



From Insight to Action

ORANGE COUNTY NONPROFIT NEEDS ASSESSMENT REPORT

To ensure the
Orange County
nonprofit sector
thrives, we must
identify critical
actions TODAY.

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THIS REPORT
WAS CREATED IN
PARTNERSHIP WITH:



On Behalf of the Samueli Foundation

Over the last three years, the Samueli Foundation has substantially increased its annual philanthropic payout and shows no signs of slowing down. Our grants payout, as reported in our 2022 990 form, was \$18.9M. Two short years later in 2024, we granted \$80.6M with \$45.8M invested in Orange County-based nonprofit organizations. I am humbled by Henry, Susan, and my other Samueli Foundation board colleagues' trust that my team and I will use these resources to deliver on our mission of creating well-being and opportunity for all in Orange County.

Our program team has a strong sense of our partners' needs as we pride ourselves on listening to and constantly learning from them. But these organic listening sessions and intuition are not enough when you are investing upwards of \$100M a year. We need the most comprehensive data and evidence from which we can be astute, informed investors in community betterment. We must constantly challenge our assumptions and never get stuck in a rut based on past giving practices.

We also appreciate we are not unique in wanting our work to be data-informed; all philanthropists want to invest with confidence in the things that create the greatest impact. This need for better data was the primary driver behind our decision to pilot this first-of-its-kind needs assessment, and to partner with Orange County Community Foundation so their leadership and donor base might also benefit from this knowledge.

I worked in federal health policy consulting in the early 2000s. Billions of dollars in healthcare legislation were influenced by powerful lobbyists representing insurance companies, hospitals, and care providers. Patients were routinely boxed out of the legislative process. I was deeply moved when I saw a cancer patient group outside a Capitol Hill briefing chanting "nothing about us without us."

That saying stuck with me for the last 25 years and heavily influenced the design of this assessment. It observes the social sector from the inside out, versus from the outside looking in. Everything you read captures the experiences and needs of the social sector as told to us by those who run it, live it, and are determined to see it deliver for our community.

"This report observes the social sector from the inside out, versus from the outside looking in."

LINDSEY SPINDLE

We are carefully studying this assessment, looking for opportunities to reengineer our giving where it makes sense. We look forward to working with others to ensure Orange County can be the model American county for delivering on well-being and opportunity for all.

Lindsey Spindle

President, Samueli Family Philanthropies

Transforming Orange County's Nonprofit Future Happens Together

The nonprofit sector in Orange County plays a critical role in meeting the diverse needs of our communities, often serving as the cornerstone of pragmatism, business creativity, and hope in times of challenge. Today, these challenges are more pronounced than ever. As federal COVID-era funding diminishes, nonprofits are navigating an economy that is experienced unevenly and inequitably. Soaring costs of living and financial instability put painful pressure on Orange County residents, who then turn toward the social sector for enhanced support.

Nonprofits are more than service providers; they are essential businesses delivering vital solutions to our communities. They prevent homelessness, strengthen families, and expand access to healthcare by rethinking traditional delivery systems. However, they often operate within constrained funding models that undervalue the true cost of impact and true benefit of their contribution. To achieve their missions, nonprofits require strategic investments in infrastructure, systems, and talent—not just to maintain services, but to innovate and thrive.

From my experience in the nonprofit sector and now working in the philanthropic space with the Samueli Foundation, I have seen nonprofits continuously rise to these challenges. Delivering high-quality services requires significant investments—not just in programs, but in the people, spaces, and structures that support them.

EMERGING THEMES FROM THE REPORT

Investing in Staff and Leadership

Nonprofits need competitive salaries to recruit and retain skilled staff, along with ample professional development opportunities to build leadership and operational capacity. For instance, training in best practices for a population and ethical storytelling can transform a board into strategic ambassadors for an organization's mission. Similarly, equipping staff with skills in evolving areas like government contracting, employment law, and nonprofit trends ensures organizations remain compliant, innovative, and effective in navigating a complex landscape.

“Nonprofits are more than service providers; they are essential businesses delivering vital solutions to our communities.”

DR. SHAUNTINA SORRELLS

Strengthening Systems and Structures

Nonprofits require crucial infrastructure to deliver services effectively, yet many face chronic underfunding in this area. Investments in systems and technology can unlock efficiency, enabling organizations to better measure impact, identify service gaps, and adapt to changing community needs. For example, funding for advanced data systems allows

nonprofits to share information across sectors, fostering collaboration and creating a clearer picture of the challenges facing our communities.

Physical spaces, too, are more than just places—they are tools for impact. Transforming environments to be purpose-built for the populations they serve ensures that nonprofits can meet people where they are. Whether it's designing spaces for those who have experienced trauma, creating youth-friendly resource hubs, or equipping multipurpose facilities to foster collaboration, these investments ensure nonprofits have the resources they need to drive meaningful outcomes and work well with others.

Building Trust and Collaboration

Collaboration among nonprofits, funders, and government agencies is vital to addressing systemic challenges. A recent partnership between nonprofits, a city housing authority, and a county agency demonstrated this power by housing over 100 youth exiting foster care. However, collaboration doesn't happen without deliberate investment in the infrastructure and trust-building processes that sustain these partnerships. Strong collaboration can lead to faster, more durable solutions, reducing redundancies and increasing efficiency across the social sector.

This report highlights the voices of nonprofit leaders who have shared these challenges and opportunities. It underscores the importance of trust-based philanthropy—not just as a concept, but as a practice

that empowers nonprofits to make decisions based on their expertise and knowledge of community needs. It calls on funders to invest boldly and strategically in the sector's sustainability, resilience, and impact. We plan on sharing the findings and recommendations with our community at all levels.

This effort would not have been possible without the incredible partnerships that brought it to life. I want to acknowledge Charitable Ventures, including Anne Olin, Limor Zimskind, Jacqueline Tran, and Robin Glover, for their leadership and dedication. My thanks also go to Jack Toan of JT Consulting Group and Adelante Partners, including James Alva, Francisco Barajas, Nina Torres, and Maria Morales, for their expertise and commitment. We are grateful for the insights and contributions of our academic partners at UC Irvine's School of Social Ecology, including Dr. Jon Gould, Dr. Jodi Quas, and Dr. Dara Sorkin, and for the strategic partnership of Lauren Shaughnessy from The Bridgespan Group, Shelley Hoss and Cathleen Otero from the Orange County Community Foundation.

To the nonprofit leaders who trusted us with their stories: Thank you. Your voices have guided this process and will continue to guide the investments and actions needed to elevate our sector. This report is not the end of the journey but the beginning of a critical conversation. Together, we can act on these findings, build strategic partnerships, and create a thriving social sector that serves all communities in Orange County.

With gratitude and commitment,

Dr. Shauntina Sorrells

Chief Program Officer, Samueli Foundation

The Vital Role of Nonprofits in Orange County

Orange County, California — home to nearly 3.2 million residents¹ — embodies a vibrant and diverse community with evolving needs. Yet, beneath its iconic beaches and affluent enclaves lies a complex tapestry of needs that are as varied as the county’s population. Like many metropolitan areas in the nation, those needs are primarily met by a local ecosystem of government, nonprofit, and philanthropic stakeholders dedicated to the health and well-being of their surrounding communities and populations. This ecosystem is essential, yet it operates in an era of intense polarization marked by political, economic, and social uncertainty making it more challenging to predict and address policy impacts at the local level. In this context, strengthening the local network of nonprofit services is becoming even more critical to our communities.

The Orange County region is home to more than 15,000 registered nonprofit organizations²; only about 5,000 of these nonprofits, however, actively file Form 990. Far fewer are even considered “visible” nonprofits, staffed to provide essential services, driving employment and addressing workforce development, meeting critical public health needs,

and addressing the impacts of economic insecurity, among many other supports. Nonprofits fill service gaps that are not covered by government programs, provide culturally responsive services to meet the needs of Orange County’s diverse communities, and are a critical economic engine, employing tens of thousands of residents.

Compared to other areas of the nation, Orange County is a “young” metropolitan service area, which can be seen in both its foundations and its nonprofits. Few institutions have celebrated their 100th birthday here. The larger percentage of younger, smaller nonprofit organizations can also be seen in the underdeveloped nature of the regional social sector, which in turn brings challenges in leadership, governance, management, and accessing funding, and ultimately, the stability of the social sector network. Despite the numbers and the needs, there remains a limited understanding of the capacities of these nonprofit organizations and what types of investment could best strengthen the nonprofit sector in Orange County.

The 2024–2025 Orange County Community Indicators Report reveals pressing challenges that underline the essential roles nonprofits play in the region.³

For example:

- **Economic Inequity:** Nearly 10% of Orange County residents live below the federal poverty line, with many more hovering just above it, especially in communities of color.
- **Housing Instability:** With a median home price exceeding \$1M, Orange County faces a severe housing affordability crisis, contributing to homelessness and displacement.
- **Public Health Concerns:** Disparities in health outcomes persist, particularly for low-income residents and communities of color, as demonstrated by higher rates of chronic diseases and continued challenges with timely and quality access to healthcare.

Without adequately resourced nonprofits, these challenges will grow more severe – communities left without vital support, families pushed further into poverty, and a social safety net at risk of unraveling. In addition, if left under-resourced, the repercussions will extend beyond those directly affected. Nonprofits are a critical part of the local economy, not only as service providers but also as employers. They contribute to workforce development and stimulate economic activity. A weakened nonprofit sector would exacerbate the region’s challenges, increasing reliance on overburdened public systems and jeopardizing community well-being.

Acknowledging these gaps, the Samueli Foundation, whose philanthropy in large part centers around the Orange County community, commissioned a nonprofit needs assessment of the Orange County region. Partnering with Charitable Ventures, a regional nonprofit and consulting firm, the research effort was designed to identify both the strengths and organizational capacity needs of local organizations that, if bolstered and addressed, could support long-term sustainability of critical social sector services.

The overarching goal of this effort, and the guiding question of the research project was this: What is needed TODAY to ensure the Orange County nonprofit sector thrives and grows? What follows are the results of the assessment and a road map for action not only for the Orange County region, but with potential relevance for other regions as well.

1 U.S. Census Bureau, 2022 American Community Survey, Table P-1

2 IRS Exempt Organization Business Master File, 2023

3 2024–2025 Orange County Community Indicators, 25th Anniversary Report (<https://ocbc.org/2024-2025-community-indicators-report/>)

READ THE
FULL REPORT



Orange County Nonprofit Needs Assessment

samueli.org/our-philanthropic-approach/ocnonprofit-needs-assessment »

Key Insight

01

Investing in Staff and Leadership

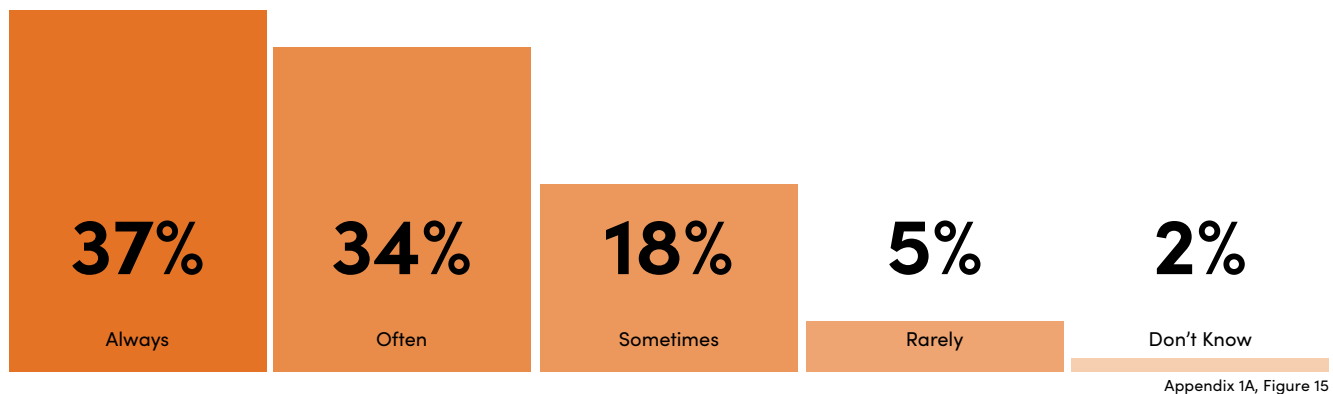
A significant challenge facing nonprofits is staffing limitations, which directly impact their ability to achieve long-term impact. Many organizations operate with lean teams, requiring employees to take on multiple roles, often leading to burnout and diminished efficiency.

Staffing Gaps and Overextension

Survey results highlight the widespread reliance on staff to perform multiple functions, stretching resources thin and affecting operational effectiveness.

Reliance on Existing Staff for Multiple Roles

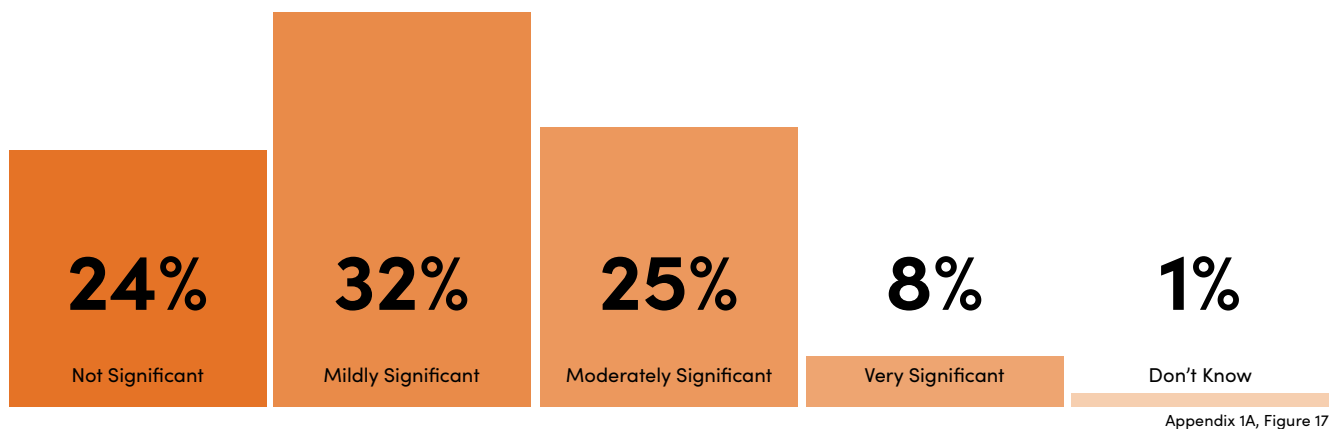
How often do nonprofit employees take on multiple responsibilities?



Over 70% of survey respondents reported depending on staff to take on multiple responsibilities, with 37% always and 34% often doing so.

Impact of Staff Turnover

How significant is staff turnover for nonprofits?



33% of survey respondents identified staff turnover as a “very” or “moderately” significant problem.

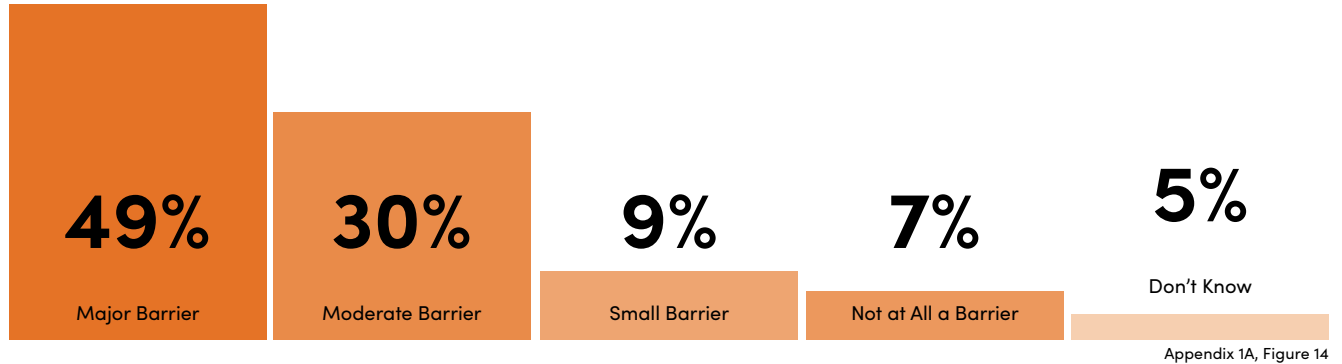
Focus group participants frequently cited an overreliance on volunteers to fill operational gaps, further exacerbating instability.

Attracting and Retaining Talent

Recruiting and retaining staff with the skills necessary to meet nonprofit missions is a pressing challenge. Many organizations struggle to provide competitive compensation and benefits, limiting their ability to attract and retain experienced professionals.

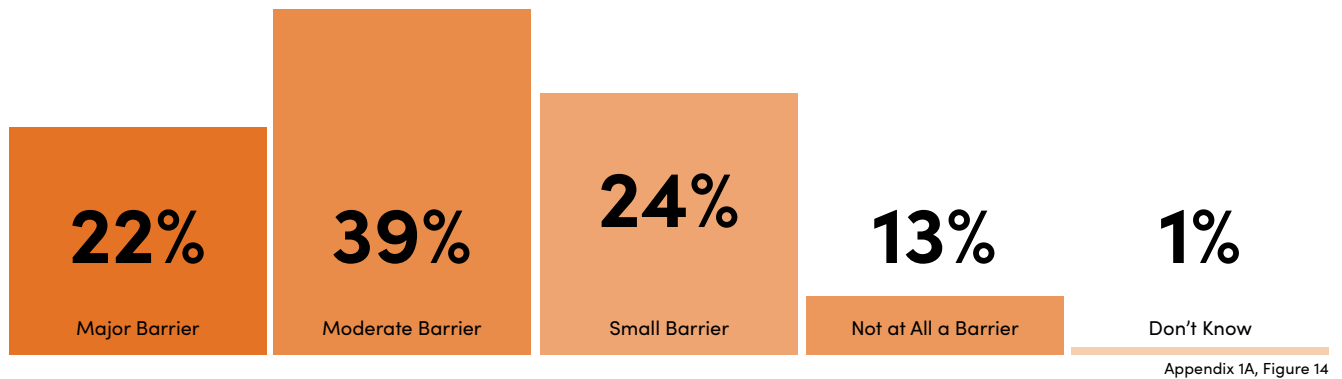
Barriers to Offering Competitive Salaries

To what extent is offering competitive salaries a challenge for nonprofits?



49% of survey respondents stated that not being able to offer competitive salaries is a “major barrier” to securing and maintaining required skills and knowledge.

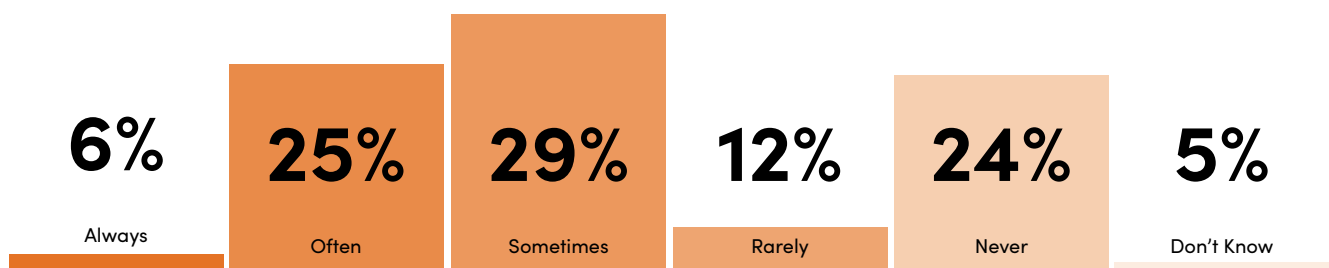
Finding Talent to Fill Key Roles



61% of survey respondents reported difficulty in attracting qualified talent to fill key roles.

Focus group discussions highlighted that specialized roles in finance, HR, and fundraising are particularly difficult to recruit, leading to inefficiencies.

Staff Leaving for Better Opportunities



The most common reason nonprofits lose talent is for a promotion or education, with 60% of respondents reporting that staff leave "often" or "sometimes," compared to lower occurrences of personal reasons, remote work, or relocation.

Reliance on External Expertise

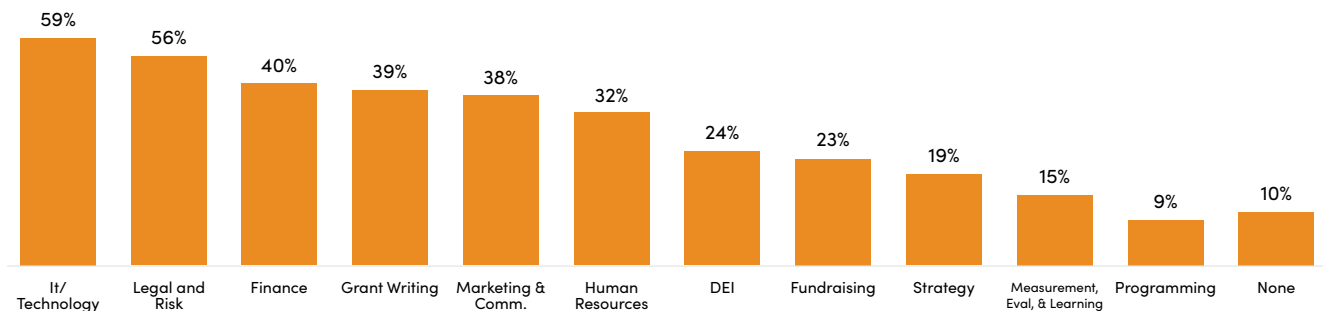
A significant number of organizations lack the internal resources necessary to manage key operational functions and rely on external consultants for critical support, especially in IT and legal services. While external support can be invaluable, it comes at a cost and requires oversight from already overburdened staff.

NONPROFIT VOICES

Our team is stretched thin...most of us juggle multiple responsibilities that affect our efficiency and ability to innovate.

Use of External Expertise for Key Priorities

Which areas do nonprofits rely on external consultants for?

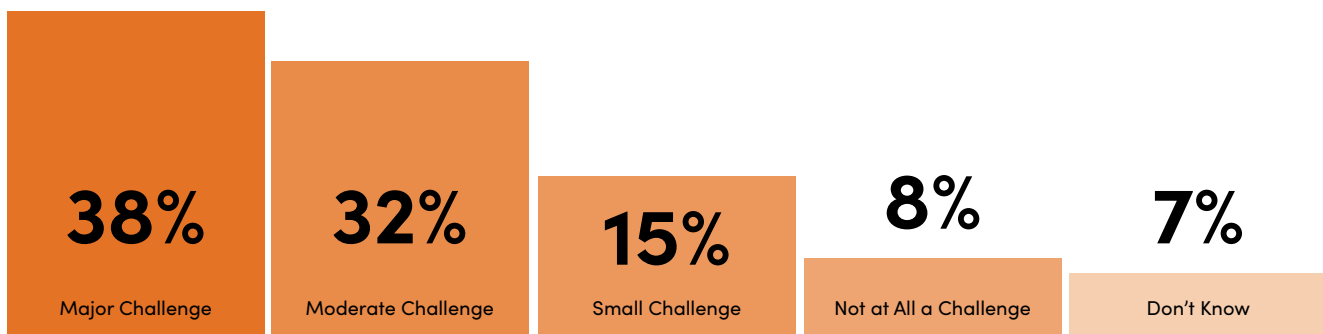


Appendix 1A, Figure 24

59% of survey respondents rely on external personnel for IT/Technology needs, and 56% for legal and risk support.

Challenges in Securing External Personnel Resources

How difficult is it for nonprofits to afford and find external professional services (IT, legal, finance, etc.)?



Appendix 1A, Figure 25

70% of survey respondents cited costs as a "major" or "moderate" challenge in accessing these external services.

Focus group participants expressed frustration over the difficulty of finding reliable consultants, further increasing operational strain.

Key Insight

02

Infrastructure and Financial Sustainability

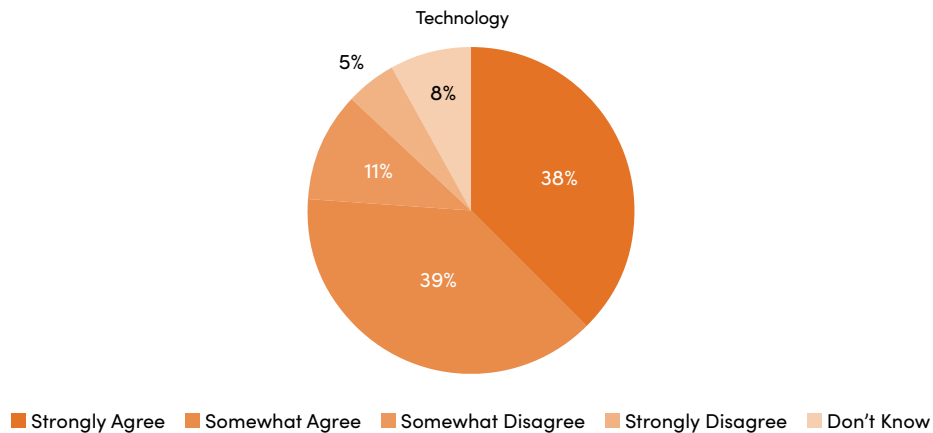
Many nonprofits struggle with outdated infrastructure and financial instability, limiting their ability to scale and adapt. The assessment highlighted key concerns around access to updated technology, financial capital, and sustainable governance structures.

Outdated Technology and Systems

Technology is increasingly critical to nonprofit operations, yet many organizations lack the necessary tools to track performance, engage with stakeholders, and manage data efficiently. Many organizations continue to rely on outdated CRMs, performance tracking, and program data systems, limiting their ability to scale services.

Investment Needs in Technology, Systems, and Infrastructure

Would investments in technology help nonprofits better achieve their goals?



Appendix 1A, Figure 33

Capacity investments such as upgrading technology and shared data systems were consistently cited as key needs.

Marketing and digital presence also surfaced as areas requiring investment to improve fundraising and community engagement.



NONPROFIT VOICES

Without flexible funding, we're stuck in a cycle of survival, unable to plan ahead or build the capacity needed to truly thrive.



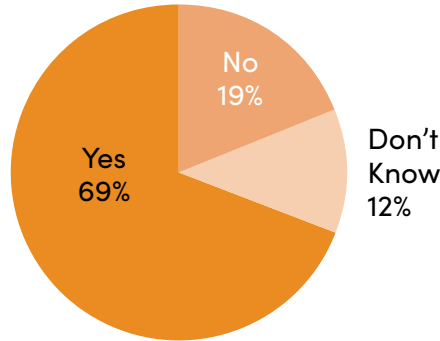
Insufficient Financial Capital

Financial constraints continue to pose challenges for nonprofit growth and sustainability.

Many organizations operate with limited cash reserves and have difficulty securing financing or credit.

Availability of Cash Reserves

Do nonprofits have financial reserves?

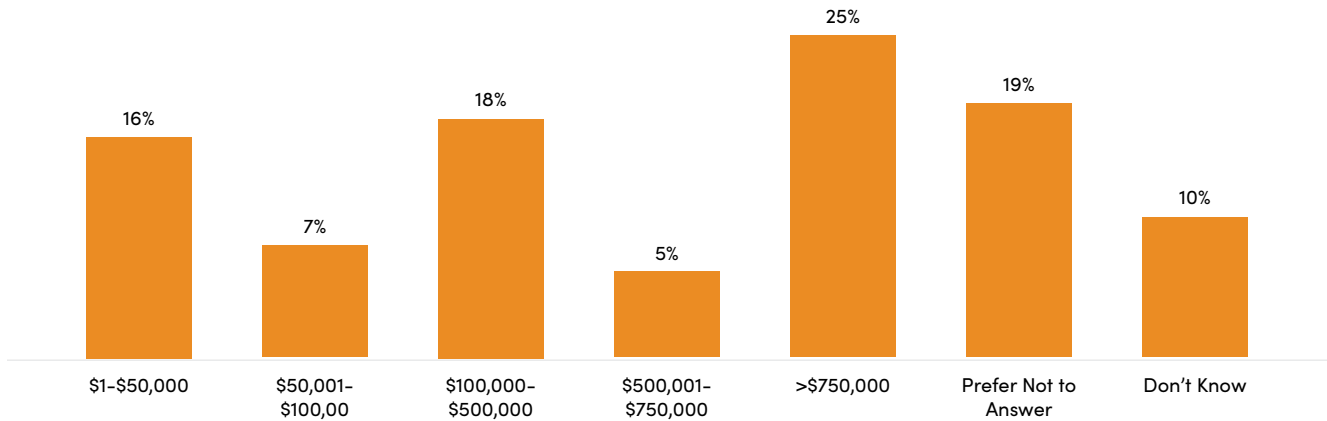


Appendix 1A, Figure 20 & 21

69% of respondents reported having a cash reserve, but 19% did not, and 12% were unsure.

Nonprofit Cash Reserve Amounts

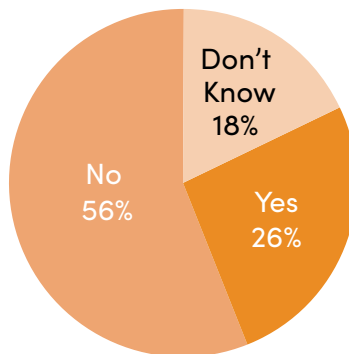
If yes, on average, how much do they typically hold?



Appendix 1A, Figure 21

Access to Credit or Loans

How many nonprofits have access to credit or loans for financial stability?



Appendix 1A, Figure 22

56% of respondents do not have access to credit or loans, severely limiting their ability to manage cash flow volatility.

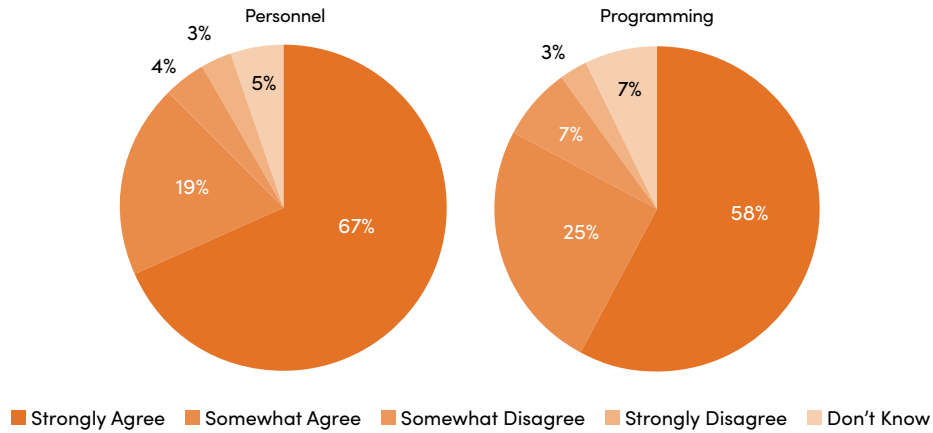
Flexible Capital to Invest in Operations

Focus group discussions revealed that nonprofits continue to struggle with securing funding for operations, leading to undercapitalization of infrastructure and systems.

At the same time, survey and focus group data indicate that nonprofit leaders prioritize unrestricted funding for personnel and programming over infrastructure and systems, reflecting the immediate operational demands they face.

Personnel and Programming Are Priorities for Nonprofit Funding

Where do nonprofits prioritize unrestricted funding?



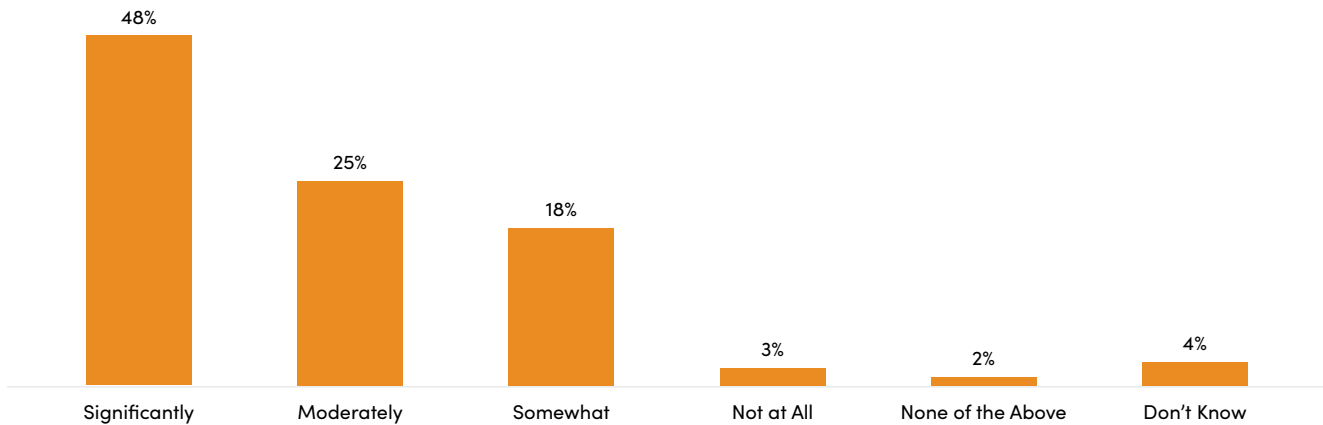
Appendix 1A, Figure 33

Governance Challenges

A well-functioning board is essential for strategic decision-making and long-term stability. However, nonprofits expressed challenges related to board engagement, training, and governance practices.

Board Contribution to Strategic Direction

How actively do nonprofit boards shape organizational strategy?



Appendix 1A, Figure 27

48% of respondents reported that their boards significantly contribute to strategic decision-making yet focus group discussions highlighted gaps in board engagement and training.

During focus groups, participants surfaced issues that create barriers to growth and innovation such as Founder Syndrome, the need for clarity on roles and responsibilities, and term limits, which also foster diversity.

Key Insight

03

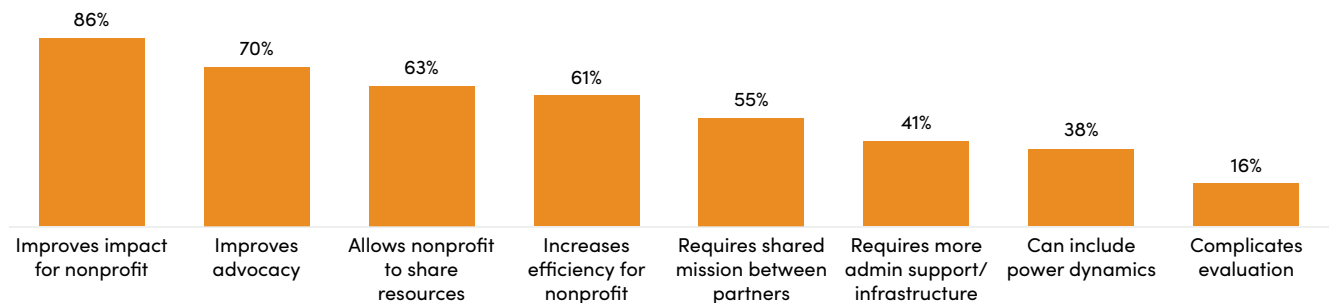
Collaboration

Collaboration among nonprofits can improve service delivery, increase efficiency, and strengthen community impact. While many organizations see collaboration as a powerful tool, significant barriers prevent deeper, more sustained partnerships.

Benefits of Collaboration

Many nonprofits recognize the value of collaboration and actively seek opportunities to partner with other organizations.

How can collaboration benefit nonprofits?



Appendix 1A, Figure 31

86% of respondents agreed that collaboration enhances impact, while 70% said it improves advocacy.

Participants in focus groups and Town Hall highlighted that collaboration enhances resource sharing, expands funding opportunities, and improves community outcomes.



NONPROFIT VOICES

Without dedicated funding or structured opportunities for collaboration, partnerships often feel like an additional burden rather than a solution.



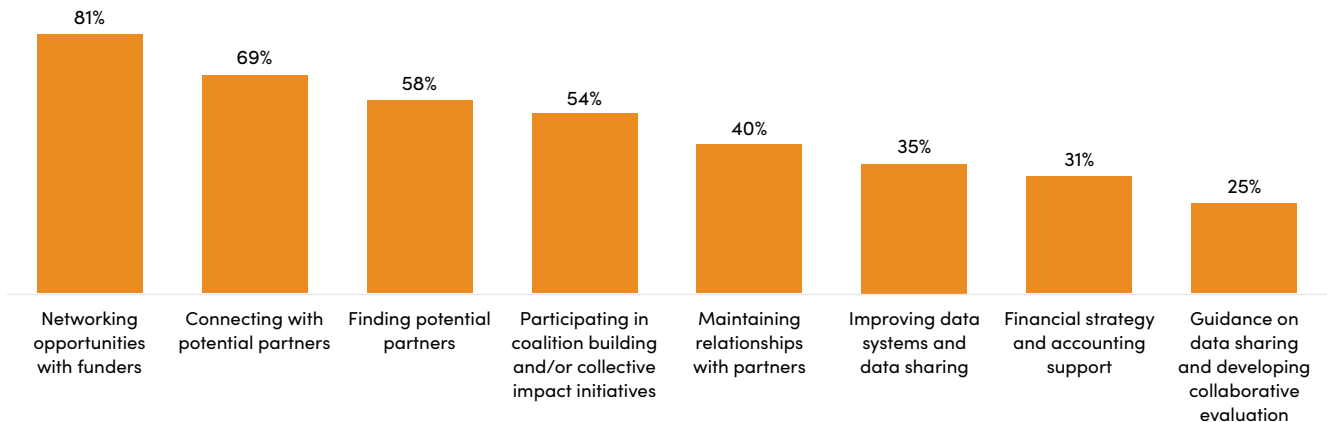
Barriers to Collaboration

Despite widespread agreement that collaboration strengthens nonprofit impact, significant structural and financial barriers limit deeper partnerships.

Focus group and Town Hall participants emphasized that effective collaboration requires leadership commitment, dedicated staff time, and structured coordination—resources that many nonprofits struggle to secure.

Collaboration Opportunities to Strengthen Organizations

What types of collaborations would most benefit nonprofits?



Appendix 1A, Figure 19

Focus group discussions confirmed that opportunities for collaboration are limited due to competitive funding and a “scarcity mindset” in the sector.

Participants noted that many organizations find it difficult to allocate staff capacity for partnership-building, often treating it as secondary to immediate service delivery.



NONPROFIT VOICES

Funders often focus on shiny new projects, but what we need are resources to sustain what’s already working and make it better.



According to participants, competitive grant structures compel nonprofits to prioritize direct service delivery over building long-term partnerships.

Limited financial support for collaborative efforts was identified as a barrier preventing organizations from investing in shared initiatives.

Key Insight

04

Orange County Funding Practices

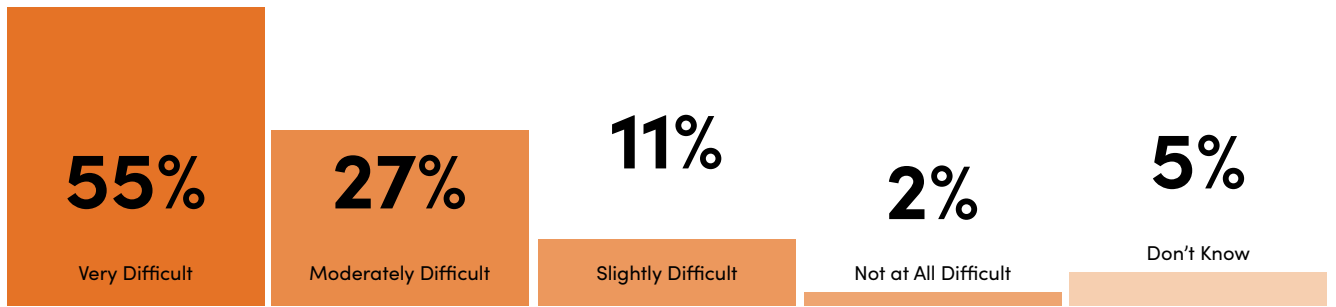
Nonprofits in Orange County operate under restrictive funding models that make it difficult to invest in long-term sustainability. The assessment revealed that organizations struggle to secure multi-year, unrestricted funding, limiting their ability to plan, retain staff, and invest in infrastructure.

Restricted and Short-Term Funding Models

Nonprofits expressed that the limitations of short-term, program-specific funding make it difficult to invest in essential infrastructure and long-term planning.

Gaining Access to Multi-year Funding

How challenging is it for nonprofits to secure multi-year funding?

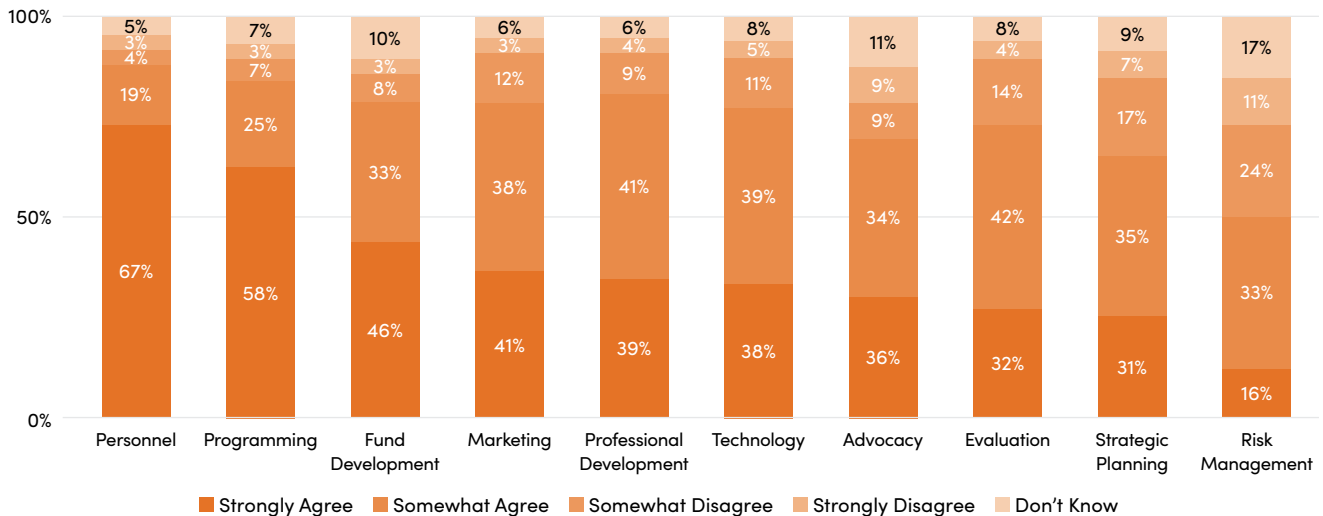


Appendix 1A, Figure 32

82% of nonprofits found accessing multi-year funding "very" to "moderately" difficult.

Key Areas That Would Benefit from Unrestricted Funding

Where would unrestricted funding have the greatest impact?



Appendix 1A, Figure 33

Beyond personnel and programming, nonprofits would leverage unrestricted funding to gain access to specific expertise, with over two-thirds citing fund development and marketing as critical areas.

Focus group participants described short-term, program-specific grants as a major constraint that forces nonprofits to focus on immediate service delivery rather than long-term planning.

Nonprofits struggle with unpredictable funding, limiting their ability to retain talent and sustain operations beyond grant periods.

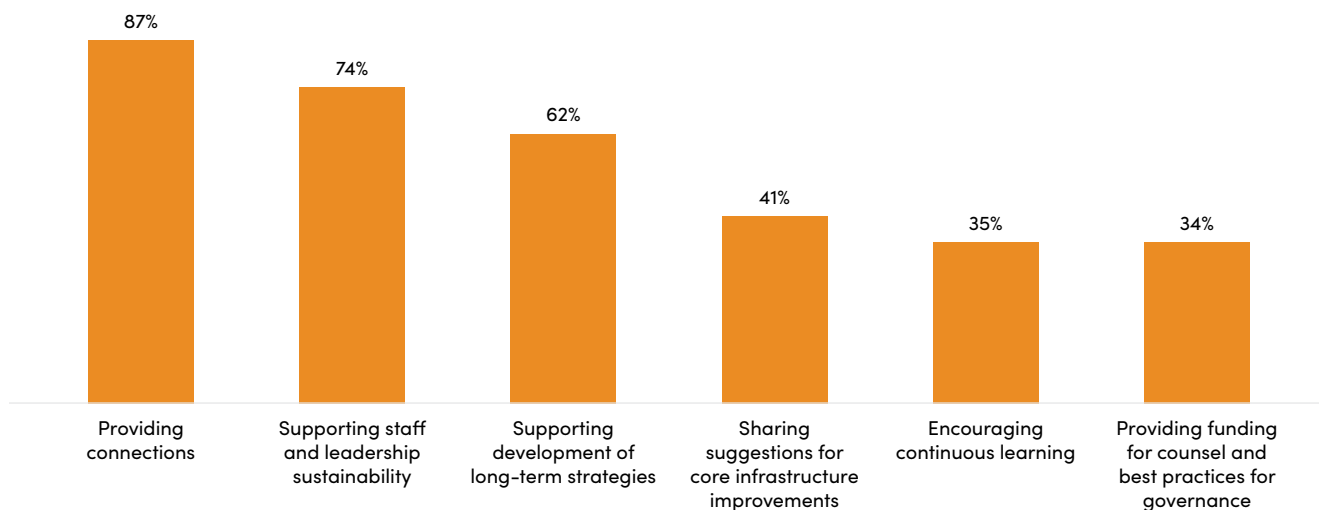
Some organizations reported that fundraising cycles and delayed government payments force them into short-term survival mode rather than allowing for strategic investment.

Role of Funders Beyond Investment

Beyond financial support, nonprofits expressed a need for funders to act as partners in strengthening the sector. Organizations would benefit from greater flexibility, strategic networking, and access to diverse funding sources.

Funder Support of Nonprofits Is Needed Beyond Financial Giving

How can local funders support nonprofits beyond providing additional funding?



Appendix 1A, Figure 34

87% of nonprofits see value in funders facilitating networking opportunities.

74% want more support for staff and leadership sustainability, and 69% desire connections to potential partners.

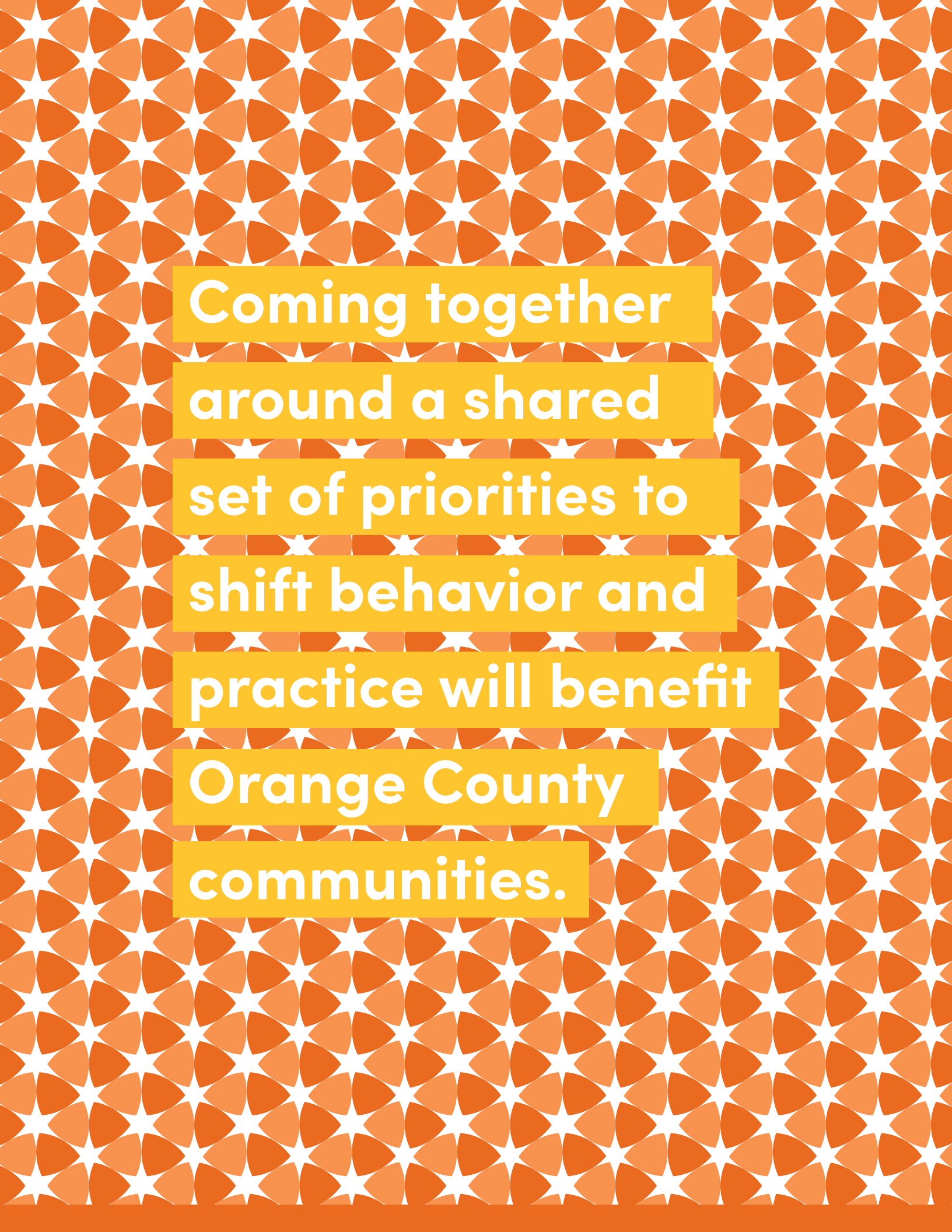
Nonprofit leaders expressed a need for funders to be fully invested partners, offering flexible practices, strategic introductions to other funders, and connections to capacity-building resources.



NONPROFIT VOICES

Unrestricted funding is the difference between just getting by and being able to actually grow and meet the community's needs.





**Coming together
around a shared
set of priorities to
shift behavior and
practice will benefit
Orange County
communities.**

Key Priorities to Advance Orange County's Social Sector

This assessment unearthed rich data about the current state of the Orange County nonprofit sector. Across the data collection efforts – via survey, focus groups, and a Town Hall – a consensus emerged on how practitioners and funders can work together to strengthen individual nonprofits and address structural challenges needed in the sector.

Across the data a clear message came through that working in isolation limits impact and coming together around a shared set of priorities to shift behavior and practice will benefit Orange County communities. A scarcity mindset has long constrained the sector, resulting in underdeveloped nonprofit capacity relative to what is needed. The findings from this research reveal a strong appetite for deeper partnerships and a willingness to work together.

Funders who are interested in driving toward enduring systemic change should consider beyond short-term, fragmented investments and commit to multi-year, flexible funding for both individual organizations and the collective capacity of the sector. This would allow nonprofits to prioritize investing in their people and systems that power their ability to serve communities and embrace collaboration to contribute to overall systemic change. Challenging outdated assumptions

and strengthening relationships via open dialogue, shared initiatives, and coordinated systems will transform regional collaboration from aspiration to reality.

By listening to the many voices in this research initiative and pairing the response with best practices in the sector, we identified a set of priorities that are needed to strengthen the Orange County social sector at both the organizational level and the collective level. Investments in both will allow the social sector in Orange County to be stronger, more resilient, and better positioned to serve the communities that depend on it.

What follows are practical and tangible ideas emerging from the assessment that deserve further exploration from regional stakeholders dedicated to strengthening the Orange County social sector through philanthropy and engagement.

Investments in Individual Organizations

The strength of the social sector lies in its people. Yet, underinvestment in talent has led to chronic challenges in staffing, recruitment, and turnover for Orange County's nonprofits. To build a resilient and effective nonprofit workforce, organizations and funders must prioritize skill development, market-based compensation, and board leadership that strengthen the effectiveness of individual nonprofits serving our communities.

Beyond talent investments, nonprofits must also invest in foundational infrastructure to operate effectively. While program funding is critical, and must be maintained, sustained investment in systems, technology, and operational support is essential for long-term stability and efficiency. Strengthening infrastructure allows organizations to manage resources effectively, scale impact, and enhance service delivery.

PRIORITIES

COMMIT TO SUPPORTING TRANSPARENT PAY STRUCTURES AND BENEFITS

Establish clear, standardized salary frameworks to promote pay equity and retention across the sector.

Advocate for and provide comprehensive benefits, including health insurance stipends, retirement contributions, and flexible work policies that support employee well-being in high burnout fields.

IDENTIFY OPPORTUNITIES TO CONNECT STAFF TO TRAINING, COACHING, AND MENTORSHIP

Expand access to leadership development programs, emphasizing financial management, strategic planning, and operational efficiency.

Invest in structured coaching and mentorship programs, particularly for emerging community leaders and professionals, to cultivate a strong and diverse leadership pipeline.

EMBRACE INNOVATIVE STAFFING MODELS TO INCREASE BOTH EFFICIENCY AND WELLNESS

Adopt shared or consultant leadership models, leveraging specialized expertise in areas like finance, HR, and IT through part-time or shared roles.

Expand participation in shared services programs that leverage shared systems such as shared staff, back-office functions, and insurance policies to reduce operational costs and enhance efficiency.

**INVEST IN SYSTEMS
AND TECHNOLOGY FOR
EFFICIENCY**

Promote awareness of the power of technology in achieving mission impact to encourage broader adoption across the sector.

Provide targeted grants specifically for investment in CRM systems, technology, and data tools to improve impact measurement and reporting.

**INVEST IN BOARD
DEVELOPMENT TO DEEPEN
UNDERSTANDING OF
NONPROFIT CHALLENGES**

Provide regular and ongoing board training on governance, compliance, best practices, fundraising, and role-specific skills needed to clarify role expectations and better stewardship of the organization's mission.

Assess board composition for skill and expertise gaps to help boards better support the nonprofits' mission and create board mobility opportunities.

Investments in Orange County's Social Sector Ecosystem

A thriving nonprofit sector requires more than individual organizational success—it demands a strong, interconnected ecosystem. Investing in the collective strength of Orange County's social sector means addressing some of the pervasive barriers that have uniquely prevented the sector from thriving. In Orange County, this includes shifting funder behavior and investing in support systems that can accelerate impact ranging from technical assistance, to research, to innovative financing mechanisms.

PRIORITIES

**COMMIT TO FUNDING
BEST PRACTICES**

Where possible, streamline application and reporting processes to increase accessibility to funding opportunities and minimize nonprofit burden.

Offer flexible funding criteria and provide multi-year grants that allow nonprofits to alleviate the pressures of short-term funding cycles and allow for longer range strategic planning.

Identify opportunities to support nonprofits "beyond the grant" – facilitating introductions and connections to resources that may otherwise be hard to access.

PRIORITIES

IDENTIFY AND CATALYZE SECTOR-WIDE INITIATIVES DESIGNED TO BOLSTER REGIONAL CAPACITY

Support the development and growth of regional consultants and intermediaries that provide tailored support for nonprofits, especially those with lived experience to guide and support nonprofit initiatives.

Enhance connections and awareness to existing regional management service organizations, incubators, and capacity building hubs.

Invest to bring in additional training capacity that does not currently exist in Orange County to ensure nonprofit practitioners have access to sector best practices.

INVEST IN CREATING BODIES OF RESEARCH AND DATA THAT WILL BENEFIT THE COLLECTIVE

Invest behind research that can allow the sector to work from a shared understanding of data that would strengthen their work. This could range from competitive compensation and benefits research to understanding the key drivers of burnout to field-specific research – all at no cost to nonprofits.

CREATE SPACE FOR AND INCENTIVIZE COLLABORATION

Create dedicated funding streams to incentivize bold, cross-sector collaboration on complex challenges such as homelessness, mental health, and workforce development. These grants should prioritize innovative, integrated solutions by supporting the infrastructure, staffing, and coordination necessary to sustain long-term partnerships. Funding should reward multi-organization efforts that drive systemic change and amplify collective impact.

Funders can invest in convening regular, meaningful forums for nonprofit stakeholders with a focus on fostering trust, encouraging alignment around regional priorities, and building a shared understanding of trends and challenges.

Create public-private funding collaborations that leverage government resources alongside philanthropic investments to increase the scale and sustainability of nonprofit services.

**CREATE INNOVATIVE
FINANCING MECHANISMS THAT
COUNTERACT RESTRICTIVE
FUNDING PRACTICES**

Develop a nonprofit revolving loan fund tailored to nonprofits' needs, using modified business lending models. These funds can provide access to working capital to secure government grants and reimbursable contracts more effectively.

Establish an unrestricted funding pool specifically for capacity-building activities such as technology upgrades, leadership development, and staff retention strategies.

Provide nonprofits with opportunities to apply for rolling capital grants that enable them to build equity, strengthen their financial positions, and support sustainable growth. Allow for flexible access that aligns with the nonprofit's unique operational cycles.

“Together, we can act on these findings, build strategic partnerships, and create a thriving social sector that serves all communities in Orange County.”

DR. SHAUNTINA SORRELLS

