

SURVEY: Black-Led and Black-Empowering Organizations: Strengthening CA's Economy and Communities

Respondent Guide



Thank you for your interest in the **Black-Led and Black-Empowering Organizations: Strengthening California's Economy and Communities Survey!** Your voice will help raise a powerful demonstration of our collective contributions to California. **All responses will be used in aggregated form only, and all individual responses are held in strictest confidence.**

This survey is designed for Black-led and Black-empowering nonprofit organizations (which may not necessarily be Black-led) that are located in California. We kindly request only one response per organization—please consider designating someone on your staff to take the survey.

In this document, you will find helpful tips and a list of **some of the questions that are included in the survey that may need you to gather information to answer (this is not a complete list of questions)**. By providing this in advance, our hope is to ensure a smooth and straightforward experience for survey respondents.

Here are those tips:

- Before you begin the survey, take a look at the survey questions listed below. These are the questions that we anticipate may require more time to complete or information from organizational documents (your organizational budget and IRS Form 990 or 990-EZ, or your Annual Report) or from other people (e.g., your Talent professional for the benefits-related question). We recommend that you gather the necessary documents and consider answering these questions on this worksheet before you begin the actual survey.

On the survey, you will see a note on any question that is asking you to refer to your budget or the 990. **If the date of your document doesn't match the time frame in the question, an educated estimate is sufficient.**

- If you need to stop in the middle of completing the survey, your response will be saved. You can pick up where you left off when you're ready to resume by clicking on the original link. If you are working on the same device, **and if you have not cleared your cookies**, your survey response should be saved.

- If you wish to review any sections of the survey that you have already completed, please use the green back button at the bottom of the survey page, rather than the back arrow at the top of your browser window.
- If there are other questions that emerge for you as you complete the survey, please reach out to our team at researcher@evitarus.com.

Thank you for taking the time to contribute your voice and experience to the survey!

Black Equity Collective and Nonprofit Finance Fund thank the Weingart Foundation, Black Equity Initiative Inland Empire, and Rosenberg Foundation for generously supporting this survey.

Your Organization Leadership

Does your organization's Executive Director/CEO/Managing Director identify as...?
(Please select all that apply.)

- American Indian and/or Alaska Native
- Asian and/or Asian American
- Black and/or African American
- Hispanic and/or Latinx
- Middle Eastern
- Native Hawaiian and/or Pacific Islander
- Non-Hispanic White
- Multi-Racial/Multi-Ethnic
- Prefer to self-describe: _____
- Unsure

What percentage of the senior staff or core decision-making body at your organization identifies as Black? Please **do not** include the Executive Director/Organizational Lead in your estimate:

- 0-24%
- 25-49%
- 50-74%
- 75-100%
- Unsure

What percentage of the Board at your organization identifies as Black?

- 0-24%
- 25-49%
- 50-74%
- 75-100%
- Unsure

Your Organization and the People You Serve

Approximately how many people did your organization serve in Fiscal Year 2023? _____
(If you are unsure, if at all possible, please consult relevant documentation or another person in your organization who can provide this information. Please feel free to round to the nearest 100.)

Fiscal year definition: the 12-month period your organization uses for financial reporting and budgeting

Your Financial Story

What were your organization's total net assets as of the end of FY2023? _____

Note: This amount can be found in the final question of Part I of your organization's IRS 990 or 990-EZ (on page 1). If you do not have access to your 990, please feel free to estimate.

Total net assets definition: the value of an organization's assets minus its liabilities.

Approximately what were your organization's total operating expenses for Fiscal Year 2023?
(If you are unsure, if at all possible, please consult relevant documentation or another authorized party in your organization who can provide this information. Feel free to round to the nearest \$10,000.)

Approximately what was your organization's total revenue for Fiscal Year 2023 (FY2023)?
(If you are unsure, if at all possible, please consult relevant documentation or another authorized party in your organization who can provide this information. Feel free to round to the nearest \$10,000.)

What is your largest source of revenue?

- a. Private and corporate foundations
- b. Government grants and contracts
- c. Earned revenue
- d. Individual donations
- e. Investment income
- f. Other (please specify): _____
- g. Prefer not to answer

What is your second largest source of revenue?

- a. Private and corporate foundations
- b. Government grants and contracts
- c. Earned revenue
- d. Individual donations
- e. Investment income
- f. Other (please specify): _____
- g. Prefer not to answer

Supporting your Staff

How many full-time staff (FTEs) did you employ in FY2023? _____

How many part-time staff did you employ in FY2023? _____

Approximately what was the total amount your organization paid in salaries in FY2023?

How much did your organization pay in payroll taxes for all of FY2023? _____

Note: This amount can be found in Part IX line 10 on page 10 of your organization's IRS 990. If your organization fills out the IRS 990-EZ or if you do not have access to your 990, please feel free to estimate.

This next question pertains to any employee benefits which may be available to employees of your organization. The purpose of this is to help understand your organization's ability and any needs in connection with employee benefits. For each benefit, please select the best option that most closely described what is true for your organization.

Our organization:	Does provide this benefit	Wants to provide this benefit	Has decided not to provide this benefit	Has not considered providing this benefit
a. Healthcare insurance				
b. Dental insurance				
c. Vision insurance				
d. Paid vacation time				
e. Paid sick time				

Our organization:	Does provide this benefit	Wants to provide this benefit	Has decided not to provide this benefit	Has not considered providing this benefit
f. Flexible work schedule				
g. Paid family leave above what the state provides				
h. Short-term disability insurance				
i. Long-term disability insurance				
j. Retirement fund contributions				
k. Professional development				
l. Pre-tax Account for medical expenses (e.g., Health Savings Account, Flexible Spending Account)				
m. Pre-tax Dependent Care Flexible Spending Account for childcare, seniors or other dependents				
n. Pre-tax Commuter Benefits Account				
o. Tuition reimbursement				
p. Debt payment assistance (student loan assistance, other)				
q. Wellness program, including gym membership				
r. Paid sabbatical				
s. Unpaid sabbatical/leave of absence				
t. Other (please specify): _____				

Approximately what percent of salaries does your organization pay for fringe benefits (e.g., for health insurance, dental insurance, retirement account contributions) for your employees?

- a. 1-10%
- b. 11-20%
- c. 21-30%
- d. More than 30%
- e. Unsure
- f. Our organization is not currently able to pay for fringe benefits for employees
- g. Prefer not to answer

Supporting Local Communities

Approximately what percentage of your staff lives in a *geographic* community you serve?

- a. 0-10%
- b. 11-25%
- c. 26-50%
- d. 51-75%
- e. 76-100%
- f. Prefer not to answer

Approximately what percentage of your current staff have lived experience as members of one of the populations you serve? (So, for example, if you serve veterans, what percentage of your staff are veterans?)

- a. 0-10%
- b. 11-25%
- c. 26-50%
- d. 51-75%
- e. 76-100%

Are any of your current staff individuals who:

	Yes	No	Unsure	Prefer not to answer
Were formerly incarcerated or justice system-involved				
Have experienced homelessness and/or are living in temporary housing				
Are or were in the foster care system				
Identify as having a disability				

Does your organization have funds deposited with any of the following?

Please select all that apply:

- a. A regional bank
- b. A regional credit union
- c. A branch of a national bank
- d. A national credit union
- e. A Black-owned bank
- f. Other (please specify): _____
- g. Prefer not to answer

Conditional question, if people answer A or B above:

Please estimate the amount of funds you currently have deposited with a regional bank or credit union:

- a. \$5000 or less
- b. \$5001-25,000
- c. \$25,001-50,000
- d. \$50,001-100,000
- e. More than \$100,000
- f. Unsure
- g. Prefer not to answer

Conditional question, if people answer E above:

Please estimate the amount of funds you currently have deposited with a Black-owned bank:

- a. \$5000 or less
- b. \$5001-25,000
- c. \$25,001-50,000
- d. \$50,001-100,000
- e. More than \$100,000
- f. Unsure
- g. Prefer not to answer

What is your best estimate of the total amount of money you spent in FY2023 on buying services, food, or other supplies (e.g., restaurants, printing, facility rental, professional services such as accounting, taxes, marketing) from **local vendors**?

- a. \$0-\$5,000
- b. \$5,001-\$10,000
- c. \$10,001-\$20,000
- d. \$20,001-\$30,000
- e. \$30,001-\$50,000
- f. \$50,001-\$100,000
- g. Over \$100,000
- h. Prefer not to answer