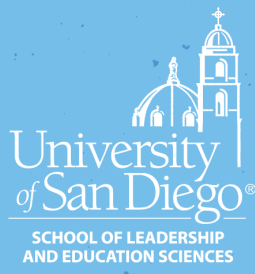


ANNUAL REPORT

STATE OF NONPROFITS & PHILANTHROPY

IN SAN DIEGO



Presented by:
The Nonprofit Institute

TRUST

October 2019



ABOUT THE NONPROFIT INSTITUTE

Mission: The Nonprofit Institute 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 toward a more inclusive, just society and healthy planet

What We Do:

Develop Leaders – We develop the next generation of leaders dedicated to making a positive difference in their communities through our applied learning and leadership programs.

Strengthen Organizations – We provide hands on assistance to nonprofits, philanthropy and other partners through community education and consulting.

Create Knowledge – We drive innovation and solutions through research, evaluation and consulting.

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Data Sources

The Nonprofit Institute. (2018). *2018 State of Nonprofits Quarterly Index*.

The Nonprofit Institute. (2019). *2019 Nonprofit Leader Survey*.

IRS Business Master File (BMF) of exempt organizations, circa 2019.

IRS Form 990 and 990-EZ public charity returns, circa 2012-2017 (IRS e-File and GuideStar digitized datasets), DataLake, LLC (www.datalake.net).

Labor Market Information Division, California Economic Development Department (2016).

Notes

- Full technical appendices available at:
<https://www.sandiego.edu/soles/nonprofit/resources/nonprofit-quarterly/>
- Due to rounding, some charts and tables may not add to 100%
- Some quotes have been edited for readability

FROM THE NONPROFIT INSTITUTE

The nonprofit sector is caught in the cross winds of major shifts in the ways that people engage in their communities and how they give. Our research shows that as public trust in institutions has waned, the nonprofit sector stands out as an exception, enjoying high public confidence. How will changes in giving and engagement affect the public's esteem and support for the nonprofit sector?

More broadly, there is dawning recognition of the interconnected nature of our most urgent societal and environmental issues. Nonprofit leaders surveyed for this report recognize the need for more visionary, courageous and inclusive leadership to address our region's critical community needs in a more holistic and collective manner. Are our regional leaders from the public, private, and nonprofit sectors up to the challenge?

This report features our latest findings on the state of San Diego's nonprofit sector, as well as key trends and perspectives from leaders in nonprofits and philanthropy. The Nonprofit Institute uses these annual findings to develop priorities for training, education and research:

- We use them to create tailored leadership programs aimed at developing ethical, compassionate and transformational leaders making a positive difference in their communities.
- We incorporate them into the development of our programs to strengthen organizational leadership and management.
- And of course, we rely on these data to identify critical areas in need of further inquiry, as part of our larger effort to create knowledge that drives innovation and solutions.

We would like to take this opportunity to thank our region's nonprofit and philanthropic leaders for taking the time to respond to our annual survey, which is an integral source of data for this report.

We hope you enjoy this latest report and are so very honored to be our community's resource for helping values-driven leaders and organizations make an impact that will last forever.



Emily Young, PhD
Executive Director, The Nonprofit Institute

INTRODUCTION / KEY FINDINGS

The 2019 State of Nonprofits and Philanthropy Annual Report presents findings from five years of quarterly public opinion polling (San Diego Residents Survey) and over 200 survey responses from local nonprofit leaders (Nonprofit Leaders Survey) combined with the latest nonprofit data from the Internal Revenue Service (IRS) and the California Employment Development Department (EDD). Taken together, these data provide a holistic snapshot of San Diego's nonprofit sector in 2019, summarizing its social and economic contributions to our region, highlighting potential opportunities for greater impact, and drawing our attention to trends which could threaten the nonprofit sector in the future.

Summary of Findings

The Public Trusts Local Nonprofits

- In a time where people are more divided than connected, San Diegans collectively express high levels of confidence in nonprofits to act on the public's behalf, provide high quality services, act ethically, and spend money wisely.
- 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.
- Nonprofits can bolster trust by amplifying their storytelling with outcomes measurement to report on the impact of their programs.
- Regional leadership challenges and a perceived inability to make headway on complex social problems have potential to erode public trust. Nonprofit leaders expressed the need for more effective cross-sectoral partnerships and they called for visionary, courageous, and inclusive leadership from all sectors.

Key Trends to Watch

- Nonprofit leaders reported increased demand for services last year. However, most nonprofits were unable to meet all of the new demand.
- Uncertainty in financial markets and changes to tax policy are causing some corporate and individual donors to limit giving. Nonprofit leaders' predictions for fundraising in the coming year are ambiguous.
- San Diego's nonprofit sector continues to grow, but growth is concentrated in large nonprofits. Smaller nonprofits with budgets under \$1 million experienced decreased contributions.
- Regardless of uncertainty, the sector maintains an impressive economic footprint with 11,523 nonprofits producing \$19.6 billion in revenue, stewarding \$32 billion in assets and contributing \$7.3 billion in total wages.
- 95% of nonprofit leaders predict their organization's financial health next year to be as good or better than this year.

SAN DIEGANS TRUST LOCAL NONPROFITS

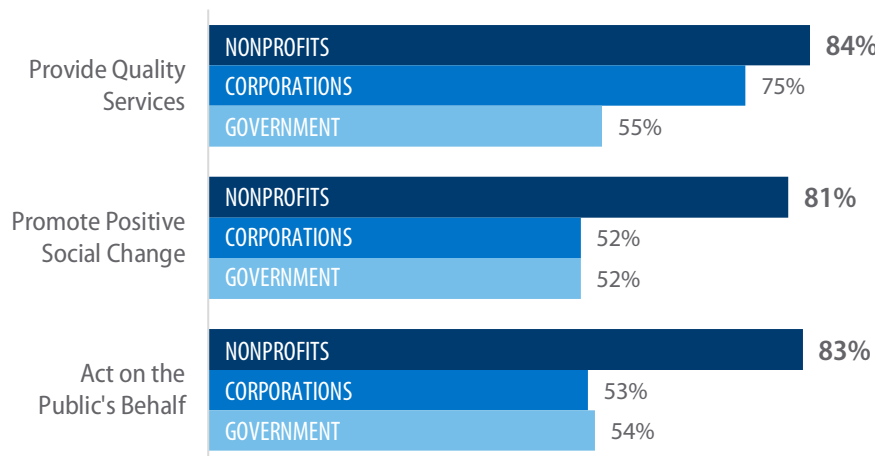
For more than five years, The Nonprofit Institute has partnered with Luth Research in the administration of a quarterly survey to gauge San Diegans' perceptions of local nonprofits and to measure their giving and volunteering activities. **San Diegans continually express high levels of confidence in nonprofits** to effectively deliver quality services, uphold high ethical standards, and improve the quality of life in our region.

Comparison of overall confidence in nonprofits versus corporations and government:



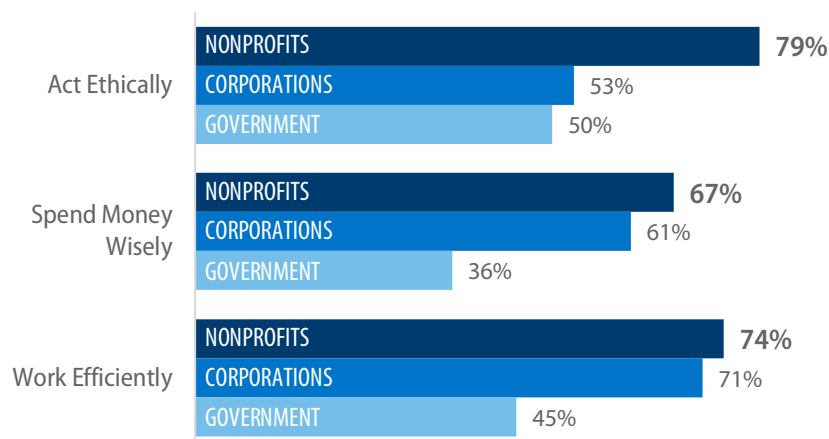
Nonprofits Rank Highest at Improving Quality of Life

Comparison of confidence in nonprofits, corporations and government in improving quality of life:



Nonprofits are Viewed as Trustworthy and Effective

Comparison of confidence in nonprofits, corporations and government to operate effectively:



PUBLIC CONFIDENCE = ENGAGEMENT

Our quarterly survey of San Diegans found that confidence in a nonprofit is closely associated with giving and volunteering behaviors.

Those who are **CONFIDENT** in nonprofits are:

2x MORE LIKELY TO **DONATE**
THAN THOSE WHO ARE NOT CONFIDENT

3x MORE LIKELY TO **VOLUNTEER**
THAN THOSE WHO ARE NOT CONFIDENT

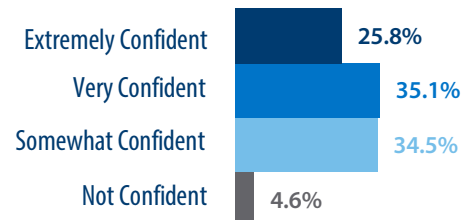
AND...

Those who **VOLUNTEER** are:

3x MORE LIKELY TO **DONATE**

Volunteers provide critical human capital AND are three times more likely to donate to nonprofits, heightening the need for purposeful engagement and stewardship of volunteers. While 60% of our survey respondents expressed high confidence in their volunteer engagement abilities, nearly 40% indicated they need to build capacity in this area.

How confident are San Diego nonprofit leaders in their ability to engage volunteers?



2018 Giving and Volunteering Patterns Fluctuate

Volunteering



33%

OF SAN DIEGO HOUSEHOLDS
VOLUNTEERED IN 2018
(decreased 8% from 2017)



27

AVERAGE QUARTERLY HOURS VOLUNTEERED
BY SAN DIEGO HOUSEHOLDS IN 2018
(no change from 2017)

Giving



43%

OF SAN DIEGO HOUSEHOLDS MADE MONETARY
DONATIONS TO NONPROFITS IN 2018
(decreased 4% from 2017)



\$361

AVERAGE QUARTERLY GIFT
BY SAN DIEGO HOUSEHOLDS IN 2018
(increased 2.5% over 2017)

PROOF OF IMPACT BOLSTERS TRUST

Research shows that proof of impact is related to higher levels of public trust.¹ However, nonprofit leaders reported that **accurate measurement of program success is elusive** for many.

67% 

OF NONPROFIT LEADERS ARE CONFIDENT
IN THEIR ABILITY TO
COMMUNICATE EFFECTIVELY
WITH EXTERNAL AUDIENCES

A MAJORITY RELY ON
**STORYTELLING AND
COUNTING OUTPUTS**



Measuring Change is Challenging

80%

OF NONPROFIT LEADERS EXPRESS
HIGH CONFIDENCE IN THEIR
ORGANIZATION'S ABILITY TO
TRACK OUTPUTS

(e.g. things that **can be counted**:
number of clients served, number
of program sessions held, etc.)

YET...

50%

OF NONPROFIT LEADERS LACK
CONFIDENCE IN THEIR
ORGANIZATION'S ABILITY TO
MEASURE AND ASSESS OUTCOMES

(e.g. **measurable changes** in
knowledge, attitudes, behaviors,
skills, conditions, etc.)



We are able to report on [outputs] (number served during a FY), however we are nowhere near being able to report on outcomes. Moreover, staff need capacity building when it comes to data entry and using evidence to make decisions.



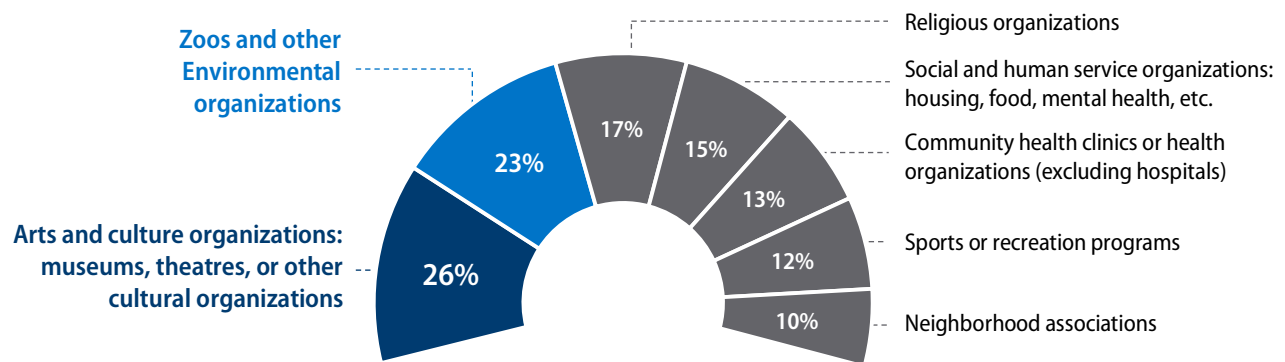
Right now, we could provide some attendance numbers for events and anecdotal evidence of success. But we are not staffed to do more sophisticated analysis.

¹ Populus. (2018). *Trust in Charities, 2018: How the Public Views Charities, What This Means for the Sector, and How Can Trust Be Increased*. Charity Commission for England and Wales.

NONPROFITS BENEFIT ALL SAN DIEGANS

Despite high levels of public confidence, many San Diego residents are not aware of the vast number, reach, and impact of nonprofits on our local economy and quality of life. Our research shows that when residents are asked if they have “benefitted from a nonprofit”, the majority (73%) say, “no.” However, when residents are asked if they have benefitted from specific types of nonprofit services, the majority (53%) say “yes.”

Over Half of San Diegans Benefit Directly from Nonprofits



In Fact, All San Diegans Benefit Indirectly from Nonprofits

In San Diego...

1,072 Nonprofits
Connect Us to One Another
 through artistic and cultural resources such as museums, festivals, and theaters

573 Nonprofits
Steward Our Natural Environment
 to keep our air, water, land, and beaches clean, and provide us with access to enjoy the natural outdoors

816 Nonprofits
Take Care of Us
 through community clinics and hospitals
Did you know that our largest health systems (Kaiser, Scripps, and Sharp) are nonprofits?

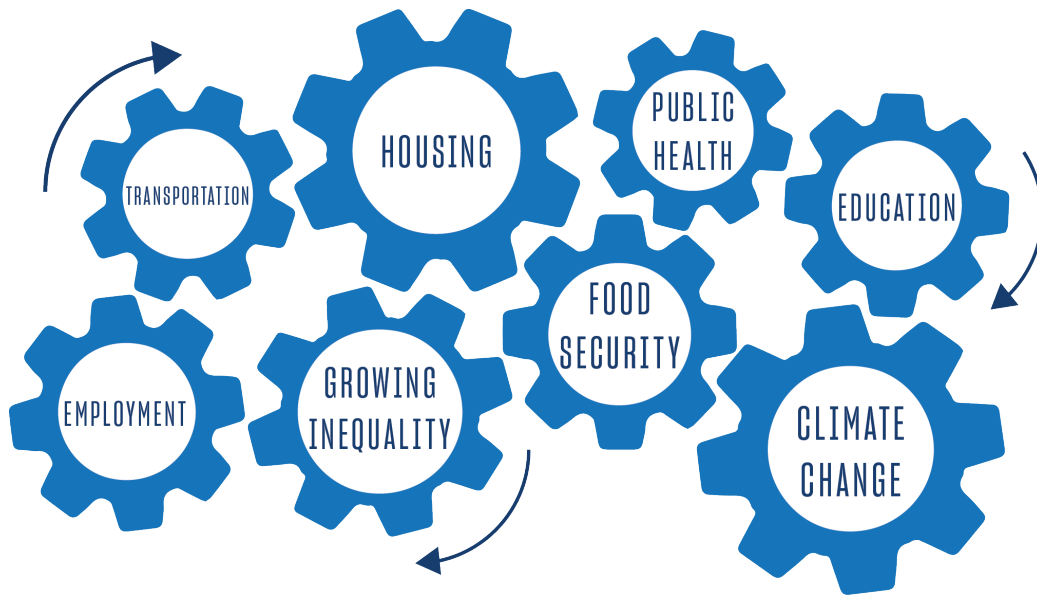
2,408 Nonprofits
Enrich Our Spiritual Lives
 through churches, temples, mosques, and other religious institutions

501 Nonprofits
Help Us Raise the Next Generation
 through after-school programs, summer camps, and other youth development specific initiatives

121 Nonprofits
Protect Our Democracy
 through civil rights and advocacy organizations

LEADERSHIP NEEDED TO ENSURE OUR REGION'S QUALITY OF LIFE

Nonprofits are the changemakers the public trusts most to work efficiently to promote positive social change. However, **our region faces many socioeconomic and environmental challenges** that threaten our quality of life. Nonprofit leaders recognized the interconnected nature of these challenges and stressed the **need to do a better job of working together** in confronting them.



It is very difficult to find support for integrated initiatives (versus specific sector activities). Immigration / migration / climate change are huge trends. The connection of climate change to migration is not made and current initiatives lack long-term thinking.



There is a realization of the need for more cross-institutional collaboration, however support for the systems necessary to develop and maintain these networks is lacking.

Despite growing recognition of the need for new ideas and action, nonprofit leaders gave all sectors relatively low marks (on a scale of 1-10) in **demonstrating the leadership necessary to enact solutions to critical challenges in our region.**

Federal Government	4.3	F	Institutions of Higher Education	6.4	D
Corporations	5.0	F	Private & Community Foundations	6.6	D
State Government	5.6	F	Individual Philanthropists	6.7	D
Local Government	5.7	F	Advocacy Groups	6.9	D
Membership Associations	6.1	D	Nonprofit Organizations	7.4	C

LEADERSHIP CHALLENGES STIFLE PROGRESS AND THREATEN TRUST

Given the high levels of trust San Diegan's place in nonprofits, it is natural to expect local nonprofits to take up leadership in tackling the region's toughest and most intractable issues. We asked these frontline leaders to describe what they believe to be the **biggest leadership challenges** facing San Diego. Here is what they said:

“

Why are housing costs so high? Why so many homeless with mental health issues? Why aren't our schools better resourced?

“

Creating a genuinely integrated and equitable social fabric is challenging when our incredibly diverse population is divided into stark geographical and economic pockets.

“

Accessibility, equity, awareness, accountability, diversity, term limits (or lack of), power in the hands of a few, big gaps in resources and opportunities...

Income inequality and a high cost of living create many inter-related social challenges

Understanding and prioritizing needs is difficult

“

There is a lack of understanding about what is REALLY needed.

“

There are huge disparities of interests, needs and circumstances across different parts of the county.

“

Politics and bureaucracy seem to take priority over the needs of the people.

“

Lack of cohesive collaboration across diverse, and often siloed, sectors

“

Most of us reinvent simple solutions to complex issues because we have minimal awareness of what our partners are doing.

“

Leaders need to team up to maximize capacities.

**People are not working together effectively
Therefore...**

Progress on big issues is slow or altogether stalled

“

Everyone is pointing fingers at each other, saying they have done enough and someone else should step in... And everything takes too long with too much talk, not enough action

“

We should be able to accomplish more together. However, it does not seem like this has been able to happen around some of the big issues, education, homelessness, immigration, etc.

“

Leadership has addressed key issues – crime and clean parks – but other issues remain vexingly under-addressed

“

Experienced, capable, ethical leadership is in short supply.

“

There is a lack of political courage to address critical regional human and economic issues.

“

There is a lack of imagination... Vision, or visions, are not clearly enunciated.

Visionary, courageous, and inclusive leadership is needed in order to move forward

“

We are challenged in figuring out how to all pull in one direction and make the kinds of bold policy moves that other cities/states are making to solve shared problems.

“

Many leadership roles are limited to financially stable retirees, like myself, who have time to allocate to these activities. Obviously, this negatively impacts the diversity of local decision-makers. Certain viewpoints are over represented, while others are not well represented. This leads to decisions that do not take the needs of all into account. We could definitely benefit from fresh ideas from new perspectives.

KEY SECTOR TRENDS TO WATCH

Nonprofits Unable to Meet Growing Demand for Services

Over the last five years, nonprofit leaders have consistently reported increasing demands for their services. A shrinking middle class, a humanitarian crisis on our border, the high cost of housing, cutbacks to government programs, and the effects of climate change are but a few of the reasons driving an increased need for nonprofit services. This year, 83% of the nonprofit leaders who responded to our survey observed that **demand for their organization's services has increased** within the past 12 months. While nonprofits are well positioned to take the lead on many of the region's most pressing issues, many local nonprofits are **not equipped to sufficiently meet the continued growing demands** for their services. Of those that experienced an increase in demand for services this year, only 9% reported that they were able to fully meet the demand.



Resource Needs

In order to meet growing demands for services, **nonprofits require more resources** to be effective. In addition to more financial resources, nonprofit leaders told us that they need access to affordable facilities and up-to-date technology, as well as assistance with leadership development and other capacity building opportunities.



Minimum Wage Increases are Manageable, Long-Term Impacts Still Unfolding

Thus far, most local nonprofits have been able to effectively absorb mandatory minimum wage increases, with many (73%) reporting staff members are already paid above the new minimum wage. However, **pay compression** is a trend worth watching, as the effects of raising an organization's lowest wage rate naturally put upward pressure on nonprofits to adjust all pay rates accordingly. This financial objective may be impossible for many local nonprofits to meet. If left unaddressed, pay compression can negatively impact staff morale and hinder recruiting and retention efforts² in a sector that is already challenged to keep pace with the pay and benefits offered in the for-profit and public sector.³ In this year's survey, many nonprofit leaders commented on the difficulty of recruiting, retaining, and compensating high quality staff. Additionally, recent changes to laws that redefine independent contractors are adding to workforce concerns.

42%

OF NONPROFITS HAVE
STAFF MEMBERS WHO ARE
CURRENTLY PAID
ABOVE MINIMUM WAGE
ALSO REQUESTING PAY
INCREASES

“

The impact of the minimum wage is a significant issue. Our rates of reimbursement are set by the state and they have essentially relegated all of our employees to be minimum wage earners. If employees make more than the state minimum wage, our rates of reimbursement are not increased. Those with seniority are leaving our industry. There is no realization of the compaction issues in terms of wages. Our staff are NOT entry level minimum wage earners, but are treated/classified that way by the state.

“

It's difficult to build a pipeline of dedicated nonprofit leaders when they are stressed about finances (often housing, school loans, healthcare) and may have to work a second job.

“

Attitudes about overhead have been slowly changing in recent years, but continued efforts are still needed to spread the word that investing in high-quality staff who have specialized skills is actually MONEY WELL SPENT to further an organization's mission.

“

Changes in the law about classification of independent contractors vs. employees has made it very difficult to get our volunteer board members to understand the urgency of converting our current 1099 staff to W-2 status. The additional costs of benefits and worker's compensation insurance that will come with such a conversion seems an insurmountable barrier.

² Miller, B. (2016, November 24). *What is Pay Compression?* Retrieved from <https://hrdailyadvisor.blr.com/2016/11/24/what-is-pay-compression/>

³ San Diego Workforce Partnership and The Nonprofit Institute, “2017 Nonprofit Sector Employment Trends and Career Opportunities” (2017). *Nonprofit Sector Issues and Trends*. <https://digital.sandiego.edu/npi-npissues/2>

Signs that Market Volatility and Tax Policy Discourage Giving

Survey respondents commented frequently on a perceived decline in corporate giving which they attributed to uncertainty in the financial markets, and changing priorities for local corporate donors.

“Corporate monetary support is slowly disappearing. Corporate entities are giving lower levels of support while wanting increased public relations and employee engagement.

“We have experienced a dramatic drop this year in corporate support. Corporations are claiming their budgets have been cut as a result of a challenging Q4 (Oct-Dec 2018). We have also heard corporations are “bracing for recession.”

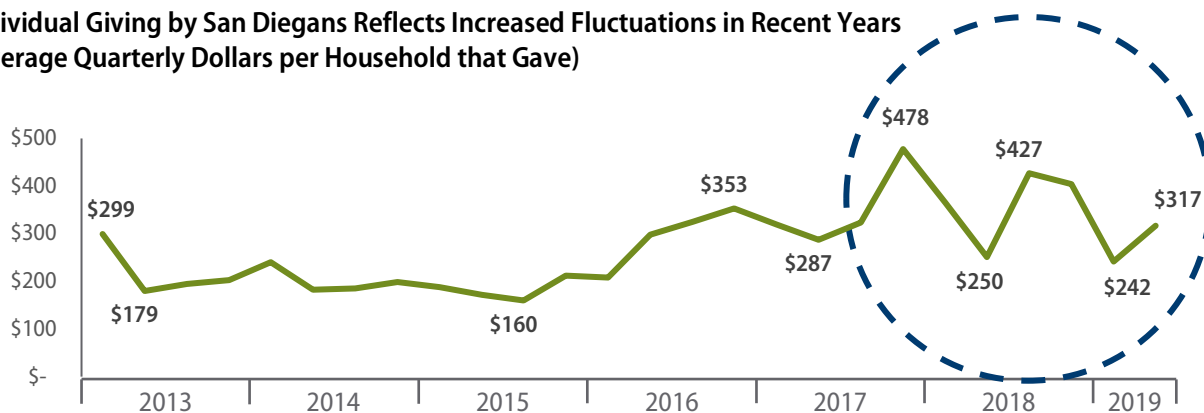
Additionally, while some nonprofit leaders tell us they have clearly felt the impact of the Tax Cuts and Jobs Act of 2017, others are **still uncertain** about the Act’s ultimate impact on philanthropic giving to nonprofits. What is known is that the raising of the standard deduction and the lowered marginal tax rates for most tax payers curtailed a longstanding incentive for charitable giving supported by the federal tax code. As a result, recent IRS data reflect a sharp decrease in the number of Americans who itemized deductions on their 2017 returns. Furthermore, of those households that did itemize, charitable deductions were lower than in previous years.⁴

“We are uncertain regarding the impact of federal tax reform on individual giving. We’ve had many donors cancel their monthly recurring gifts and (thankfully) send larger gifts via their donor advised funds in order to receive the tax benefit. We won’t know until January if donors ‘doubled up’ their gifts in December 2018 and don’t plan to give an end gift this year. Entry level gifts (under \$100) are down fairly significantly this year.

“The new tax law threw a wrench into some of our fundraising.

“The impact of the tax reform act has reduced the proportion of middle-class donations, so there is an increasing reliance on major donors, foundations, and government funding.

Individual Giving by San Diegans Reflects Increased Fluctuations in Recent Years (Average Quarterly Dollars per Household that Gave)



⁴ Andreoni, J. & Durnford, J. (2019). *The Effects of the 2017 Tax Reform on Itemization Status and the Charitable Deduction*. San Diego, CA: University of California - San Diego.

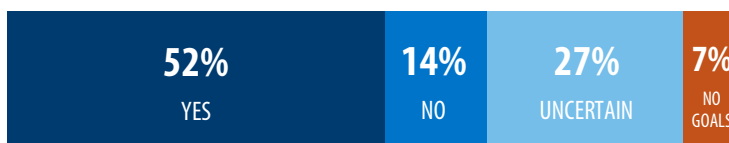
Fundraising Outlook is Ambiguous

Nonprofit leaders reported mixed results when it comes to fundraising and were split in their opinions as to what the future holds.

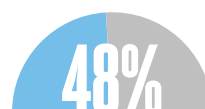


59% of nonprofit leaders report **meeting their fundraising goals** in their last fiscal year

Half of nonprofit leaders report **being on track** to meet fundraising goals for their current fiscal year



52% OF NONPROFIT LEADERS ARE **EXTREMELY OR VERY CONFIDENT** IN THEIR ORGANIZATION'S **ABILITY TO RAISE FUNDS TO SUPPORT THEIR MISSION**

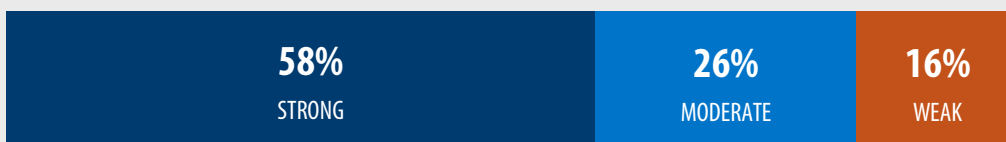


48% OF NONPROFIT LEADERS DESCRIBE THE **FUNDRAISING OUTLOOK** FOR NEXT YEAR AS **SOMEWHAT OR MUCH BETTER THAN THIS YEAR**

Despite Some Uncertainty, Nonprofit Leaders Predict Financial Stability in Coming Year

Despite slower growth and the general concerns about market conditions and individual giving just described, 95% of the San Diego nonprofit leaders who responded to our survey report a **strong or stable financial outlook** for their organizations.

General financial health of organization this 2019 calendar year



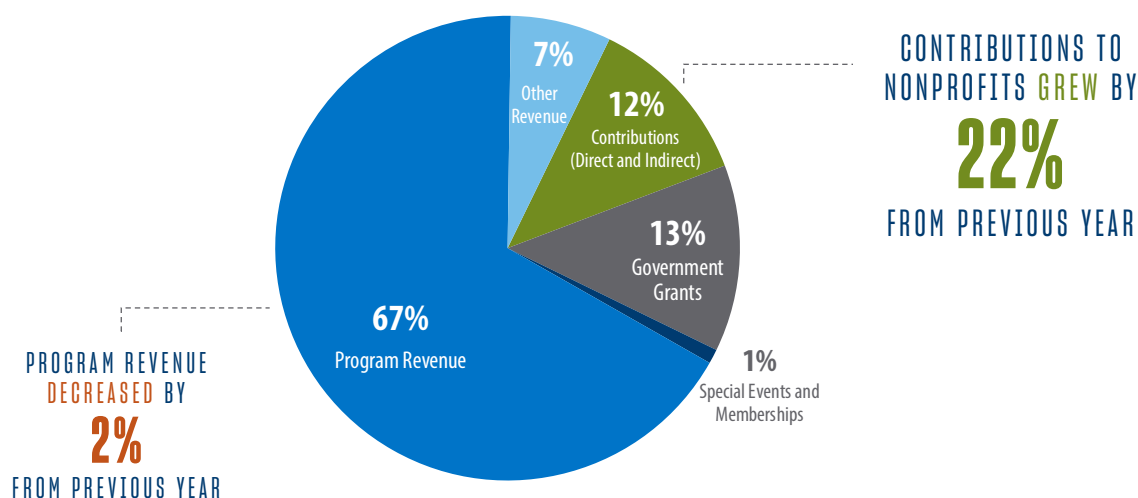
Expectation of general financial outlook for next calendar year compared to this calendar year



Nonprofit Sector Continues to Grow

Research on individual giving suggests we should expect contributions to nonprofits to be flat or even decline.⁵ Yet, the most recently available Internal Revenue Service returns for local nonprofits show, as a sector, all the components of nonprofit revenue (contributions, program revenue, and investments) continue to grow.

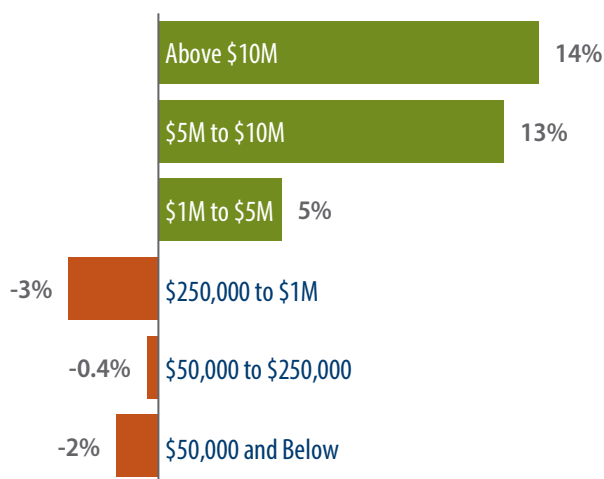
Sources of Nonprofit Revenue



Contributions to Small Nonprofits Decline, While Those Made to Large Organizations Grow

Although contributions to nonprofits overall have grown 22% between 2016 and 2017, this growth only occurred among large nonprofits. Contributions to smaller nonprofits (budgets under \$1 million) have actually declined.

Percent Change in Annual Contributions to Nonprofits 2016 vs. 2017 By Budget Size



“We are seeing more large individual philanthropists in San Diego and these people want to be more directly involved and recognized. Small nonprofits, particularly in disadvantaged and underserved areas, are not connecting with these funders.”

⁵ Indiana University Lilly Family School of Philanthropy and Giving USA Foundation. (2019). *Giving USA 2019*.

STATE OF THE NONPROFIT SECTOR PROFILE

SAN DIEGO COUNTY

11,523

NONPROFITS
Registered 501(c)(3)
Public Charities

+2.6%
2016 to 2017

786 PRIVATE
FOUNDATIONS

\$19.6B

REVENUE

\$18B

EXPENSES

\$32B

ASSETS

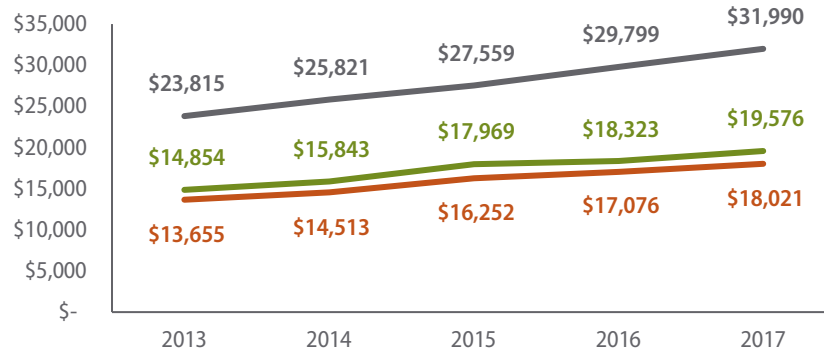


CONTRIBUTION SOURCES

Special Events and Memberships	2.8%
Other Direct Contributions	44.7%
Indirect Contributions	2.7%
Government Grants	49.9%

5 YEAR TREND OF REVENUE, EXPENSES AND ASSETS (in millions) 2013-2017

Assets —
Revenue —
Expenses —



EMPLOYMENT



2,682

STAFFED
NONPROFITS

121,334

PAID
EMPLOYEES

\$7.3B

TOTAL
WAGES

Nonprofit Subsector Profiles

This report has described San Diego's nonprofit sector, which is comprised of organizations that pursue a variety of mission-specific activities. We have used the National Taxonomy of Exempt Entities (NTEE) codes to create profiles of eleven major subsectors.

ANIMAL-RELATED

2%
OF TOTAL
ORGANIZATIONS

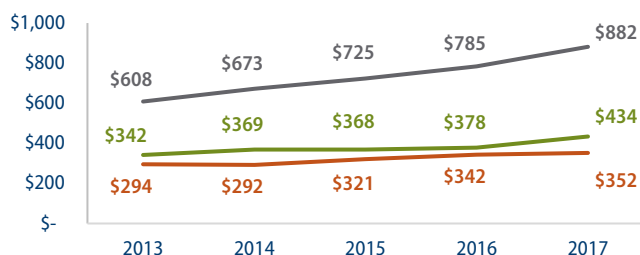
\$434.3 REVENUE
(IN MILLIONS)

\$352.2 EXPENSES
(IN MILLIONS)

\$881.5 ASSETS
(IN MILLIONS)

**5 YEAR TREND OF
REVENUE, EXPENSES
AND ASSETS (in millions)
2013-2017**

Assets —
Revenue —
Expenses —



ARTS / CULTURE / HUMANITIES

\$377.7 REVENUE
(IN MILLIONS)

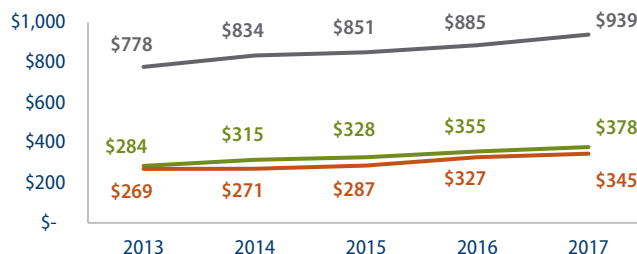
\$345.3 EXPENSES
(IN MILLIONS)

\$938.5 ASSETS
(IN MILLIONS)

10.9%
OF TOTAL
ORGANIZATIONS

3,057

PAID EMPLOYEES



**5 YEAR TREND OF
REVENUE, EXPENSES
AND ASSETS (in millions)
2013-2017**

Assets —
Revenue —
Expenses —

EDUCATION (OTHER*)

18.9%

OF TOTAL
ORGANIZATIONS

12,531

PAID EMPLOYEES

\$1,582.6

REVENUE (IN MILLIONS)

\$1,433.9

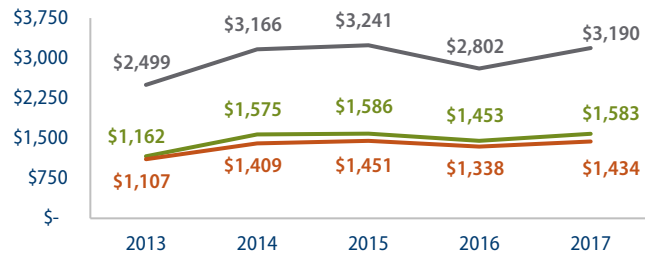
EXPENSES (IN MILLIONS)

\$3,190.4

ASSETS (IN MILLIONS)

**5 YEAR TREND OF
REVENUE, EXPENSES
AND ASSETS (in millions)
2013-2017**

Assets —
Revenue —
Expenses —



*Does not include Higher Education / Universities

ENVIRONMENT

\$241.3

REVENUE (IN MILLIONS)

\$227.5

EXPENSES (IN MILLIONS)

\$168.8

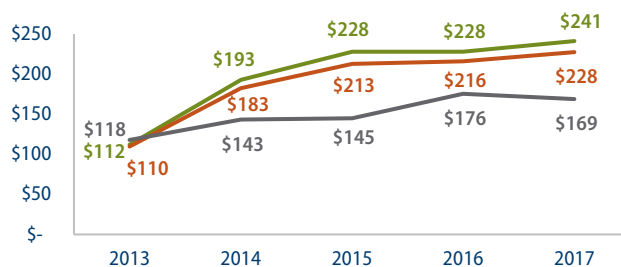
ASSETS (IN MILLIONS)

5.6%

OF TOTAL
ORGANIZATIONS

**5 YEAR TREND OF
REVENUE, EXPENSES
AND ASSETS (in millions)
2013-2017**

Assets —
Revenue —
Expenses —



HEALTH (OTHER*)

10.1%

OF TOTAL
ORGANIZATIONS

15,971

PAID EMPLOYEES

\$4,041.4

REVENUE (IN MILLIONS)

\$3,755.4

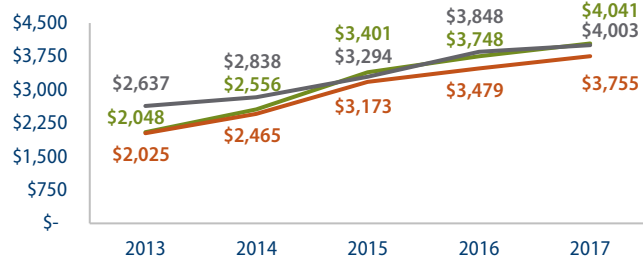
EXPENSES (IN MILLIONS)

\$4,002.7

ASSETS (IN MILLIONS)

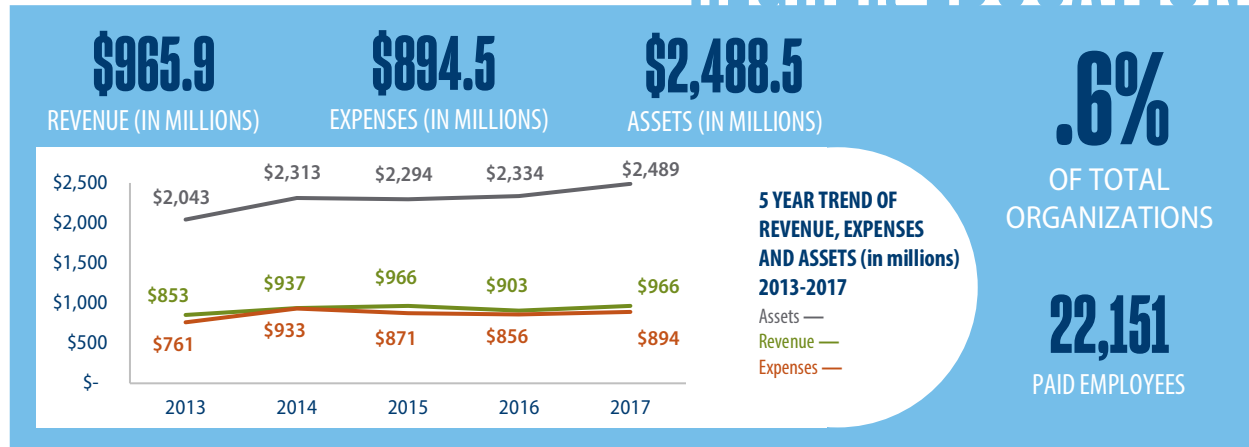
**5 YEAR TREND OF
REVENUE, EXPENSES
AND ASSETS (in millions)
2013-2017**

Assets —
Revenue —
Expenses —

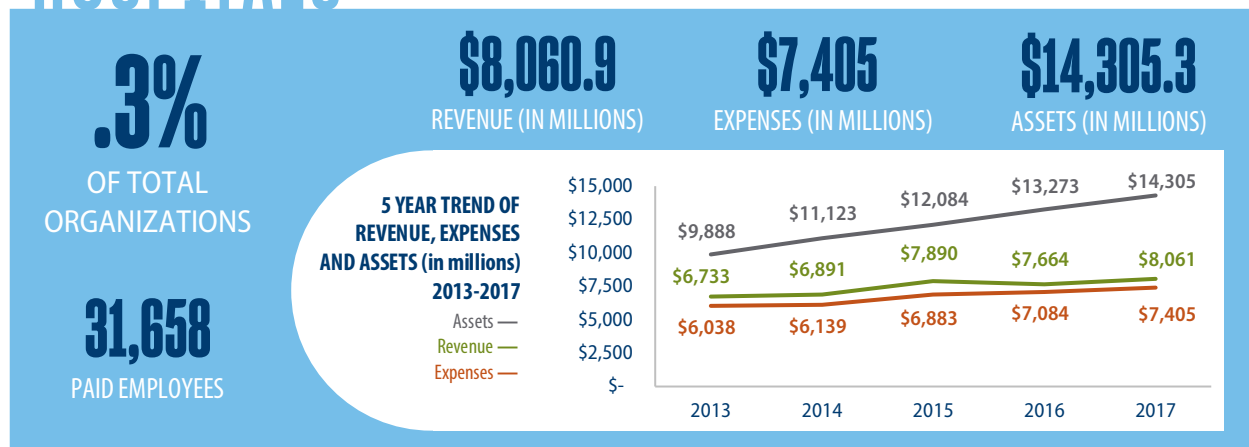


*Does not include Hospitals

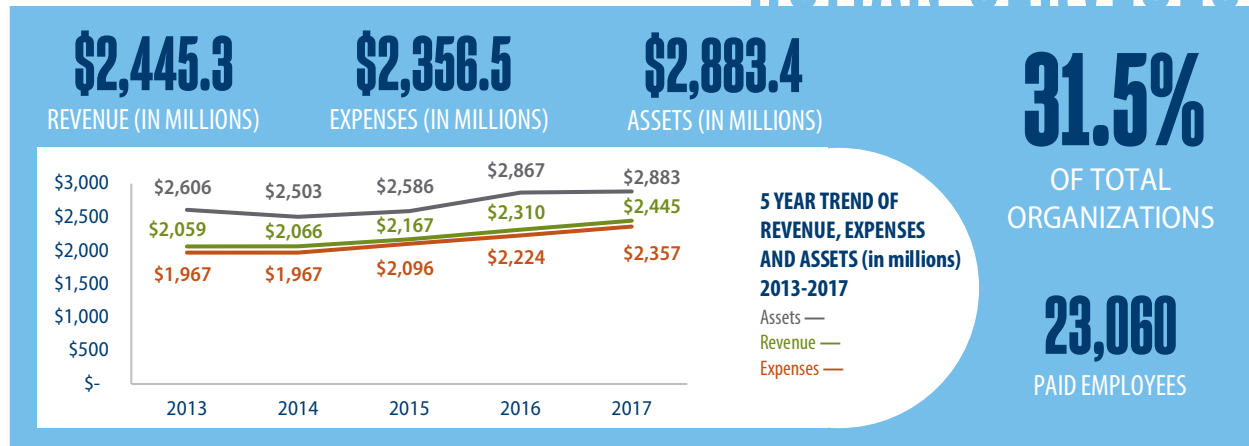
HIGHER EDUCATION



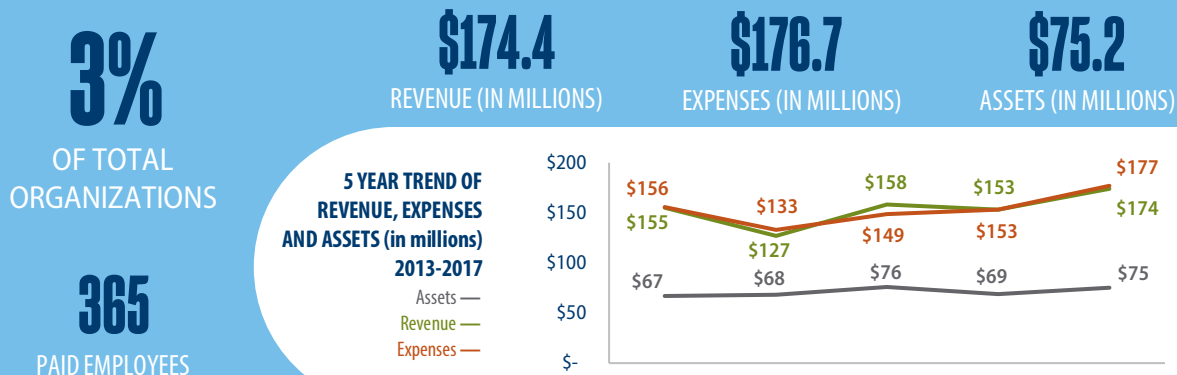
HOSPITALS



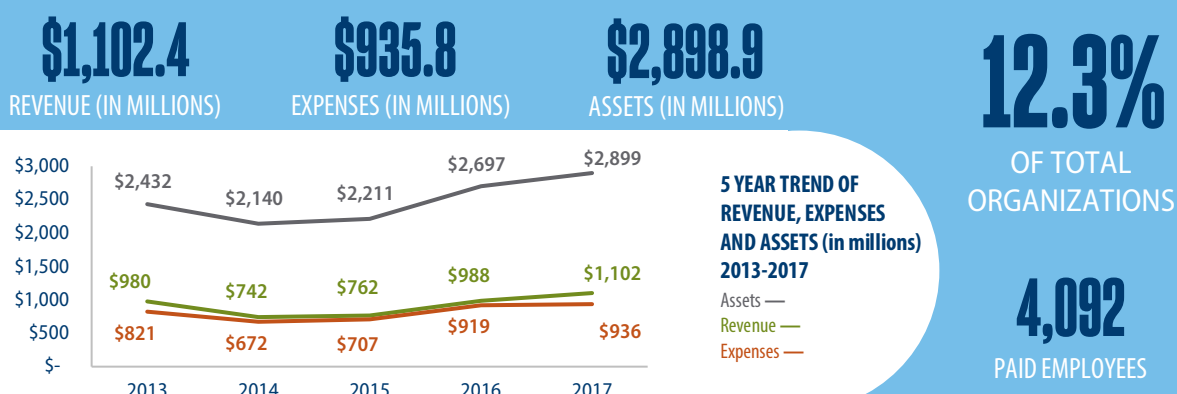
HUMAN SERVICES



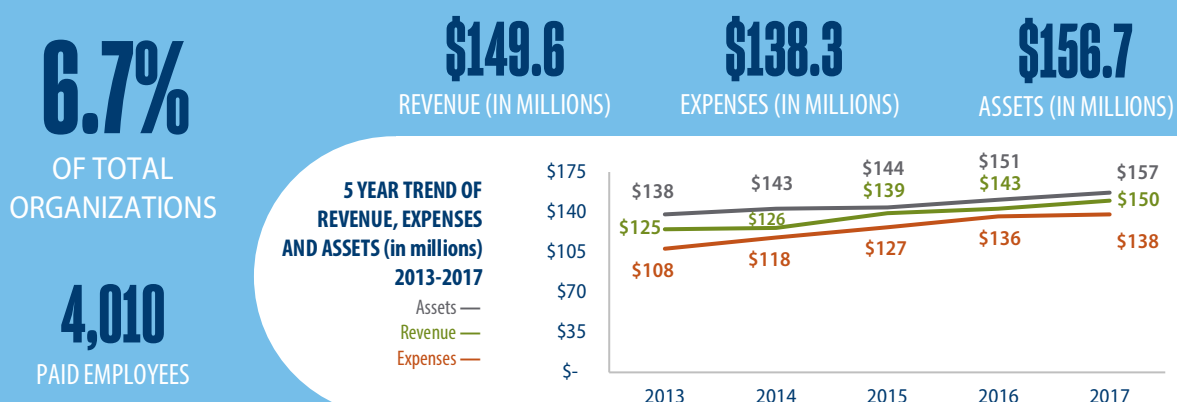
INTERNATIONAL



MUTUAL / PUBLIC / SOCIETAL BENEFIT



RELIGION-RELATED*



*Religious organizations are not required to file with the IRS, however, many do. These data represent religious organizations that have elected to file and are likely an undercount of true activity.



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