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EXECUTIVE SUMMARY
The 2018 State of Nonprofits and Philanthropy Report highlights the pivotal role nonprofits play in protecting and enhancing the well-being and prosperity of our region. The sector continues to grow in number of total organizations, size of the workforce, and total revenues and assets. Despite continued growth, demand for nonprofit services continues to outpace the sector’s ability to meet growing needs. Additionally, the full impact of federal tax reform on charitable giving remains unclear. Moreover, nonprofit leaders are challenged with navigating an ambiguous policy environment at a time when the public is increasingly divided about tax reform on charitable giving remains unclear. The Nonprofit Institute has studied and reported on major issues of importance to San Diego’s nonprofit sector, along with employment and financial trends data. Our goal is to provide community leaders and nonprofit stakeholders with a comprehensive analysis of the economic health of the sector, to document major trends, and to broadly share insights from those who are on the front lines.

LEADING WITH COMPASSION AND COURAGE IN DIVIDED TIMES
Since 2006, The Nonprofit Institute has studied the nonprofit sector closely mirrors that of California. In 2018, on average, San Diego County’s nonprofit sector compare to California?

HOUSEHOLD VOLUNTEERING AND GIVING
37% of San Diego area households volunteered with local nonprofits
50% of households made monetary donations to nonprofits

PUBLIC CONFIDENCE AND LEADERSHIP
San Diegans express high confidence in the nonprofit sector

FINANCIAL HEALTH & GROWTH OF SECTOR
93% of nonprofit leaders surveyed expect the general financial health of their organization to be about the same or better in 2019 vs. 2018

SECTOR AT A GLANCE: CA vs. SAN DIEGO
Q: How does the size of the San Diego County nonprofit sector compare to California? A: On average, San Diego County’s nonprofit sector closely mirrors that of California.
How do we engage and develop a more diverse array of leaders from academia, business, government, nonprofits, and philanthropy to create a better future for our region?

MORE DIVERSE VOICES NEEDED TO LEAD OUR WAY FORWARD

"We have just developed DEI plans for the agency. Historically, this was just talk and not action. We are very committed to moving the needle in this important area."  - Human Services Nonprofit Leader, Survey Response

Like California, San Diego County has a long and rich cultural history. While our border region and immigrant populations contribute to our diversity, it is not fully reflected in organizational leadership across all sectors. Particular to the nonprofit sector, diversity, equity, and inclusion (DEI) among board and staff members is important to ensure informed decision making, culturally competent programming, and organizational effectiveness.

In light of these realities, it is not surprising that when asked about the federal policy environment, over half (55%) of San Diego nonprofit leaders surveyed reported increased levels of staff anxiety about the future. Many leaders reported they are more closely monitoring public policy activity and its potential impacts on constituents. As a result, 43% reported increasing their public policy advocacy efforts and 14% said they had engaged in public policy for the first time.

At a time of growing division and anxiety, there is heightened interest regarding where or to whom to turn for leadership that bridges difference and builds common ground towards solutions. In this year’s survey, nonprofit leaders gave local representatives from a variety of institutions and organizations in government, business, and philanthropy a failing grade in their ability to enact solutions to critical challenges in our region.

However, when asked whether they had experienced a tangible impact from the 2017 Tax Reform Bill, most nonprofit leaders either had not (46%) or did not know if they had (47%). When asked whether or not their organization will experience any impact from the tax reform bill within the next six months, 58% responded that they did not know, while 23% reported they expected no impact.

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