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2021 State of Nonprofits and Philanthropy Annual Report

Laura Deitrick

Tessa Tinkler

Jon Durnford

Tom Abruzzo

Nallely Manriques

See next page for additional authors

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Authors

Laura Deitrick, Tessa Tinkler, Jon Durnford, Tom Abruzzo, Nallely Manriques, and Mehrnoush Jamshidi

A wide-angle photograph of the San Diego skyline, featuring numerous skyscrapers and buildings, viewed from across a body of water under a clear blue sky. The text is overlaid on the image.

ANNUAL REPORT

**STATE OF NONPROFITS
& PHILANTHROPY**

IN SAN DIEGO

**MEETING THE MOMENT:
Stewarding the Momentum
2021**

Table of Contents

Introduction	1
Meeting the Moment	2
San Diego Nonprofit Response to COVID-19	5
Public Trust in Local Institutions	8
Adapting to Meeting Community Needs	10
How Funders Can Support Nonprofits to Meet Community Needs	14
Nonprofits' Greatest Resource: Their People	15
Nonprofit Employment	16
Volunteerism	19
Employment Trends	21
Leadership Diversity	22
Diversity Trends and Strategies	24
Diversity of Board and Leadership Team	26
Fundraising and Financial Outlook	27
Disparities in Financial Position and Outlook	30
Sources of Revenue	31
Cash on Hand	33
Emergency Funding for Nonprofits	34
Individual Giving	36
Looking Ahead: Financial Predictions and Fundraising Outlook	38
Stewarding the Future	39
Notes	41

Introduction

As San Diego County endured the unforeseen impacts of COVID-19, local nonprofit organizations were well prepared to answer the call of those in need. Working together, dedicated staff, volunteers, donors, and partners upheld the public's trust to deliver quality services, demonstrating ingenuity and resilience at the very moments they were needed most. This year's State of Nonprofits and Philanthropy Report integrates multiple perspectives and data sources to document the successes, challenges, and lessons learned over the last 18 months.

As of the writing of this report, nearly two-thirds of local nonprofit leaders surveyed said their organizations fared better than they had originally expected at the onset of the pandemic. As a result, the nonprofit sector collectively reports a relatively positive financial position with most leaders predicting stability or growth in the coming twelve months. The current financial health of the sector is due in large part to emergency relief funding provided by government and foundations. As a result, more nonprofits than ever before report having 6 or more months of cash savings. However, arts and culture nonprofits and smaller community-based nonprofits, faced larger losses of income and more difficulty accessing emergency relief funding than other nonprofits. Additionally, many of the nonprofits surveyed reported demand for their services have increased. Yet, most indicated they were unable to meet all the demand for their services, indicating unmet need persists in the county.

Keeping up with demand for services will likely continue to be a problem as almost all leaders surveyed reported some level of difficulty hiring qualified staff with nearly a quarter saying it is extremely difficult to hire qualified employees. Most nonprofit leaders shared they are implementing practices to increase the diversity of their leadership teams and board directors. However, their leadership teams and boards remain predominantly White and do not fully reflect the ethnic diversity of San Diego's population.

As San Diego nonprofits look to the future, innovations adopted in response to the pandemic will likely have a lasting and positive impact on the sector and those it serves. For example, leaders said the use of technology to deliver services, hybrid working arrangement for employees, and prioritizing equity are practices that they intend to implement permanently. Additionally, increased competition for qualified employees has the potential to increase nonprofit wages and benefits to be more on par with the for-profit and public sectors.

Meeting the Moment



Meeting the Moment

11,910

NONPROFITS

**Registered 501(c)(3) Public
Charities**

+1.3% from 2020 to 2021

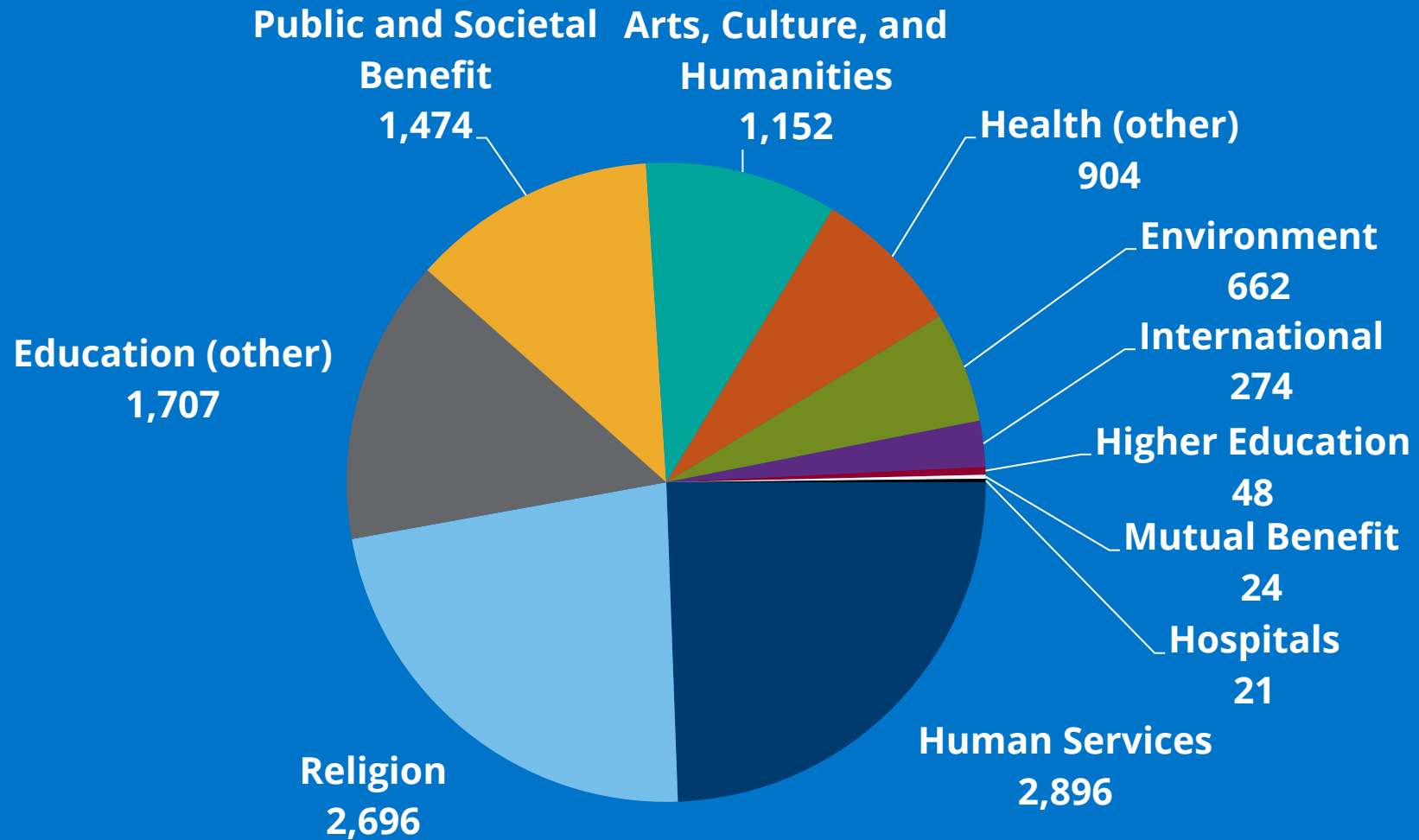
Through good and bad times,
San Diego's nonprofit sector
stands on the frontlines
to ensure health and vitality
for our diverse region.

976

PRIVATE FOUNDATIONS

+0.2% from 2020 to 2021

Number of Nonprofits Providing Services by Subsector



San Diego Nonprofit Response to COVID-19

Demand for Services

Most nonprofits (61%) reported experiencing an increase in demand for their services, but this varied by subsector. Nearly three-quarters of Human Services and Health nonprofits reported increased demand for services while one-third of Arts and Culture nonprofits reported a decrease in demand. Across all sectors, leaders attributed the change in demand (either increase or decrease) to the COVID-19 pandemic. While nonprofits that have provided essential services during the pandemic - such as food, housing, and healthcare - experienced an increased demand, nonprofits that have historically provided services to enrich San Diegans' quality of life - such as through art and education - were more likely to experience a decrease in demand.

There was also a correlation between the size of an organization and the demand for their services. Our analysis shows that the larger an organization's budget size was, the greater the increase in the demand for their services.

Twelve percent of organizations that experienced an increase in demand said they have been able to meet all of the increase. This indicates that there is still a sizable gap between need for services and organizational capacity to fulfill it.

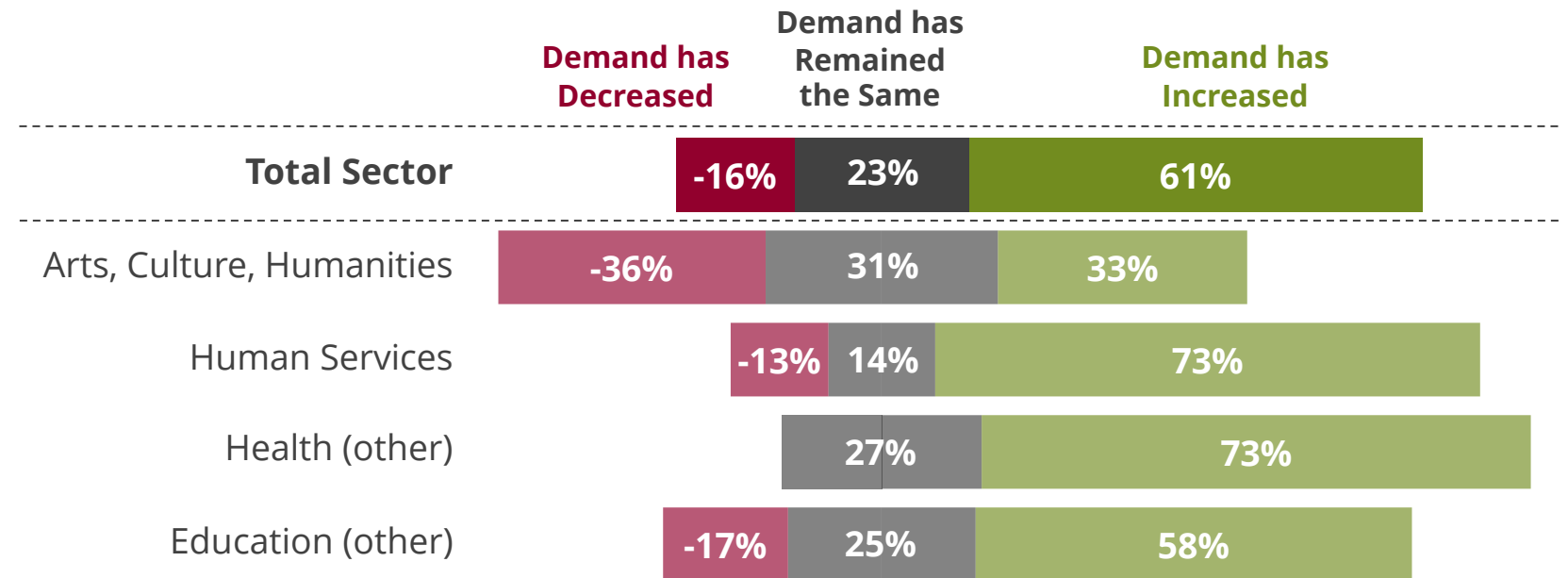
12%

of nonprofits report being able to **meet all increased demand for services**



San Diego Nonprofit Response to COVID-19

Changes to Demand for Nonprofit Services

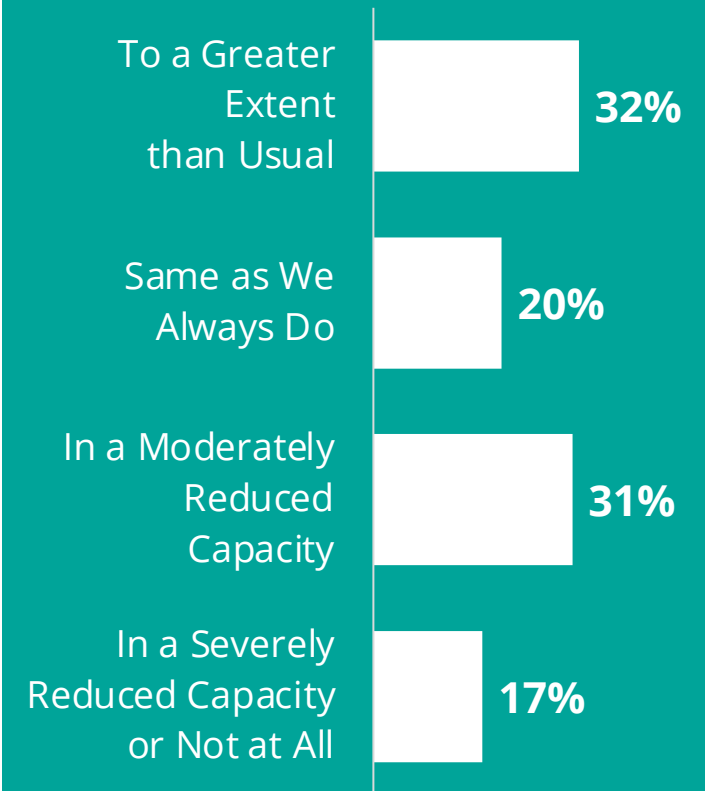


San Diego Nonprofit Response to COVID-19

Operational Capacity

Although half of organizations are operating either the same as always or to a greater extent than usual, the other half are still operating in a reduced capacity nearly two years after the pandemic began. The organizations that are operating at a reduced capacity tend to be smaller and tend to be concentrated in the Arts and Culture subsector. Eighty three percent of organizations with operating expenses less than \$50k reported operating in a reduced capacity. In contrast, only 27% of organizations with operating expenses greater than \$10m reported the same. Among Arts and Culture organizations, 78% reported operating at a reduced capacity.

The Extent to Which San Diego Nonprofits are Delivering Programs: August 2021



Public Trust in Local Institutions

Trust is the bedrock on which the nonprofit sector rests, and the public's confidence drives their engagement in the sector. Individuals who express confidence in nonprofits are two times more likely to donate and three times more likely to volunteer. In order for nonprofits to meet the high demand for services, San Diegans must trust their institutions. For more than five years, The Nonprofit Institute has partnered with Luth Research in the administration of a quarterly survey to gauge San Diegans' perceptions of local nonprofits. **San Diegans continually express higher levels of confidence in local nonprofits** than in corporations and government.

82%

of San Diegans express confidence in
NONPROFITS

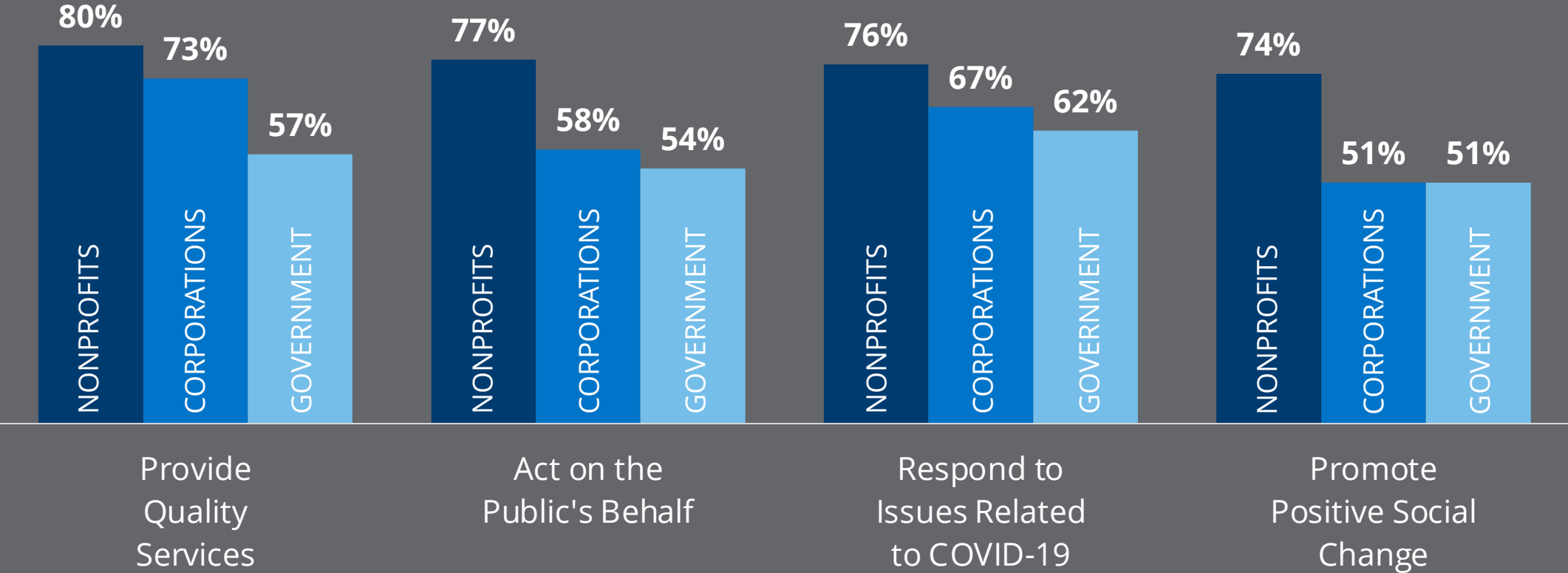
70%

of San Diegans express confidence in
CORPORATIONS

56%

of San Diegans express confidence in
GOVERNMENT

San Diegans Rank Nonprofits Highest at Addressing Community Needs



Adapting to Meet Community Needs

Despite the many challenges nonprofits have faced for nearly two years, this forced disruption has also led nonprofits to reimagine their workplaces and how they deliver services to the community. Nonprofit leaders shared a desire and intention to make the following adaptations permanent.

74%

of organizations anticipated that more of their employees would now **work at least part of their time remotely as a permanent arrangement**

Adapting to Meet Community Needs

Remote Hybrid Work Models

Organizational leaders shared that the pandemic allowed them to explore work-from-home models as well as test out how services could be delivered remotely. This convenience has been appreciated by staff as well as clients receiving services, especially clients whose biggest barrier was transportation. Leaders were hopeful that allowing remote work for new positions could expand the applicant pool for hard to fill positions or unique skill sets.

Organizations that have made the decision to go fully remote are considering adding schedule flexibility as an employee benefit. This has allowed organizations to either fully give up their lease or reduce their square footage of office space and invest funds in other areas such as training, diversity, equity, and inclusion work, and technology. Organizations that have expressed support of hybrid work models expressed that the flexibility fosters a work dynamic that allows for “people’s human needs to take priority” and overall instills a better work-life balance for those that have caregiving and/or family obligations.

Additionally, 35% of organizations reported either currently employing or being willing to hire people who live outside of San Diego to work the majority or all of their job remotely. About half of those organizations reported considering this for the first time. Those considering incorporating an increase in remote positions have stated expanding the applicant pool for hard to fill positions or unique skill sets as a motivation behind the decision.



[We plan to] continue remote work for most administrative staff [and] increase our use of virtual offerings for our therapy, education and support group services. [We will] add a virtual element to existing services where appropriate, and look for opportunities to create new virtual programs to serve more low income and disenfranchised community members.

SUBSECTOR: HUMAN SERVICES

Adapting to Meet Community Needs

Expanded Use of Technology to Deliver Programs

With having to shift to remote and/or hybrid work models, organizations also expressed a desire to improve current technology used to ensure quality of services to San Diego residents and anyone else outside of San Diego they may attract through virtual delivery of services. There is one organization that stated technology is so crucial to programming that it has now shifted from an operational to a programmatic expense.

“

We will continue to deliver our programs virtually. IT/Technology became essential to delivering our program and there is no going back; it will remain classified as a programmatic expense, not an operational expense.

SUBSECTOR: ARTS, CULTURE, AND HUMANITIES



Adapting to Meet Community Needs

DEI Reimagined

Organizations have expressed newfound commitments to addressing diversity, equity, and inclusion (DEI) and have been working to incorporate these commitments into their organizations and programmatic structures. The pandemic highlighted big disparities such as the digital divide, health access, and racism. A common theme among organizational leaders was using this pandemic time to reimagine what DEI looks like in order to continue to serve and improve the communities in which they work.



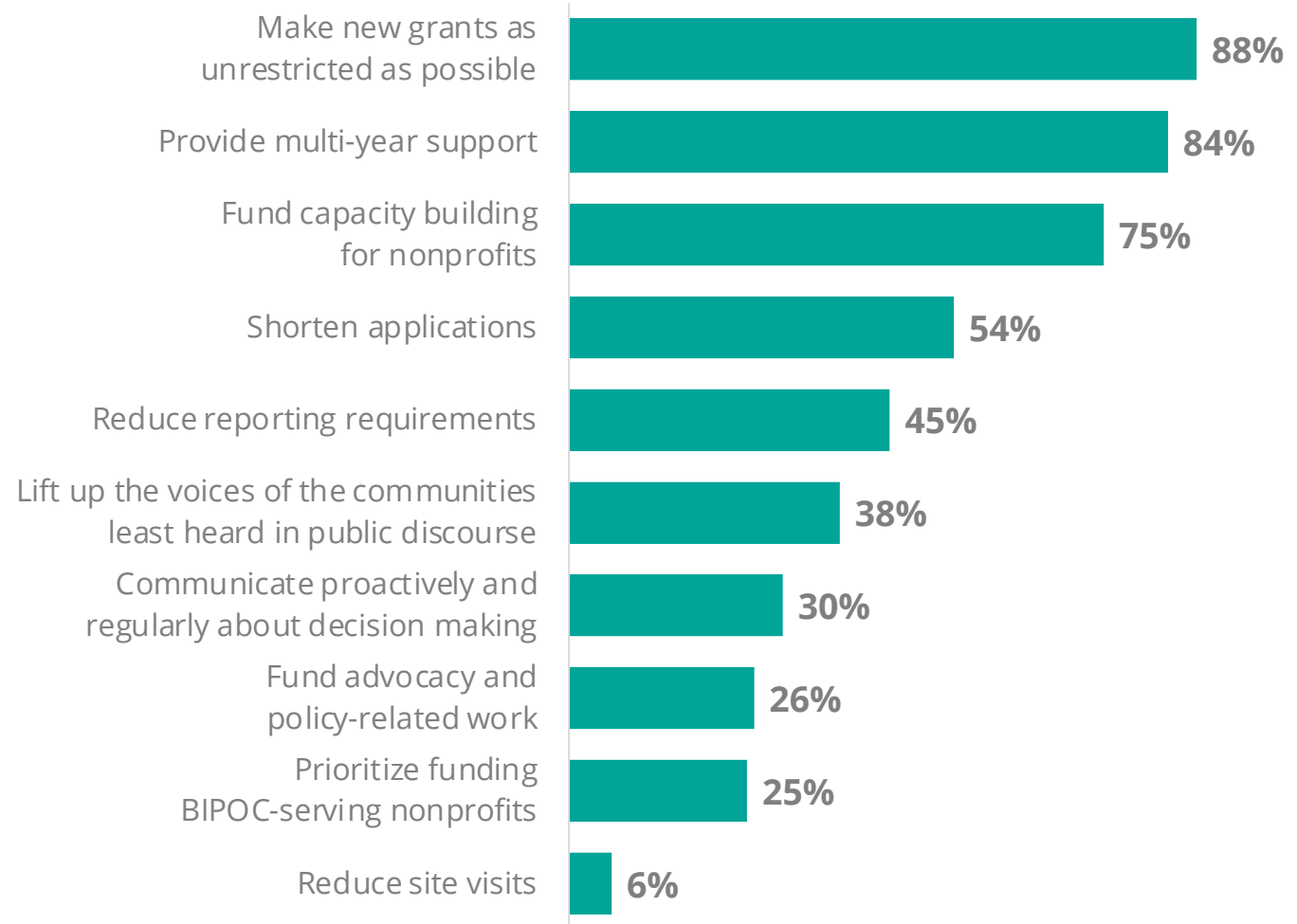
The pandemic and the movement for racial equity and justice ... has increased our need to listen carefully to community needs and to remain agile in order to survive and remain relevant. Our staff were challenged to innovate programming in ways that they hadn't before...Regardless of what's ahead, I hope that we retain the posture of innovation and adaptability as an organization so that we're always best positioned to meet our communities need.

SUBSECTOR: ENVIRONMENT

How Funders Can Support Nonprofits to Meet Community Needs

Many foundations adapted their grantmaking practices to enable nonprofits to more rapidly respond to the community's needs throughout the pandemic. Some funders minimized reporting burdens, increased flexibility in funding, and sought additional feedback from nonprofits about where to prioritize dollars. In ranking the practices nonprofits would most like to see funders make permanent, increased flexibility in funding was most popular, followed by funding capacity building for nonprofits and minimizing application and reporting requirements. Although some nonprofits want to see funders listen and communicate more transparently, this was not the top priority.

Top Practices Nonprofits Would Like to See Funders Make Permanent



A woman with braided hair, wearing a black top and a patterned skirt, is pointing at a laptop screen. A man with glasses and a beard is looking at the screen with a thoughtful expression. In the background, another person is working at a desk in a modern office environment.

Nonprofits' Greatest Resource: Their People

Nonprofit Employment

2,849

2020 Average
Number of Nonprofits
with Paid Employees

105,795

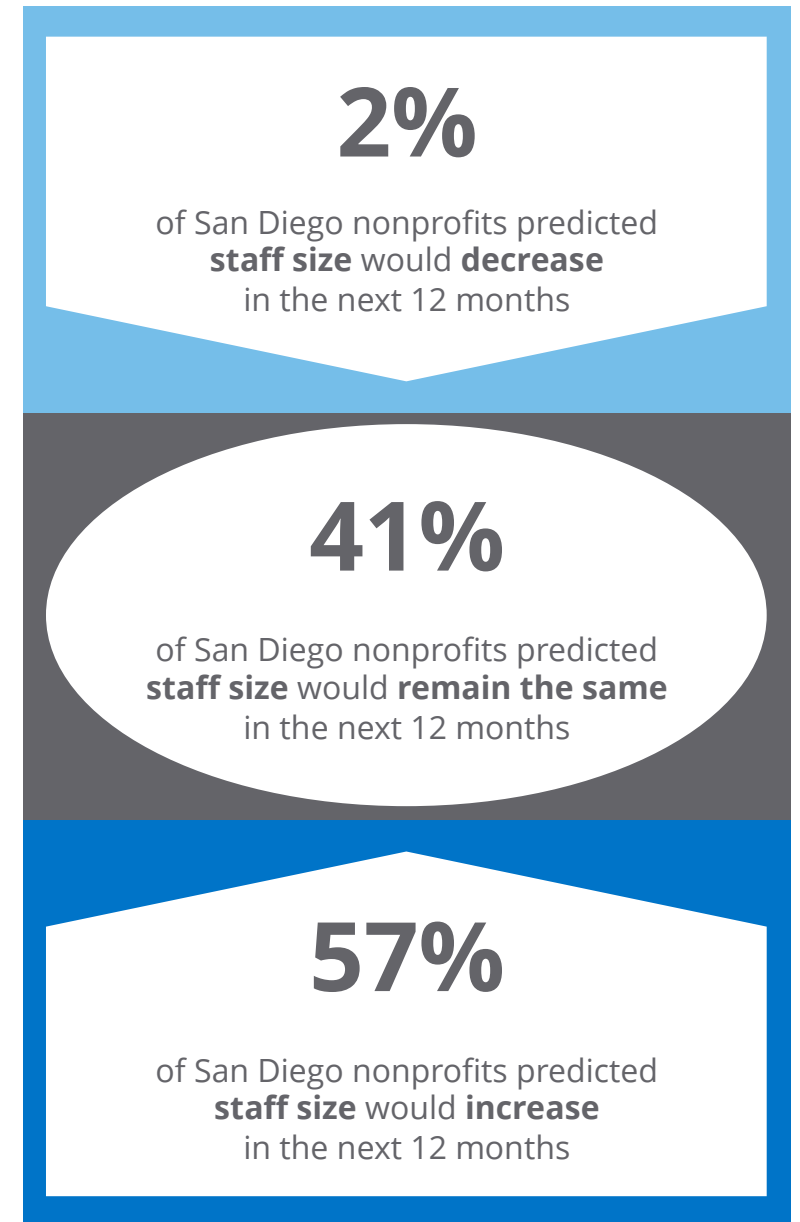
2020 Average
Total Employment

\$6.63B

2020 Total Wages

Nonprofit Employment

Despite the pandemic's disruption to the workforce, nonprofit leaders anticipate growth in employment. Looking forward to the next 12 months, 41% predicted their staff size would remain the same and 57% predicted their staff size would increase. Only 2% (n=4) of organizations predicted their staff size would be smaller.



Nonprofit Employment

Further, while 80% of organizations reported actively hiring new employees, 87% indicated it was at least somewhat difficult for them to find qualified employees. Ninety-five percent of Human Service organizations said it was at least somewhat difficult, with 25% noting that it was extremely difficult. Across all subsectors, the positions most frequently identified as difficult to find qualified employees for were Program Staff (66%) and Licensed or Specially Certified Staff (32%). Over half of respondents for each of these categories were human service organizations.

Positions Most Difficult to Fill:

- Program Staff
- Licensed or Specially Certified Staff
- Fundraising / Development
- Admin and Operations

Looking forward to the next 12 months, 80% of organizations anticipated increasing wages, while only 41% anticipated increasing benefits.

80%

of San Diego nonprofits reported **actively hiring new employees**

Yet...

87%

Indicated it was at least somewhat **difficult to find qualified employees**

80%

of San Diego nonprofits anticipated **increasing wages** in the **next 12 months**

41%

of San Diego nonprofits anticipated **increasing benefits** in the **next 12 months**

Volunteerism

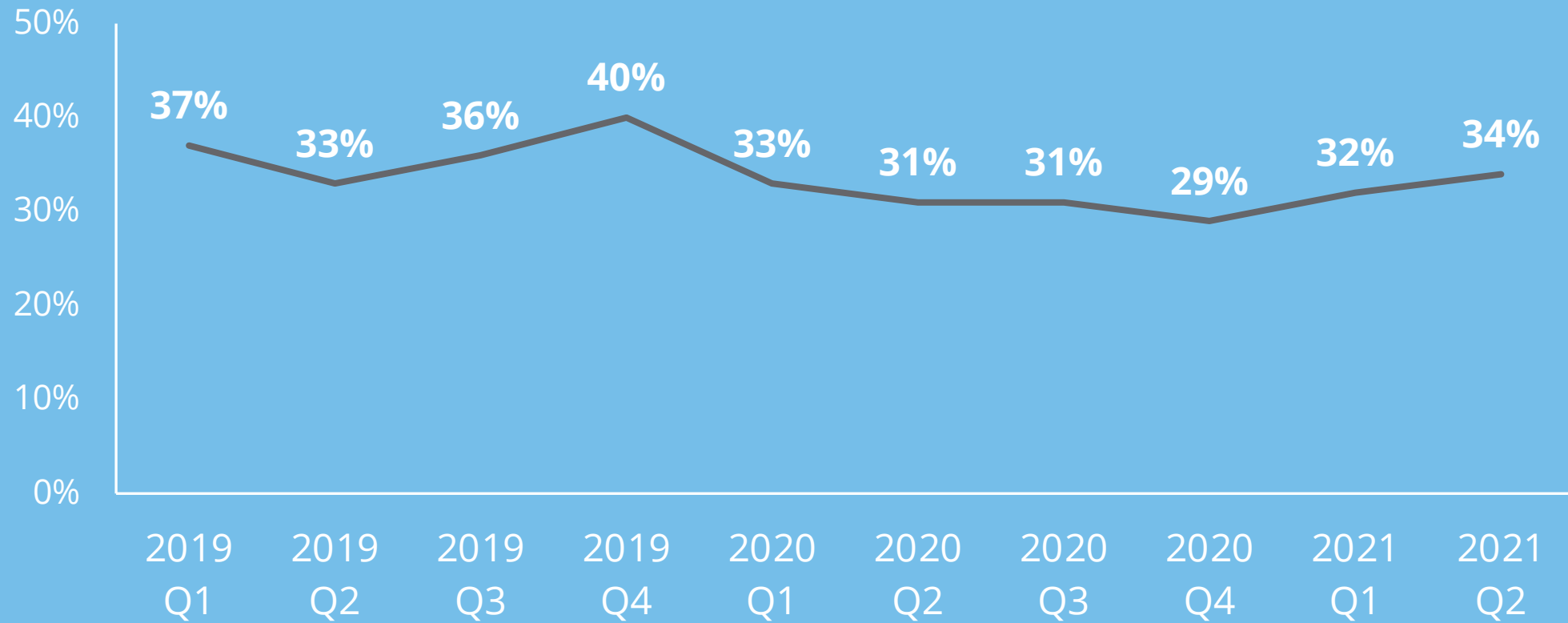
San Diego County's nonprofit sector, not unlike the nature of nonprofit organizations in general, relies heavily on the spirit of volunteerism. Sixty seven percent of organizations reported that volunteers were either very important or absolutely essential in delivering their mission. However, 33% indicated it was either somewhat or very difficult to engage the volunteers they need.

23.3

Average Quarterly Hours Volunteered
(Q3, Q4 2020 and Q1, Q2 2021)



Average Quarterly Percent of San Diego Households Who Volunteered



Employment Trends

Nonprofit leaders paint a picture of frustration and difficulty recruiting and retaining qualified employees. Leaders reported high turnover as a result of low wages, inadequate benefit packages, and burnout. Leaders stated that employees' desire for a remote work environment, school closures and the lack of child care, the high cost of living in San Diego, and competition with government and private sectors are fueling the shortage of qualified employees. Few respondents see the pandemic as the culprit, but acknowledge that it has led employees to reexamine their work life priorities.

In an effort to attract qualified candidates in a highly competitive labor market, nonprofit organizations have adjusted pay schedules, implemented additional benefits, formed partnerships with other nonprofits, and introduced various professional development opportunities.

Key Trends:

- Mounting pressure to increase wages, particularly for entry level staff who cannot remain in San Diego without a livable wage
- Changes in recruiting and hiring practices to increase diversity of staff
- Urgent concerns over the lack of qualified staff who are willing to work for lower wages than the government and private sector offer

“

It is an applicant's market, and we have had to increase salaries to compete.

SUBSECTOR: HUMAN SERVICES

“

We did increase wages and benefits in the past year in order to retain employees.

SUBSECTOR: RELIGION

“

Being a woman-owned and founded nonprofit, we want to increase our wages to be competitive and honoring to women and moms in the workplace.

SUBSECTOR: HEALTH (OTHER)

“

We provide hot, freshly made lunches for staff, gift cards when we can, [and] provide fun food days.

SUBSECTOR: HUMAN SERVICES

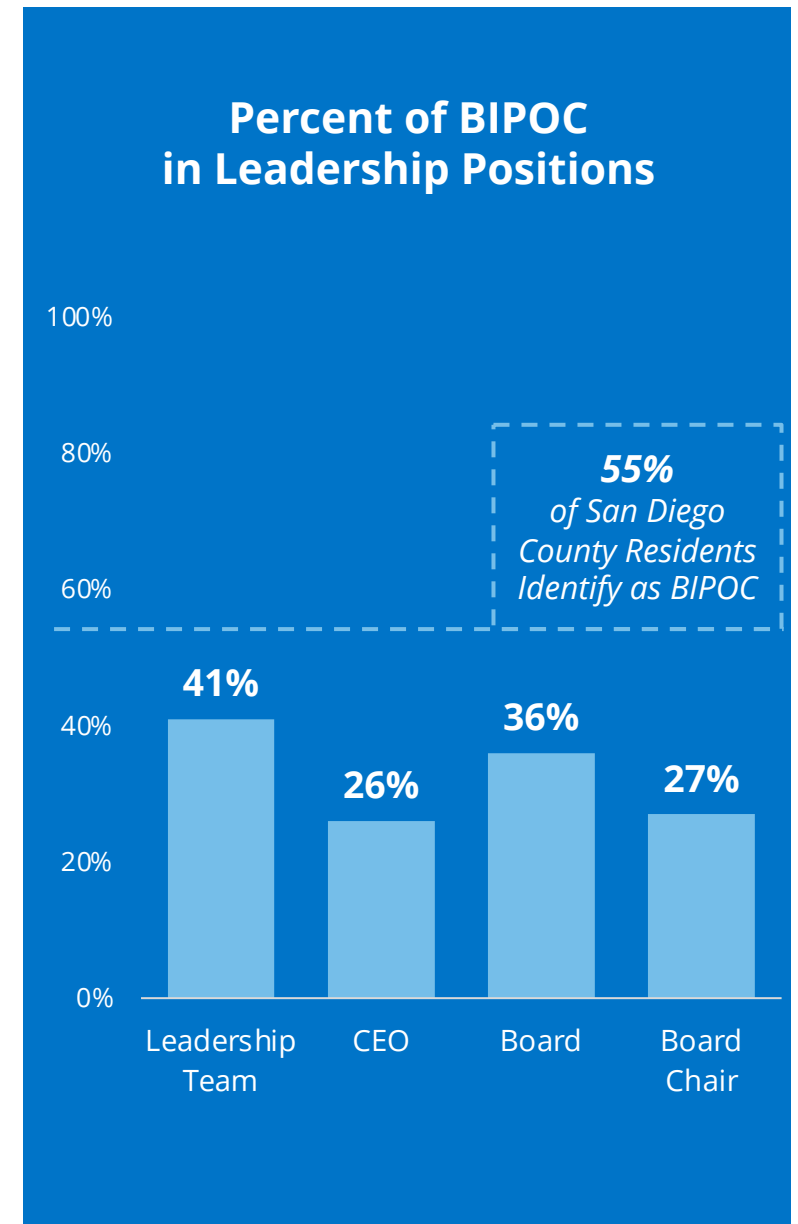


Leadership Diversity

Leadership Diversity

Nonprofit leaders do not reflect the diversity of San Diego's residents. While 55% of San Diego County residents identify as Black, Indigenous, and People of Color (BIPOC), nonprofit leaders and boards are predominantly White. Based on a sample of 200 survey respondents who shared demographic data about their organization's leadership teams, 26% of CEOs and 27% of board chairs were BIPOC. In terms of an organization's leadership team, on average 41% of leadership teams and 36% of board members identified as BIPOC.

There is greater gender diversity in nonprofit leadership. Based on survey respondents, 57% of CEOs and 47% of board chairs identified as women. Survey respondents also shared that 10% of CEOs and 7% of board chairs identified as part of the LGBTQ+ community.



Diversity Trends and Strategies

Most nonprofit leaders (84%) reported they were satisfied with their organization's willingness to talk about issues around diversity, equity, and inclusion (DEI), but fewer (61%) were satisfied with their actual ability to implement practices that increase diversity, equity, and inclusion. There is an evident increase in leaders' satisfaction with their organizations' ability to discuss issues around diversity, equity, and inclusion compared to findings from 2020. Our 2020 report revealed that 68% of leaders were very or completely satisfied with the organization's willingness to discuss concepts compared to this year's finding that 84% are very or completely satisfied.

Most commonly, organizations reported implementing practices to increase diversity of board members (76%) and job candidates (67%). Further, 59% reported issuing a public statement on the organization's commitment to anti-racism. To a lesser extent, organizations reported providing specialized training to staff (53%) and board members (34%) in the focus area of DEI. However, 22% and 34% respectively reported planning to implement these trainings for staff and board members in the future.

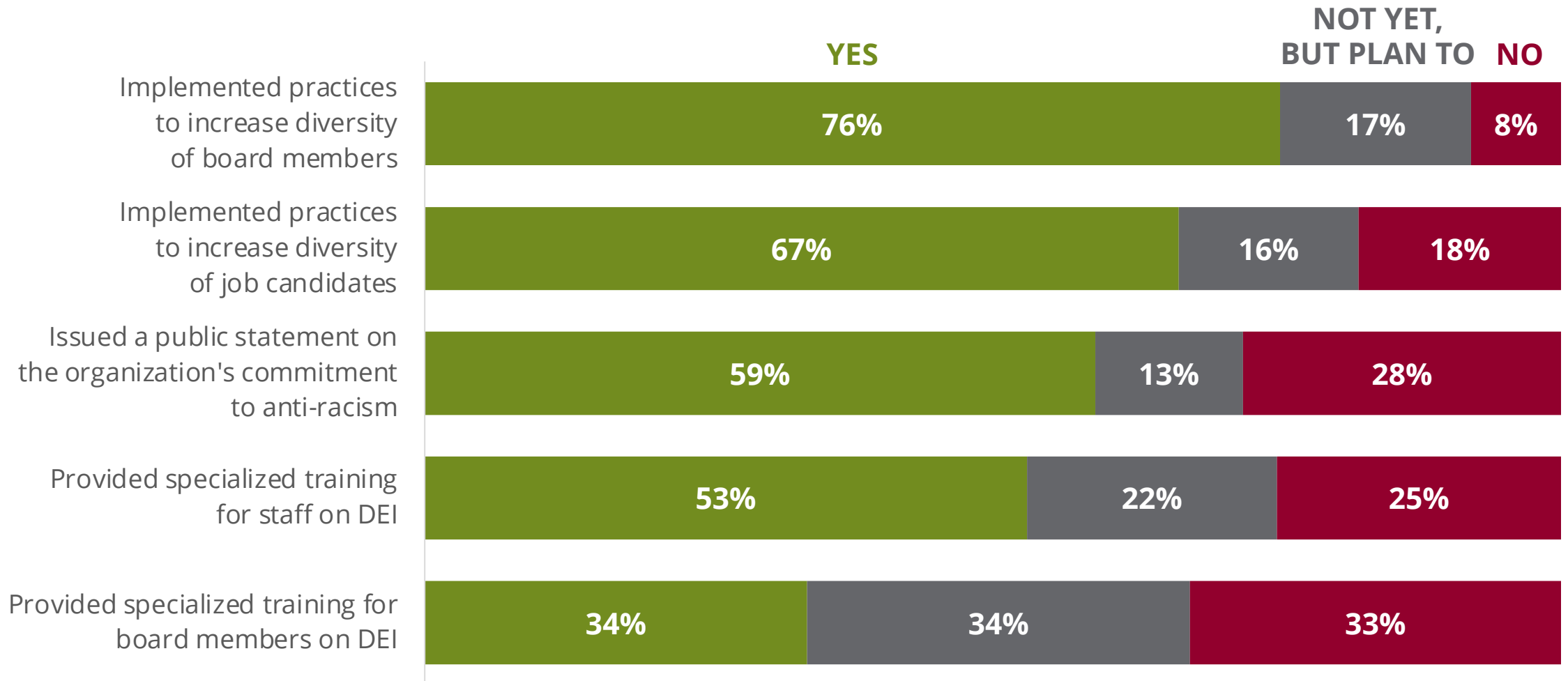
84%

of nonprofit leaders were **very or completely satisfied** with their organization's **willingness to discuss concepts of diversity, equity, and inclusion**

61%

of nonprofit leaders were **satisfied** with their organization's **ability to implement practices that increase diversity, equity, and inclusion**

Has your organization taken any of the following actions to promote racial/ethnic diversity, equity, and inclusion?

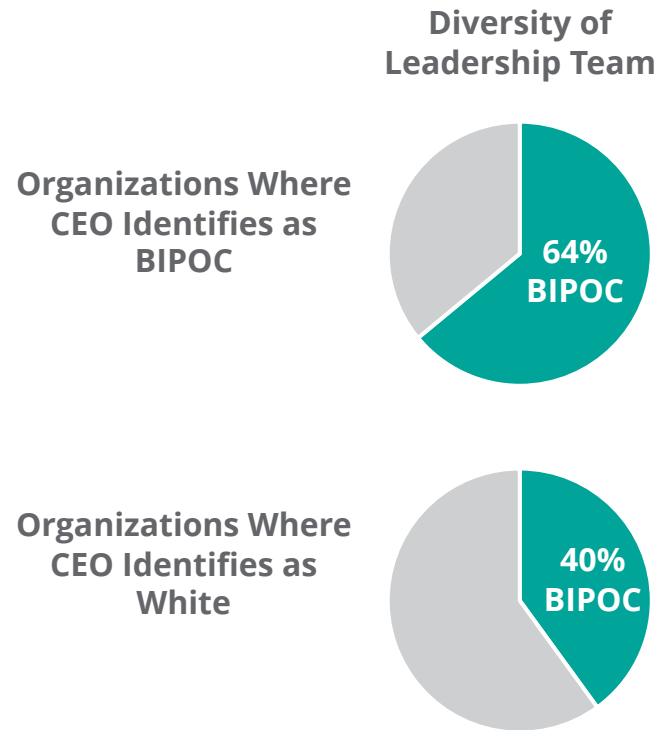


Diversity of Board and Leadership Team

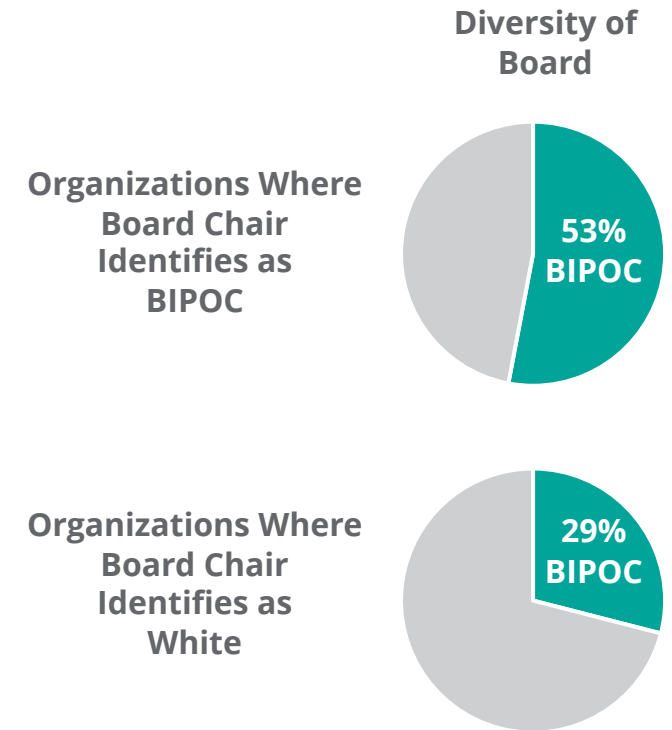
Analysis of the data shows that BIPOC-led organizations equated to more ethnically diverse leadership overall. Organizations with BIPOC CEOs had more diverse leadership teams. The average percent of BIPOC leadership for organizations led by BIPOC CEOs was 64%. On the other hand, the average percent of BIPOC leadership for organizations led by white CEOs was 40%.

Similarly, organizations with BIPOC Board Chairs were more likely to have more diverse boards. The average percent of BIPOC board members for organizations with a BIPOC board chair was 53%. Conversely, the average percent of BIPOC board members for organizations with a white board chair was 29%. These differences were statistically significant, indicating that an effective strategy for increasing racial equity in the nonprofit sector may be to increase the number of CEOs and Board Chairs who identify as BIPOC.

Percent of Leadership Teams Who Identify as BIPOC by Ethnicity of CEO



Percent of Boards Who Identify as BIPOC by Ethnicity of Board Chair



A close-up photograph of a camera lens. The lens is dark and has a circular opening in the center. Inside the lens, a city skyline at night is visible, with several tall buildings and lights. The background is a soft, out-of-focus bokeh of warm, golden-yellow and white lights, suggesting a city at night. The overall mood is professional and focused.

Fundraising and Financial Outlook

Fundraising and Financial Outlook

Despite a tumultuous 2020 and the lingering effects of the pandemic, 64% of organizations reported faring better financially through COVID-19 than they originally expected.

As a leader of a Workforce Development organization wrote, the factors that contributed to faring better through the pandemic were, “Hustle. Relationships. Creativity. Results.”

An analysis of the past three years of survey data, spanning from prior to the pandemic to summer 2021, shows that the general financial health of the nonprofit sector in San Diego County has fluctuated with uncertainty similar to that of the national economy. In 2019, 58% of organizations reported their general financial health as somewhat or very strong. In our 2020 report, that number fell to 46%. This year, 69% of organizations are reporting that their current financial health is somewhat or very strong. Leaders attributed this positive financial position to COVID-specific relief from government, foundations, and the generosity of loyal individual donors. Organizations also attributed their current financial health to strong and innovative leadership and governance in a time of crisis.

“

Hustle. Relationships.
Creativity. Results.

SUBSECTOR: HUMAN SERVICES

69%

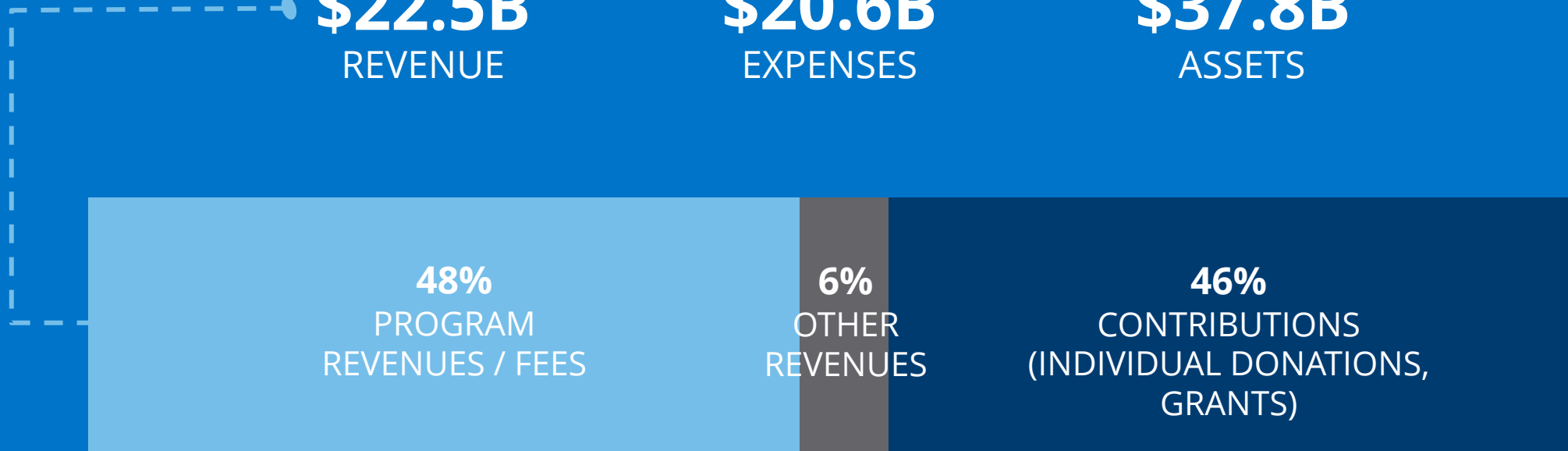
of organizations report that their
**current financial health is
somewhat or very strong**

Breakdown of Nonprofit Revenue

\$22.5B
REVENUE

\$20.6B
EXPENSES

\$37.8B
ASSETS



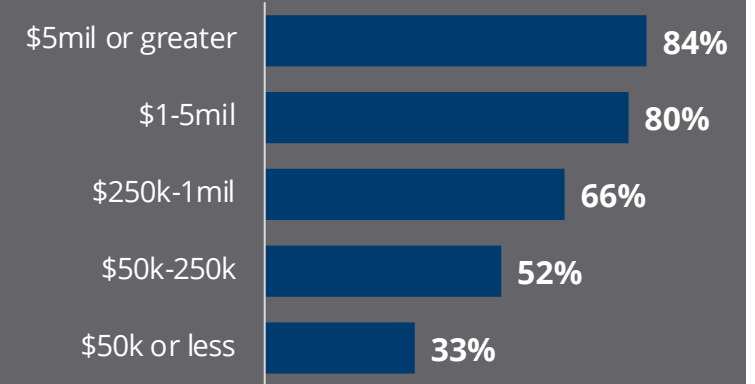
** Bar chart excludes Hospitals and Higher Education*

Disparities in Financial Position and Outlook

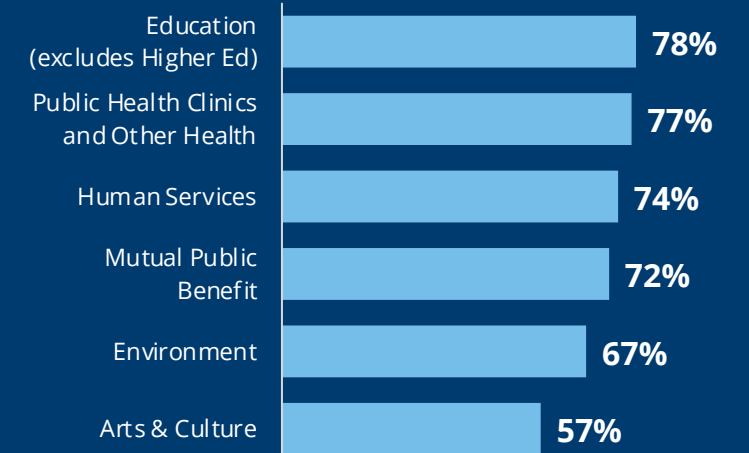
In most cases, financial outlook correlated to organizational size. Nonprofits with larger operating budgets reported stronger financial health than organizations with smaller budget sizes. Similarly, many more small organizations reported faring worse than expected through the pandemic than large organizations.

In addition to differences in financial health by organization size, there were also disparities by the ethnicity of the CEO. White-led organizations reported stronger financial health than BIPOC-led organizations. Among organizations in which the CEO was white, 73% reported somewhat or very strong financial health. In contrast, in BIPOC led organizations, 57% reported somewhat or very strong financial health.

Percent of Organizations Reporting "Somewhat" or "Very Strong" Financial Health by Nonprofit Budget Size



Percent of Organizations Reporting "Somewhat" or "Very Strong" Financial Health by Nonprofit Sub-sector



Sources of Revenue

Many organizations reported changes in their revenue sources over the past 12 months. Organizations experienced the greatest increases in revenue from government sources and foundations. Not surprisingly, organizations experienced the greatest decreases in their revenue from fundraising and earned revenue, sources that historically depended on in-person contact.

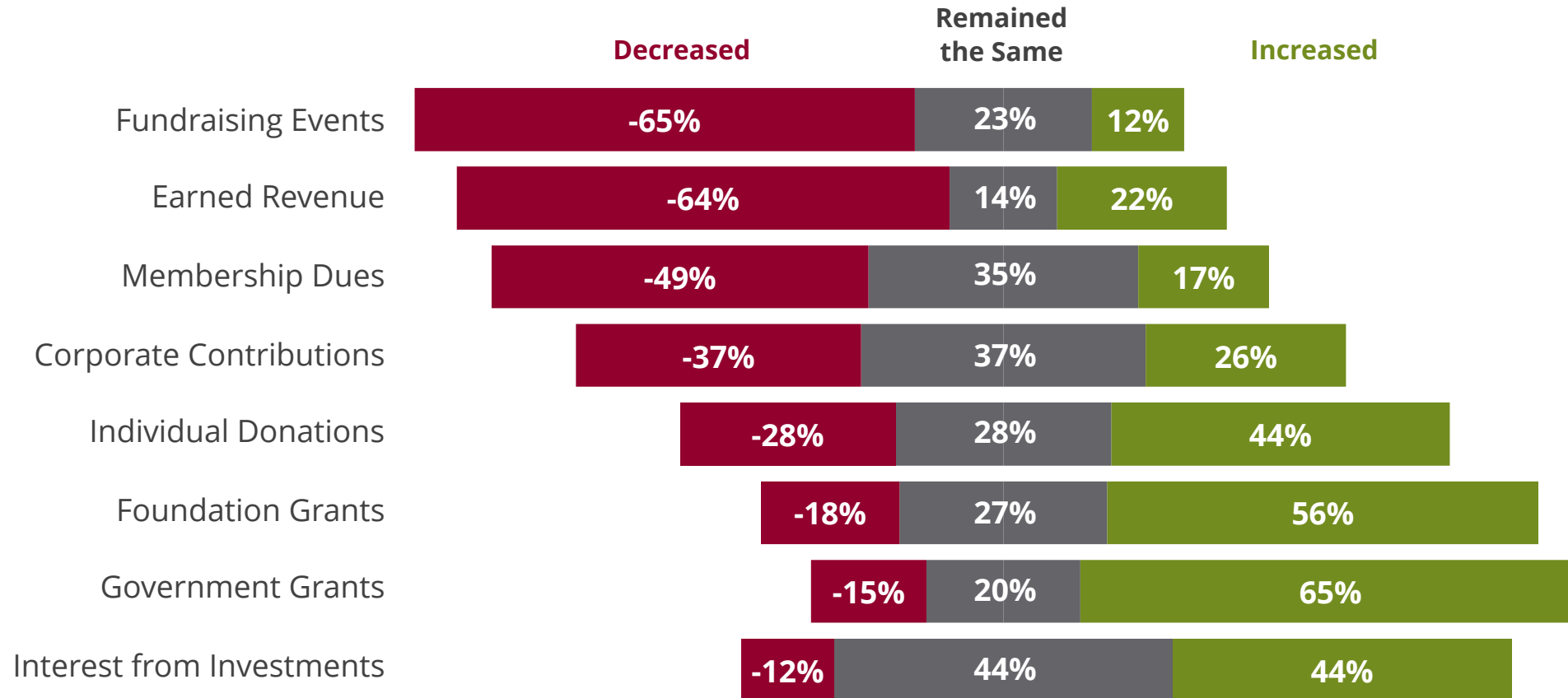
Sixty-five percent of respondents reported that income from government grants and contracts increased moderately or substantially. Fifty-six percent reported increases in foundation grants and 44% in individual donations. Sixty-four percent of leaders indicated that earned revenue decreased either moderately or substantially and 65% said the same for fundraising events. Forty-nine percent reported their income from membership dues decreased moderately or substantially.

“

We received relief grants, our donors continued to support us, and we were able to pivot online, including charging for some online programs.

SUBSECTOR: ARTS AND CULTURE

Revenue Changes Over the Past 12 Months



Cash on Hand

Another factor contributing to the financial outlook of the sector is the number of months of cash reserves each organization has on hand. Historically, it's typical for nonprofits to have less than three months of cash on hand. However, 63% of leaders reported having six or more months of cash reserve on hand at the time of this survey.

63%

of organizations reported having
6 or more months
of cash reserves



Emergency Funding for Nonprofits

Of the organizations that took the survey, 72% were awarded Paycheck Protection Program (PPP) funds. Access to this type of emergency funding was positively associated with faring better than expected through the pandemic.

Smaller nonprofits were more likely to have reported not receiving PPP. Thirty-three percent of those with budgets under \$250k reported receiving PPP while 84% of organizations with budgets between \$250k and \$1m and 82% of organizations with budgets greater than \$1m reported receiving PPP.

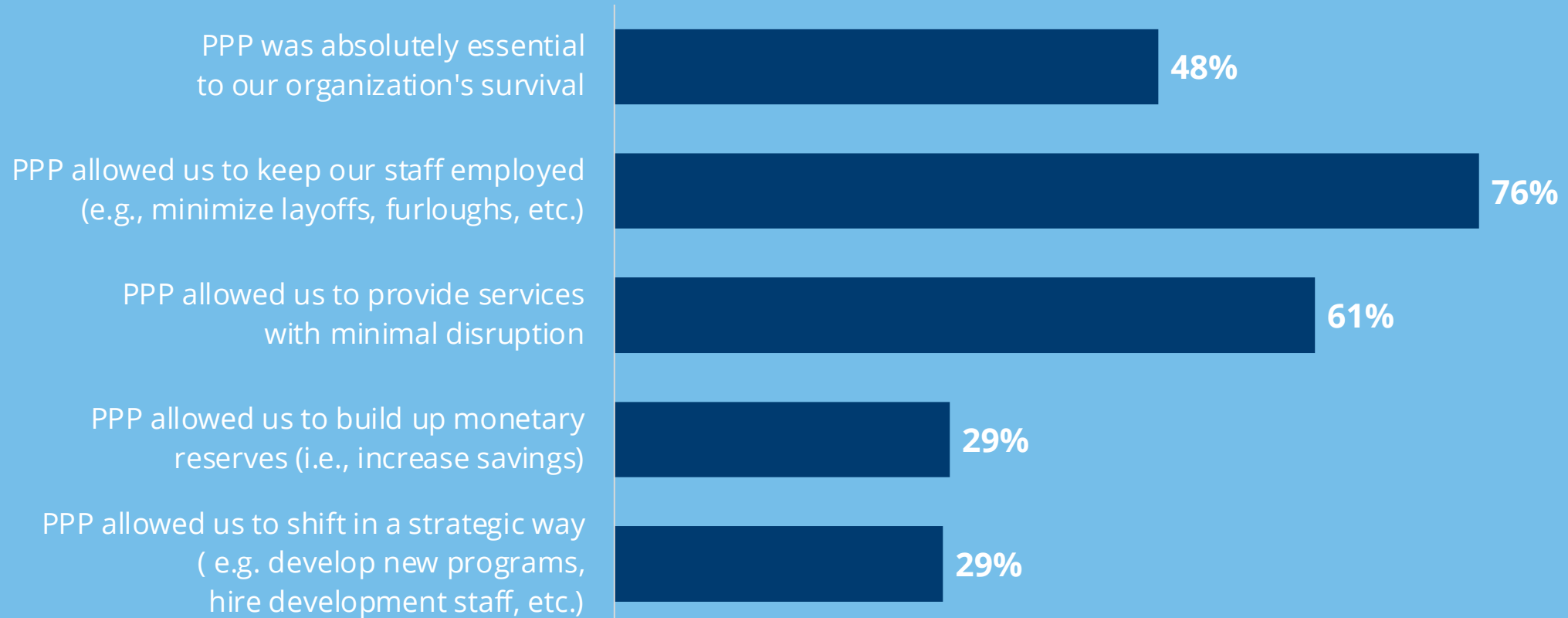
Of those who reported receiving PPP, nearly half (48%) agreed that this source of funding was absolutely essential to their organization's survival. While most nonprofits reported using it to keep their staff employed and programs running, more than one-quarter were able to use the funding to build up much needed reserves or shift in a new strategic direction.



72%

of survey respondents were
Awarded
Paycheck Protection Program (PPP)
funds

How Nonprofit Leaders Leveraged PPP Emergency Funding



Individual Giving

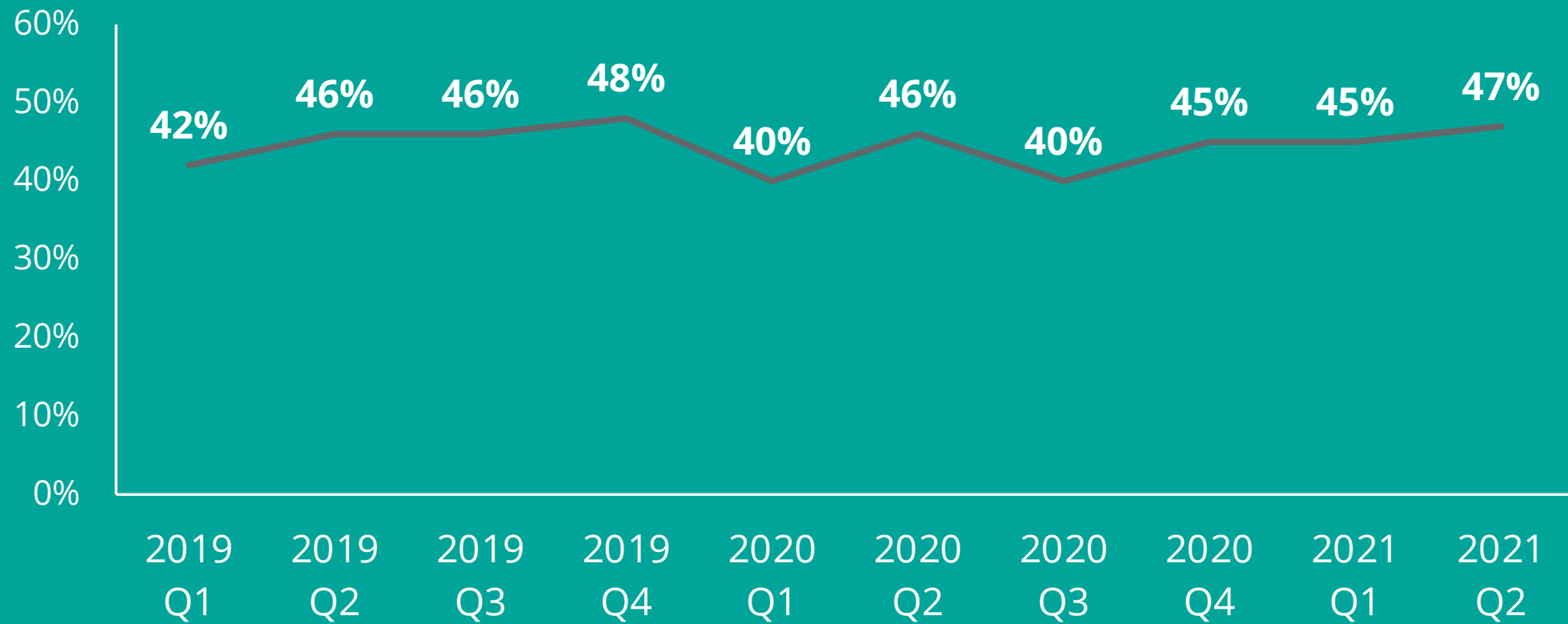
Charitable giving is an important way for people to support the causes they care most about, and donations account for a substantial percentage of funding for nonprofits in the region. Throughout the pandemic, individual giving did not change substantially. In our quarterly survey of a sample of San Diego residents, 47% reported making a charitable donation in the second quarter of 2021. The average quarterly gift was \$472, a 13% increase from the previous year.

\$472

**Average Quarterly Gift
by San Diego Households**



Average Quarterly Percent of San Diego Households Who Gave to Local Nonprofits



Looking Ahead: Financial Predictions and Fundraising Outlook

Nonprofit leaders projected financial health over the next 12 months. In our October 2020 report, in the thick of the pandemic, 37% of organizations reported they projected their general financial health to be somewhat or much worse over the following 12 months. This year, this percentage was only 9%, with zero respondents predicting it would be much worse. Half of respondents predicted their overall financial health and their fundraising outlook will be better in the next 12 months compared to today.



A photograph of a sunset over the ocean. On the left, a wooden pier with a railing extends into the water. The sun is a bright, glowing orb on the horizon, partially obscured by the pier's structure. The sky is a gradient of orange and yellow, and the water is dark with white-capped waves in the foreground. The text "Stewarding the Future" is overlaid in the center in a white, sans-serif font.

Stewarding the Future

Stewarding the Future

In this moment, many San Diego nonprofits are situated in a relatively steady financial position, and their leaders predict stability and growth in the coming 12 months. This optimism is undergirded by the fact that many, but certainly not all, nonprofits find themselves with larger than normal cash surpluses accumulated through myriad strategies including decreased expenses and infusions of COVID-19 emergency funding relief. Encouragingly, many nonprofits have adopted innovative and promising program delivery methods and ways of working that they plan to make permanent. Nonprofit leaders have also forged new partnerships with funders and government agencies, some for the first time. For those nonprofits that find themselves in a better than expected position, the challenge now is to determine how to strategically leverage these advantages to recharge the nonprofit workforce and invest in longer-term capacity that will help extend their mission and impact for years to come.

At the same time, challenges persist in some parts of the nonprofit sector. Increasing demand for services and a shortage of qualified workers threatens nonprofits' ability to deliver needed services. Additionally, smaller organizations are having a harder time securing individual donations. Inflation and any economic downturn could easily wipe away financial gains made over the past 18 months. Thus, for all the San Diegans who benefit from and care about a healthy and productive nonprofit sector, now is not the time to let support slide. The public and private sectors as well as individual donors can help our local nonprofits build momentum and steward a better future for our region by coming alongside them with deeper investment and partnership.



Notes

Methodology

This report draws from five primary data sources collected and analyzed during the summer of 2021:

- **The Nonprofit Institute. (2021). Annual Nonprofit Leader Survey.** This annual survey of 247 nonprofit leaders collected information on nonprofits' demand for services, financial outlook, organizational capacity, leadership, and sector trends in light of the COVID-19 pandemic. The survey was administered online in August 2021 and is a convenience sample of the nonprofit sector. The survey is slightly overrepresented in Arts and Culture and Environment nonprofits and slightly underrepresented in Education and Mutual Public Benefit nonprofits. The survey sample also has an overrepresentation of large nonprofits and an underrepresentation of the smallest nonprofits. Most nonprofits (65%) are very small with budgets of \$250,000 or less. In contrast, within our survey sample, 22% report budgets of \$250,000 or less.
- **The Nonprofit Institute. (2021). 2021 State of Nonprofits Quarterly Index.** The Nonprofit Institute partners with Luth Research in the administration of a quarterly survey to gauge San Diegans' confidence in local institutions and to measure their giving and volunteering activities. The State of Nonprofits Quarterly Index is administered online to a panel of San Diego residents. The sample reflects the racial and ethnic distribution of the region.
- **IRS Business Master File (BMF) of exempt organizations, circa 2021.** This data source was used to analyze data on the number of public charities and private foundations, classified by subsector based on groupings of National Taxonomy of Exempt Entities (NTEE).
- **IRS Form 990 and 990-EZ public charity returns, circa 2012-2019 (IRS e-File and GuideStar digitized datasets), DataLake, LLC (www.datalake.net).** This data source was used to analyze nonprofit financials, including the sector's revenues, assets, and expenses.
- **Labor Market Information Division, California Economic Development Department (2020).** This data source was used to summarize nonprofit employment and wages.

Notes

- Due to rounding, some charts and tables may not add to 100%
- Some quotes have been edited for readability

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About The Nonprofit Institute

Mission: The Nonprofit Institute (NPI) is committed to providing education, training, and research to build leaders and strengthen organizations that help meet critical community needs.

Vision: The Nonprofit Institute envisions a world where ethical, compassionate leaders and strong organizations are working together

Research Team

Laura Deitrick, PhD, Associate Director, The Nonprofit Institute

Tessa Tinkler, PhD, Director of Research, The Nonprofit Institute

Jon Durnford, MBA, Principal, DataLake, LLC; Research Associate, The Nonprofit Institute

Thomas Abruzzo, MA, Doctoral Research Assistant, The Nonprofit Institute

Mehrnoush Jamshidi, MAcc, Doctoral Research Assistant, The Nonprofit Institute

Nallely Manriques, MPA, Doctoral Research Assistant, The Nonprofit Institute



The Nonprofit Institute

sandiego.edu/nonprofit
nonprofit@sandiego.edu
619.260.7443

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