**Protocols and instructions for coding nonprofit missions**

Taxonomy 1: A Collective Action Framework

Our first taxonomy was inspired by Knack & Keefer (1997) and Rupasingha et al. (2006), which divide nonprofits into Putnam-style civic association and Olsen-style professional associations or special interest groups, which they call P-Groups and O-Groups. Specifically, Putnam emphasizes the importance of nonprofits that support bridging social capital and trust:

*Putnam (1993) maintains that participation in political and social activities and collective organizations is the primary means of civic engagement…he claims that individuals’ participation in social and political organizations “instill(s) in their members habits of economic cooperation, solidarity, and public spiritedness” (Putnam, 1993, pp. 89–90)…Such activities facilitate information-sharing through repeated interactions and these interactions promote reciprocity. People who belong to such groups tend to trust others who belong to the same group, and they are therefore more likely to cooperate.* (Rupasingha et al., 2006, p. 88)

These are distinct from Olson’s strategic and self-interested collective active framework where:

*…there is a financial incentive to form and join associations because they are a mechanism for transferring income or wealth from other parts of society to members. For example, farmers join the Farm Bureau because it is instrumental in persuading the government to provide farm program payments. For O-groups the potentially higher level of return from membership may lead to individuals willing to invest additional time and perhaps other resources such as dues, contributions, or labor.* (Rupasingha et al., 2006, p. 89)

Rupasingha et al. (2006) utilized County Business Pattern data from the Census to generate social capital measures based upon nonprofit density. They categorized all civic organizations, bowling centers, golf clubs, fitness centers, sports organizations and religious organizations to P-Group social capital entities. They categorized all political organizations, labor unions, business associations, and professional membership groups as O-Group rent-seeking organizations.

Although this provides an excellent starting point, we found that many nonprofits did not fit within these categories. Many nonprofits were created to provide social services for communities, which is neither a social or leisurely activity like P-Group organizations, but also not self-interested activity consistent with O-Group organizations. Thus we have developed a third category of a Salamon-type, or S-Group organization inspired by his work outlining important social service roles of nonprofit organizations in the modern state (Salamon 1995). These are primarily service providers that do not have members and provide services other than sports, leisure, and civic engagement.

**Coding Rules for Schema 1: Putnam, Olson, Salamon Group**

P-Group:

* Does the organization focus on developing community through a shared interest or common background, often primarily through volunteer labor by members? This may include promoting the arts, historical preservation, recreational activities such as sports or outdoor experiences, cultural events, neighborhood events or community beautification, bringing together people of the same religion, and helping animals.
* Does the organization focus on furthering the interests of people not directly related to its members?
* If a membership group, are members broadly defined by experiences and not professional interests? For example, veterans groups that are not specifically advocating for benefits or rights. “To locate WWII, Korea and Vietnam veterans from the Texas Panhandle region and transport them to Washington D.C. for wreath laying ceremonies at all their memorials.”
* Broad community benefit through civic engagement: Does the organization offer a free service delivered through volunteers for the good of the community? For example, voter registration drives or civic pride events that support community engagement but do not promote a specific political and special interest group agenda.
* A social activism group that engages in protests would classify as a P-Group, as the organization is not offering a service, and the organization’s intention is to serve the community beyond its members. An advocacy group for a special interest would not.
* Examples: Parent-Teacher Associations (PTAs) that uses volunteers to improve the school. The organization exists to improve the community (quality of public schools broadly, not a homogenous group of kids from a private academy) but does not deliver services.
* Little League Baseball chapters, bowling clubs, summer camps, neighborhood watch groups.
* Humane Societies. Although they provide services, the services are for pets, they are run largely by volunteers from the community, their goal is stronger communities through humane treatment of animals, and they operate primarily through donations not fees for services.
* YMCA & YWCA: Do we automatically code these as P-Group even though they deliver services? They tend to have missions about race and empowerment, and support recreation and community, even though they generate a lot of fees for services.
* A foundation to provide support for amateur photographers is a P-Group (promoting a broad interest with no professional gain for members), a foundation to support professional photographers is an O-Group.
* “To collect, preserve and interpret late 19th and early 20th century Blackland Prairie history while making appropriate use of the authentically restored Farrell-Wilson Farmstead, a designated historic site.” Alternatively, this group would not be a P-Group: “To improve quality of life for the citizens of Canyon and the benefit of the overall community, through the enhancement and promotion of historic preservation, restoration, business vitality, tourism, cultural and arts awareness.” They support arts and culture, and engage in historic preservation, but in the context of economic development for group members (town residents).
* “To enhance the lives of all people by promoting peace through educational programs and curricula designed to develop positive character.” Although education is a service, this is broad civic education, likely run by volunteers, and is probably supported by donations rather than government contracts or fees.
* “Texas Renal Coalition: To lead in the prevention and mitigation of risks, effects, and burdens of Chronic Kidney Disease through advocacy and education.” Does not deliver services directly, but rather advocates for vulnerable population and educates people about the disease. Not acting for economic or political interests of the “group” (people with kidney disease), and the group is a class of people not a set of members, so it’s not an O-Group.
* “To provide needed money to help postoperative transplant patients in the Dallas-Fort Worth region in their struggle to regain their healthy return to society.” Helps a broad class of people, but does not provide services directly.
* What about summer camps, or specialized camps? I would categorize a summer camp or outdoor education club as P-Group because it creates opportunities for community and shared experiences, but a treatment center for anorexia as S-Group because it uses nature as a component of a fee-based social service. This one is hard because it’s in the middle: “CAMP ALPHIE: To provide a place for children suffering from cancer, as well as their families, to experience some new things, make new friends and connections, and relax - forget about their worries.” It’s not part of the cancer treatment, though, so I vote we change it to P-Group.
* What about community centers and parks associations? They provide services and likely collect fees, but much of what they do is providing space for civic engagement. “To provide a meeting facility for residents of Kingsland and the surrounding communities, as well as visitors to the area.”
* Where would we put Alcoholics Anonymous? It’s a service, but primarily through volunteers and supported by donations. But it’s also a membership group, although the primary concern is the well-being of members, not economic or political interests.

O-Group:

* Does the organization have members, potentially informal membership but often enforced through dues, and do members have shared economic or political concerns? Members may include other organizations. Members are defined by joining the association, or belonging to a professional class (school teachers). They are not defined by broad categories of people like the blind and deaf. For example, a foundation that provides scholarships for black students is not an O-Group. One that provides scholarships for children of those who work in a specific industry is an O-Group.
* Does the organization focus primarily as a professional or trade association, or advocates for the economic interests of its membership?
* Does the organization provide opportunities for members to formally affiliate, share professional norms and knowledge, advocate for their needs, and / or provide certification or accreditation?
* Does the nonprofit fundraise or financially support one other nonprofit or special interest cause, such as a university foundation?
* Rather than focusing on the community outside of the member base, the organization will aim to support its members through generating networking opportunities, advocating on their behalf, and bridging personal and professional interests.
* Example: labor unions, the State Boards of Bar Examiners for lawyers, a Chamber of Commerce, the National Rifle Association.
* Alcoholics Anonymous has members, but it is a service organization run primarily by volunteers and does not advocate for the economic or political interests of members.
* “That we, as Sheriffs, have assembled in convention for no political purpose whatsoever, but for the purpose of more successfully aiding each other as officers, to execute the laws, in the discharge of our duties against criminals, and for the further and better protection of the citizens of our respective counties and the State at large.”
* “To bring into working relations with one another, music clubs and other musical organizations and individuals for the purpose of developing and maintaining high musical standards, aiding and encouraging musical education, and the promotion of American music and American artists.”
* The Deaf-Blind & Multihandicapped Association of Texas would not be an O-Group even though they are an association and have a narrowly-defined membership because their mission is inclusive for all Texans and focuses on improvements in the quality of life: “To promote and improve the quality of life for all Texans who are deaf-blind multi-handicapped, deaf multi-handicapped, and blind multi-handicapped.”
* What do we do with advocacy on behalf of a vulnerable population for access to services? It’s not direct service provision, but it is advocacy as service? Membership is not defined by joining, but by a large class of people? If advocating for civil rights for gay people, I would say Putnam. If advocating for access to existing services, I would say Salamon. For example, we both coded this as S-Group, but not obvious what the reasoning is: “DEAF ACTION CENTER: Providing those who are deaf and hard of hearing the means to ensure advancement through education, economic security and good health.”

S-Group:

* Does the organization provide a specific type of service or services related to an issue? Does the mission or organizational name seem most oriented around providing a service or services to a target community?
* Is it reasonable that the organization would receive some type of compensation from the consumer, government, or some other entity for the service provided (ex. medical or substance abuse services, therapy)?
* An organization that has a strong component of the mission dedicated to fostering community or faith would still classify as an S-Group if service delivery is a significant focus identified in the mission.
* United Ways are categorized as S-Group because they provide a service of streamlining fundraising, and unlike foundations attached to a specific group like a university or faith tradition, their funds support a broad group of social service nonprofits in the community. They are professional fundraisers to support social services, and also add value through training, monitoring, and evaluation.
* Examples: professional human service nonprofits, private charter, religious, or college prep. schools, a park services nonprofit that manages a city space.
* “To educate and train Christians about addiction and to equip those who are struggling to overcome addiction with the necessary tools to be effective.” This group has elements of a P-Group, but operates primarily through paid staff.
* “AMYOTROPHIC LATERAL SCLEROSIS ASSOCIATION: To improve the lives of people living with Amyotrophic Lateral Sclerosis and leave no stone unturned in search for its cure.” Focuses on human services, not broad community benefit, and likely run by professionals, not volunteers.
* Is a Humane Society a P-Group (works with animals, typically run by volunteers), or an S-Group? It’s not human services? Also not a vet or specialized service for pets, but rather tries to build strong communities through humane treatment of animals.

Not Applicable:

* The organization does not seem to provide services to the community.
* The organization does not act to create community and generate positive gains for people beyond its members.
* The organization does not work to further the aims of its members.
* Example: a foundation’s decisions are generally made by a small group. They tend to provide grants over direct services, while focusing on supporting a community beyond its members.
* Or unable to assign a category based upon the mission descriptions.

Taxonomy 2: Explicit Religious Origins or Purpose

Many nonprofits have religious origins, either through support and sponsorship by formal religious institutions or through members that have been motivated by their beliefs. Some of these have missions that are religious in nature, such as running a place of gathering or educating the general population about belief systems. Others might provide services unrelated to religion, but members have been inspired to act because of their religious beliefs. We code nonprofit activities as religious if they were created for specific religious purposes, or else they explicitly mention their belief system in their mission statements.

**Coding Rules for Schema 2: Religious in Motivation or Purpose?**

Does the organization mention a religious or spiritual motivation in their mission?

Religious or Spiritual:

* The mission uses language of a religious nature to identify its activities or aims, or makes mentions to deities or religious figures. Such language includes: evangelism, ministry, Christ, Muslim, spiritual, and God.
* The mission identifies or strongly implies an affiliation between the organization and a religion or religious institution.
* Missions that have repeated language with a strong spiritual connotation, even if not affiliated to a specific religion, should be categorized as religious if a specific religion, religious practice, or philosophical school of thought is identified. Examples of spiritual language include: peace, compassion, unity, meditation, and healing.
* Example: a nonprofit that acts as a professional coalition for schools affiliated with a specific branch of Christianity, such as Catholic, Episcopal, Methodist, or Baptist.

Not Religious:

* The mission does not use any language of a religious nature.
* The mission includes spiritual language but no specific religion, religious practice, or philosophical school of thought is identified.
* Boy Scouts has religious roots, but religion is not explicitly mentioned in the name or mission.
* Example: an economic development group for a specific neighborhood in a city.

Taxonomy 3: Work with Disadvantaged or Vulnerable Populations

Our final taxonomy aims to assess whether the nonprofit targets vulnerable or disadvantaged populations. This task can be challenging since mission statements are broad, but also vulnerable populations can be hard to define. Should we consider all minorities to be vulnerable populations, even those that have high educational achievement and wealth than average households? American Jews, for example, are twice as likely as the average US household to receive a college degree or earn over $100,000 (Murphey, 2016); but they are also the group that tops the list of targets of hate crimes in the US (FBI Hate Crime Statistics, 2016). Women are subject to wage discrimination and sexual violence, so should all women be considered part of a vulnerable population? The elderly are typically poor and struggle with health issues. Should we then consider a wealthy retirement community to be a vulnerable population?

**Coding Rules for Schema 3: Does the nonprofit serve a disadvantaged population?**

Disadvantaged:

* Does the mission explicitly identify a segment of the population that has historically been denied services or civil liberties? Causes can include sex, age, race, ethnicity, income level, gender identity and sexual orientation, linguistic barriers, and physical and mental health.
* Does the organizational title or mission identify specific handicaps, diseases, substance abuse, or any physical or mental conditions that may cause a decrease in an individual’s quality of life?
* Is the served population vulnerable to financial distress? This may include challenges securing employment and permanent housing or covering certain expenses.
* Example: a religious ministry whose mission mentions helping people in need or in crisis situations has a focus on people in a disadvantaged situation, with the implication that a lack of intervention by the organization will probably result in a worsening of the quality of life for those people.
* “Dallas Women's Foundation invests in women and girls and empowers women's philanthropy to build a better world.” Focuses on empowerment of women.
* “Empower Hispanic business professionals to achieve their full educational, economic and social potential.”
* What if they support organizations that serve disadvantaged communities? Professional association for special education teachers? United Way that supports local social services for disadvantaged populations? Their target population is the same as the organizations they support, so I say yes if they mention the vulnerable population in their title / mission.
* What about organizations that support historically disadvantaged populations in privileged conditions? College scholarships for black students? Business association for a minority group? Foundation for women’s empowerment? I think yes, because the historically disadvantaged group will still be at a disadvantage in their current endeavor. Women still make 80 cents on the dollar. Black college grads will face discrimination in the workplace.

Non-disadvantaged:

* Does the mission identify a historically disadvantaged population but does not focus on issues relating to/stemming from that history?
* The organization does not identify a disadvantaged population or does not make specific mention to any such population.
* Example: a French cultural group that organizes language session, cultural exchanges, etc. in the community that does not explicitly identify a disadvantaged population as a recipient of its offerings would be classified as non-disadvantaged.
* Veterans groups, unless they specifically focus on disability or trauma, are not disadvantaged by default.
* Senior citizens are not by default a vulnerable population unless it’s clear they have specific special needs or they are in financial distress.
* Access to health care in general does not imply disadvantage. Specific classes of sick people, though, like cancer patients or those with Alzheimer’s, does qualify as a disadvantaged group.
* The BISD Education Foundation has a mission: “To assist the Bryan Independent School District in achieving excellence.” It may be an independent school district formed to benefit a historically disadvantaged population, but that is not made explicit in the mission.

Not Applicable:

* Are you not sure if the mission identifies a disadvantaged population as the target community of the organization’s activities?
* The disadvantaged status of the target community is not clear.
* Example: an organization’s mission mentions a disadvantaged population, but how the organization interacts with that population is unclear.