WESTCHESTER COUNTY NONPROFITS: A MAJOR ECONOMIC ENGINE

by
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with the technical assistance of S. Wojciech Sokolowski

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INTRODUCTION

Largely invisible to most Westchester County residents is a set of institutions that, taken together, constitute the county’s largest employer. These institutions deliver the lion’s share of health care and cultural and social services; enliven the county’s democracy; and add immeasurably to its residents’ overall quality of life.

This integral component of Westchester’s community is the private “nonprofit sector” comprising a vast array of private hospitals, universities, symphonies, art galleries, nursing homes, family service agencies, churches, civic agencies, environmental groups, and other diverse organizations.

This report provides the most up-to-date information available on the scope and scale of the nonprofit sector in Westchester County, and on how it has changed over the past decade. What emerges from this analysis is a picture of a set of institutions with far greater economic heft than is commonly recognized. However, the data also reveal real and growing threats to the sector’s health, including increased competition from for-profit entities and relatively low overall wages.

DATA SOURCES

This report focuses on what is commonly regarded as the “heart” of the nonprofit sector—the hospitals, clinics, day care centers, arts institutions, advocacy groups, and others that are exempt from taxation under Section 501(c)(3) of the Internal Revenue Code.1 Gaining a clear understanding of these organizations is complicated, however. There are several different sources of data on 501(c)(3) organizations, each of which offers a different picture of even the most basic parameters of Westchester’s nonprofit sector. Because the data depicting the scale of the sector’s resources—its revenues, expenditures, and employment—are more reliable than those depicting the number of organizations, this report focuses on these variables rather than on counting organizations or establishments.

To do so, we draw on two key datasets—the Form 990 filings that nonprofits with expenditures over $25,000 are required to submit to the Internal Revenue Service, and the Quarterly Census of Employment and Wages (QCEW) that states conduct as part of the operation of the federal unemployment insurance program. The result is a comprehensive picture of the scope, distribution, and recent trends in this critical, but overlooked, component of Westchester County’s economy and society.

It is important to note, however, that while the data used in this report comprise the most robust and up-to-date data currently available on Westchester nonprofits, they are not without their limitations. Full details on these limitations and on the methodology used in this report are provided in Appendix A.

1 U.S. tax law actually delineates twenty-seven separate sections under which organizations can claim exemption from federal income taxes as nonprofit organizations. These categories include social welfare organizations, business leagues, and credit unions, to name just a few. Of these, our focus is on organizations that claim tax exemption under Section 501(c)(3) which is reserved for “charitable, religious, educational, scientific, literary,” and related organizations.
FINDING #1
A Major Economic Force

Simply put, the private nonprofit sector in Westchester—including private hospitals, clinics, colleges, universities, schools, day care centers, social service providers, museums, theaters, and many more—is a major economic engine in the county.

EMPLOYMENT

Westchester’s private, nonprofit organizations employed 53,987 paid workers as of the first quarter of 2013. This makes Westchester’s nonprofit sector the largest industry in the county, employing more people than the construction, finance, and wholesale trade industries combined. More specifically, as illustrated in FIGURE 1, Westchester County nonprofits employ:

→ Nearly six times as many workers as the county’s real estate2 and information3 industries.
→ More than five times as many workers as the transportation and management4 industries.
→ Nearly four times as many workers as the wholesale trade and manufacturing industries.
→ Three times as many workers as the county’s finance industry.
→ More than two and a half times as many workers as the construction and administrative/support services industries.
→ Two times as many workers as the county’s accommodation and food industry.
→ Twelve percent more people than the county’s retail industry.
→ Ten percent more people than local government.

Reflecting this, Westchester nonprofits employ 13.6 percent of the county’s total workforce—one out of every 7 workers—and 16 percent of the county’s private workforce (one out of every 6 private workers).

FIGURE 1
Nonprofit employment vs. employment in selected industries, Westchester County, 2013

<table>
<thead>
<tr>
<th>NONPROFIT SECTOR</th>
<th>NUMBER OF PAID WORKERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local government</td>
<td>53,987</td>
</tr>
<tr>
<td>Retail trade</td>
<td>49,096</td>
</tr>
<tr>
<td>Accomodation &amp; food</td>
<td>48,144</td>
</tr>
<tr>
<td>Administrative &amp; support services</td>
<td>26,841</td>
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<td>Construction</td>
<td>20,562</td>
</tr>
<tr>
<td>Finance</td>
<td>20,111</td>
</tr>
<tr>
<td>Finance</td>
<td>17,788</td>
</tr>
<tr>
<td>Wholesale trade</td>
<td>13,971</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>13,665</td>
</tr>
<tr>
<td>Transportation</td>
<td>10,413</td>
</tr>
<tr>
<td>Management of companies</td>
<td>10,110</td>
</tr>
<tr>
<td>Information</td>
<td>9,324</td>
</tr>
<tr>
<td>Real estate</td>
<td>9,010</td>
</tr>
<tr>
<td>Utilities</td>
<td>2,800</td>
</tr>
<tr>
<td>Agriculture</td>
<td>261</td>
</tr>
</tbody>
</table>

Source: Johns Hopkins Nonprofit Economic Data Project based on QCEW data.

2 Real estate includes lessors of buildings and property; offices of real estate agents and brokers; rental and leasing services; and related industries.
3 Information includes publishing, broadcasting, and telecom; information and data processing services; and the motion picture and sound recording industries.
4 Management includes establishments focused on managing enterprises and/or holding the securities or financial assets of enterprises in order to own a controlling interest in them and/or influence their management decisions.
As shown in FIGURE 2, this ranks Westchester’s nonprofit share of the total workforce well above the U.S. average of 8.4 percent, slightly above New York City’s 13.1 percent, on par with nearby Nassau County’s 13.5 percent, but slightly below New York State’s 15.0 percent.

FINANCES AND WAGES
In addition to being a major employer, the Westchester nonprofit sector has a considerable financial footprint in the county. Demonstrating this, as of 2011, Westchester nonprofits:

- Generated nearly $6.9 billion in revenues.
- Spent nearly $6.6 billion.
- Held over $8.4 billion in total assets.

Moreover, as of the first quarter of 2013, Westchester nonprofits accounted for nearly 10 percent of the county’s total payroll. At nearly $675 million, Westchester nonprofit payrolls exceeded those for:

- Transportation ($138 million)
- Real estate ($154 million)
- Accommodation and food ($158 million)
- Information ($208 million)
- Administrative and support services ($229 million)
- Wholesale trade ($302 million)
- Construction ($329 million)
- Retail trade ($385 million)
- Manufacturing ($470 million)
- Management ($668 million)

Further evidence of the nonprofit sector’s significant economic impact is found in the approximately $2.7 billion in wages and compensation that these organizations paid in 2013. These wages will, in turn, generate roughly $311 million in federal income tax revenue, $104 million in state income tax revenue, and $21.8 million in local income tax revenue.
FINDING #2
Health Dominance

Health organizations account for the vast majority of Westchester’s nonprofit jobs, but education and social services organizations also account for significant shares.

In particular, as illustrated in FIGURE 3 and detailed more fully in APPENDIX B:

→ Over half of all nonprofit jobs in Westchester (29,324 jobs) are in health services. Hospitals\(^5\) account for the bulk of these jobs, employing 27 percent of the county’s nonprofit workforce, or roughly 1 out of every 4 nonprofit workers. Nursing homes also comprise a significant share, employing 20 percent of the county’s nonprofit workforce, or 1 out of every 5 nonprofit workers.

→ Another 20 percent of Westchester’s nonprofit workers (10,966 total) are employed by educational organizations, which includes colleges and universities (12 percent), elementary and secondary schools (7 percent), and other education-focused organizations (1 percent).

→ A considerably smaller 11 percent (5,843) of all nonprofit jobs in Westchester are in social assistance. This includes employment in individual and family services, community food services, housing services, and vocational rehabilitation.

→ Eight percent (4,132) of all nonprofit jobs are in various membership organizations. This includes jobs in religious organizations, grantmaking and giving services, advocacy organizations, membership and social organizations, and the charitable arms of various professional associations.

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\(^5\) The hospitals category includes general, specialty, and psychiatric facilities. Some well-known hospitals in Westchester are not registered under section 501(c)(3) of the IRS code (although they may be organized as a public benefit corporation or other 501(c) section of the IRS code), and as such are not included in this nonprofit category.

FIGURE 3

Distribution of Westchester County’s 53,987 nonprofit workers\(^*\) in 2013, by field

*full & part-time

<table>
<thead>
<tr>
<th>Field</th>
<th>Nonprofit Workers</th>
</tr>
</thead>
<tbody>
<tr>
<td>HOSPITALS</td>
<td>14,375</td>
</tr>
<tr>
<td>NURSING HOMES</td>
<td>10,961</td>
</tr>
<tr>
<td>COLLEGES &amp; UNIVERSITIES</td>
<td>6,506</td>
</tr>
<tr>
<td>SOCIAL ASSISTANCE</td>
<td>5,843</td>
</tr>
<tr>
<td>OTHER FIELDS(^*)</td>
<td>4,304</td>
</tr>
<tr>
<td>MEMBERSHIP ORGS</td>
<td>4,132</td>
</tr>
<tr>
<td>AMBULATORY HEALTH</td>
<td>3,989</td>
</tr>
<tr>
<td>ELEMENTARY &amp; SECONDARY EDUC</td>
<td>3,877</td>
</tr>
</tbody>
</table>

\(^*\) Including arts & entertainment, science & research, and professional services

Source: Johns Hopkins Nonprofit Economic Data Project based on QCEW data.
FINDING #3
A Growing Sector

The nonprofit sector is a critical driver of Westchester’s economy, adding thousands of new jobs over the past decade—even though this period included a major economic recession. As illustrated in FIGURE 4:

- Between 2003 and 2013, nonprofit employment in Westchester grew by **8.4 percent**, adding 4,203 jobs to the county’s total.
- By contrast, the county’s for-profit sector grew by just 1.2 percent and local government actually experienced significant contraction, accounting for the loss of 5,240 jobs over this same period.

What is more, the nonprofit sector was the only source of overall private employment growth in the county during the recession. More specifically, between 2008 and 2010, the nonprofit sector grew by an average of .6 percent per year while the for-profit sector lost jobs at a rate of 4.4 percent per year. Thus, despite the difficult economic climate, by 2013 nonprofit employment was 2.6 percent above what it had been prior to the recession’s start.

Moreover, nonprofits operating in almost all major fields of activity added jobs over the past decade. As shown in FIGURE 5:

- The nonprofit elementary and secondary education field experienced the most significant growth – nearly 40 percent.
- At 31 percent, the county’s ambulatory health field also experienced well-above-average growth.
- The one exception was the social services field, which contracted by 0.8 percent.
FINDING #4
Increased Competition Affecting Market Share

Despite this overall growth, nonprofits are facing increased competition in many of the fields which they have traditionally dominated. As shown in figures 5 and 6, for-profit entities operating in several of these fields also experienced growth between 2003 and 2013—and often at a pace that exceeded nonprofit growth.

→ Most notably, employment in for-profit social service providers expanded by nearly 70 percent, and for-profit colleges and universities by 61 percent (see FIGURE 5).

→ As a result, the nonprofit share of total private employment in these key fields actually declined even while the absolute size of nonprofit employment increased (see FIGURE 6). The most significant loss was in the social services field, where the nonprofit share of employment dropped from 69 to 56 percent.

→ The one field in which nonprofits gained ground on for-profits in their share of private employment was elementary and secondary schools, where nonprofit employment grew from 63 percent to 73 percent of private employment.

FIGURE 6
Nonprofit employment as a percent of total private employment by field, Westchester County, 2003 vs. 2013

Source: Johns Hopkins Nonprofit Economic Data Project based on QCEW data.
Finding #5
Wages: A Mixed Story

Overall Wages
The average monthly wages of Westchester’s nonprofit workers are below those of the county’s for-profit and government workers. As illustrated in Figure 7:

→ The average Westchester nonprofit worker earned $4,168 per month, which is roughly a third lower than the average for-profit worker’s monthly average wage of $6,192.

→ Similarly, the average county nonprofit worker earned 36 percent less per month than the average local government worker and 17 percent less than the average state government worker.

Variations by Field
These averages obscure, however, some significant variations in the average wages of nonprofit workers in different fields. In particular, as shown in Figure 8:

→ Average nonprofit monthly wages range from a low of $2,495 in the social assistance field to a high of $5,476 in the hospital field.

→ Other fields in which nonprofit average wages are especially low include nursing and residential care and membership organizations.

Also significant, while overall nonprofit monthly wages remain lower than overall for-profit wages, a different picture emerges when attention focuses on just the fields in which nonprofits and for-profits are both actively involved. As Figure 8 demonstrates, in these fields nonprofits often pay better wages than their for-profit counterparts. This suggests that the real reason overall wages in the nonprofit sector trail those in for-profits is not that nonprofits pay lower wages but rather that nonprofits are concentrated in low-wage fields.

→ In the hospital field, nonprofit workers earn a striking 40 percent more, on average, than their for-profit counterparts.

→ Similarly, in elementary and secondary education, nonprofit workers earn roughly 38 percent more than their counterparts in for-profit facilities.

→ Despite the low monthly wages found in the social assistance field, nonprofit salaries actually average nearly 20 percent more than those paid by for-profits.

These findings may support the widespread notion that nonprofits typically employ more full-time and highly-skilled workers in these key fields than their for-profit counterparts.
CONCLUSION

This study makes clear the critical economic role that Westchester County’s nonprofit sector plays as both a job creator and revenue generator. The sector is not only the largest employer among all industries in Westchester County, but has contributed significantly to the county’s private employment growth over the past decade despite the recent recession.

However, the data reported here also call attention to a number of challenges confronting Westchester nonprofits—in particular, the growing competition they face from for-profits operating in traditional fields of nonprofit activity including social assistance and higher education. Similarly, this report highlights the relatively low wages available to workers in critical fields, such as social assistance and nursing. While nonprofit wages in these fields often exceed those provided by for-profit providers, they remain well below those common in the public sector and elsewhere in the private sector, raising important questions about the ability of nonprofits to continue to attract and retain quality workers.

All of this demonstrates the need for information of the sort reported here to put Westchester’s nonprofit sector on the radar screen of policymakers and to alert leaders within the sector of the important challenges it is facing.

Hopefully, this report has usefully served both of these goals.

ACKNOWLEDGEMENTS

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SUGGESTED CITATION

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OVERVIEW
The data for this study come primarily from two sources. The first source is the aggregate dataset of organizations exempt from income tax under Section 501c(3) produced by the Johns Hopkins Center for Civil Society Studies from the Quarterly Census of Employment and Wages, which is administered by state Labor Market Information agencies (e.g., the Department of Labor in New York) and the Bureau of Labor Statistics. The second source is the database of organizations exempt from income tax under Section 501c(3) produced by the National Center for Charitable Statistics (NCCS) at the Urban Institute from the tax reports filed by tax-exempt organizations (IRS Form 990) to the Internal Revenue Service. In addition to these main data sources, we used supplementary data from the Bureau of Economic Analyses (Gross State Product) and Individual Income and Tax Data tables produced by the Internal Revenue Service and available online for public use.

QUARTERLY CENSUS OF EMPLOYMENT AND WAGES
The Quarterly Census of Employment and Wages (QCEW) is an administrative dataset collected by states as a part of the federal Unemployment Insurance (UI) program. QCEW draws on the quarterly surveys of workplaces that state employment security offices have conducted since the 1930s and accounts for approximately 98 percent of all wage and salary civilian employment nationally (the program does not cover self-employed and family workers). Under federal law, all nonprofit places of employment with four or more employees are required to participate in the unemployment insurance system. At their discretion, states can extend this requirement to nonprofit places of employment with one or more employees. However, New York has not extended the coverage beyond the federal mandate.

The principal exclusions from the QCEW dataset vary by state and include employees of religious organizations, railroad workers, small-scale agriculture workers, domestic service workers, crew members on small vessels, state and local government elected officials, and insurance and real estate agents who receive payment solely by commission. In New York, QCEW data encompass approximately 97 percent of nonfarm employment, providing a virtual census of employees and their wages as well as the most complete universe of employment and wage data by industry, at the State, regional and county levels. In terms of nonprofit employment, the exclusion of religious organizations as well as entities with less than four employees is the most significant; however, religious organizations may elect to be covered by the unemployment insurance program and those that do are covered in the data. At this time the exact number of employees in tax-exempt establishments not covered by QCEW is not known, but we estimate it to be no more than 3 percent of total employment in the nonprofit sector in New York.

While nonprofit places of employment have long been covered by the QCEW surveys, the data generated by these surveys have never broken out the nonprofit employment separate from the for-profit employment. As a consequence, the nonprofit sector has essentially been buried in the data. The JHU Center for Civil Society Studies has developed a methodology of identifying nonprofit employers in the QCEW micro-data by record matching with the publicly available register of tax exempt entities maintained by the Internal Revenue Service (IRS). The nonprofit micro-data were subsequently aggregated by county and fields of activity to meet the New York Department of Labor’s disclosure rules, mandated by law to protect the confidentiality of company specific information. The result is the most accurate and up-to-date picture of Westchester nonprofit employment yet available, and a pathway to generating such data on a regular basis into the future.

QCEW data have a number of critical advantages over other data sources as a window into nonprofit employment trends. In particular, these data:

- Are collected every quarter;
- Are available within six to eight months of their collection, unlike Economic Census data, which typically require two to three years to process;
- Are closely monitored and verified for accuracy by the Labor Market Information offices of state Employment Security agencies and the federal Bureau of Labor Statistics;
- Are collected at the establishment level rather than the organization level, which is important to avoid distortions otherwise caused by the existence of multipurpose and multi-location organizations;
- Cover employment and wages, which is especially relevant for gauging the operations of labor-intensive entities such as nonprofits;
- Are comprehensive, covering about 98 percent of all nonprofit employment; and
- Cover for-profit and government places of employment in the same data system, which facilitates systematic comparisons among the sectors, a matter of increasing importance.
IRS FORM 990 DATA

The IRS Form 990 database is the main source of financial variables for public charities that filed Form 990 with the Internal Revenue Service (IRS). The 990 database includes 1,672 nonprofit organizations (not to be confused with establishments) located in Westchester in 2011, the latest year for which data are available.

Compared to the QCEW data, the Form 990 data have a number of limitations:

- Because the data are organization-based and not establishment-based, they provide a less detailed picture of the geographic distribution of nonprofit activity since many organizations have multiple places of operation that are frequently spread across a state or a metropolitan area.
- Because the forms are not scrutinized by the IRS to the extent that the tax returns of for-profit corporations are, they are more likely to contain significant errors in the data reported on the forms.
- Form 990 filings are typically less up-to-date than QCEW data. Forms are filed after the end of each calendar year for the previous year and it takes considerable time to convert them into electronic form. This makes it difficult to track current trends.
- The Form 990 covers only nonprofit organizations and does not classify nonprofit organizations by the North American Industrial Classification System (NAICS). As such, it is difficult to use these data to compare nonprofits to for-profits or government.
- Form 990 treats certain key variables in a manner that was developed for other purposes but is not well suited for studying the behavior of nonprofit institutions. Thus, for example, it does not distinguish between market sales, on the one hand, and government contracts and reimbursement payments (e.g., Medicaid) on the other. This can lead to gross understatements of the extent of government support in the revenue base of the nonprofit sector, which can lead, in turn, to serious policy errors. Similarly, the 990 form groups government grants together with private philanthropic contributions, thus potentially overstating the extent of philanthropic support.
- Only about 380,000 out of the estimated 1.2 million nonprofit organizations in the country are required to file Form 990 in a typical year.

As such, most of the present analysis relies on the QCEW dataset.
# Appendix B

## Employment in Westchester County, 2013q1

<table>
<thead>
<tr>
<th>NAICS</th>
<th>INDUSTRY</th>
<th>TOTAL NONPROFIT JOBS</th>
<th>SHARE OF TOTAL NONPROFIT JOBS</th>
<th>SHARE OF TOTAL PRIVATE JOBS</th>
<th>TOTAL FOR-PROFIT JOBS</th>
<th>TOTAL PRIVATE JOBS</th>
</tr>
</thead>
<tbody>
<tr>
<td>51</td>
<td>INFORMATION</td>
<td>1,030</td>
<td>2%</td>
<td>11%</td>
<td>8,294</td>
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<td>54</td>
<td>PROFESSIONAL SERVICES</td>
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<td>55</td>
<td>MANAGEMENT OF COMPANIES</td>
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<td>56</td>
<td>ADMINISTRATIVE &amp; SUPPORT SERVICES</td>
<td>47</td>
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<td>0%</td>
<td>20,515</td>
<td>20,562</td>
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<tr>
<td>61</td>
<td>EDUCATION</td>
<td>10,966</td>
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<td>70%</td>
<td>4,666</td>
<td>15,633</td>
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<tr>
<td>6111</td>
<td>Elementary &amp; secondary education</td>
<td>3,877</td>
<td>7%</td>
<td>73%</td>
<td>1,416</td>
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<tr>
<td>6112, 6113</td>
<td>Colleges &amp; universities</td>
<td>6,506</td>
<td>12%</td>
<td>91%</td>
<td>644</td>
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<td>62</td>
<td>HEALTH &amp; SOCIAL ASSISTANCE</td>
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<td>621</td>
<td>Ambulatory health</td>
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<td>Hospitals</td>
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<td>27%</td>
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<td>624</td>
<td>Social assistance</td>
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<td>71</td>
<td>ARTS &amp; RECREATION</td>
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<td>OTHER SERVICES</td>
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<td><strong>ALL INDUSTRIES</strong></td>
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<td><strong>16%</strong></td>
<td><strong>283,637</strong></td>
<td><strong>337,624</strong></td>
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</tbody>
</table>

Source: Johns Hopkins Nonprofit Economic Data Project based on QCEW data.
THE JOHNS HOPKINS
NONPROFIT ECONOMIC DATA PROJECT

Nonprofit organizations are facing increased pressures in states and localities throughout the United States, but the nonprofit sector’s ability to respond to these pressures has been limited by a lack of timely information about how prevailing economic realities are affecting the sector. The Johns Hopkins Nonprofit Economic Data Project (NED) is helping to tackle this problem by charting economic trends in the nonprofit sector including how employment, wages, and finances have changed over time and in relation to other industries. Moreover, the project is able to analyze these data at the national, regional, state, and local level, and to focus on particular subsectors, such as nursing homes, hospitals, home health centers, education, social services, and the arts.

THE JOHNS HOPKINS
CENTER FOR CIVIL SOCIETY STUDIES

The Johns Hopkins Center for Civil Society Studies is a leading source of ground-breaking research and knowledge about the nonprofit sector, social investing, and the tools of government. Working in collaboration with governments, international organizations, investment innovators, and colleagues around the world, the Center encourages the use of this knowledge to strengthen and mobilize the capabilities and resources of the public, nonprofit, and for-profit sectors to address the complex problems that face the world today. The Center conducts research and educational programs that seek to improve current understanding, analyze emerging trends, and promote promising innovations in the ways that government, civil society, and business can collaborate to address social and environmental challenges.

NONPROFIT WESTCHESTER

With a single unified voice, Nonprofit Westchester (NPW) is an organization that advocates for nonprofits and the role they play in the economic vitality and sustainability in Westchester County, focusing on sharing resources, connections, and information. The organization currently represents nearly 100 501(c)(3) nonprofit organizations in the county under a cooperative mission to strengthen the impact, capacity and visibility of the sector for a more just and caring community.