Market Study of Arkansas Nonprofit Organizations
About this Report
The Winthrop Rockefeller Foundation, Carl. B. and Florence E. King Foundation, and Arkansas Community Foundation collaborated to assess the Arkansas nonprofit organization (NPO) market sector to help inform investment decisions over the next decade. The goal is that investments result in greater NPO capacity that enables Arkansas families to move beyond poverty to prosperity.

About Communities Unlimited
The mission of Communities Unlimited is to move rural and under-resourced communities in areas of persistent poverty to sustainable prosperity. Its goal is to provide deep and lasting impact in communities by combining fundamental infrastructure services with economic entrepreneurial growth strategies. Communities Unlimited serves seven southern states: Arkansas, Mississippi, Tennessee, Texas, Oklahoma, Louisiana, and Alabama. Learn more at www.communitiesu.org

About the Arkansas Community Foundation
The mission of the Arkansas Community Foundation is to engage people, connect resources and inspire solutions to build community. The Arkansas Community Foundation promotes smart giving to improve communities, and offers tools to help Arkansans protect, grow, and direct their charitable dollars as they learn more about community needs. Learn more at www.arcf.org

About the Carl B. and Florence E. King Foundation
Carl B. and Florence E. King started the Foundation that bears their names in 1966. The Foundation has now grown to more than $80 million in assets, and distributes more than $3 million per year to charities serving the Dallas-Fort Worth area, 38 counties in West Texas, and 32 counties in Arkansas. Learn more at www.kingfoundation.com

About the Winthrop Rockefeller Foundation
The Winthrop Rockefeller Foundation affirms its founder’s legacy who envisioned a thriving and prosperous Arkansas that benefits all Arkansans. The mission of WRF is to relentlessly pursue economic, educational, social, ethnic, and racial equity for all Arkansans. Learn more at www.wrfoundation.org

About Arkansas Impact Philanthropy
Arkansas Impact Philanthropy has a vision of a strong, philanthropic sector that collaborates to create a more prosperous Arkansas for all Arkansans. Learn more at www.arkansasimpact.org
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A Letter From the Funders

We all have a role to play in supporting nonprofit organizations and nonprofit leadership and to champion the contributions of nonprofits to our state. To better understand how nonprofits want to be supported, our three foundations collaborated to support a study of the state of the nonprofit sector in Arkansas. The study was driven by the opinions of nonprofit leaders and represents how they perceive the challenges and opportunities for nonprofits in this state.

The study reinforced many of our beliefs and shed new light on how our organizations have supported and will support nonprofit capacity in the future. As we share this report, we know these three things to be true:

Nonprofits contribute to every Arkansas community. There are more than 14,000 nonprofits in the state of Arkansas working to preserve our environment, educate our people, improve our health, empower our residents, save animals, promote the arts, and hundreds of other causes. The variety of nonprofits in our state reflects the complexity of our communities. Their unique approaches reflect the unique needs and resources of each region, city, and neighborhood. The racial diversity of leaders at these organizations reflects the racial diversity of our state. Arkansas nonprofits employ more than 90,000 people and generate $17 billion dollars in annual revenue.

Nonprofits need our investment. Arkansans are known for their generosity, and give over $1.5 billion to nonprofits each year. However, nationally, generosity is on the decline. Individual giving in America has dropped more than 10% since 2000. Funding from state and federal governments has decreased, and changes in the tax code are squeezing corporate giving. Nonprofits in Arkansas need more than just funding, they also need hours and skills from their fellow Arkansans as volunteers, supporters, and board members. Without increased investment of time, talent, and treasure, they cannot keep up with the needs of their communities.

Nonprofits need the right investment. Limited funding for nonprofits is further limited by the requirements and “strings attached” to grants and donations invested in programs while starving leaders and crippling organizations. Nonprofits need general operating support. They need investment in staff and leadership. They need sustained, long-term investment that allows them to move beyond a survival mentality. When their basic needs are met, they can plan, evaluate, and move up the hierarchy of needs to self-actualization.

If we provide more unrestricted support for Arkansas’s nonprofits, invest in people (not just programs), and understand that until basic needs are met, nonprofits can’t effectively engage in long-term planning, our nonprofits will begin to reach their full potential.
A Survey of Nonprofits

The study evaluated the size, diversity, and challenges of the Arkansas nonprofit organization (NPO) sector and included analysis of public data sources, quantitative and qualitative survey responses, and interviews with NPO executive leaders. Participants included grantees of the study funders, former Arkansas Nonprofit Alliance members, and organizations that responded to invitations to participate shared through social media, public announcements, and newsletters.

There are 14,227 registered NPOs in Arkansas\(^1\), including charitable organizations and others recognized by the IRS as nonprofits (e.g. churches and educational institutions). All types were included with purposeful and random selection of interviewees to ensure diverse representation.

**Study Respondents**

- 441 NPOs responded to the survey
- 72 executive leaders completed an interview

Respondents generally represented the state NPO population in regards to geographic distribution.

**Figure 1: Arkansas Nonprofits and Study Participants**

\(^1\) Internal Revenue Service Exempt Organizations Business Master File 2017
Respondents also generally represented the mission-focus distribution in the state NPO population. The majority of study respondents were classified by the National Taxonomy of Exempt Entities (NTEE) as Human Services, Health, Public/Societal Benefit, or Education—47%, 13%, 11%, and 9%, respectively. While the sample generally aligns with the state population of NPOs, there are two unique attributes of the study population.

- The study population may be more highly resourced than average Arkansas NPOs as the majority indicated having paid staff (75%) and being funded by foundations (62%).
- Human Service, Health, and Arts and Culture NPOs are slightly overrepresented and Education, Public/Societal Benefit, and Religion Related NPOs are underrepresented.

**Figure 2: Study Respondents by NTEE Major Group**

![Pie chart showing the distribution of NPO respondents by NTEE major group]

**NPO Respondents – Demographics**

The demographics of NPO executive leadership of respondents generally aligns with Arkansas’s population demographics. The following charts summarize some characteristics of the executive leadership of NPOs participating in the study as compared with the Arkansas population.
- Varied levels of assets or revenue for NPOs did not result in significant variance in the gender of leadership
- Ethnicity and race mostly mirror that of the state population, however, Hispanic/Latino leadership is underrepresented
- Average tenure is 7.3 years. *(Range: 1 month to 45 years)*

**Figure 3: Race and Ethnicity of Nonprofit Leaders**

Respondents indicated strong commitment to recruiting diverse board members, which they found to be increasingly difficult. Respondents indicated that board demographics generally align with both the state population and that of executive leaders. The gender balance of boards differs from the gender balance of executive leaders. Males make up 51% of board members, more closely matching state demographics, and only 35% of nonprofit executive leadership. At 65%, nearly two-thirds of nonprofit executive leadership is female, while female board representation is at 49%.

**Figure 4: Diversity of Nonprofit Board Membership**

The majority of respondents indicated having paid staff and volunteers. As with board member recruitment, the majority of NPO’s reported struggling to recruit staff and volunteers.
Figure 5: Paid Staff at Arkansas Nonprofits

NPO Respondents – Poverty in AR

Respondents were asked to provide feedback on this question in the initial survey. Analysis of the narrative answers revealed common themes or discussion threads that were reflected across a majority of responses.

Leaders often passionately described children, youth, families, and others that had been impacted by their NPO in life altering ways, including stories of escaping generations of poverty. They often described success as critically dependent upon:
Education and job training opportunities
• Good jobs that pay livable wages
• Continuous effort

There was a strong thread woven throughout that NPOs are successfully moving individuals out of poverty, however, a broader reduction of poverty in Arkansas is challenged because:

• It requires “lots” of assistance and long-term investments
• “Others” do not seem to care or believe the need is valid

The most consistent theme reflected discouragement with and concerns about a pervasive “ambivalence about the challenges faced by [families and children]—in our own community—that are living in poverty.” Below are some of the leaders’ own words from answers to the question about moving people out of poverty.

| “Economic growth is happening in other places and it’s not impacting [our] community.” | “In our area people live off government subsidies because they can make more that way than with a job” | “Heck no, they don’t care” |

When asked to describe who “they are” or what is meant by “others,” the answers reflected the context of the NPO and the leader. For example, a leader struggling to maintain or secure state agency funding might indicate they were referring to agency staff, elected officials and the general public. A leader challenged by a diminishing donor base might describe “community residents/leaders” or “the people around here” as facing their own economic challenges and having less to share, or sharing a perception that if you “want to work you can get a job” so help is not necessary.

The following quote reflects the most common sentiment:

“For every person we help escape poverty, two more come right in behind them.”
NPO Respondents – Capacity Development Needs

The survey included questions about NPO capacity needs, including in what areas capacity-building support would be welcomed, willingness to pay for this type of support, greatest need, and what is most important.

The majority indicated that they welcome capacity-development support of some kind, but also indicated that they cannot pay. In the interviews, many explained their unwillingness or inability to pay in the following ways.

“I am willing to spend money on capacity development, but …”

- I just don’t have any money I can use for that.
- I don’t have any money.
- the money I have has strings tying it to [specific trainings, events, or meetings].

“It is more about ability to pay, not willingness or the importance I place on capacity development.”

“If I could find someone to write grants, even someone I could train, we could look for more funding. But I don’t have the funds to hire/train that person.”

Respondents were asked to identify their single most important organizational capacity and greatest need for organizational capacity development.

Figure 6: Nonprofit Capacity Needs
Fundraising: The Greatest and Most Important Need

Fundraising is both the greatest (> 60%) and most important (> 40%) capacity-development need reported. Respondents were asked about fundraising activities, sources of funding, grantors, and revenue trends. The data provided in the survey was used to customize follow-up questions for interviews. A summary of this information is below.

**Figure 7: Nonprofit Fundraising Activities**

- 93% Write Grants
- 54% Have Fundraising Plans
- 76% Actively Cultivate Donors

61% have < 250 donors.

**Figure 8: Nonprofit Grant Submissions**

Organizations that identified Fundraising as their greatest need were more likely to have:

- No paid staff (33%)
- Communications plans (63%)
- Volunteers (91%)
- Business Revenue (76%)
Fundraising – Insights from interviews

NPO leaders provided insight into the types of Fundraising challenges they needed to address. Four central themes emerged. The following are summaries of comments and for each theme:

- **Lack of access to and availability of funding**
  - Lack structured effort
  - Never have enough [to cover costs /meet needs]
  - Need working capital — too many grants are for specific program services
  - No one wants to pay for operations/administration
  - Need is increasing and funding is decreasing

- **Increased difficulty finding grants for which they or their services are eligible**
  - Not many foundations
  - Grants are tied to specific programs/services, and these change frequently
  - Hard to find grants
  - Decreased government funding

- **Diminishing donor bases**
  - Donor base has decreased (apathy/lack of awareness of need/limited resources as economic growth is not strong in their area)
  - So many are asking for help; it is so easy to give via phone/online; fundraising campaigns are competing for donors
  - Many in our community are “donating” to family (e.g., adult children living at home, raising grandchildren, or quitting jobs to care for elderly)

- **Lack of staff and lack of knowledgeable/experienced staff.**
  - Lack experienced fundraising staff
  - Need more staff (e.g., executive director can write grants or fundraise and there is not enough time to adequately support those efforts and take care of all else)
  - Need help with fundraising/asking for money/how to maximize funding without turning people off
  - Need help with aspects of fundraising (e.g., developing metrics, using data, social media, communications, telling our story, and federal requirements)

| “You need money to get money — you need capacity to develop capacity.” | “We were successful so now our funding is decreasing.” |
| “[They] won’t pay for operations. I need grants that pay for [people] to [write grants].” | “[Funders] do not want to support what we do. They want us to create new programs.” |
NPO Respondents – Operations

Various operational aspects of NPOs were assessed via the survey and interviews including: staff/volunteer management, communications, policies, and financial performance. Respondents’ answers generally indicated strong operational procedures and tools.

Findings included that:

- The majority of NPOs reported current vision and mission statements and strategic plans, on average updated within the last two years
- Most NPOs have written operational policies and procedures that have been updated within the last three years (see table below)
- Few NPOs have written emergency CEO/executive director succession plans (31%)
- Most NPOs report use of communication channels including websites, social media, and printed collaterals (see table below)

Table 1: Nonprofit Operational Capacity

<table>
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<tr>
<th>Operational Policies and Documentation</th>
<th>Communications Channels</th>
<th>Nonprofit Voice</th>
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<tr>
<td>Respondents that have:</td>
<td>Respondents that have:</td>
<td>Respondents that engage in:</td>
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<tr>
<td>Program Goals Measured Annually 87%</td>
<td>Organization Facebook Page 93%</td>
<td>Community or Constituency Organizing* 39%</td>
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<tr>
<td>Written Standard Operating Procedure 83%</td>
<td>Organization Website 91%</td>
<td>Policy Advocacy 28%</td>
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<tr>
<td>Staff Handbook 80%</td>
<td>Printed Marketing Materials 75%</td>
<td>Lobbying 8%</td>
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<tr>
<td>Performance Evaluations 76%</td>
<td>Twitter Account 47%</td>
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<tr>
<td>Fundraising Plan 54%</td>
<td>Annual Report (Print Publication) 43%</td>
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<tr>
<td>Communication Plan 48%</td>
<td>Organization Instagram Account 39%</td>
<td></td>
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<tr>
<td>Written Emergency CEO Succession Plan 31%</td>
<td>Annual Report (Electronic Publication) 35%</td>
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* The percent of respondents indicating involvement in community or constituency organizing was an anomaly in comparison to state data and comparative statistics from other research. This trend was explored in interviews. Leaders described community/constituency organizing as including a broad range of activities that are not the typical public advocacy/policy organizing activities traditionally included in this category. (For example, organizing community participation in a food drive.)
Related Research

The central themes from this Arkansas NPO market study align with existing studies of nonprofit capacity development needs. Below is a brief literature review of studies with similar findings.

The greatest challenge for nonprofits is funding:

- 67% of respondents to a national survey of nonprofits said the greatest challenge is raising funding to ensure financial sustainability.\(^2\)
- 38% of nonprofits have less than four months of reserves.\(^3\)
- Most common challenge of NPO sector in various metropolitan areas and regions is procurement of funding and resources.\(^4\)
- There has been a significant decline in nonprofits reporting meeting their fundraising goals in 2016 as compared to 2015 and 2014.\(^5\)
- The number of U.S. households giving to charity has significantly dropped, from 66.2% in 2000 to 56% giving in 2015.\(^6\)
- Government agencies have recently accounted for 29% of nonprofit funding,\(^7\) but federal and state budgets are being reduced for programs nonprofits are expected to deliver.\(^8\)
- Challenges in the partisan environment and potential changes in tax policy impact charitable giving. “If lawmakers truly want effective tax policies and more efficient government, then we also need a thriving charitable nonprofit sector that provides essential services for the people who need them the most.”\(^9\)

Nonprofits also face operational challenges:

- The second greatest challenge facing nonprofits is not having enough staff or volunteers (i.e., ability to offer competitive pay limits and ability to recruit/retain qualified staff).\(^10\)
- 19% of nonprofit hiring is because of turnover.\(^11\)
- The ability to pay competitive wages is the number one staffing challenge reported for 2012 – 2016 among NPO employers, and the second biggest challenge since 2014 is finding qualified staff.\(^12\)
- Nonprofit employees report being unsatisfied with compensation (50%), and half report planning to leave the organization.\(^13\)

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\(^9\) Mayor Walter Weeks, Coats, NC, writing in “Senate bill harms nonprofits, communities” Fayetteville (NC) Observer (2015).
\(^12\) Ibid.
17% of nonprofits report having an emergency succession plan for executive leadership.\textsuperscript{14} Nonprofits with budgets of less than $1 million are more likely to not have written succession plans. (17% have plans compared to 27% of nonprofits with budgets between $1 million and $9.9 million and 50% of nonprofits with budgets greater than $10 million.)\textsuperscript{15}

**Nonprofits face challenges with collaboration:**

- Nonprofits within a community need to coordinate/collaborate to meet community needs and this is most effectively accomplished when nonprofits build and maintain effective relationships.\textsuperscript{16} \textsuperscript{17} \textsuperscript{18}
- “I know two grantees who should be allies but spend so much time fighting over turf. I’m putting them in a canoe for a few hours and saying, ‘Don’t come back until you’re on speaking terms.’ That’s a kind of capacity building right there.”\textsuperscript{19}
- “Ultimately, the capacity of the nonprofit community is not limited by the pool of available resources but by the possibilities of the community to support exchanges among diverse agents.”\textsuperscript{20}

**Opportunities for Nonprofits**

After the quantitative and qualitative data were analyzed, the individuals involved in implementing the study engaged in a discussion about what we learned and the opportunities to respond to the needs expressed by the Arkansas NPO community. These individuals included:

- Undergraduate students from multiple disciplines from a four-year university
- Volunteers including retirees, a child care provider, and an educator
- NPO staff members involved in the administration of the study
- An NPO executive leader involved in the administration of the study and who is not represented in response data
- An NPO manager with academic and professional backgrounds in program evaluation, research, program development, management, and evaluation

\textsuperscript{14} Oregon’s Nonprofit Sector Brief (2014).
\textsuperscript{15} Leading with intent: 2017 National index of nonprofit board practices. (2017) BoardSource
\textsuperscript{17} Mapping the nonprofit infrastructure (2011) Texas A&M University.
\textsuperscript{20} Paarlberg, L. & D. Varda (2009)
Challenges for Nonprofits

The challenges to addressing capacity-development needs and options for possible next steps were identified by this group as summarized below.

**Capacity Development:** A common theme reported during the interviews was that many capacity-development activities were mandatory requirements related to funding, professional licensure requirements, and/or requirements of a state or national association.

**Funding:** “What is brought in in funds determines what we can do [for capacity development].” In several cases, certain activities were required by funders (e.g., workshops), and therefore time/travel was covered by the funding source. The opposite was also reported, meaning that funders would not allow professional development or staff training expenses.

**Location:** Geography was described as a barrier to accessing capacity-development opportunities. The barrier exists when NPOs do not have the staff available to be away from their primary duties for an entire day or more to travel two to three hours to a training, meeting, or workshop. Several leaders indicated that they could not take a full day away to participate in opportunities that they wish they could have attended.

**Competition:** Leaders also reported what the researchers described as a sense of competition between NPOs and the perception that some NPOs are taking care of some need so others should not be focusing on that same need in the same geography as that creates unnecessary competition for resources. Another theme related to competition was that collaboration to meet capacity-development needs by, for example, sharing grant writing resources/staff, was not possible as “you could never be certain that [your organization] was getting their best effort if two of us are competing for the same grant.”

**The Hotline:** Several respondents expressed a need for “hotline” type assistance described as accessible via phone, not necessarily an immediate response but within the business day or 24 hours and capable of providing context specific answers from subject matter experts in HR, accounting, evaluation/metrics, how to find the right data (e.g., census data), and possibly legal. An example given for when this type of assistance would be helpful was, “A volunteer comes in and tells me a dementia patient touched her inappropriately. Is this harassment? What do I do?”

**Arkansas Nonprofit Alliance (ANA):** When organizations mentioned sources of capacity development assistance or their awareness of ANA, follow-up questions were asked to further explore their identification of this as a resource. When asked about ANA a resource the answers varied with the most common being:
• “I just did not think about calling them.”
• “I’ve called ANA in the past and [they] were helpful. I don’t really know why I don’t use [them] more.”
• “So many [trainings/workshops] are a two- to three-hour drive from where I am located. I just do not have that much time to be out of the office.”
• “[They] couldn’t really answer my question, so they referred me to [some other resource or some other person/consultant].”

Possible Next Steps

The researchers believed a series of focus groups and/or nominal groups with intentionally selected participants and some randomly selected participants could provide more detailed information about ways to address the reported challenges.

Regional collaboration for delivery of capacity development services: Consider exploring the viability of a model of capacity-development service delivery centered on a smaller geographic area and structured as some form of collaboration or cooperative. The idea includes:

• Creating peer-to-peer learning opportunities.
• Facilitating meetings/workshops with shorter travel distance to the location.
• Exploring ways to share resources (e.g., HR, Accounting, Data, and Evaluation) that are not needed full-time by any individual organization and are often needed periodically. Note: Grant-writing and fundraising capacity should be discussed as a separate conversation due to the concerns about competition and shared resources not serving the best interest of all organizations.
• Considering the state as including at least five regions: Central, Northwest, Northeast, Southwest, and Southeast. Other boundaries may make more sense when considering the number, size, funding level, and mission focus of NPOs by geographic distribution.

Fundraising tools: Consider hosting a series of nominal groups among NPOs with common missions to explore the idea of competition among and between donor populations and open a discussion about how to raise awareness about the needs among the general public while helping NPOs in a common geography (i.e., county) or those with a common mission reduce direct competition. Discussion around this issue also included a possible discussion on:

• Fundraising tools and resources that are part of the capacity development need
• Need for unrestricted operating grants to cover the cost of staff and/or staff training related to fundraising and grant development
Need to address the lack of concern among community members and the general public about the needs

**Entrepreneurial spirit:** It was noted that several NPOs reported operating businesses as part of their revenue generation strategy. During the interviews, several leaders shared that while this was helping with revenue, they needed to “take a step back” and consider their financial and operational processes to ensure this revenue was recorded and reported properly. Additional interviews with leaders involved in this type of initiative or nominal groups might provide additional insight on this thread of concern.

**Grant writing:** A common theme was that NPOs need skilled grant writers in addition to staff skilled in fundraising. The most common barrier to meeting this need was funding that supported the staff and/or staff training to build this capacity. (Note: Some reported this as a program management capacity development need.) There was a strong sense that sharing a skilled grant writer with other NPOs was not feasible and that contract grant writers were expensive and there was no funding to pay them. More information is needed to illuminate a potential path toward building and/or meeting this capacity development need and, specifically, to address the concerns related to competition between NPOs.
Appendix A: Methodology

There are 14,227 registered NPOs in Arkansas\(^{21}\), including charitable organizations and other types of nonprofits recognized by the IRS (e.g. churches, membership organizations like the Fraternal Order of Police associations, and educational institutions). All types of NPOs were included in the study with purposeful and random selection of interviewees designed to ensure diverse representation.

All types of NPOs were included in the study with purposeful and random selection of interviewees designed to ensure diverse representation, including:

- Geographic location / service area
- Mission focus as defined by NTEE cause area\(^{22}\)
- Annual revenues / assets
- Age of organization
- Number of paid staff
- Type of NPO as defined by the IRS, e.g. Internal Revenue Code 501(c)3
- The analysis of existing data sets included the following:
  - IRS Business Master File (BMF)
  - Guidestar records\(^{23}\)
  - Data from the sponsor foundations
  - Member organization data from the Arkansas Nonprofit Alliance
  - Review of current research, e.g. National Center for Charitable Statistics

The foundations partnered with an Arkansas-based NPO to facilitate the study providing anonymity and confidentiality for respondents. Participant recruitment was facilitated by the foundations and the NPO administering the study using various contact lists including Arkansas Nonprofit Alliance membership, Guidestar contact records, grantee contacts and various other sources of contact information shared with either the foundations or the study facilitator.

The study used a combination of online questionnaire and structured phone interviews. 441 NPO participants completed the online survey and 71 participants completed phone interviews. The majority of study respondents were classified by the NTEE as Human Services, Health, Public/Societal Benefit, or Education—47%, 13%, 11%, and 9%, respectively. By this measure, the sample generally aligns with the state population of NPOs. The sample may be more highly resourced than average Arkansas NPOs as the majority reported paid staff (75%) and foundation funding (62%). Human Service, Health, and Arts and Culture NPOs were slightly overrepresented and Education, Public/Societal Benefit, and Religion Related NPOs were underrepresented.

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\(^{21}\) IRS BMF July 2017

\(^{22}\) IRS National Taxonomy of Exempt Entities (NTEE) Codes

\(^{23}\) Retrieved from Guidestar.org during July and August 2017