

State of Nonprofits: North Bay & Beyond

Linda Jacobs
CEO, Center for Volunteer & Nonprofit Leadership
July 16, 2026



Introductory Comments

Public Confidence in the Nonprofit Sector (CA/2026)

- 72% said nonprofits fill the gaps left by private business and corporations
 - 85% Improve quality of life
 - 78% Stand for values
 - 78% Reduce inequality
- 77% said nonprofits fill the gap left by government
 - 90% Help the needy and vulnerable
 - 46% Help people like me
 - 19% Help people who don't deserve help

Source: Causes Count 3.0, 2026

Navigating Current Times (all geographies)

- **Challenging funding landscape**
 - Funding is increasingly uncertain
 - State and federal funding cuts have increased demand for services in a tough funding environment
 - Cuts are creating gaps faster than they can be filled
- **Mounting pressures started by pandemic, disasters, all levels of government/HR1-One Big Beautiful Bill Act**
 - Greater demand due to increasing pressure on individual/family basic needs
- ***Burnout, stress, fear, low staff morale, generational culture**
 - Working in an environment of stress and uncertainty for organizations, communities served and the issues trying to address
- **Diverting attention to public perception and communication in describing work**
- **Legal challenges**
- **Changes in board engagement**
- **Technology**

*300 CEO's reported burnout up to 46% from 30% in 2025, *CEO State of Nonprofits 2026*

Navigating Current Times (all geographies)

➤ **Adapting has included:**

- Diversifying revenue streams
- Shrinking programs (budgets)
- Restructuring staff and board
- Mergers / Closures
- Using reserves, investment funds
- Scenario planning
- Starting new collaborations with public and private partners

“We have staff and board members who are personally targeted and impacted by the current context. It has given us a sense of purpose, however. We share a belief in the importance of what we do and the role we are able to play in this moment.

We talk regularly about how it gives us hope to focus on what we can do in this climate, rather than be overwhelmed by all the challenges that feel outside of our control.”

Nonprofit Experiences Since January 2025 (US)

FIGURE 2. Nonprofit Experiences Since January 2025 (N=368-372)

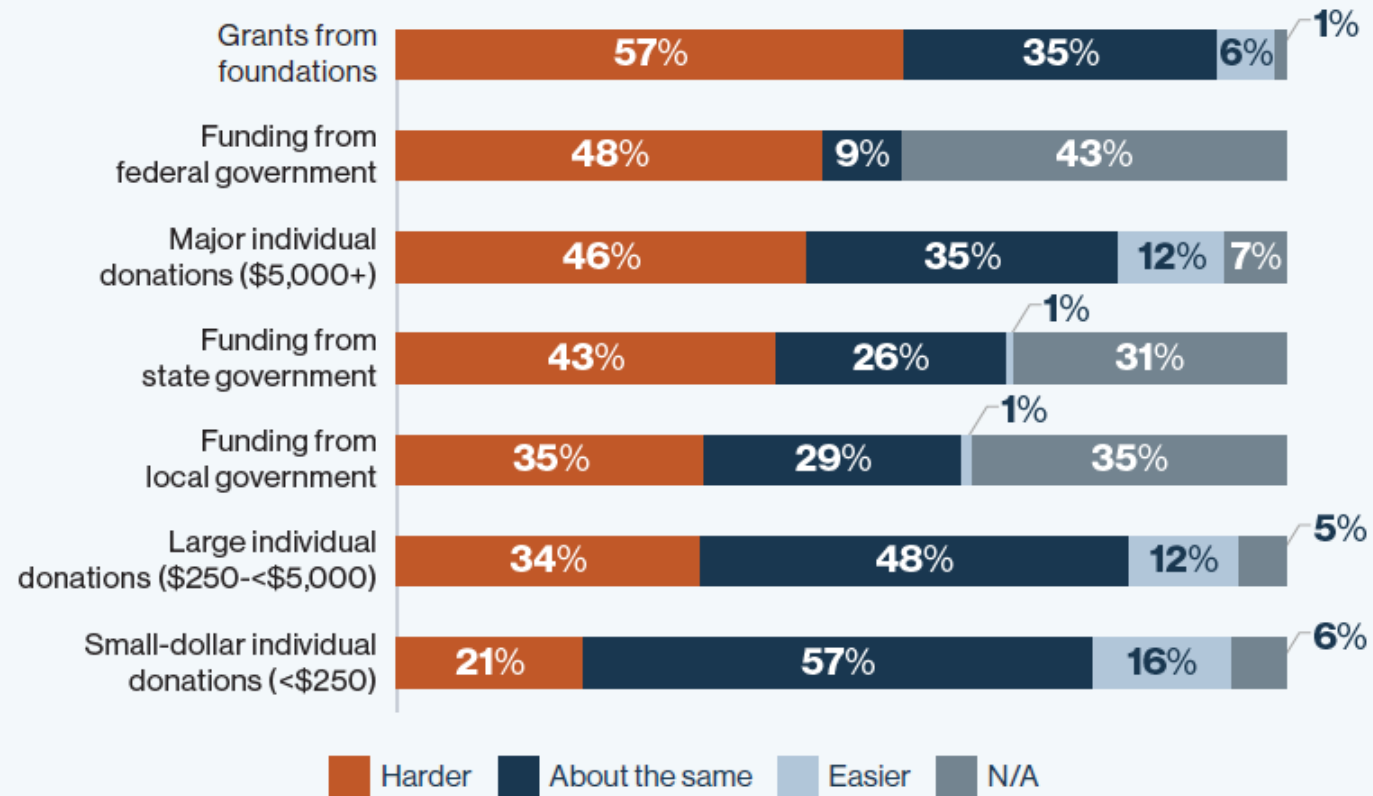


Note: Percentages add up to more than 100 because respondents could select all that apply.

Source: State of Nonprofits 2026: What Funders Need to Know, Center for Effective Philanthropy

Unpredictable Funding (US)

FIGURE 5. Change in Level of Difficulty Nonprofits Report in Getting Funding Since January 2025 (N=377-378)

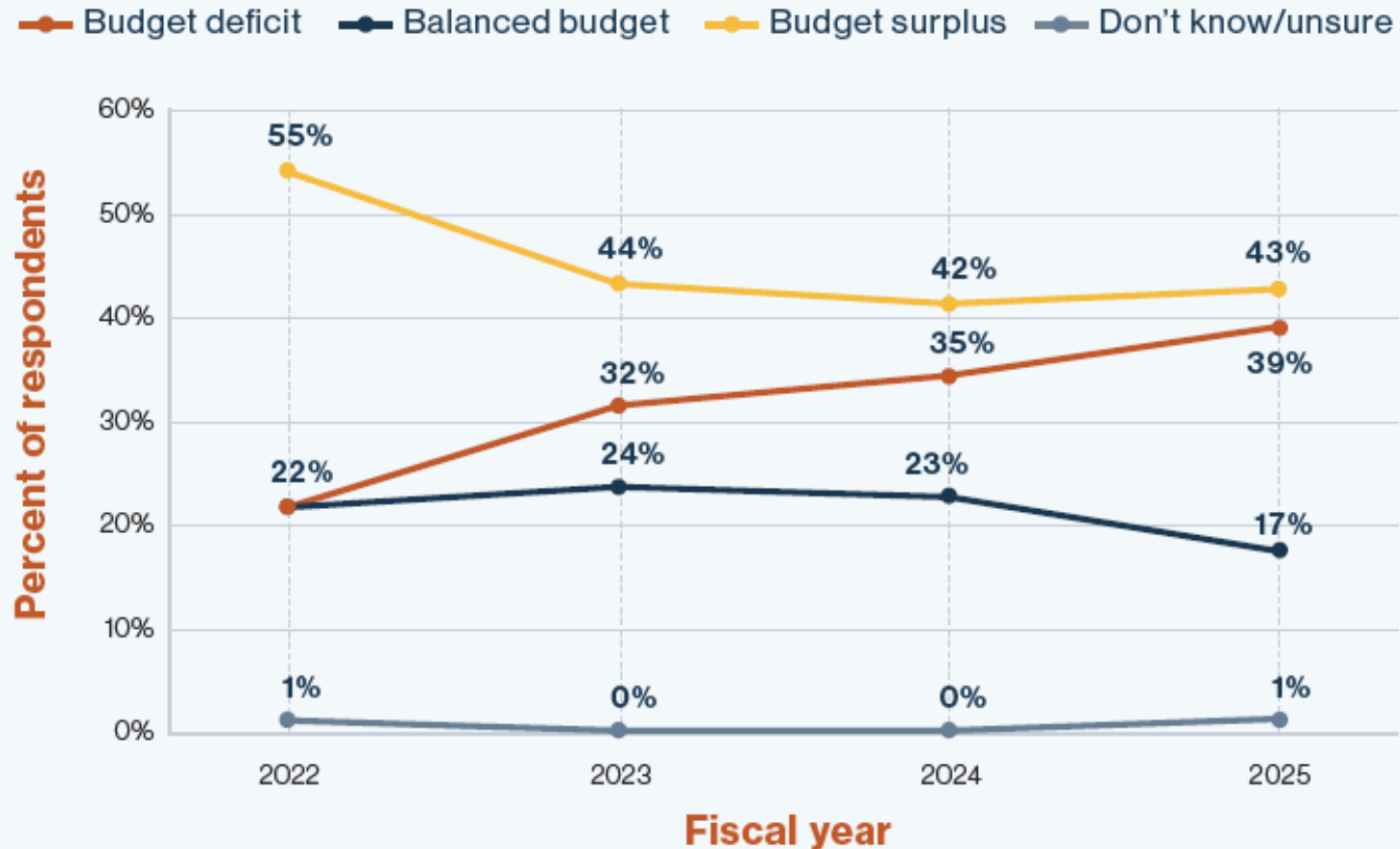


Note: Percentages may not add up to 100 due to rounding.

Source: State of Nonprofits 2026: What Funders Need to Know, Center for Effective Philanthropy

Trends in Fiscal Budgets (US)

FIGURE 7. Trends in Fiscal Year Budget Status, 2022-2025 (Ns=239-583)



Source: *State of Nonprofits 2026: What Funders Need to Know*, Center for Effective Philanthropy

Financial Actions (US)

FIGURE 9. Financial Actions Nonprofits Are Considering Taking (N=380)

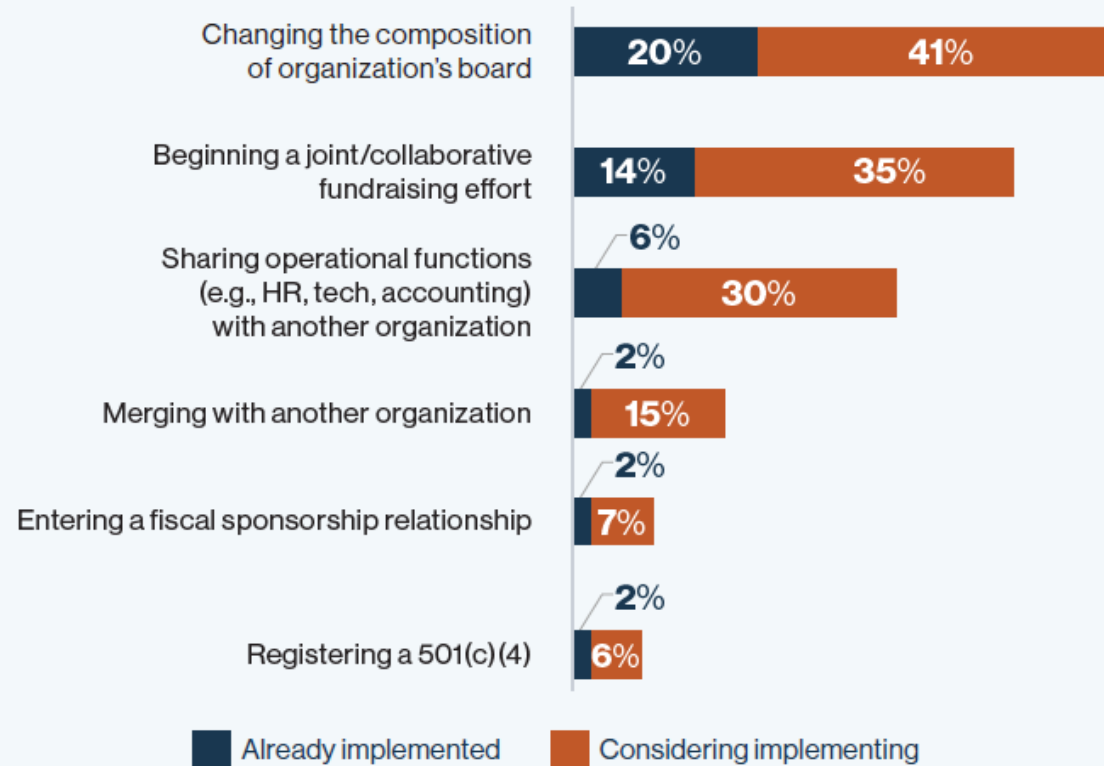


Note: Nine percent of CEOs reported that they are considering an action not otherwise listed here. Percentages add up to more than 100 because respondents could select all that apply.

Source: State of Nonprofits 2026: What Funders Need to Know, Center for Effective Philanthropy

Organizational Changes (US)

FIGURE 10. Percentage of Nonprofits Considering or Making Larger Operational or Organizational Changes (N=370-376)



Note: Percentages do not add up to 100 because respondents could also select "Not considering implementing" or "Not applicable/don't know."

Source: State of Nonprofits 2026: What Funders Need to Know, Center for Effective Philanthropy

Number and Types of Nonprofits in CA

- There are 108,390 registered 501 (c)3 public charities as of 2023*.
- There were 27,317 nonprofits with paid staff in 2016. Not all voluntary organizations are small – for example Alcoholics Anonymous.
- There are 7,643 foundations (family and private, corporate, operating, community), distributing \$9.5 billion in grants, receiving \$8.8 billion in gifts and holding \$137.5 billion in assets.
- Human Services and Education nonprofits are the most numerous, while Hospitals and Universities dominate the revenue picture.

*does not include churches, houses of worship, and private foundations

Source: Causes Count: The Economic Power of California's Nonprofit Sector 2019/Causes Count 3.0

Employment (CA)

- One in every 12 jobs is in a nonprofit.
- More than 1.5 million people are employed by nonprofits, 9.1% of private employment.
- Nonprofits rank as 3rd largest employer by number of jobs among key CA industries (up from 4th in 2016)*.
- The nonprofit sector workforce is more diverse by gender and race compared to the workforce as a whole.
- Nonprofit Hospitals represent only 4% of employees, but account for 40% of wages. Human Services nonprofits account for 37% of employers, yet only 11% of wages.

*excludes private foundations

Source: Causes Count: The Economic Power of California's Nonprofit Sector 2019/Causes Count 3.0

Nonprofits Employ More Women & Higher Percentages of People of Color (CA)

Employment of Women –

63% compared to 45% in overall workforce

People of Color –

31% compared to 28% in overall workforce

Women in Staff Leadership –

73% compared to 29% across all industries

People of Color in Staff

Leadership – 29% compared to 12% across all industries

Women in Board Leadership –

56% compared to 23%

People of Color in Board

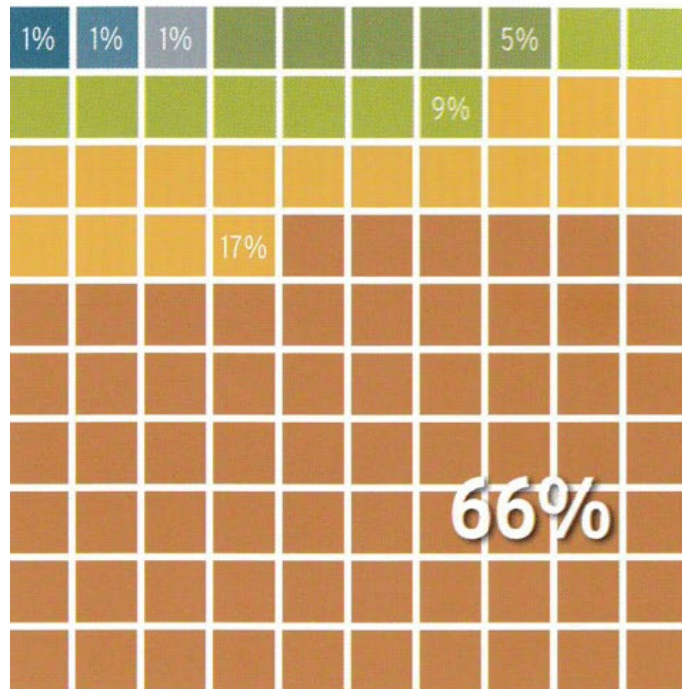
Leadership – 27% compared to 16% in Fortune 500

Source: Causes Count: The Economic Power of California's Nonprofit Sector 2019

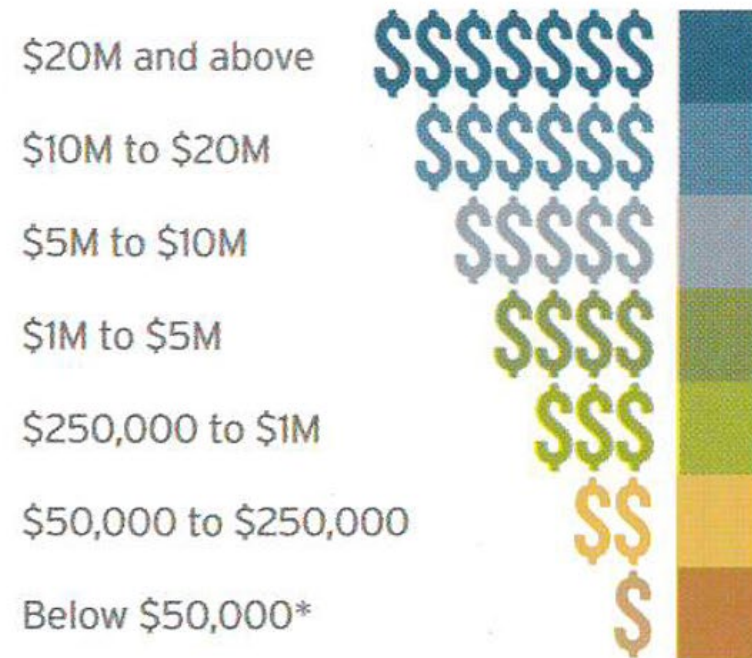
Size (CA)

Of the 92,567 nonprofits, two thirds are very small – annual expenses under \$50,000. Nonprofits with \$1 million or more are in the top 9% and those with \$10 million in the top 2%.

Percentage of California nonprofits mapped by their annual expense levels*



ANNUAL EXPENSE LEVELS



Source: Causes Count: The Economic Power of California's Nonprofit Sector 2019

Volunteers (CA)

- 4.8 million+ volunteers.
- Contribute the equivalent of 331,058 full time staff.
- Contribute about \$16.6 billion in unpaid labor each year.
- Volunteers spend time on:
 - 42% core program or services
 - 25% raising awareness
 - 23% supporting fundraising activities
 - 14% on administrative or technical tasks
 - 12% supporting social media/technology activities
 - 7% work on advocacy activities

The percentage of people volunteering in CA (25%) is lower than the national average (30%).

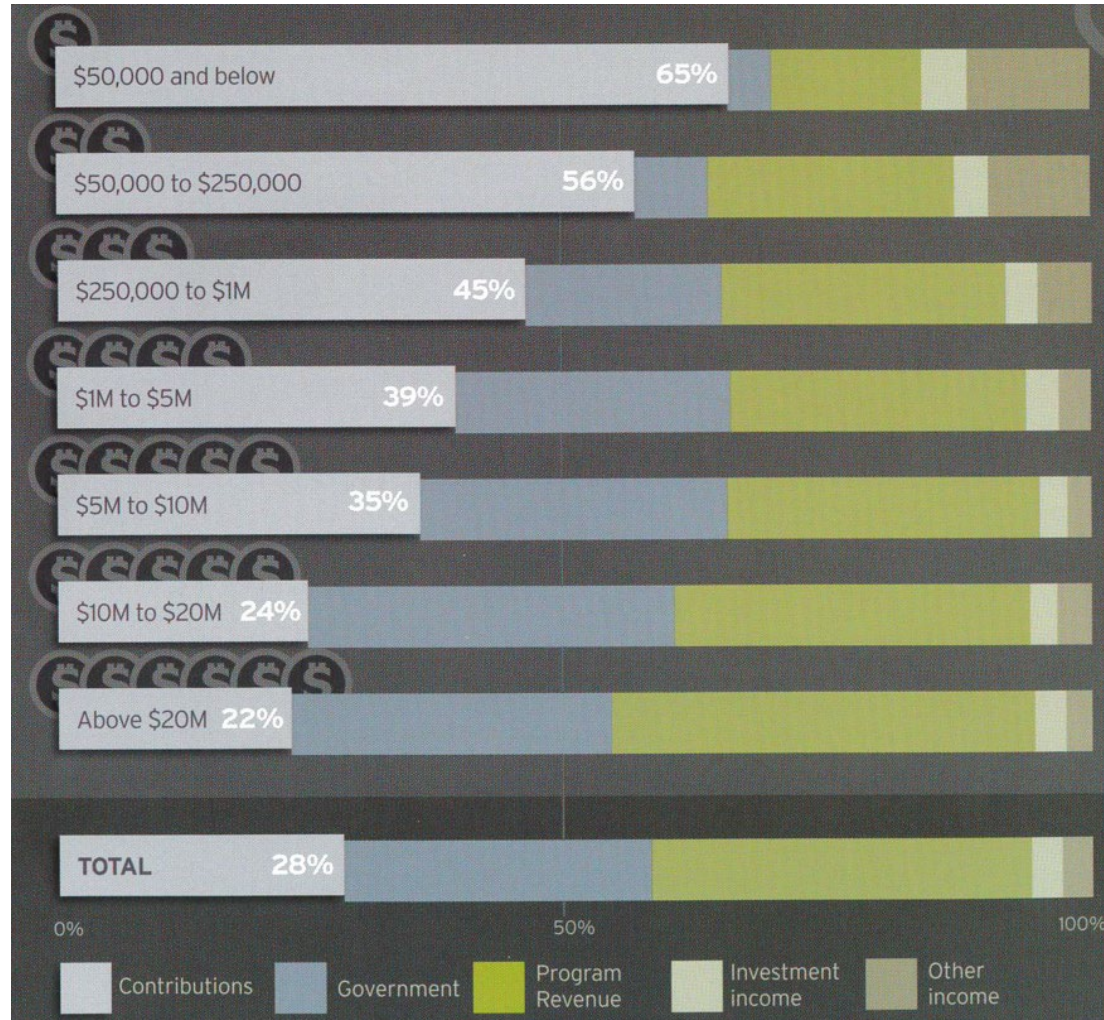
Source: Causes Count: The Economic Power of California's Nonprofit Sector 2019

Most Common Income Sources (North Bay)

Fees for service and program revenue (not including hospitals & universities)	37%
Government	30%
Individual donations, foundation and corporate grants	27%
Investment and asset sales	3%
Other income	3%

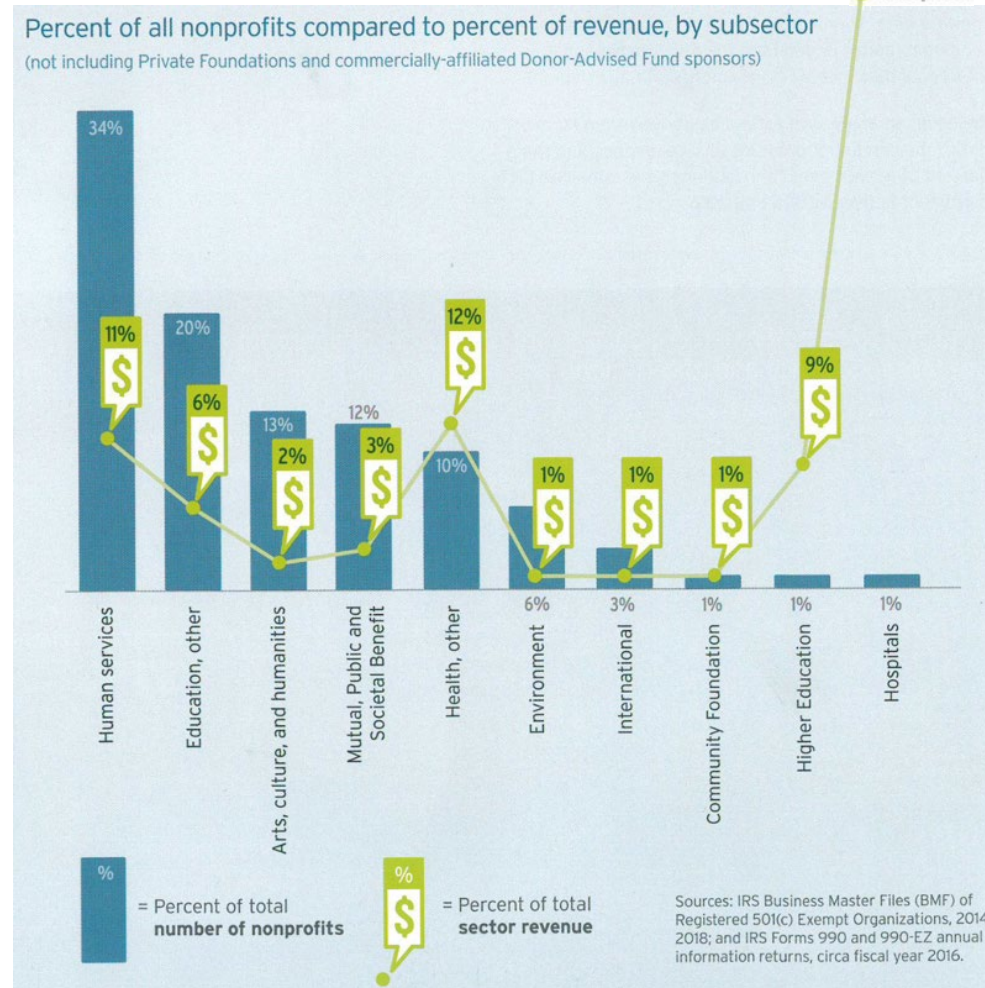
Source: Causes Count: The Economic Power of California's Nonprofit Sector 2019

Revenue Mix (CA)



Source: Causes Count: The Economic Power of California's Nonprofit Sector 2019

Subsectors (CA)



Source: Causes Count: The Economic Power of California's Nonprofit Sector 2019

What is Keeping You Up At Night (North Bay)?

- Personnel issues – leadership transitions
- US Government – Federal and State policies
- Philanthropy – drastically reduced funding from grant freezes, policy changes, lower foundation giving causing higher number of organizations planning for a budget deficit and staff burnout from shifting priorities of funders & donors
- Fundraising – declining donor retention due to prioritizing their own expenses
- Financial management – deficits, reserves, budgets
- Technology – AI, security (phishing/spam), software/hardware
- Business continuity and sustainability



CHANGE STARTS HERE.

THANK YOU!