, however, and there are still nonprofits in need of supports. Early in the pandemic in May 2020, 70% of nonprofits reported a need for assistance, especially with technology, strategic planning, and human resources (Figure 10). Many of these needs persist.

The pandemic magnified the need for intentional local braiding of resources, and interviewees want to continue to build on local coordination post-pandemic. “We need to be cognizant of who’s doing what, and how quickly,” one staff member of a grantmaking organization stated. “Too often, when our community comes together, we’re omitting a really key group from that, not necessarily intentionally, but because things are moving fast.” Key groups include, but are not limited to, cities and townships, counties, federal funding stream representatives, non-profits, health systems, education institutions, neighborhood-based organizations, and other community leaders.

There is also an opportunity to build greater intentionality into racial equity in the distribution of funds. Taking care up-front to ensure funds are elevating the work of effective nonprofits with leaders of color, serving the needs of communities they represent. One example is the Equity Now Coalition—a group of elected officials and nonprofit leaders working on “facilitating the design and implementation of a collective impact strategy to achieve equitable outcomes for the Black Columbus.”<sup>19</sup> Furthermore, organizations delivering supports to residents impacted by racism are rethinking how they prioritize and operationalize funds to ensure an explicit understanding of who is being served, and whether social service programs are effective in helping residents overcome structural hurdles.

Nonprofits are a small but critically important part of a complex ecosystem that supports human service delivery. While these organizations can (and often do) serve important roles in serving residents who have been impacted by structural racism, removing those structures will take far broader change and greater strides in realizing diverse leadership in the private, public and nonprofit sectors, not only within administrations and C-suites, but within councils and boards.

“[In a year I want to see] Tangible ways that everyone has the opportunity to participate fully in the recovery,” an interviewee stated. “[We need to] have equity as the lens that we’re looking through in terms of serving low-income people and people of color... we’ll see more minority businesses and job growth among minority businesses; greater participation from larger entities and corporations to provide not only financial support, but technical support to help the smaller organizations where most of the job growth takes place. So a year from now, I’d like for us to truly live up to the motto of One Columbus—prosperity for all.”





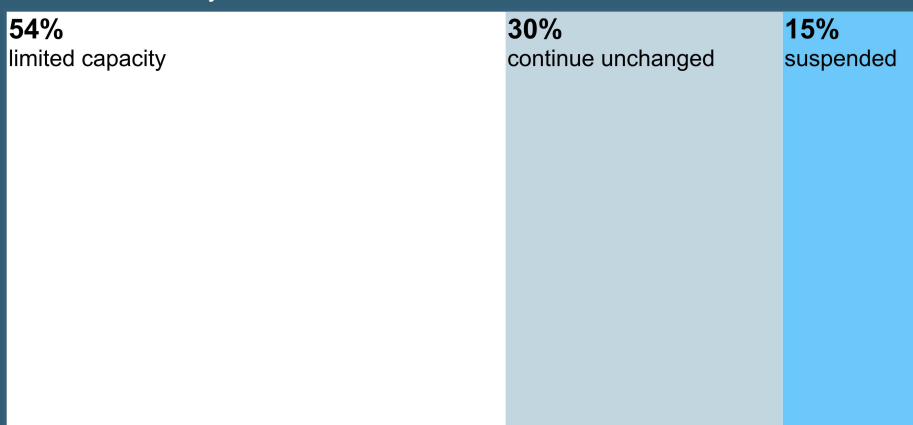
In part, improvements to operational agility were realized through targeted technical assistance for nonprofits and leveraged partnerships with larger organizations. For instance, the Human Service Chamber of Franklin County (HSC) discussed its shared services for its members. HSC has served as a central resource for acquiring personal protective equipment and general legal guidance to ease the burden on its nonprofit members. Another example, IMPACT Community Action created memorandums of understanding and partnership agreements with 20 smaller nonprofits to share revenue to help process rental assistance for the soaring demand.

Other adaptations are technology-driven, improving the discoverability of the ever-changing landscape of resources and services to improve efficiency for providers and clients. IMPACT Community Action is creating a centralized client relationship management system so that the organization and its partners can coordinate and collaborate to serve families. Discussed in more detail in the Technology and Broadband Access brief, the civic technology community, like the Can't Stop Columbus initiative, was an important player in developing resources for enhanced virtual service delivery for under-resourced service organizations.

The stress on nonprofit frontline workers at places like food banks, homeless shelters, and behavioral health facilities was also noted. While social services professionals have risen to the occasion, they have also been mentally and emotionally challenged by the pandemic and the volume of demand. These secondary impacts are discussed further in the Public Health brief. Additionally, nonprofit workers have struggled with absences due to COVID-19 illness and quarantine as a result of being on the front lines of service delivery, which hamper operational capacity on top of the health impact to workers and their families.

**Figure 9. Nonprofit Service Delivery Impact**

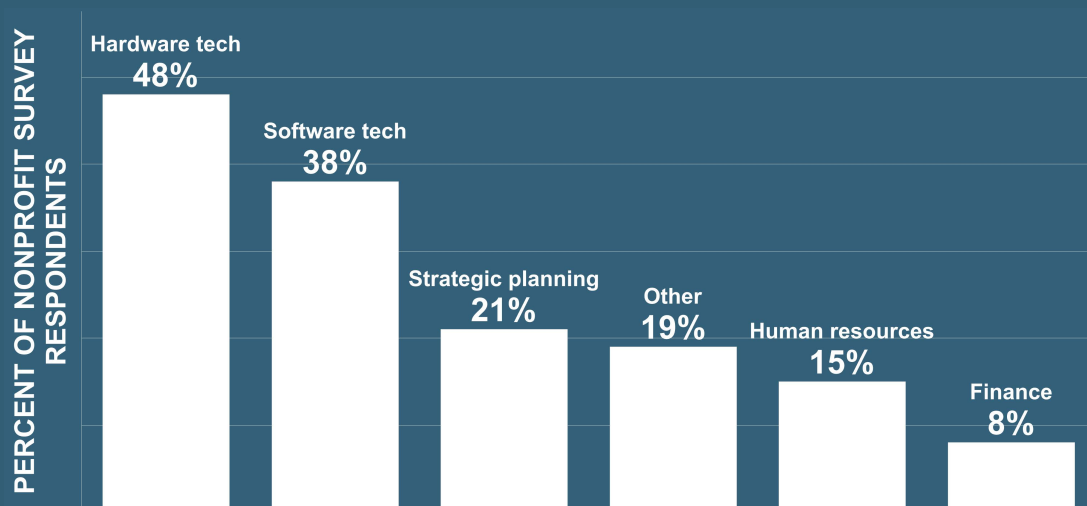
Central Ohio, July 2020



SOURCE : UWCO, HSC & Illuminology Survey of Central Ohio Nonprofits

**Figure 10. Nonprofit Needs**

Central Ohio, May 2020



SOURCE : UWCO, HSC & Illuminology Survey of Central Ohio Nonprofits

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