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2026 Needs Assessment Survey Results

jevs.org

Acknowledgements

William Penn Foundation, for their ongoing support of the NPLG.

University of Pennsylvania, School of Social Policy & Practice for research support of the Needs Assessment Survey.



Approach & Sample

Follow-up to track compounding pressures over time and inform regional funding and policy responses

Outreach

Survey Dates: March 20 – April 27, 2026

- **NPLG**
- **Funders**
- **Nonprofit Service Organizations**
- **Nonprofit Organizations in SE Pennsylvania**
(List publicly available from IRS data)

Response

- **399 Organizations responded**
(response rates differed by survey item; are noted)
- Majority served residents from **Southwest Philadelphia, North Philadelphia, and Northwest Philadelphia**

67%

Fewer than
20 staff

68%

More than
500 clients/yr

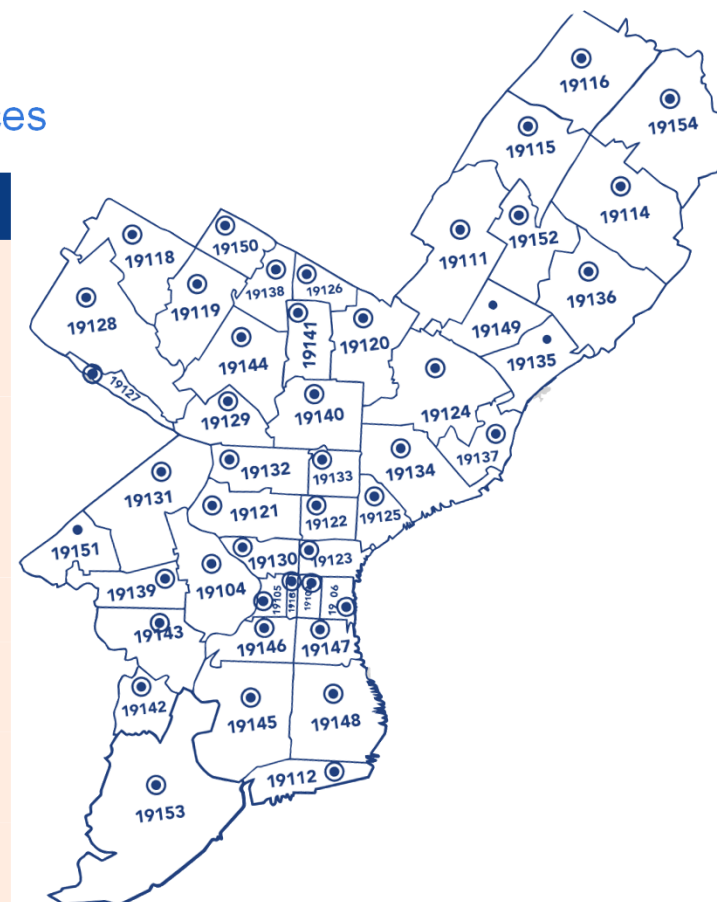
54%

Annual budgets
less \$1M

Geography

Q: Please enter the 3 zip codes where you provide the most services

Mentions by County			Top Philadelphia Zips		
	2025	2026		2025	2026
Philadelphia	591	613	Southwest Philly, Kingsessing, Cedar Park, Squirrel Hill	19143	19143
Chester	242	44	West Philly, Mantua, Belmont Mill Creek, Powelton	19104	-
Montgomery	309	27	Northwest Philly, Germantown, parts of Nicetown, Logan	19144	19144
Bucks	105	7	North Philly, Hunting Park, Nicetown-Tioga	19140	19140
Delaware	45	6	West/Northwest Philly, Wynnefield, Overbrook, Belmont Village	19131	-
Top Zips Outside Philadelphia					
	2025	2026			
Pottstown	19464	-	Cobbs Creek, Haddington, Mill Creek, Dunlap, Walnut Hill	-	19139
Coatesville	19320	19320	Kensington, Harrowgate, Port Richmond, Fairhill, Juniata Park	-	19134
Norristown	19401	19401			
Chester	-	19013			



Primary Services

by Organizational Count and Survey Year

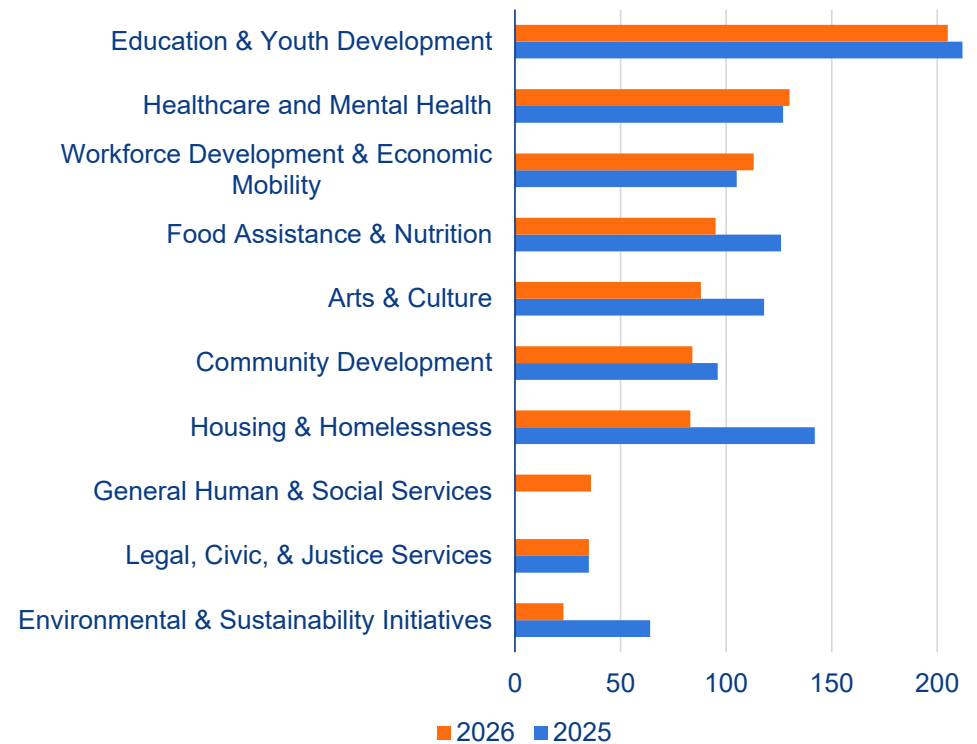
Most commonly provided Services (2026 results)*

51% Education & Youth Development services

33% Healthcare & Mental Health services

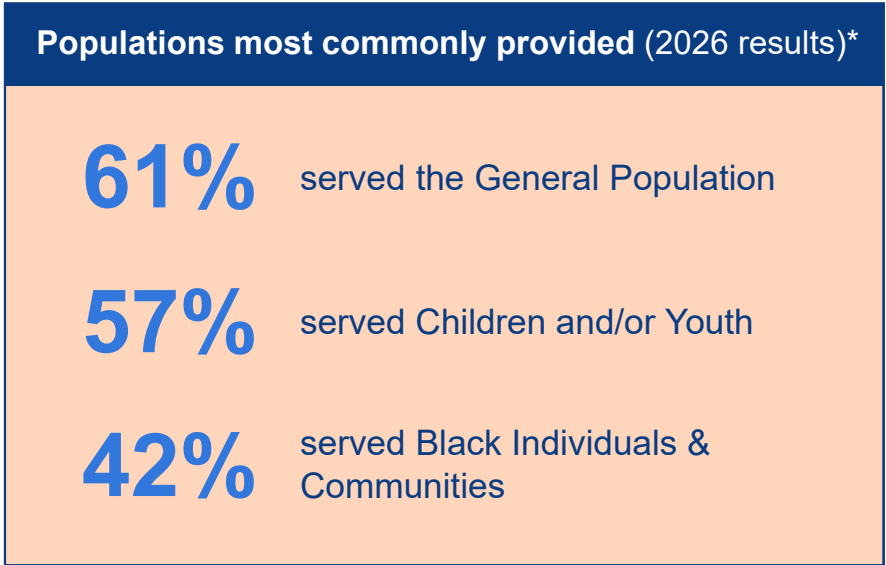
28% Workforce Development & Economic Mobility services

*Organizations were asked to select all that apply.
399 Organizations responded.

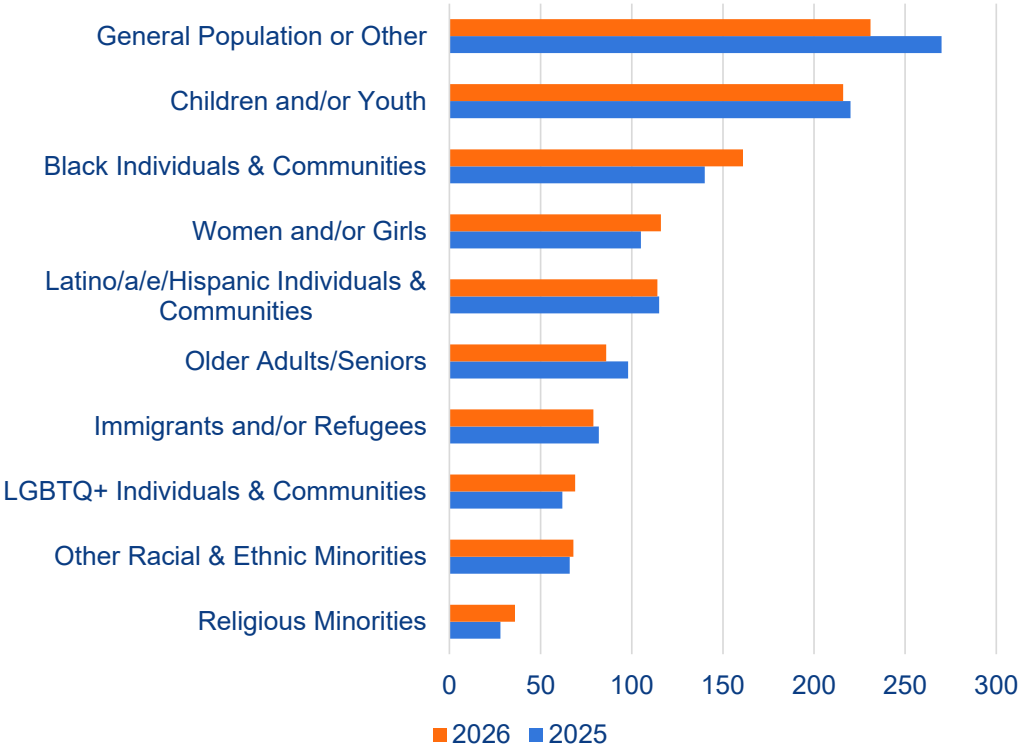


Target Populations Served

by Organizational Count and Survey Year



*Organizations were asked to select all that apply.
379 Organizations responded.





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Findings: Reported Concerns & Impacts

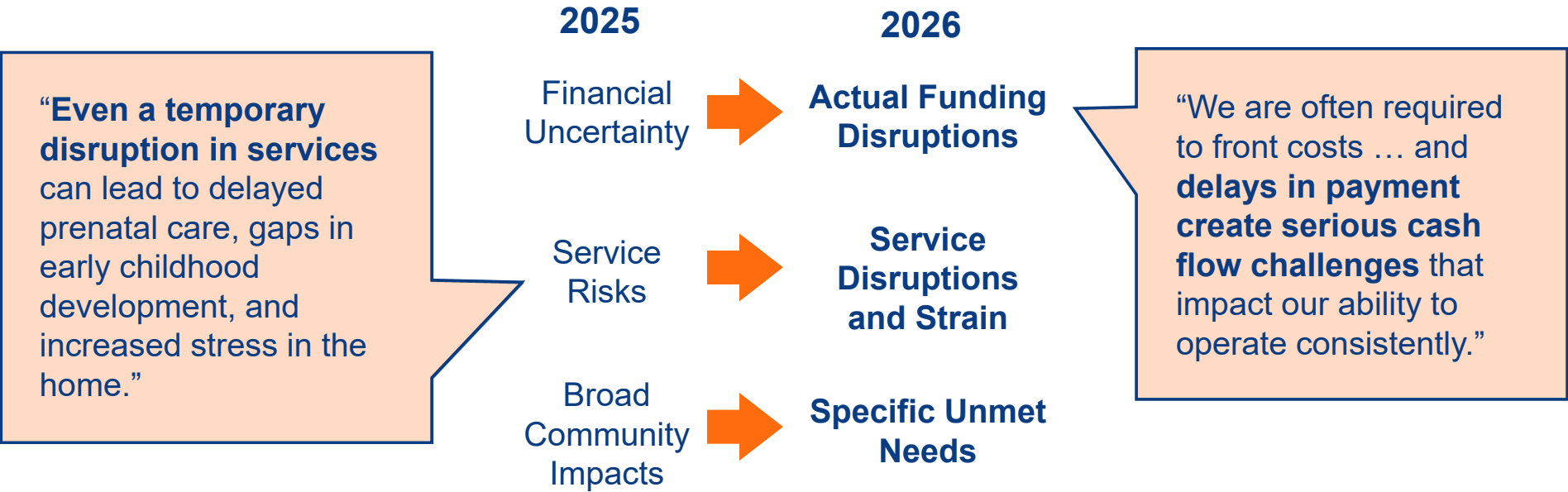
Shift from anticipation and uncertainty in **2025 to concrete impacts in 2026** across operations, staff, finances, and communities

What we feared is now happening

Q: What are your organization's top 3 greatest concerns?*

*272 Organizations responded.

Shifting Trends



What we feared is now happening

Q: How have federal/state actions impacted your organization?

*323 Organizations responded.

Impact

- Increased demand with fewer resources
- Ongoing financial strain and delayed reimbursements

Budget Reductions	Already Made	Forecasted
Avg. budget reduction by organization**	26%	29%
Organizations with reductions of <u>≥</u> 50%	17%	19%

**211 Organizations responded.

Response

- 2025: Slowed or paused programming
- 2026: Shift toward alternative/non-governmental funding
- Increased collaboration with peers to manage gaps

Staff strain escalated

Q: How have federal/state actions impacted your staff?

*278 Organizations responded.

Because 2025 survey surfaced staff stress and decreased morale as the top impact, the 2026 survey intentionally probed deeper to quantify the impacts on staff

74% Experienced **increased stress** among their staff

44% Reported **decreased staff morale**

35% Faced **increased caseloads** for staff

Reported by ~50 Organizations, collectively

345

Staff laid off

240

employees with reduced benefits

122

Employees w/ reduced hours/ reduced or no pay



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Requested Supports & Priority Needs

Narrowing of organizational priorities from a wider array of informational, preparatory, and policy-oriented needs in 2025 to a more targeted set of strategic and financial needs focused on sustaining organizations in 2026

Funding prioritized over growth

Q: What specific supports do you need most from Funders?*

This survey question was new in 2026, so there is no 2025 comparison

87% Flexible funding for general operating support

58% Targeted programmatic funding

<25% Technology, data, partnership, advocacy, or governance supports

Message to Funders:

- Flexible, unrestricted funding is critical to sustain operations
- Capacity building is secondary under current conditions

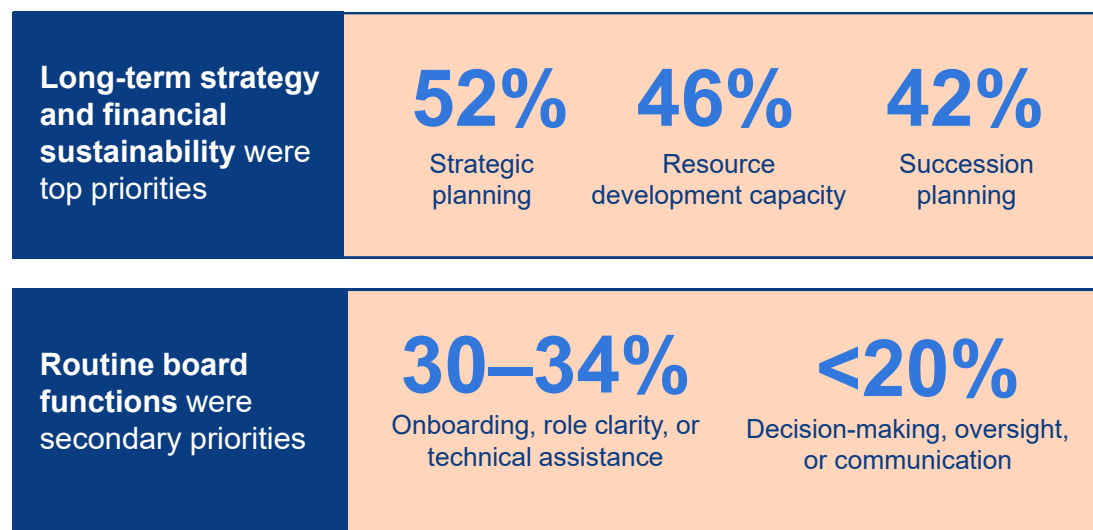


* Organizations were asked to select their top three choices.
278 Organizations responded.

Highest & Lowest Priorities

Q: What specific governance tools might best support your Board to help navigate this past year's federal/state actions?*

This survey question was new in 2026, so there is no 2025 comparison



* Organizations were asked to select their top three choices.
258 Organizations responded.



Focus shift to concrete resources

Q: Information & Resources: Rank in order of most importance*

*236 Organizations responded.

Back in 2025

- 1 State & local budget updates**
- 2 Financial resources**
- 3 Federal funding & policy updates**
- 4 Information on advocacy efforts**
- 5 Peer organization connection**

Focus shift to concrete resources

Q: Information & Resources: Rank in order of most importance*

*236 Organizations responded.

Now in 2026

- 1 Financial resources**
- 2 Federal funding & policy updates**
- 3 State & local budget updates**
- 4 Peer organization connection**
- 5 Information on advocacy efforts**

2025 Ranking

1. State & local budget updates
2. Financial resources
3. Federal funding & policy updates
4. Information on advocacy efforts
5. Peer organization connection

- **Financial resources and federal guidance emerged as top priorities in 2026**, replacing state and local budget monitoring
- **Peer networks gained importance in 2026**, signaling increased reliance on sector connections

Focus shift to concrete resources

Q: Education & Capacity Building: Rank in order of most importance*

*236 Organizations responded.

Back in 2025

- 1** Scenario planning for financial uncertainty
- 2** Fundraising & grant writing workshops
- 3** Strategic collabs, mergers & acquisitions
- 4** Board leadership & governance training
- 5** Navigating government grants

Focus shift to concrete resources

Q: Education & Capacity Building: Rank in order of most importance*

*236 Organizations responded.

Now in 2026

- 1 **Financial planning & cash flow management**
- 2 **Fundraising & grant writing workshops**
- 3 **Board leadership & governance training**
- 4 **Scenario planning for financial uncertainty**
- 5 **Data collection & impact measurement**

2025 Ranking

1. Scenario planning for financial uncertainty
2. Fundraising & grant writing workshops
3. Strategic collabs, mergers & acquisitions
4. Board leadership & governance training
5. Navigating government grants

- **From planning to execution:** 2025 prioritized scenario planning while 2026 shifted to concrete financial management
- **Fundraising remained a constant need:** Grant writing and fundraising remained an important priority across both years
- **New gaps emerged:** Increased demand for board training and impact measurement in 2026

Policy threats to core challenges

Q: Legal Support & Compliance: Rank in order of most importance*

*217 Organizations responded.

Back in 2025

- 1** Navigating DEI restrictions
- 2** Grant compliance & contractual obligations
- 3** Strategic collabs, mergers & acquisitions
- 4** 1st amendment & constitutional protections
- 5** Lobbying & advocacy regulations

Policy threats to core challenges

Q: Legal Support & Compliance: Rank in order of most importance*

*217 Organizations responded.

Now in 2026

1

Strategic collabs, mergers & acquisitions

2

Grant compliance & contractual obligations

3

Employment & labor law

4

Tax law & IRS compliance

5

Contract & vendor agreements

2025 Ranking

1. Navigating DEI restrictions
2. Grant compliance & contractual obligations
3. Strategic collabs, mergers & acquisitions
4. 1st amendment & constitutional protections
5. Lobbying & advocacy regulations

- **From policy threats to operational realities:** DEI restrictions and constitutional protections in 2025 gave way to collaborations, mergers, & acquisitions, as well as staffing and contract needs in 2026
- **Supporting survival:** Legal support was needed in 2026 to navigate business partnerships, workforce decisions, and legal compliance.

Nonprofit Leaders Group: Member Feedback

How the NPLG has been most helpful this year?

NPLG helps nonprofits stay informed, connected, and positioned to act in a shifting policy and funding environment.



**Policy Developments
& Updates**



**Peer Connection &
Shared Learning**



**Funding Updates &
Opportunities**



**Organizational &
Leadership Growth**

"NPLG has helped us stay informed about shifts in the funding landscape, exchange best practices, and feel less isolated in complex decision-making. The opportunity to engage in dialogue with other leaders has strengthened our organizational thinking around sustainability, partnerships, and advocacy."

How might the NPLG best support your organization in the coming year?

Members want deeper support in funding, organizational support, and policy engagement, while maintaining strong peer connection and access to information.



**Sustainable Funding
& Resources**



**Organizational Capacity Building
& Leadership Development**



**Collaboration & Peer
Connection**



**Information Sharing &
Policy Engagement**

"In the upcoming year ... ongoing **learning related to funding trends, public policy, leadership development, and organizational sustainability** would be especially valuable."

About the NPLG

The Nonprofit Leaders Group works to ensure that nonprofit organizations remain informed and prepared to navigate an evolving fiscal and political landscape. For more information, email info@jevs.org. Nonprofit leaders of human services and health-related organizations are welcome to attend the group's biweekly meetings. However, you must register: [Nonprofit Leaders Group Registration](#).

The group is led by Cynthia F. Figueroa (JEVS Human Services), with support from the steering committee: Loree D. Jones Brown (Philabundance); Heather Keafer (JEVS Human Services); Sharmain Matlock-Turner (Urban Affairs Coalition); Arun S. Prabhakaran (Urban Affairs Coalition); Marianne A. Fray (Maternity Care Coalition); and Matt Rader (Philadelphia Horticultural Society).



Thank you

Steering Committee

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Loree D. Jones Brown

Chief Executive Officer, Philabundance

Sharmain Matlock-Turner

CEO, Urban Affairs Coalition

Arun S. Prabhakaran

President, Urban Affairs Coalition

Marianne A. Fray

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