La Piana Consulting surveyed our social sector contacts, receiving 433 responses, painting a picture of the current impact of COVID-19. We will request your input again as this crisis develops in the coming months, so we can further understand trends to share with the sector... The results are astounding:

93% OF RESPONDENTS HAVE BEEN FORCED TO CURTAIL SERVICES OR ADAPT HOW THEY HAVE PROVIDED THEM THUS FAR:

ON AVERAGE, RESPONDENTS HAVE HAD TO LAY OFF OR FURLough 19% OF THEIR STAFF.

ON AVERAGE, RESPONDENTS HAVE MOVED 83% OF THEIR OPERATIONS TO A WORK FROM HOME ARRANGEMENT.

CURRENT AVERAGE IMPACT ON REVENUE:

- 26% of respondents indicated a loss of revenue between 50% and 100%.
- 44% of respondents indicated a loss of revenue between 0% and 49%.
- 27% of respondents indicated a gain in revenue between 0% and 49%.
- 3% of respondents indicated a gain in revenue between 50% and 100%.

79% OF RESPONDENTS HAVE MOVED SOME OR ALL OF THEIR PROGRAMS / SERVICES TO AN ONLINE OR OTHER DIGITAL DELIVERY METHOD.

STRONG MAJORITIES EXPECT TO MAKE FURTHER REDUCTIONS IN THE NEAR FUTURE:

LIKELIHOOD THAT RESPONDING ORGANIZATIONS WILL MAKE (FURTHER) REDUCTIONS IN STAFF:

<table>
<thead>
<tr>
<th>Extremely Unlikely</th>
<th>Extremely Likely</th>
</tr>
</thead>
<tbody>
<tr>
<td>15.3%</td>
<td>23.5%</td>
</tr>
<tr>
<td>Somewhat Unlikely</td>
<td>Somewhat Likely</td>
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<tr>
<td>28.6%</td>
<td>32.6%</td>
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</tbody>
</table>

LIKELIHOOD THAT RESPONDING ORGANIZATIONS WILL MAKE (FURTHER) REDUCTIONS IN SERVICES:

<table>
<thead>
<tr>
<th>Extremely Unlikely</th>
<th>Extremely Likely</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.6%</td>
<td>23.8%</td>
</tr>
<tr>
<td>Somewhat Unlikely</td>
<td>Somewhat Likely</td>
</tr>
<tr>
<td>23.8%</td>
<td>42.5%</td>
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</tbody>
</table>

La Piana Consulting
This is a time of incredible uncertainty. Much of the sector faces an existential threat from service shutdown, revenue loss, and the unknown duration of the pandemic.

Most responding school-based and arts & culture organizations are completely closed, many are experiencing 100% loss of revenue.

Many respondents self-insure for unemployment, causing another wave of crisis.

Respondents are being incredibly resourceful in adapting to remote operations and service delivery, where possible. But many services rely on personal connections now lost or hindered.

“Brutal. The impact will be felt for a long time.”

“It may put us out of business.”

“The toll on staff should be lifted up more. People are stressed, worried, and while work is helpful to keep busy, there's an underlying palpable anxiety.”

“We have already cut 100% staff and 100% programs.”

“We have no revenue and without grants to cover our costs, we don't have a way to recover.”

“It's a major threat to our ability to survive as an organization.”

“Most chaotic and threatening situation in my 40-year career.”

“We anticipate significant negative impact on fundraising.”

“HR issues are a nightmare.”

“When we get to the other side, we will need to be mindful of the new way of living and reflect that in our programs and services. New learnings in an extraordinary time. We must stick together and support each other.”