
Laura Deitrick
Caster Family Center for Nonprofit and Philanthropic Research, University of San Diego

Mary Jo Schumann
Caster Family Center for Nonprofit and Philanthropic Research, University of San Diego

Dominika Bukalova
Caster Family Center for Nonprofit and Philanthropic Research, University of San Diego

Kim Hunt
Caster Family Center for Nonprofit and Philanthropic Research, University of San Diego

Crystal Trull
Caster Family Center for Nonprofit and Philanthropic Research, University of San Diego

Follow this and additional works at: http://digital.sandiego.edu/npi-stateofnp

Part of the Nonprofit Administration and Management Commons

Digital USD Citation
http://digital.sandiego.edu/npi-stateofnp/3

This Report is brought to you for free and open access by the The Nonprofit Institute at Digital USD. It has been accepted for inclusion in State of Nonprofits by an authorized administrator of Digital USD. For more information, please contact digital@sandiego.edu.
For nearly a decade, The Caster Family Center for Nonprofit and Philanthropic Research (Caster Center) has gathered and analyzed data to tell the story of San Diego’s diverse, growing, and influential nonprofit and philanthropic sector.

This year’s State of Nonprofits and Philanthropy report documents the increased economic impact of the sector as revenue, assets, and employment continue to grow. Furthermore, our State of Nonprofit Quarterly Index (SONP) and survey data from nonprofit leaders indicate that, overall, the sector is moving in a positive direction.
Private Foundations in San Diego

**756** TOTAL NUMBER OF PRIVATE FOUNDATIONS
**62** ORGANIZATIONS WITH PAID STAFF
**241** EMPLOYEES

<table>
<thead>
<tr>
<th></th>
<th>Total Revenue</th>
<th>Total Expenses</th>
<th>Total Assets</th>
<th>Grants Distributed</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2009 vs 2013</strong></td>
<td><strong>$578.7M</strong></td>
<td><strong>$323.5M</strong></td>
<td><strong>$2,769.5M</strong></td>
<td><strong>$263.2M</strong></td>
</tr>
</tbody>
</table>

**Average Quarterly Growth in San Diego**

Employment

- Nonprofit Sector Employment: +11%
- All Other Sector Employment: +4%

**Total San Diego Wage Growth**

- Nonprofit Sector Wages: +29%
- All Other Sector Wages: +15%

**San Diego Nonprofit Organizations by Subsector**

<table>
<thead>
<tr>
<th>Subsector</th>
<th>Total Number</th>
<th>% of Total</th>
<th>Total Revenue (in Millions)</th>
<th>% of Total</th>
<th>Total Assets (in Millions)</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts, Culture, Humanities</td>
<td>429</td>
<td>12.3%</td>
<td>$273.4</td>
<td>2.0%</td>
<td>$762.8</td>
<td>3.7%</td>
</tr>
<tr>
<td>Higher Education</td>
<td>15</td>
<td>0.4%</td>
<td>$820.4</td>
<td>6.0%</td>
<td>$1,919.0</td>
<td>9.4%</td>
</tr>
<tr>
<td>Education, Other</td>
<td>746</td>
<td>21.3%</td>
<td>$1,067.2</td>
<td>7.8%</td>
<td>$2,354.0</td>
<td>11.6%</td>
</tr>
<tr>
<td>Environment</td>
<td>197</td>
<td>5.6%</td>
<td>$408.4</td>
<td>3.0%</td>
<td>$600.9</td>
<td>3.0%</td>
</tr>
<tr>
<td>Hospitals</td>
<td>9</td>
<td>0.3%</td>
<td>$6,176.7</td>
<td>45.1%</td>
<td>$7,552.3</td>
<td>37.3%</td>
</tr>
<tr>
<td>Health, Other</td>
<td>358</td>
<td>10.2%</td>
<td>$1,888.7</td>
<td>13.8%</td>
<td>$2,467.1</td>
<td>12.2%</td>
</tr>
<tr>
<td>Human Services</td>
<td>1,162</td>
<td>33.2%</td>
<td>$1,965.1</td>
<td>14.3%</td>
<td>$2,344.0</td>
<td>11.6%</td>
</tr>
<tr>
<td>International</td>
<td>122</td>
<td>3.5%</td>
<td>$152.8</td>
<td>1.1%</td>
<td>$80.6</td>
<td>0.4%</td>
</tr>
<tr>
<td>Mutual, Public, &amp; Societal Benefit</td>
<td>463</td>
<td>13.2%</td>
<td>$943.9</td>
<td>6.9%</td>
<td>$2,181.1</td>
<td>10.8%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>3,501</strong></td>
<td><strong>100.0%</strong></td>
<td><strong>$13,696.6</strong></td>
<td><strong>100.0%</strong></td>
<td><strong>$20,261.8</strong></td>
<td><strong>100.0%</strong></td>
</tr>
</tbody>
</table>

---

5 Data Sources: National Center for Charitable Statistics, Urban Institute, 501(c)(3) Private Foundations Filing IRS Form 990-PF (circa 2012) and Labor Market Information Division, California Economic Development Department, 2013

Note: Does not include community foundations, which are registered as Public Charities

6 Data Source: Labor Market Information Division, California Economic Development Department, 2013

7 Data Source: National Center for Charitable Statistics, Urban Institute, 501(c)(3) Public Charities Filing IRS Forms 990 and 990-EZ (circa 2012)
Where Are the Nonprofit Jobs in San Diego?

Average Quarterly Employment by Subsector

<table>
<thead>
<tr>
<th>Subsector</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>International</td>
<td>332</td>
</tr>
<tr>
<td>Arts, Culture, and Humanities</td>
<td>2,607</td>
</tr>
<tr>
<td>Environment</td>
<td>3,209</td>
</tr>
<tr>
<td>Mutual, Public, and Societal Benefit</td>
<td>3,478</td>
</tr>
<tr>
<td>Religion Related</td>
<td>3,578</td>
</tr>
<tr>
<td>Human Services</td>
<td>21,156</td>
</tr>
<tr>
<td>Health (includes Hospitals)</td>
<td>31,043</td>
</tr>
<tr>
<td>Education (includes Higher Education)</td>
<td>40,100</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>105,503</strong></td>
</tr>
</tbody>
</table>

Types of Nonprofit Jobs Advertised in 2014

<table>
<thead>
<tr>
<th>Paid Jobs in 2014</th>
<th>Unpaid Jobs in 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(Internships and volunteer opportunities)</td>
</tr>
<tr>
<td>Fundraising</td>
<td>11%</td>
</tr>
<tr>
<td>Grantmaking</td>
<td>3%</td>
</tr>
<tr>
<td>Management</td>
<td>14%</td>
</tr>
<tr>
<td>Program</td>
<td>43%</td>
</tr>
<tr>
<td>Support</td>
<td>27%</td>
</tr>
<tr>
<td>Technology</td>
<td>2%</td>
</tr>
</tbody>
</table>

How Are San Diego Nonprofits Performing Post-Recession?

San Diego Nonprofits Generating Surpluses

AVERAGE SURPLUS MARGIN RATIO BY ORGANIZATION TYPE

Surplus Margin = End of Year Surplus or Deficit / Total Revenue

53% of Nonprofit Leaders Plan to Hire for Newly-Created Positions in 2015

17% of Nonprofit Leaders Plan to Eliminate At Least One Existing Position in 2015

---

8 Data Source: Labor Market Information Division, California Economic Development Department, 2013
9 Data Source: www.npworks.org (Nonprofit Management Solutions)
10 Data Source: Caster Center for Nonprofit and Philanthropic Research 2015: Nonprofit Leadership Survey
11 Data Source: NCCS Core Files (circa 2006-2012)
How do San Diego Nonprofits Generate Revenue?

San Diego Nonprofits Receive a Greater Proportion of Contributions than California Nonprofits

**Revenue Sources of 501(c)(3) Public Charity Organizations Excludes Hospitals and Higher Education**

- Contributions
- Program Revenue
- Special Events
- Investment Income
- Sale of Assets
- Other Income

**Sources of Contributed Income**

- 56% Government Grants
- 39% Individuals, Corporations, and Foundations
- 5% Other

Revenue Sources Vary by Size of Nonprofit Organization

**Revenue Sources by Operating Budget Size**

- Contributions
- Program Revenue
- Special Events
- Investment Income
- Sale of Assets
- Other Income

---

12 Data Source: CalNonprofits Data File (circa 2012)
13 “Other” Includes: Federated Campaigns, Membership Contributions, Fundraising Event Contributions, and Support from Related Organizations
Since its inception in 2011, the Caster Center’s State of Nonprofits Quarterly Index (SONP) has charted the economic health of nonprofits in San Diego. Published quarterly, the SONP tracks six distinct indicators important to the vitality of the San Diego nonprofit sector. The data provided here represent the average of four quarters in 2014.

PUBLIC CONFIDENCE
Public confidence in the nonprofit sector is vital to the sector’s existence and sustainability. The SONP consistently finds that at least eight out of ten San Diegans say they have confidence in local nonprofits.

Percent of San Diegans Who Express Confidence in Local Nonprofits
88%

INDIVIDUAL GIVING
Charitable giving in San Diego remains fairly steady, with approximately one-half of households making monetary contributions to local nonprofits.

49% of Households Gave Monetary Donations to a San Diego Nonprofit in 2014

$202 Average Dollars Given per Household in 2014 per Quarter
VOLUNTEERISM
In 2014, slightly more than one-third of San Diego households volunteered for a local nonprofit, and spent the equivalent of four days volunteering throughout the year.

DEMAND FOR SERVICES
The SONP utilizes data from 2-1-1 San Diego – a local nonprofit that connects people with community, health, and disaster services – to track demand for vital human services throughout the county. In 2014, demand for food and housing services declined slightly, while demand for income and employment support services increased.

EMPLOYMENT/NONPROFIT JOB POSTINGS
The nonprofit sector has been leading the economy in terms of job growth, both locally and nationally. In 2014, there were a total of 2,470 paid positions and 472 unpaid positions posted on NPWorks.org (hosted by Nonprofit Management Solutions).

COUNTY UNEMPLOYMENT
The unemployment rate provides data about the economic status of San Diego’s total population. It serves as an indicator of charitable giving capacity and demand for nonprofit social services, among other things. Overall, the unemployment rate in San Diego has decreased consistently since the inception of the Index.
**Looking Forward**

Our 2015 Nonprofit Leadership Survey identified several trends that raise the following important questions for the future of San Diego’s nonprofit and philanthropic sector:

- Solving community problems requires effective, cross-sector (collective impact) oriented approaches. What can be done to create meaningful collaboration for **true** collective action?
- Innovative solutions come from both small and large organizations, yet grantmakers tend to fund larger organizations. How can we create a system where new ideas can be tested regardless of who proposes them?
- An increasing number of foundations are providing general operating funds. However, nonprofit leaders and board members remain focused on immediate fundraising needs. How can we generate more flexible and sustainable capital that will stabilize operations and allow leaders to plan more strategically to address the needs of an evolving San Diego region?

---

**Data Source:** Caster Center for Nonprofit and Philanthropic Research 2015: Nonprofit Leadership Survey