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The Appreciated Sector: Public Confidence in San Diego County Nonprofit Organizations

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the APPRECIATED sector

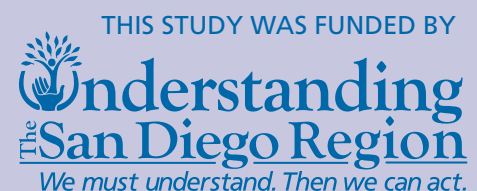
PUBLIC CONFIDENCE IN SAN DIEGO COUNTY NONPROFIT ORGANIZATIONS

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CASTER FAMILY CENTER FOR NONPROFIT RESEARCH

INSTITUTE FOR NONPROFIT EDUCATION AND RESEARCH
UNIVERSITY OF SAN DIEGO

LINDSEY M. MCDUGLE, M.E.M., LAURA DEITRICK, M.A.,
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The San Diego Foundation's purpose is to improve the quality of life within all of our communities by promoting and increasing responsible and effective philanthropy.

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- To monitor and assess changing needs;
- To meet those needs through financial awards and organizational support;
- To convene members of the community to promote creative dialogue on issues affecting all of our communities.



The mission of the Institute for Nonprofit Education and Research is to educate leaders and advance best practices in the nonprofit community through academic excellence, applied learning, and research that examines issues of strategic importance to the sector. The Institute Houses the Caster Family Center for Nonprofit Research.

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Dear Reader,

Our vision is that San Diego's nonprofits will be nationally recognized as the strongest, most effective organizations in the United States. To accomplish this vision, nonprofits must have access to the necessary resources and capacity to achieve their missions. The San Diego Foundation and its Organizational Success Program (OSP) Working Group are committed to seeking out those resources and making them available to all nonprofits.

Public confidence plays a significant role in evaluating the strength of the nonprofit sector. Confidence in our region's nonprofit sector is positive and that is a testament to the great work being done in our region. We are pleased to share the good news for San Diego as you will discover in this report.

However, there are still many opportunities identified that we as a sector must address. One critical opportunity is to provide better communication about what it takes to operate effective nonprofits. To address this, the OSP Working Group is exploring ways in which to provide more complete information to the public on San Diego's nonprofit organizations.

Another opportunity this research highlights is that nearly 30 percent of our residents, based on the survey, have little or no awareness of the nonprofit sector. Greater awareness links to greater confidence and increased instances of volunteering and donations to organizations.

The OSP Working Group is committed to expanding our current resources, like the Nonprofit Resource Center, IMPACT program and Endow Partnership, as we strive to achieve our vision. Together, with you and our partners, we can strengthen the nonprofit organizations that provide vital services and programs for our entire region.

Thank you to University of San Diego's Caster Family Center for Nonprofit Research for their commitment to studying issues of strategic importance to the nonprofit sector.

Regards,



Bob Kelly, President & CEO



Ray Smilor, Chair



Doug Hegebarth, Vice-Chair



Lori Finch, Manager

June, 2008

Dear Reader:

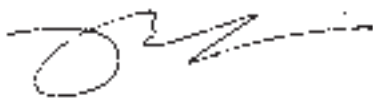
The Caster Family Center for Nonprofit Research is pleased to present this latest report to the community on San Diego's third sector. San Diego's nonprofits contribute in significant ways to the quality of life in the San Diego region, and the confidence that San Diegans have in the sector is its bedrock. The findings presented in this report, therefore, are exceedingly encouraging. Overall, they suggest that the public does, indeed, appreciate the sector and what it contributes to the community.

This is the second in a series of research studies conducted by the Caster Center designed to generate baseline information about San Diego's nonprofit sector. A previous study examined economic aspects of the sector, and a current study—scheduled for release in September 2008—focuses on the extent and nature of organized philanthropic giving in San Diego. The San Diego Foundation funded this study; the Foundation also helped support the other two baseline information studies. We very much appreciate the Foundation's support.

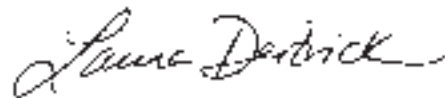
Over the next few years, the Caster Center intends to use the baseline information it is generating to map the evolution and health of San Diego's third sector. It will do this while continuing to provide evaluation and policy analysis services on a contractual basis to nonprofit, philanthropic, and governmental organizations. The Caster Center also will continue to research other aspects of the nonprofit sector. Already completed studies have focused on such topics as executive transition and the high rate of deficit spending evident in San Diego's third sector.

The study results that appear in the enclosed report are just the beginning of an in-depth analysis of public confidence in San Diego's nonprofit sector. If you are interested in learning more, please visit our website at www.sandiego.edu/npresearch in the coming months for additional papers and reports.

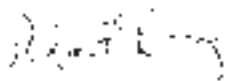
Sincerely,



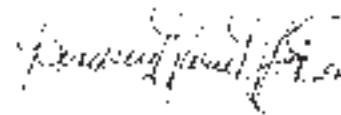
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EXECUTIVE SUMMARY

From November 2007 to January 2008, a total of 1,002 adult San Diego County residents responded to a survey designed to assess their confidence in the ability of local nonprofit organizations to provide quality services on the public's behalf and to spend money wisely. At the beginning of this survey, participants were given an *identification test* to determine their awareness of nonprofit organizations. Additionally, respondents were asked several questions related to their confidence in San Diego County nonprofit sub-sectors (i.e., arts, human services, environment, etc.), as well as their involvement in the local nonprofit sector through giving and volunteerism.

When comparing the nonprofit, for-profit, and government sectors, San Diegans had the most confidence in nonprofits to provide quality services, spend money wisely, and represent the public's interest. Other key findings in this report include the following:

- **Seventy-five percent** of respondents expressed either a *great deal* or a *fair amount* of confidence in the ability of San Diego County nonprofits to spend money wisely
- **Seventy-five percent** of respondents reported making a financial contribution to a nonprofit organization in 2007
- **Media coverage, opinions of friends and colleagues**, and an organization's website **were the leading sources of information** consulted prior to making a financial donation
- **San Diegans expressed more confidence** in the ability of local nonprofit organizations to spend money wisely **than the American public** has expressed in national surveys of public confidence
- Persons demonstrating higher levels of nonprofit awareness were nearly **three times** as likely to express higher levels of confidence in the ability of nonprofit organizations to effectively provide quality services
- Persons demonstrating higher levels of nonprofit awareness were nearly **two times** as likely to express higher levels of confidence in the ability of nonprofit organizations to spend money wisely
- According to the survey results, **more than a third** of San Diegans (40 percent) indicated that they volunteered with a nonprofit organization in 2007
- More than **86 percent of respondents** had an overwhelmingly positive impression of the support provided by local nonprofits during the 2007 firestorm
- Despite their generally positive view of the nonprofit sector, many San Diegans indicated that they were **unlikely** to choose a nonprofit service provider in the areas of education and healthcare

86% of respondents expressed either a *great deal* or a *fair amount* of confidence in the ability of San Diego County nonprofit organizations to provide quality services

INTRODUCTION

Within the nonprofit sector, public trust and confidence have traditionally been viewed as crucial elements in assessing the overall health of the sector. In fact, trust and confidence in the sector are assumed to be among the key determinants of volunteering, giving, and development of donor, charity and beneficiary relationships.¹ It is hardly surprising, therefore, that several scholars have periodically assessed trust and confidence in nonprofit organizations.² As scholars have noted, *The concept of trust lies at the heart of charity.*³ Or, to state the matter another way: Trust and confidence are the foundations upon which nonprofit organizations are built.

Because of this trust and confidence in nonprofit organizations, the public has generally been willing to assign these organizations responsibility for accomplishing some of society's most important functions — e.g. educating our children, monitoring our health, and protecting our environment. It should not be surprising, then, that the public will often hold nonprofit organizations to a high standard of accountability and ethical behavior. Harvard Business School professor Regina Herzlinger has noted, *When nonprofit organizations fail, the breach of public trust is devastating.*⁴

In recent years, especially following the perceived ethical lapses of some nonprofit organizations in the wake of the 9/11 tragedy, national reports have documented a *crisis of confidence* in America's nonprofit sector. Although some state-level reports have produced results that are somewhat more positive,⁵ no studies of the public's confidence in nonprofit organizations have been conducted in the State of California. Thus, it is not clear how residents of San Diego County perceive their local nonprofit sector.

Furthermore, it is difficult to guess what San Diego residents' perceptions of the sector might be. After all, in recent years, certain nonprofit organizations in the San Diego area have had their own well-publicized problems. On the other hand, the sector performed admirably during the 2007 Southern California wildfire crisis. It seemed appropriate, therefore, to systematically examine the level of public confidence in the San Diego County nonprofit sector and to assess confidence in relation to an individual's awareness of, involvement in, and perceptions of the sector.

¹ Sargeant & Lee, 2002b; Bowman, 2004; Burnett, 1992; Sargeant, 1999; Saxton, 1995.

² Toppe and Kirsch, 2002; Light, 2002, 2003, 2004a, 2004b, 2005; Sargeant and Lee, 2002a.

³ Sargeant & Lee, 2003a (p.1).

⁴ Herzlinger, 1996 (p. 107).

⁵ In recent years, studies of public trust and confidence in the nonprofit sector have produced contradictory findings across services and geography (see Toppe and Kirsch, 2002; Light, 2002, 2003, 2004a, 2004b, 2005, 2008; Keirouz, 1998; Lewis, 2003; Wilson and Hegarty, 1997; Maryland Association of Nonprofits, 2002).

At the beginning of this study, the level of awareness individuals have of nonprofit organizations was assessed. This was done in order to determine whether or not respondents were basing their perceptions of the sector on an accurate understanding of what is, and what is not, a nonprofit organization.

For the purpose of this study, a person's ability to correctly identify nonprofits when asked to name three nonprofit organizations was used as an indicator of nonprofit awareness

AWARENESS OF NONPROFIT ORGANIZATIONS WAS MEASURED USING THE FOLLOWING SCALE:

| | |
|--|------------------------------------|
| 3 IDENTIFICATIONS = High Awareness | Higher Level Awareness Individuals |
| 2 IDENTIFICATIONS = Moderate Awareness | |
| 1 IDENTIFICATION = Low Awareness | Lower Level Awareness Individuals |
| 0 IDENTIFICATIONS = No Awareness | |

A. IDENTIFYING NONPROFIT ORGANIZATIONS

Most San Diegans were able to correctly identify nonprofit organizations when asked the following question: *When you think about local San Diego County nonprofit organizations, which ones come to mind? (Please name three)*

In total, 49 percent of San Diegans exhibited a high level of nonprofit awareness (3 identifications), and another 22 percent of San Diegans exhibited a moderate level of nonprofit awareness (2 identifications). Taken together, these numbers indicate that approximately 71 percent of San Diego County residents have a moderate-to-high level of awareness of what is, and what is not, a nonprofit organization (see Figure 1). However, bivariate analysis of the data revealed that awareness of the sector differed significantly by racial/ethnic group, education level, age, income, and the area of the County in which the respondent resided.

From these results we can assume that perceptions of the local sector (such as perceptions of sector performance) are largely based on an accurate understanding of what constitutes a *nonprofit organization*. Yet, although this finding may be comforting, the 29 percent of respondents demonstrating no-to-low awareness of the nonprofit sector should cause at least some concern.

How do Local Findings About Awareness Compare to National Findings?

Several national studies have assessed public awareness and understanding of the nonprofit sector using different indicators. Despite the use of these different measures, comparisons can still be drawn. In particular, the level of nonprofit awareness in San Diego County is generally consistent with what national studies have found: approximately one-third of the public has little awareness or understanding of the nonprofit sector.⁶

⁶ In their survey experiment on public legitimacy of nonprofit organizations using descriptions of nonprofit ownership in hospitals, Schlesinger, Mitchell, and Gray (2004) found that when asked whether or not they knew what "nonprofit" meant, nearly one-third (between 31 – 32%) of Americans could make little sense of the term. Similarly, Light (2004) found in one out of a series of national surveys conducted to assess public confidence in nonprofit organizations, that when asked to state what the term "charitable organization" meant, 11% of respondents could not, or would not, answer the question, 39% provided the name of a specific organization, and 50% provided a description of some kind; however, follow-up questioning to those that provided a description revealed that 17% could not provide the name of a specific organization that they were thinking about. In total, then, about 28% of respondents in this study were unable to identify a nonprofit organization.

PUBLIC AWARENESS OF NONPROFIT ORGANIZATIONS

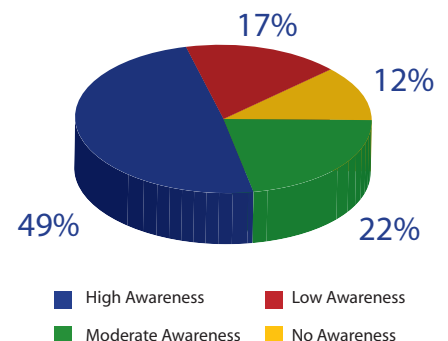


Figure 1: Percentage of San Diegans Demonstrating Awareness of Nonprofit Organizations

AWARENESS

B. NATIONALLY AFFILIATED VERSUS LOCALLY BASED NONPROFITS

While most San Diegans were able to correctly identify nonprofit organizations, smaller, more locally based nonprofit organizations (i.e., organizations without a national affiliate) were identified less frequently than were larger, nationally affiliated organizations.

For example, 20 percent of San Diegans identified the nationally affiliated American Red Cross in their first identification, while only 12 percent identified the locally based Father Joe's Villages/St. Vincent DePaul in their first identification. Similarly, in their second identification, 12 percent of San Diegans identified the nationally affiliated Salvation Army, while only 8 percent identified the locally based Father Joe's Villages/St. Vincent DePaul. Frequency counts of the three most commonly identified nationally affiliated and locally based first, second, and third responses are displayed in Figures 2, 3, and 4.

The ability to quickly name a nationally affiliated nonprofit organization over a locally based nonprofit organization may be a result of greater marketing on the part of the nationally affiliated organizations, as well as greater media attention. Larger nonprofit organizations typically have more resources (both financial and staff) for large-scale marketing campaigns and, as a result, are better able to capture the media's attention--especially when collaborating with high profile for-profit organizations in corporate-cause partnerships. Therefore, although the public may be directly influenced more by local nonprofits, they are more apt to be familiar with high profile organizations that may or may not operate directly in their community.

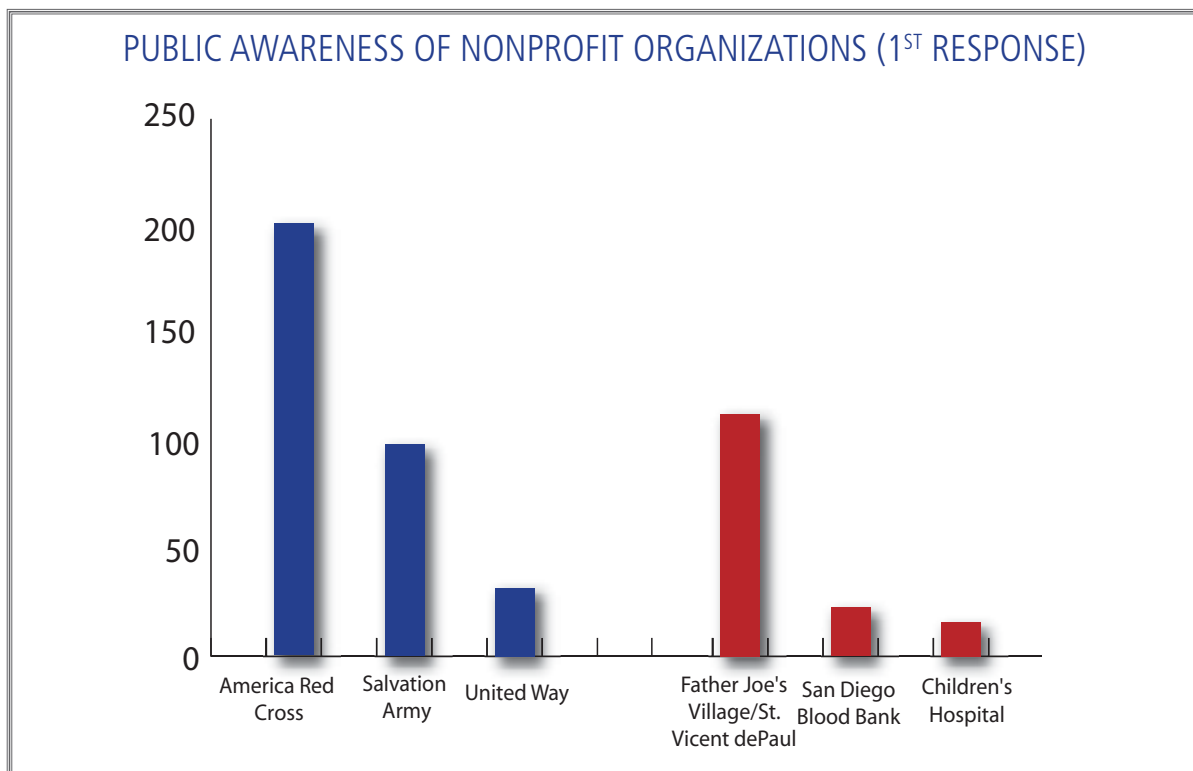


Figure 2: Top Three Most Frequently Identified Nationally Affiliated and Locally Based Nonprofit Organizations (First Response)

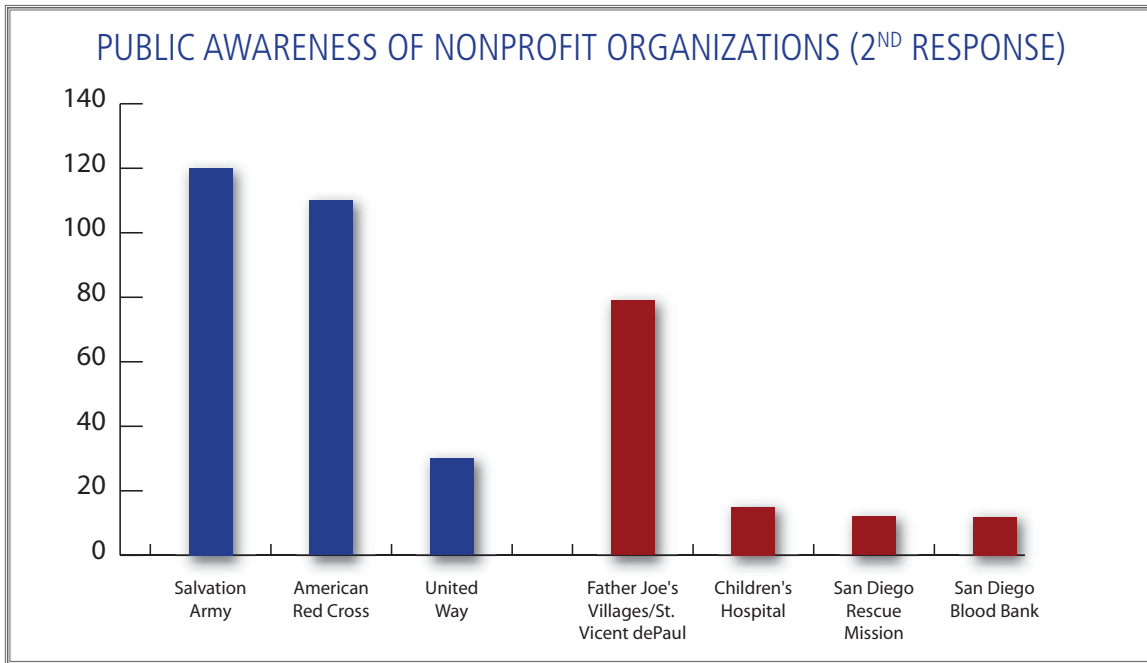


Figure 3: Top Three Most Frequently Identified Nationally Affiliated and Locally Based Nonprofit Organizations (Second Response)

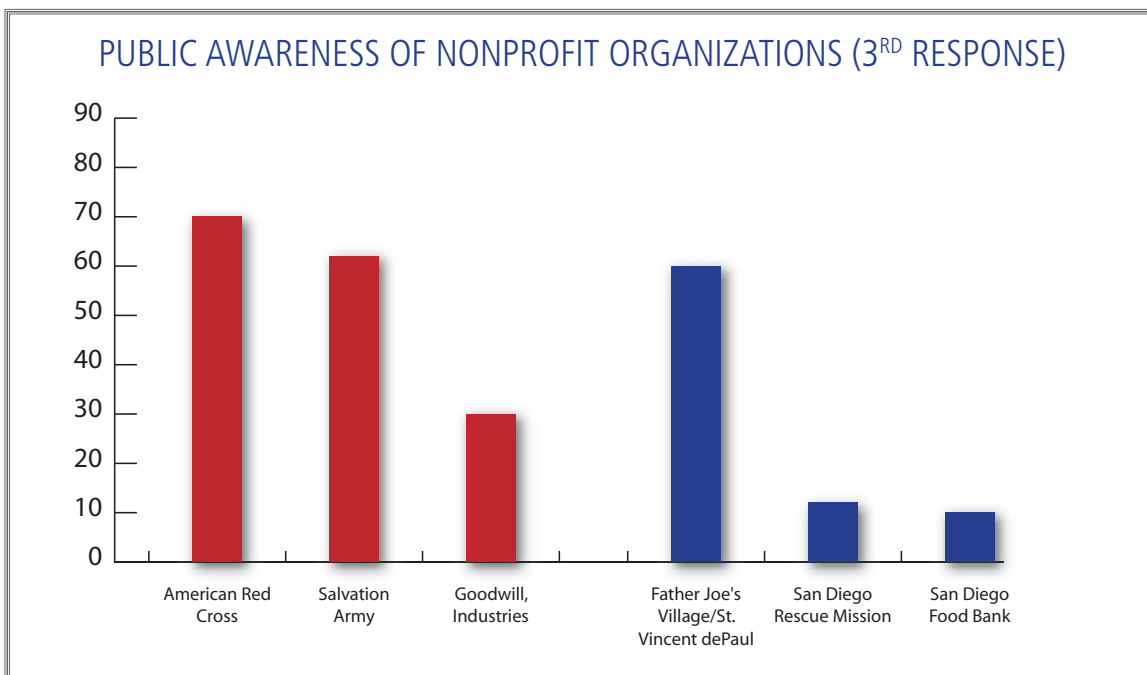


Figure 4: Top Three Most Frequently Identified Nationally Affiliated and Locally Based Nonprofit Organizations (Third Response)

After the analysis suggested that most San Diegans could correctly identify nonprofit organizations and, thus, make distinctions between sectors of society, the next tasks were (a) to examine the level of confidence San Diegans had in the capabilities of local nonprofit organizations, and (b) to investigate the extent to which the public's perceptions of confidence differed by sub-sector.

A. CONFIDENCE IN NONPROFIT CAPABILITIES

When asked *How much confidence would you say you have that San Diego County nonprofits effectively provide quality services on the public's behalf?* twenty-eight percent of respondents expressed a *great deal of confidence*, 58 percent expressed a *fair amount of confidence*, and 12 percent and 2 percent expressed either *not too much confidence*, or *no confidence at all*, respectively.

However, when asked *How much confidence would you say you have that San Diego County nonprofits spend money wisely?* the percentage of respondents expressing a *great deal of confidence* decreased to 15 percent, the percentage of respondents expressing a *fair amount of confidence* remained relatively stable at 60 percent, and the percentage expressing *not too much confidence* and *no confidence at all* both increased (21 percent and 4 percent, respectively) (see Figures 5 and 6).

Thus, while it may be encouraging to find that most respondents expressed either a *fair amount* or a *great deal* of confidence in the ability of San Diego County nonprofit organizations to effectively provide quality services, the decrease in confidence that respondents expressed in the ability of these same nonprofits to spend money wisely should be noted. This decrease could suggest that at least some San Diegans believe nonprofit organizations are effective, but not efficient. They may assume, for instance, that nonprofit organizations' administrative costs are too high.

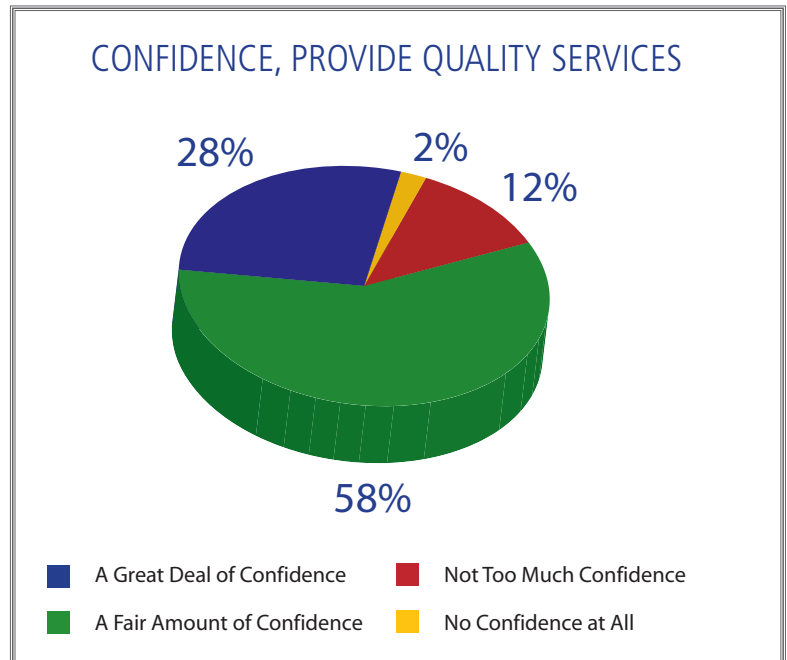


Figure 5: How much confidence would you say you have that San Diego County nonprofits effectively provide quality services?

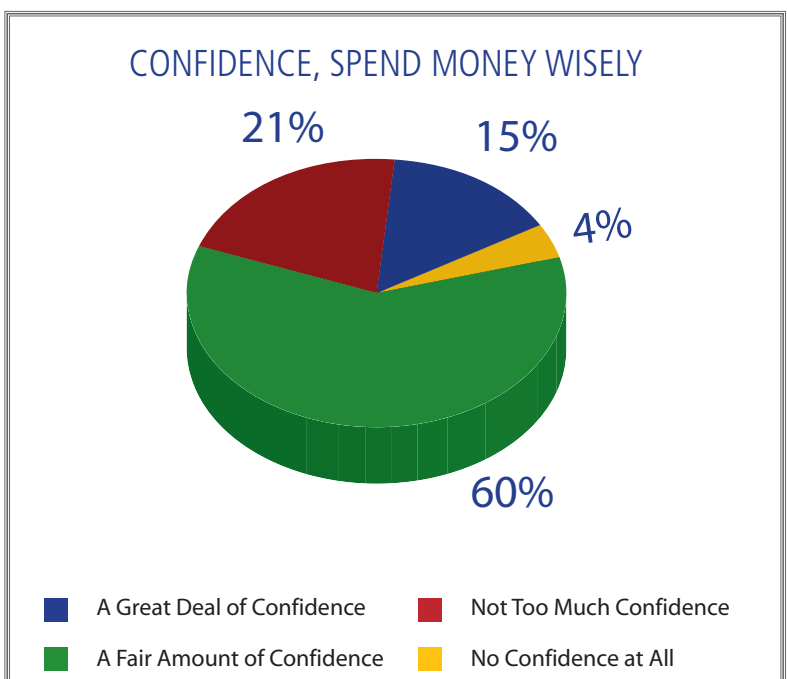


Figure 6: How much confidence would you say you have that San Diego County nonprofits spend money wisely?

PUBLIC CONFIDENCE

In fact, when survey participants were asked about their opinion of executive compensation, 42 percent indicated that they believed nonprofit executives receive *too much financial compensation*. Furthermore, when using *too much financial compensation* as a reference category, inferential analysis of the data revealed individuals that believed nonprofit executives receive *too little financial compensation* were nearly two times as likely to have higher levels of confidence in the ability of nonprofit organizations to spend money wisely.

Similarly, individuals that believed nonprofit executives receive *just the right amount of financial compensation* were more than six times as likely to have higher levels of confidence in the ability of nonprofits to effectively provide quality services, and nearly seven times as likely to have higher levels of confidence in the ability of nonprofits to spend money wisely.⁷ These findings --along with the decrease in positive responses when asked about whether nonprofits spend funds wisely-- suggest that nonprofits, at the very least, may need to do a better job of educating the public about what is required to run an efficient organization in the nonprofit sector.

The need for education also is supported by data that indicate San Diegans who demonstrated the highest levels of awareness of nonprofit organizations also expressed the highest levels of confidence in the sector. In fact, inferential analysis revealed that persons demonstrating higher levels of nonprofit awareness were nearly three times as likely to express moderate or high levels of confidence in the ability of nonprofit organizations to effectively provide quality services, and almost two times as likely to express moderate or high confidence in the ability of nonprofit organizations to spend money wisely (see Tables 1 and 2).⁸

AWARENESS AND CONFIDENCE TO EFFECTIVELY PROVIDE QUALITY SERVICES

| | None | Low | Moderate | High |
|------------------------------------|-------------|-------------|-------------|-------------|
| No Confidence At All | 4.4% | 1.7% | 2.8% | 0.8% |
| Not Too Much Confidence | 21.5 | 21.8 | 7.0 | 9.2 |
| A Fair Amount of Confidence | 53.2 | 51.3 | 61.7 | 60.0 |
| A Great Deal of Confidence | 20.9 | 25.2 | 28.5 | 30.0 |

Table 1: Percentage of San Diego County residents, Confidence in Nonprofit Ability to Effectively Provide Quality Services, by Level of Nonprofit Awareness

AWARENESS AND CONFIDENCE TO SPEND MONEY WISELY

| | None | Low | Moderate | High |
|------------------------------------|-------------|-------------|-------------|-------------|
| No Confidence At All | 9.8% | 5.1% | 3.4% | 2.8% |
| Not Too Much Confidence | 26.4 | 24.8 | 21.4 | 17.9 |
| A Fair Amount of Confidence | 48.5 | 53.8 | 59.2 | 64.8 |
| A Great Deal of Confidence | 15.3 | 16.2 | 16.0 | 14.5 |

Table 2: Percentage of San Diego County residents, Confidence in Nonprofit Ability to Spend Money Wisely, by Level of Nonprofit Awareness

⁷ Hierarchical binomial logistic regression was used to assess the odds that perceptions of executive compensation among nonprofit administrators influenced public confidence in the sector. Confidence measures were used as the dependent variable, and levels of executive compensation were used as independent variables. The model controlled for: age, income, gender, education, and race. These control variables have been suggested by Light (2005) as positive socio-demographic predictors of nonprofit confidence.

⁸ To assess the odds that someone with higher levels of nonprofit awareness would also have higher levels of nonprofit confidence, a series of hierarchical binary logistic regression analyses were conducted using confidence measures as the dependent variable, and level of nonprofit awareness as the independent variable. The models controlled for: age, income, gender, education, and race. These control variables have been identified by Light (2005) as positive socio-demographic predictors of nonprofit confidence. Regression results can be provided upon request to: lmcdougle@sandiego.edu.

PUBLIC CONFIDENCE

HOW DO LOCAL FINDINGS ABOUT CONFIDENCE COMPARE TO NATIONAL FINDINGS?

Although respondents expressed less confidence in the ability of local nonprofit organizations to spend money wisely than they did in the ability of local nonprofit organizations to provide quality services, San Diegans still appear to have greater confidence in the ability of local nonprofit organizations to spend money wisely than the American public has overall.

Specifically, 75 percent of San Diegans expressed either a *great deal* or a *fair amount* of confidence in the ability of local nonprofit organizations to spend money wisely. By comparison, national surveys of public confidence indicate that, as of July 2006, only 63 percent of respondents felt *very good* or *somewhat good* that charitable organizations spend money wisely (up from 54 percent in the previous year). Although these national survey questions were asked in a slightly different manner than the survey questions asked of San Diego County residents, comparing the results can still provide valuable information (see Tables 3 and 4).

HOW WISELY AMERICANS SAY CHARITABLE ORGANIZATIONS SPEND MONEY

| | October 2003 | August 2004 | July 2005 | July 2006 | March 2008 |
|------------------------|--------------|-------------|-----------|-----------|------------|
| Not Good at All | 6% | 7% | 8% | 6% | 11% |
| Not too Good | 22 | 19 | 25 | 25 | 21 |
| Somewhat Good | 45 | 51 | 42 | 52 | 51 |
| Very Good | 14 | 11 | 12 | 11 | 10 |

Table 3: Public Confidence in Ability of Charitable Organizations to Spend Money Wisely Nationally ⁹

HOW WISELY SAN DIEGANS SAY NONPROFIT ORGANIZATIONS SPEND MONEY

| | November 2007 - January 2008 |
|----------------------------------|------------------------------|
| No Confidence at All | 4% |
| Not Too Much Confidence | 21 |
| Fair Amount of Confidence | 60 |
| Great Deal of Confidence | 15 |

Table 4: Public Confidence in Nonprofit Ability to Spend Money Wisely in San Diego County

⁹Valid percents in the table above represent the percentage of respondents who answered the question as it was asked. It is based on a total that does not include respondents who did not have an opinion or did not wish to answer the question.

B. CONFIDENCE BY NONPROFIT SUB-SECTORS

Confidence in the ability of San Diego County nonprofit organizations to provide quality services varies greatly by sub-sector. ¹⁰ We found, for example, that respondents had the highest levels of confidence in local animal and animal rights related nonprofit organizations (86 percent of respondents expressed either a *great deal* or a *fair amount* of confidence). Local arts and culture related nonprofit organizations also were rated high (85 percent of respondents expressed either a *great deal* or a *fair amount* of confidence), as were local foundations and giving programs (84 percent of respondents expressed either a *great deal* or *fair amount* of confidence).

The least amount of confidence was placed in local housing and economic development related nonprofit organizations (only 52 percent of respondents expressed either a *great deal* or a *fair amount* of confidence). Respondents also expressed lower levels of confidence in local civil rights, social action, and advocacy related nonprofit organizations (only 59 percent of respondents expressed either a *great deal* or a *fair amount* of confidence) (see Table 5).

Perhaps these lower numbers should be expected given the historical lack of affordable housing in the region, the recent national housing and economic downturns, and the overall focus on immigration issues within the San Diego area.

| | Great Deal of Confidence | Fair Amount of Confidence | Total: Great Deal + Fair Amount | Not too Much Confidence | No Confidence at All | Total: Not too Much + No |
|--|--------------------------|---------------------------|---------------------------------|-------------------------|----------------------|--------------------------|
| Animal/Animal Rights | 35% | 51% | 86% | 9% | 5% | 14% |
| Arts and Culture | 24 | 61 | 85 | 12 | 3 | 15 |
| Foundations and Giving Program | 21 | 63 | 84 | 13 | 3 | 16 |
| Education | 21 | 62 | 83 | 14 | 3 | 17 |
| Religious/Spiritual Development | 31 | 50 | 81 | 13 | 6 | 19 |
| Health and Human Services | 20 | 56 | 76 | 19 | 5 | 24 |
| Environment | 19 | 48 | 67 | 22 | 11 | 33 |
| Civil Rights/Social Action/Advocacy | 13 | 46 | 59 | 26 | 15 | 41 |
| Housing/Economic Development | 9 | 43 | 52 | 36 | 12 | 48 |

Table 5: Generally speaking, would you say that you have a great deal of confidence, a fair amount of confidence, not too much confidence, or no confidence at all that local _____ related organizations effectively provide quality services? ⁹

¹⁰ Logistic regression results revealed that nonprofit awareness significantly predicts the likelihood that an individual will have confidence in general areas of nonprofit performance (i.e. the ability to effectively provide quality services, and the ability to spend money wisely); however, in analyzing the relationship between nonprofit awareness and confidence in nonprofit sub-sectors (e.g. arts and culture, environment, education), we find that level of nonprofit awareness does not significantly predict the likelihood of an individual expressing moderate or high confidence in the ability of nonprofit sub-sectors to effectively provide quality services—except in the nonprofit sub-sector of religious organizations. Persons demonstrating higher levels of nonprofit awareness are nearly twice as likely to express moderate or high levels of confidence in the ability of religious nonprofit organizations to effectively provide quality services.

SECTOR COMPARISONS

GIVEN THE RELATIVELY HIGH LEVELS OF PUBLIC CONFIDENCE IN THE SAN DIEGO COUNTY NONPROFIT SECTOR, IT IS REASONABLE TO ASK HOW PERCEPTIONS OF THE NONPROFIT SECTOR COMPARE TO THE PUBLIC'S PERCEPTIONS OF FOR-PROFIT AND GOVERNMENT ORGANIZATIONS.

A. PERCEPTIONS OF THE NONPROFIT, FOR-PROFIT, AND GOVERNMENTAL SECTORS

When asked a series of questions regarding perceptions of performance of the three sectors, the nonprofit sector, in all instances, was perceived more favorably than either the first (i.e., the business) or second (i.e., the governmental) sector. In response to the question *Which sector do you believe does the best job helping people?* 63 percent of respondents said the *nonprofit sector*, while only 19 percent and 18 percent, respectively, said either the *for-profit sector* or *government sector*. Additionally, when asked *Which sector do you believe does the best job representing the public interest*, 58 percent of respondents answered the *nonprofit sector*, while 24 percent said the *for-profit sector*, and only 18 percent said the *government sector*.

Even when asked about each sector's performance in terms of *spending money wisely*, the nonprofit sector was rated higher than the other two sectors. However, consistent with findings about money matters reported earlier, nonprofits' relative rating on the money issue was lower than on the other two indicators of sector performance (see Table 6). Nonetheless, in each of these three areas, fundamental operating principals of the nonprofit sector are upheld. That is, nonprofits tend to promote services and engage in activities that are intended to help those in need, represent the interests of the public, and maximize the use of resources.

As such, it is important that nonprofit organizations convey a message of charity and goodwill to the public, and educate the public about how nonprofit dollars are being spent. Indeed, when using the for-profit sector as a reference category, inferential analysis of the data reveals individuals who believed the nonprofit sector to be more favorable in terms of spending money wisely and helping people were two times as likely to have higher levels of confidence in the ability of nonprofits to spend money wisely. Moreover, those that believed nonprofits were more favorable in terms of helping people, were also four times as likely to have higher levels of confidence in the ability of nonprofits to effectively provide quality services.¹¹

| | Helping People | Spending Money Wisely | Representing the Public Interest |
|-------------------|----------------|-----------------------|----------------------------------|
| Nonprofit Sector | 63% | 53% | 58% |
| For-profit Sector | 19 | 37 | 24 |
| Government Sector | 18 | 10 | 18 |

Table 6: Thinking about the government, for-profit business, and nonprofit sectors here in San Diego County, which sector do you believe does the best job at _____?

¹¹To assess the odds that favorable perceptions of the nonprofit sector in each of these areas: helping people, spending money wisely, and representing the public interest would increase the odds of having higher levels of nonprofit confidence, a hierarchical binary logistic regression analysis was conducted using confidence measures as the dependent variables, and measures of sector performance as independent variables. The models controlled for: age, income, gender, education, and race. These control variables have been suggested by Light (2005) as positive socio-demographic predictors of nonprofit confidence.

SECTOR COMPARISONS

B. PREFERENCES FOR THE NONPROFIT, FOR-PROFIT, AND GOVERNMENTAL SECTORS

While a majority of respondents perceived the nonprofit sector as more favorable in terms of *helping people, spending money wisely, and representing the public interest*, this favorable perception of the sector did not necessarily translate into preferences among service providers when seeking either health care or educational services.¹²

For instance, when asked *When seeking health care services for yourself or your family, does it matter to you whether an organization is a government agency, a for-profit-business, or a nonprofit organization?* 52 percent of respondents said, *yes*, it matters, while only 43 percent said *no*, it does not matter. Of those that responded *yes*, when further asked, *Could you tell me which you prefer?* 44 percent of respondents said that they preferred the *for-profit business* sector, while 31 percent of respondents said that they preferred the *nonprofit sector*, and only 25 percent of respondents said that they preferred the *government sector*.

Moreover, when asked *When seeking educational services for yourself or your family, does it matter to you whether an organization is a government agency, a for-profit business, or a nonprofit organization?* 49 percent responded *yes*, it matters, while 51 percent responded *no*, it does not matter. Of those that responded *yes*, when further asked, *Could you tell me which you prefer?* 47 percent of respondents said that they preferred the *government sector*, while 28 percent and 25 percent said that they preferred the nonprofit and for-profit sectors, respectively (see Figure 7).

Responses to open-ended questions in the survey help explain the apparent contradiction between the public's positive perceptions of the nonprofit sector, on the one hand, and their failure to choose nonprofit service providers in the areas of healthcare and education, on the other. Among other things, this data suggests that respondents differed on whether they assumed that the profit motive would encourage or inhibit sensitivity to clients' needs and concerns. There also appeared to be some confusion about whether health care service providers operated as a nonprofit organization or as for-profit businesses. This confusion is understandable given that many hospitals are, in fact, hybrid organizations.

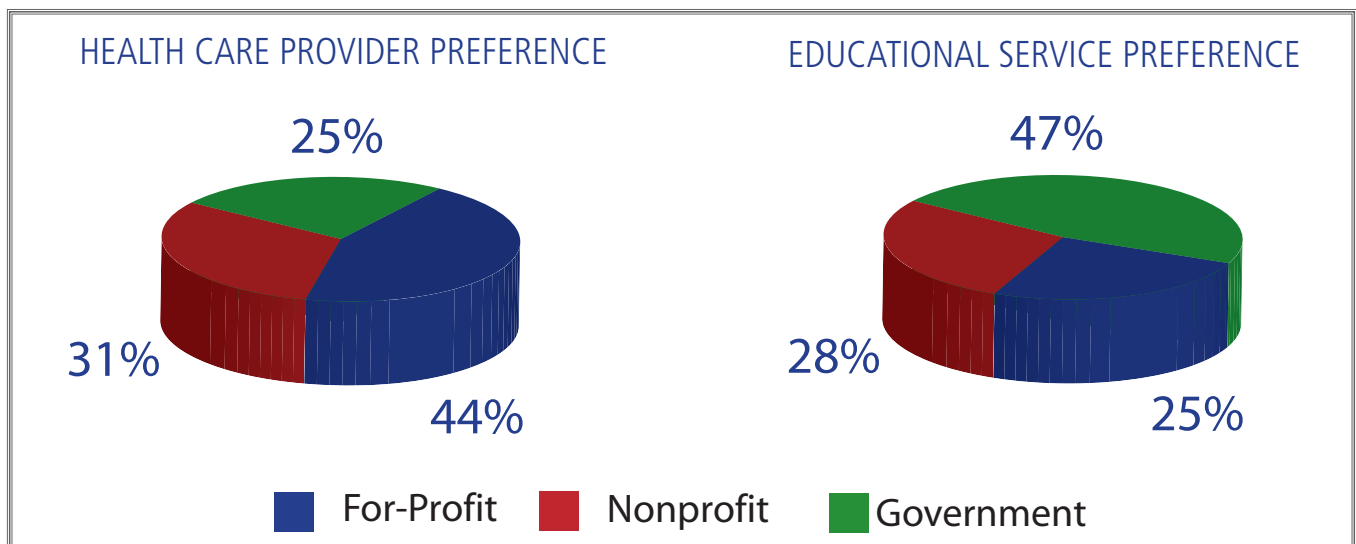


Figure 7: Public Preference Among Nonprofit, For-Profit, and Government Healthcare and Educational Service Providers

¹² Health care and education represent mixed industry sectors. As such, competition between for-profit, government, and nonprofit services is generally higher in these industries than in other nonprofit sub-sectors. For these reasons, we have only focused on healthcare and education services.

GIVING TO & VOLUNTEERING IN

And Sources of Information About Nonprofit Sector

THE STUDY ALSO EXAMINED SAN DIEGAN'S PROPENSITY TO DO VOLUNTEER WORK IN NONPROFIT ORGANIZATIONS AND TO MAKE DONATIONS TO NONPROFIT GROUPS, AS WELL AS THE SOURCES OF INFORMATION USED TO INFORM CHARITABLE GIVING.

A. INDIVIDUAL GIVING AND VOLUNTEERING

More than a third of San Diegans (40 percent) reported volunteering with a nonprofit organization in 2007. The majority of these volunteers reported volunteering on a weekly basis. This is well above the 2006 national average of volunteering (26.7 percent), and also higher than averages reported in other San Diego area volunteer studies.^{13, 14} Furthermore, San Diego may see a 5 percent increase in volunteering in 2008 since an additional 5 percent of the respondents reported that they intend to volunteer in 2008 on a monthly basis.

Seventy-five percent of San Diegans reported making a financial contribution to a nonprofit organization in 2007. Eighty-four percent indicated that they intend to donate in 2008. Furthermore, 20 percent of respondents reported that they will likely donate more money to nonprofits in 2008 than they did in 2007, while 73 percent reported that they intend to donate *about the same* amount.

San Diegans expressing higher levels of confidence both in the ability of local nonprofit organizations to spend money wisely and in the ability of nonprofit organizations to provide quality services--also indicated that they volunteered and donated more (see Tables 7-10).

B. SOURCES OF INFORMATION

Respondents indicated that they consult a variety of information sources before making a charitable contribution and 34 percent reported that news or media coverage shapes their giving decisions. Not surprisingly, over one-third of respondents reported using the internet as a major source of information on nonprofit organizations. Specifically, when thinking about making a donation to a nonprofit, 22 percent of respondents reported visiting the organization's website and an additional 10 percent used search engines such as Google to look for information before making a donation. Respondents indicated that they went to these sites to access financial data, and some said that they were particularly interested in knowing how much of a donation was spent on programs.

Furthermore, 24 percent reported that information garnered from past experiences or connections to a particular organization informed their decision-making processes before making financial donations. Only 7 percent of respondents said that they consulted consumer information services such as the Better Business Bureau's Wise Giving Alliance program.

I Google an organization, and look at their website and compare it with other online information from other sources. I don't rely on the organization's website only.

I want to know the breakdown of what dollar amount goes to the cause, and what dollar amount goes to the employees; I don't want to pay for someone's salary.

¹³ Corporation for National and Community Service, Office of Research and Policy development (2007). Volunteering in America: 2007 State Trends and Rankings in Civic Life. Washington, D.C.

¹⁴ United States Department of Labor Bureau of Labor Statistics (2007). Volunteering in the United States, Washington, D.C. Available via internet at: <http://www.bls.gov/news.release/volun.toc.htm>.

GIVING & VOLUNTEERING

HAVE YOU DONATED MONEY TO ANY SAN DIEGO COUNTY NONPROFIT ORGANIZATIONS IN 2007?

| | Yes |
|----------------------------------|---------------|
| "Lower" Level Confidence | 13.13% |
| "Higher" Level Confidence | 86.87% |

Table 7: Donations to a Nonprofit Organization in 2007, by Confidence in the Ability of Nonprofit Organizations to Provide Quality Services

HAVE YOU VOLUNTEERED WITH ANY SAN DIEGO COUNTY NONPROFIT ORGANIZATIONS IN 2007?

| | Yes |
|----------------------------------|---------------|
| "Lower" Level Confidence | 9.84% |
| "Higher" Level Confidence | 90.16% |

Table 8: Volunteering with a Nonprofit Organization in 2007, by Confidence in the Ability of Nonprofit Organizations to Provide Quality Services

HAVE YOU DONATED MONEY TO ANY SAN DIEGO COUNTY NONPROFIT ORGANIZATIONS IN 2007?

| | Yes |
|----------------------------------|---------------|
| "Lower" Level Confidence | 22.49% |
| "Higher" Level Confidence | 77.51% |

Table 9: Donations to a Nonprofit Organization in 2007, by Confidence in the Ability of Nonprofit Organizations to Spend Money Wisely

HAVE YOU VOLUNTEERED WITH ANY SAN DIEGO COUNTY NONPROFIT ORGANIZATIONS IN 2007?

| | Yes |
|----------------------------------|---------------|
| "Lower" Level Confidence | 20.75% |
| "Higher" Level Confidence | 79.25% |

Table 10: Volunteering a Nonprofit Organization in 2007, by Confidence in the Ability of Nonprofit Organizations to Spend Money Wisely

IMPLICATIONS

For Further Action And Study

THIS STUDY OF NONPROFIT CONFIDENCE HAS PROVIDED CONSIDERABLE INSIGHT ON HOW SAN DIEGO'S VIEW THE NONPROFIT SECTOR IN OUR COMMUNITY. THE FINDINGS IN THIS REPORT POINT TO THE FOLLOWING OPPORTUNITIES FOR FURTHER ACTION AND STUDY.

1. Although the public perceives San Diego nonprofits to be doing a good job of meeting performance objectives in terms of providing services, the public still needs to be better educated regarding how the sector operates. As individuals are becoming increasingly more adept at using the internet as a source of information, it is important that nonprofits better educate the public about how to interpret what they are reading.
2. Although nonprofits are viewed more favorably than other sectors in terms of helping people, representing the public interest, and, even, spending money wisely, it is puzzling that this impression does not translate into preferences when selecting health care or educational services. In the education sector this could be due, in part, to the highly regarded California Public University System. Further analysis is required to gain a more complete understanding of the service provider preference data.
3. Particular attention should be paid to the findings related to differences in public perception among the nonprofit sub-sectors. Attention needs to be paid to either improving the capacity or the public image (or perhaps both) of nonprofits working in the areas of housing and economic development and civil rights, social action, and advocacy.
4. As positive as the findings in this study may appear, it is somewhat disturbing that nearly a third (29 percent) of San Diego County residents have low or no awareness of San Diego's nonprofit sector. Given the study's findings about the relationship between increased awareness of the sector and increased confidence in the sector (nearly 3:1), it may be worthwhile to more actively publicize the work of the sector..

For additional information and to access other reports produced by the Caster Family Center for Nonprofit Research at the University of San Diego, go to www.sandiego.edu/npresearch.

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APPENDIX A: METHODOLOGY

A telephone survey utilizing a stratified random sample of 1,002 San Diego County residents was conducted over a nine-week period (November 08, 2007 to January 09, 2008) to examine several factors that were assumed to influence perceptions of confidence in the local nonprofit sector. Specifically, the survey assessed:

- 1) Level of awareness of the nonprofit sector, measured as:
 - A-The ability to correctly identify three nonprofit organizations
 - 0 Identifications = No Awareness
 - 1 Identifications = Low Awareness
 - 2 Identifications = Moderate Awareness
 - 3 Identifications = High Awareness
- 2) Confidence in the nonprofit sector, measured as:
 - A- Level of confidence in the abilities of San Diego County nonprofits
 - B- Level of confidence in local nonprofit sub-sectors
- 3) Perceptions and preferences among San Diego's first, second, and third sectors, measured as:
 - A- Perceptions of quality among the local nonprofit, for-profit, and government sectors
 - B- Preferences in service delivery among the local nonprofit, for-profit, and government sectors
- 4) Involvement in the local nonprofit sector, measured in terms of:
 - A- Individual giving and volunteering
- 5) Extraneous influences:
 - A- Public perceptions of local nonprofit response to the 2007 Southern California wildfire storm
 - B- Common sources of influence used to gather information on the local nonprofit sector for nonprofit research

The Caster Family Center at the University of San Diego contracted with the Social Science Research Laboratory at San Diego State University to conduct the surveys. The Research Laboratory used Computer Aided Technology, Inc. (CATI) software program Sawtooth WinCati.

This survey of San Diego County adult residents (18+) is believed to be representative of the general population of adults in San Diego County (over-sampling was conducted for African-American and Native-American populations). The response rate for the survey was 33 percent, the cooperation rate was 78 percent, and the refusal rate was 16 percent. Complete demographic statistics of the sample can be found in Appendix B.

APPENDIX B: SOCIO-DEMOGRAPHIC STATISTIC

| VARIABLE | COUNT | VALID% ¹ | VARIABLE | COUNT | VALID% ¹ |
|--|-------|---------------------|------------------------------|-------|---------------------|
| GEOGRAPHIC AREA | | | RELIGIOUS AFFILIATION | | |
| Central County Coastal | 54 | 5.4% | None | 96 | 9.8% |
| Central County Inland | 321 | 32.0 | Non-denominational | 172 | 17.5 |
| East County | 173 | 17.3 | Protestant | 267 | 27.2 |
| North County Coastal | 87 | 8.7 | Catholic | 294 | 29.9 |
| North County Inland | 271 | 27.0 | Jewish | 22 | 2.2 |
| South County | 96 | 9.6 | Muslim | 7 | 0.7 |
| Total | 1002 | 100.0 | Another Religious Group | 124 | 12.6 |
| GENDER | | | Total | 982 | 100.0 |
| Male | 500 | 49.9% | POLITICAL AFFILIATION | | |
| Female | 502 | 50.1 | Democrat | 254 | 26.8% |
| Total | 1002 | 100.0 | Republican | 319 | 33.7 |
| AGE (Range 18 - 93) | | | With Some Other Party | 35 | 3.7 |
| 18-29 | 99 | 10.0% | Non-partisan | 128 | 13.5 |
| 30-44 | 238 | 24.0 | Not Registered to Vote | 211 | 22.3 |
| 45-64 | 426 | 43.0 | Total | 947 | 100.0 |
| 65+ | 228 | 23.0 | MARITAL STATUS | | |
| Total | 991 | 100.0 | Single, Never Married | 163 | 16.4% |
| RACE | | | Married | 579 | 58.2 |
| White/Caucasian | 578 | 57.7% | Living With Partner | 45 | 4.5 |
| Black/African American | 101 | 10.1 | Separated | 32 | 3.2 |
| Hispanic/Latino | 224 | 22.4 | Divorced | 89 | 8.9 |
| Native American | 24 | 2.4 | Widowed | 87 | 8.7 |
| Asian/Native Hawaiian /Pacific Islander | 41 | 4.1 | Total | 995 | 100.0 |
| Other | 34 | 3.4 | CHILDREN IN HOUSEHOLD | | |
| Total | 1002 | 100.0 | No Children in Household | 605 | 60.6% |
| EDUCATION | | | 1 Child in Household | 149 | 14.9 |
| High School or Less | 215 | 21.5% | 2 Children in Household | 150 | 15.0 |
| 1 Yr College/Trade/ Vocational School | 373 | 37.3 | 3 Children in Household | 53 | 5.3 |
| Graduated College/ Bachelor's | 180 | 18.0 | 4 Children in Household | 28 | 2.8 |
| At Least 1 Year Graduate Work | 233 | 23.3 | 5 Children in Household | 8 | 0.8 |
| Total | 1001 | 100.0 | 6 Children in Household | 5 | 0.5 |
| EMPLOYMENT STATUS | | | 7 Children in Household | 1 | 0.1 |
| Full-time | 461 | 46.2% | Total | 999 | 100.0 |
| Part-time | 132 | 13.2 | ADULTS IN HOUSEHOLD | | |
| Student | 28 | 2.8 | 1 Adult in Household | 210 | 21.0% |
| Homemaker | 60 | 6.0 | 2 Adults in Household | 559 | 56.0 |
| Retired | 238 | 23.8 | 3 Adults in Household | 147 | 14.7 |
| Disabled | 45 | 4.5 | 4 Adults in Household | 57 | 5.7 |
| Unemployed | 34 | 3.4 | 5 Adults in Household | 19 | 1.9 |
| Total | 998 | 100.0 | 6 Adults in Household | 4 | 0.4 |
| NONPROFIT SECTOR EMPLOYMENT (of those employed) | | | 7 Adults in Household | 2 | 0.2 |
| Yes | 98 | 16.8% | Total | 998 | 100.0 |
| No | 485 | 83.2 | INCOME | | |
| Total | 583 | 100.0 | Under \$25,000 | 177 | 19.1% |
| LANGUAGE OF INTERVIEW | | | \$25,000 to \$49,999 | 218 | 23.5 |
| English | 892 | 89.2% | \$50,000 to \$74,999 | 189 | 20.4 |
| Spanish | 110 | 10.9 | \$75,000 to \$99,999 | 169 | 18.2 |
| Total | 1002 | 100.0 | \$100,000 to \$124,999 | 71 | 7.7 |
| | | | \$125,000 to \$149,999 | 43 | 4.6 |
| | | | \$150,000 or More | 60 | 6.5 |
| | | | Total | 927 | 100.0 |

Mission Trails Regional Park Foundation, Inc. • Museum of Contemporary Art, San Diego • Museum of Photographic Arts • Nativity Prep Academy • Neighborhood Healthcare • Neurosciences Research Foundation, Inc. • New Americans Immigration Museum and Learning Center • Nonprofit Management Solutions • North Coast Repertory Theatre • North County Health Services • North County Humane Society • NTC Foundation • Occupational Training Services, Inc. • Oceanside Public Library Foundation • SDSU Field Station Programs • MANO (Mexican American Neighbor Organization) • Old Mission San Luis Rey, Inc. Historic Foundation • Operation Samahan • Outdoor Outreach • San Diego Watercolor Society • Parent Institute for Quality Education • Parkinson's Disease Association of San Diego • Partnerships with Industry • Pathfinders of San Diego, Inc. • Paws'itive Teams • picART • Preserve Calavera • Pro Kids Golf Academy, Inc. • Project Concern International • Project Lead The Way • Project Walk • Rancho Bernardo Community Foundation • Rancho Bernardo Historical Society • Rancho Coastal Humane Society • Reuben H Fleet Science Center • Rolling Readers USA • Chicano Federation of San Diego County, Inc. • San Diego Aircraft Carrier Museum/Midway • San Diego Archaeological Center • San Diego Architectural Foundation • San Diego Art Institute • San Diego Asian Film Foundation • San Diego Center for Children • Young Audiences of San Diego • San Diego Chamber Orchestra • San Diego Coastkeeper • San Diego Council on Literacy • San Diego County Medical Society Fdn. • San Diego County Parks Society • San Diego Environmental Foundation • San Diego Hall of Champions • San Diego Historical Society • San Diego Hospice and Palliative Care • San Diego Human Dignity Foundation • San Diego LGBT Center (The Center) • San Diego Master Chorale • San Diego Natural History Museum • YMCA - Armed Services • San Diego of Museum of Art • San Diego Opera • San Diego Public Library Foundation • San Diego Repertory Theatre • San Diego River Park Foundation • San Diego Symphony Foundation • San Diego Urban League • San Diego Women's Foundation • San Diego Youth & Community Services • San Diego Youth Symphony • San Dieguito Heritage Museum • San Diego Junior Theatre • San Elijo Lagoon Conservancy • Save Our Heritage • SAY San Diego • Scripps Ranch High School Foundation • YMCA Resident Camping Branch • Human BioMolecular Research Institute • SDSU-The Campanile Foundation • Second Chance • Senior Community Centers • Shakti Rising • Sharp HealthCare Foundation • Sidney Kimmel Cancer Center Foundation • Silver Age Yoga Community Outreach • St. Paul's Retirement Homes Foundation • St. Vincent de Paul Village • Starlight Theatre • Stepping Stone of San Diego, Inc. • Tariq Khamisa Foundation • TERI, Inc. • The Army and Navy Academy • The Batiquitos Lagoon Foundation • The Children's School • The Child's Primary School • The Desert Protective Council, Inc. • The Escondido Creek Conservancy • The Friends of Los Penasquitos Canyon Preserve • The Gillispie School • The Jenna Druck Foundation • The Old Globe • Torrey Pines Association • UC San Diego Foundation • United Cerebral Palsy of San Diego County • United Through Reading • United Way of San Diego • Oceanside Museum of Art • Urban Corps of San Diego • Vista Community Clinic • Voices for Children • Volcan Mountain Preserve Foundation • Volunteers of America • Water Conservation Garden • Westwind Brass • WiLDCOAST • Wildlife Research Institute • Women's History Museum • Women's Resource Center • YMCA Border View • YMCA Cameron Family • YMCA Copley Family • YMCA Downtown San Diego • YMCA East County • YMCA Jackie Robinson Family • YMCA Joe and Mary Mottino Family • YMCA La Jolla • YMCA Magdalena Ecke • YMCA Mission Valley • YMCA of San Diego County • YMCA Palomar Family • YMCA Peninsula Family • YMCA Rancho Family • The Arc of San Diego • San Dieguito River Valley Conservancy • YMCA South Bay Family • YMCA Toby Wells • Balboa Park Cultural Partnership • San Diego Food Bank • San Diego Blood Bank • University of San Diego • American Red Cross • Midway Museum • Salvation Army • San Diego Rescue Mission • Chula Vista Nature Center