



**CINCINNATI NONPROFIT
LANDSCAPE**

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Better Together Nonprofit Collaborative Series

Nonprofit Outlook



Thank you to our series sponsors:



AGENDA

01

WHERE WE ARE

02

WHERE WE'VE BEEN

03

WHERE WE ARE GOING

04

Q&A

SIZE OF THE NONPROFIT MARKET

10M

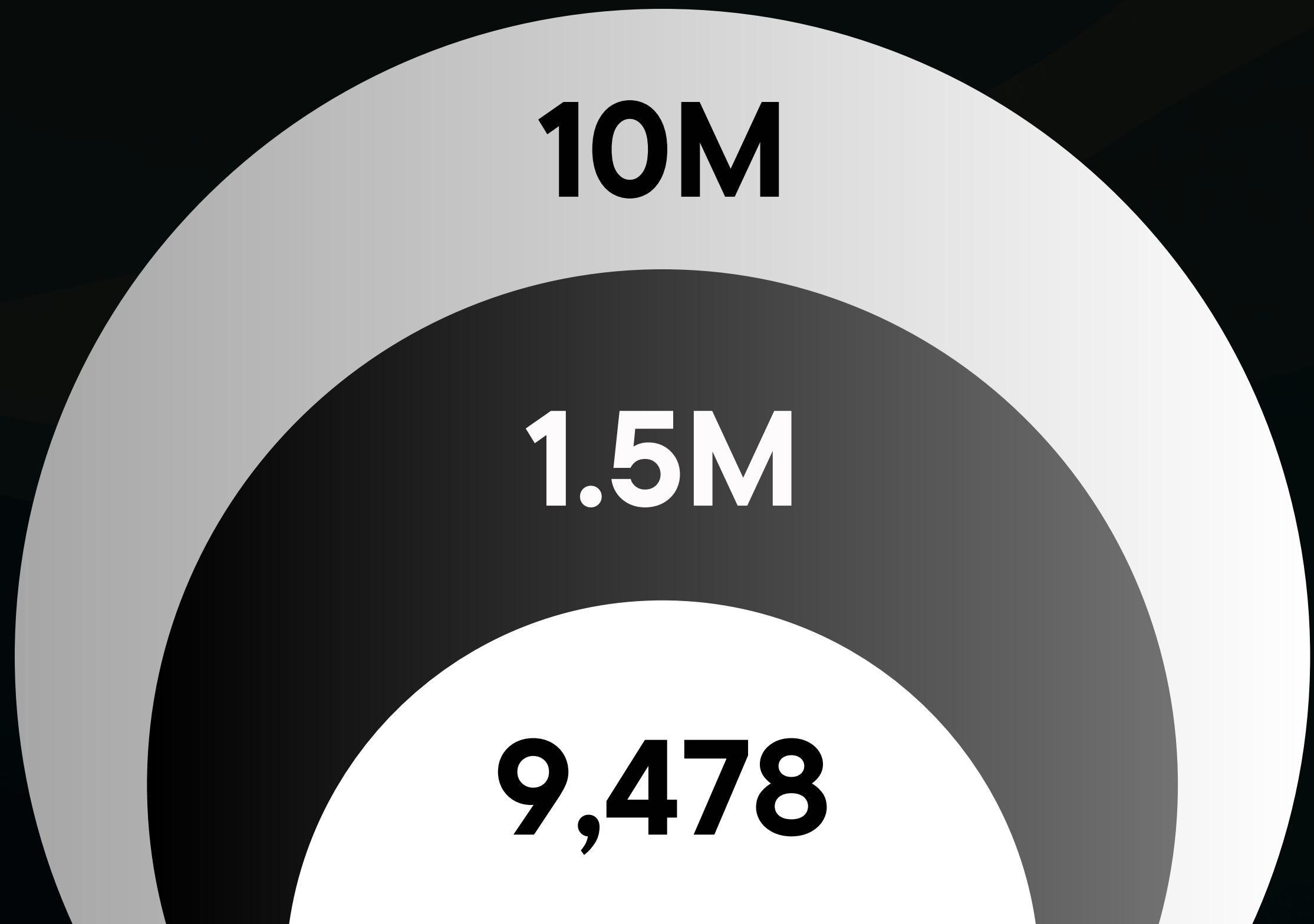
GLOBAL

1.5M

NATIONAL

9,478

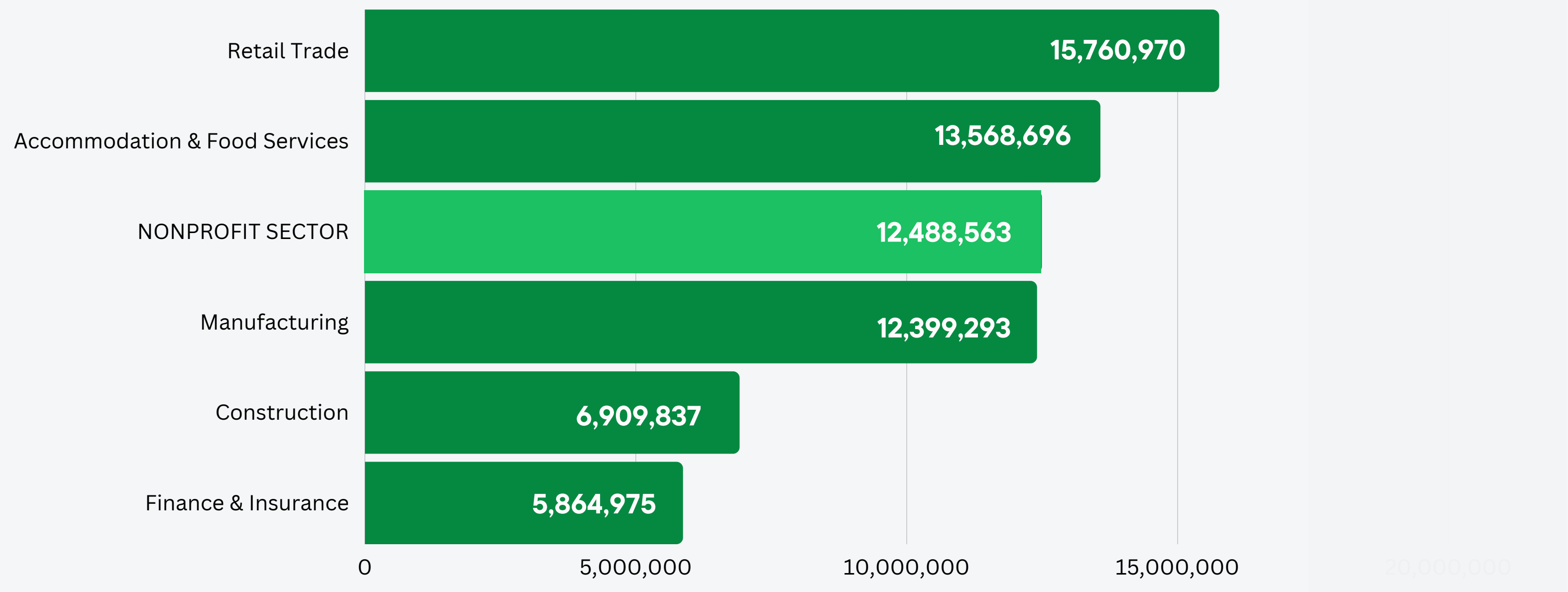
CINCINNATI



EMPLOYMENT

NATIONALLY

Employment in nonprofits vs. private employment in key industries, 2017



WAGES

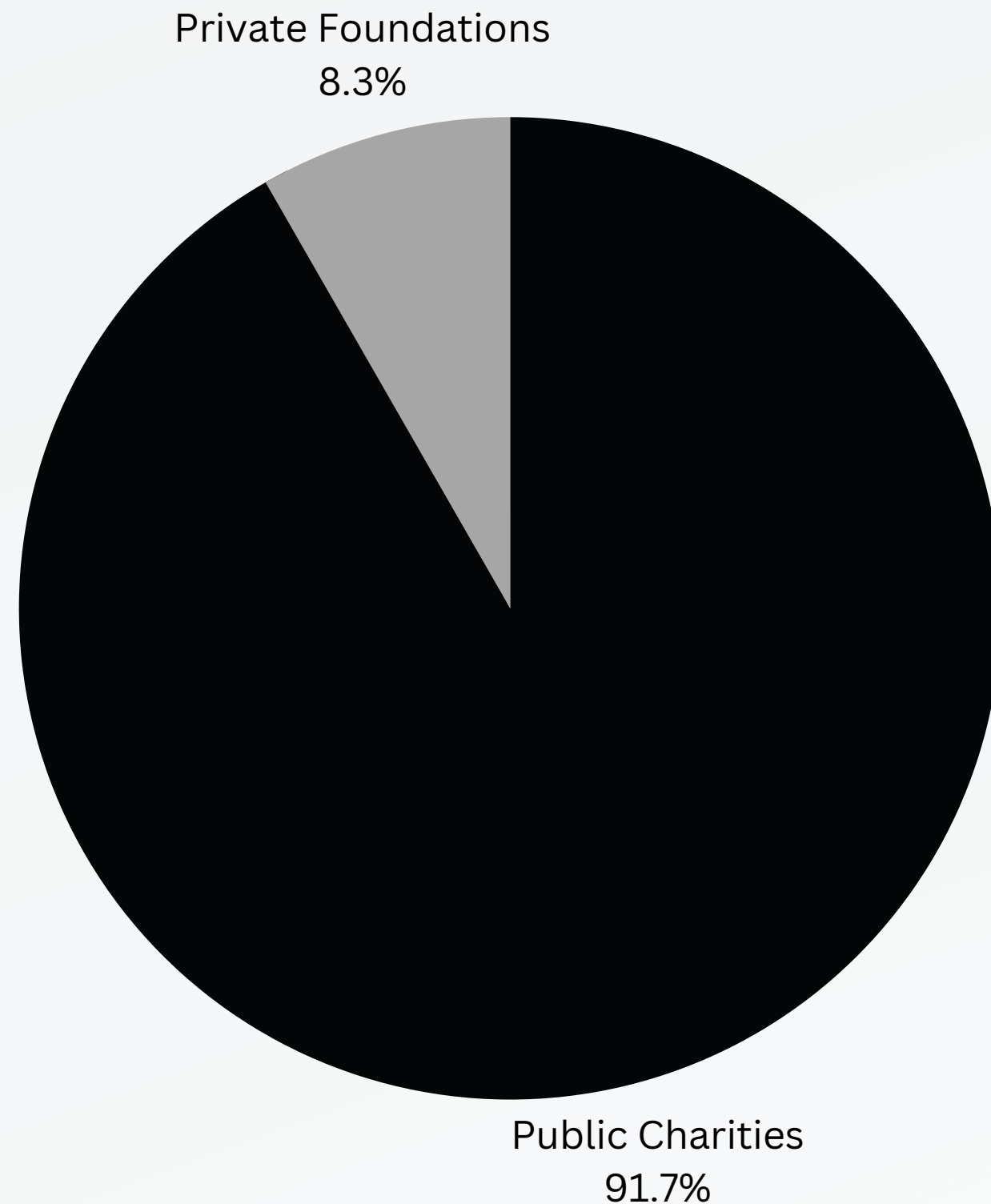
NATIONALLY

Size Class	Average Wage Per Employee
Fewer than 5 employees	\$37,360
5 - 9 employees	\$35,908
10 - 19 employees	\$35,105
20 - 49 employees	\$36,679
50 - 99 employees	\$38,778
100 - 249 employees	\$40,853
250 - 499 employees	\$42,965
500 - 999 employees	\$47,773
1,000+ employees	\$65,330
Nonprofit Average	\$53,667
All Industries National Average	\$55,390

The background features a black field with several sets of thin, bright green lines. In the top-left corner, a series of lines curve upwards and to the right, overlapping to form a mesh-like pattern. In the bottom-left corner, a series of lines curve downwards and to the right, creating a fan-like shape. On the right side of the image, a series of vertical, wavy lines flow downwards, resembling a stylized waterfall or a series of connected loops.

WHERE WE ARE

CINCINNATI MSA



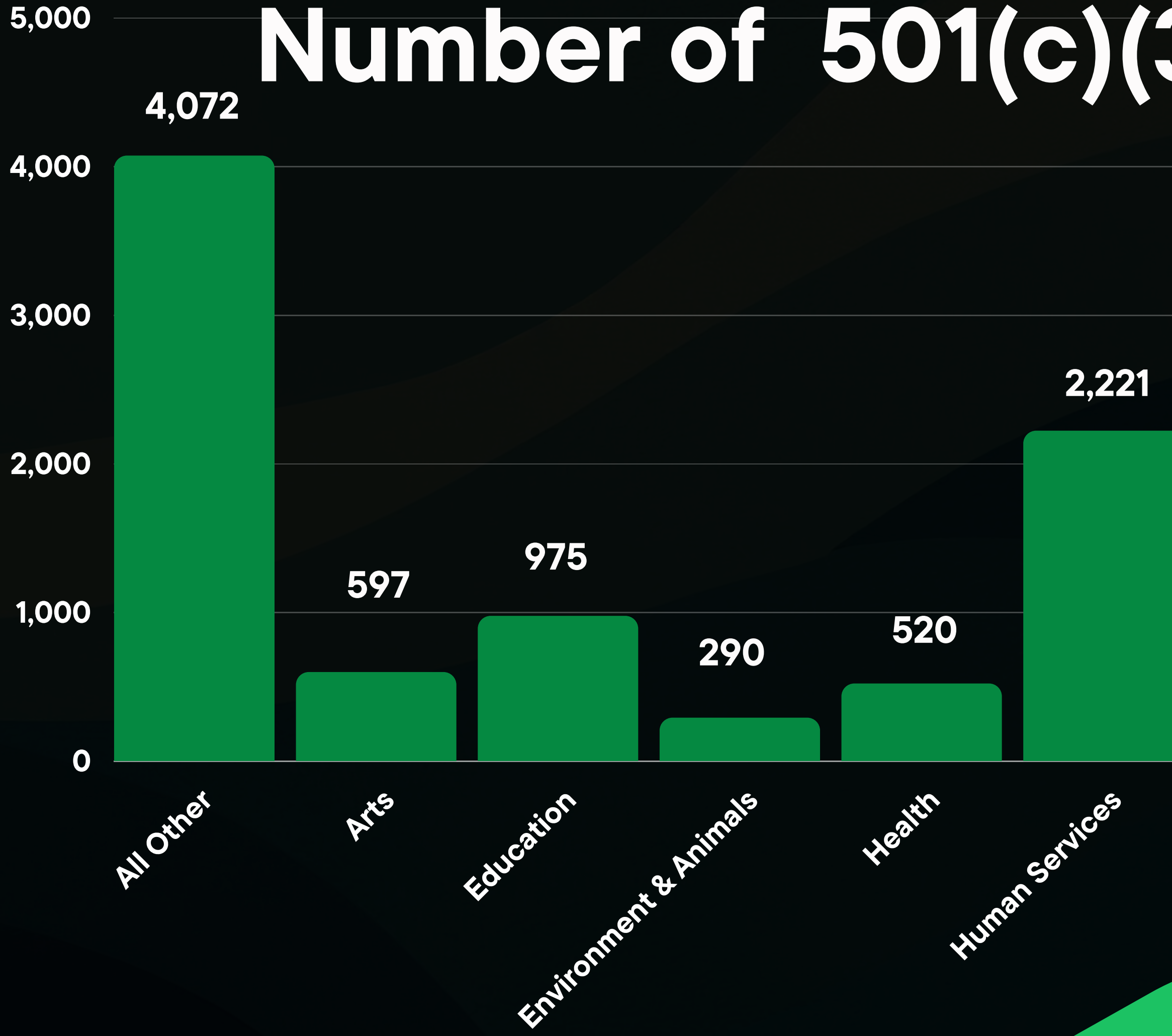
**There are nearly 9,500
Public Charities and
Private Foundations in
the Cincinnati MSA**

NONPROFIT SECTOR SIZE

by descending revenue

NTEE DESCRIPTION	REVENUE	PERCENT SHARE OF REVENUE
Health - General and Rehabilitative	\$ 17,467,149,463	75.24%
Human Services - Multipurpose and Other	\$ 1,087,578,514	4.68%
Educational Institutions and Related Activities	\$ 965,988,182	4.16%
N/A	\$ 833,406,549	3.59%
Philanthropy, Voluntarism, and Grantmaking Foundations	\$ 652,128,474	2.81%
Religion-Related, Spiritual Development	\$ 566,382,126	2.44%
Arts, Culture, and Humanities	\$ 352,544,333	1.52%
International, Foreign Affairs, and National Security	\$ 319,090,600	1.37%
Mental Health, Crisis Intervention	\$ 243,454,239	1.05%
Other	\$ 828,138,313	3.57%

Number of 501(c)(3)s



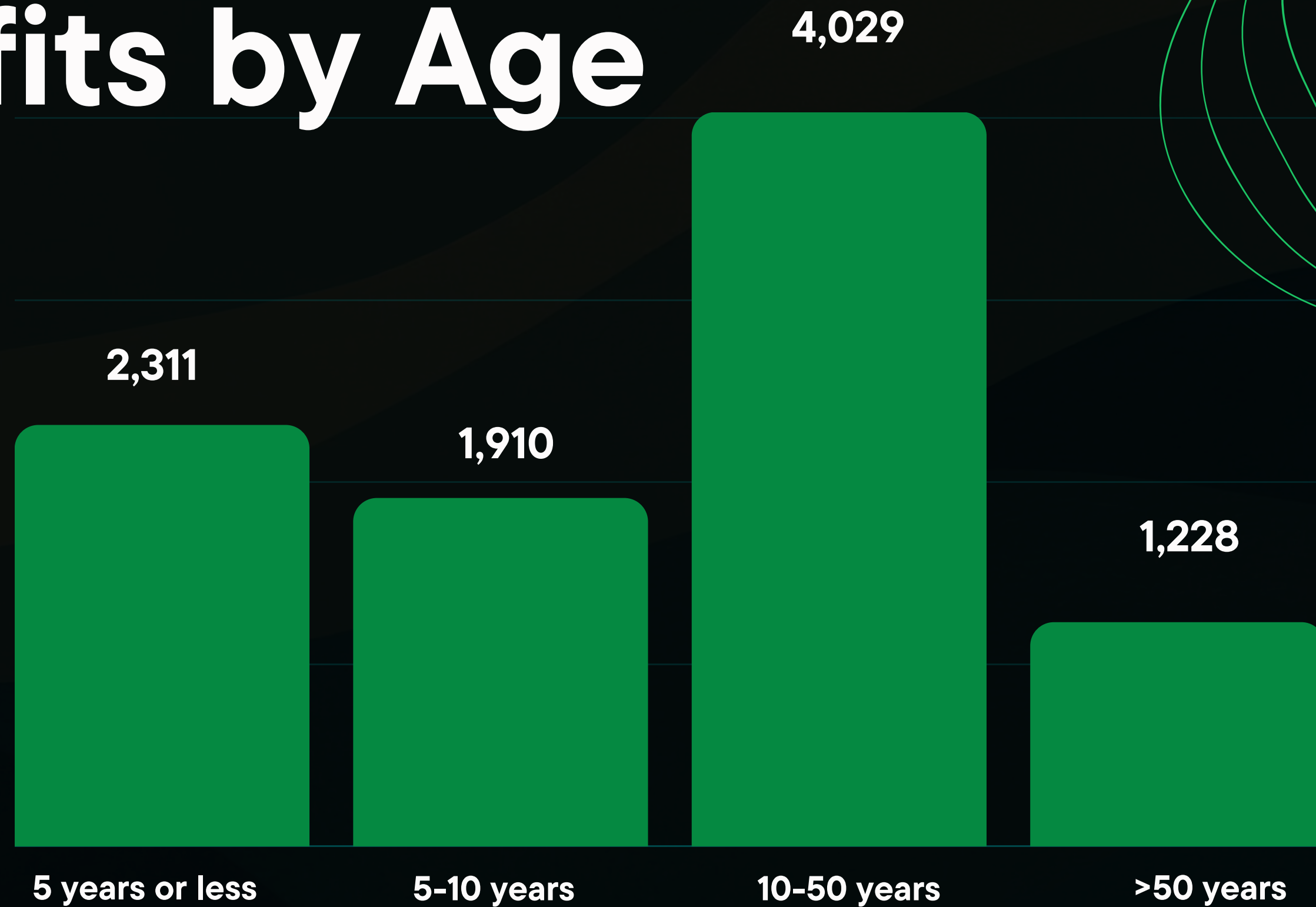
Human Services Represents the Largest Amount

LARGEST PUBLIC CHARITIES

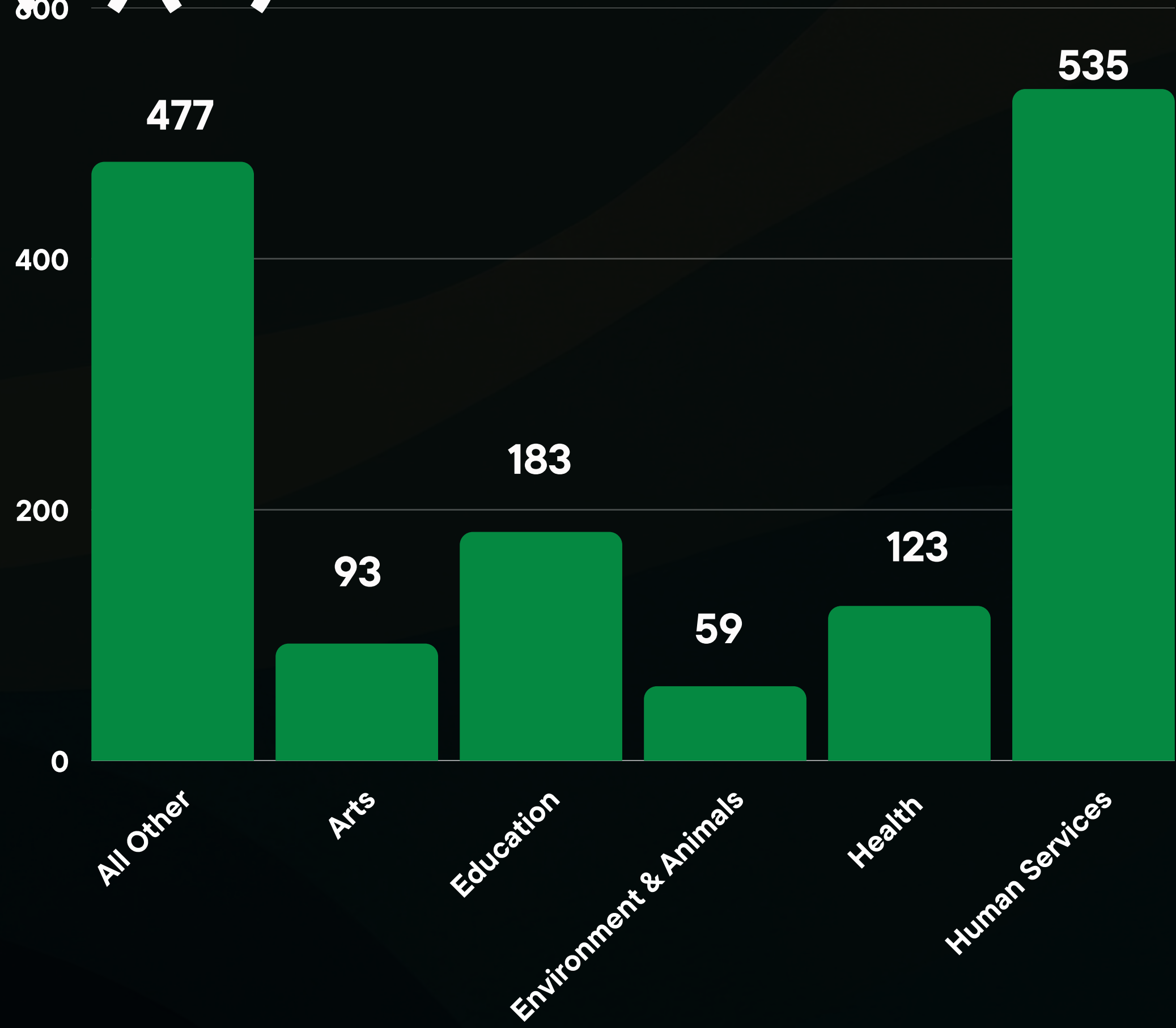
Excluding Health and Education

NAME	REVENUE_AMT
MATTHEW 25 MINISTRIES INC	\$ 319,324,169.00
GREATER CINCINNATI FOUNDATION	\$ 157,180,384.00
UNIVERSITY OF CINCINNATI FOUNDATION	\$ 116,975,364.00
JOHNSON CHARITABLE GIFT FUND	\$ 106,272,377.00
COUNCIL ON AGING OF SOUTHWESTERN OHIO	\$ 94,817,577.00
FREESTORE-FOODBANK INC	\$ 84,720,917.00
OTTERBEIN HOMES	\$ 73,479,652.00
TALBERT HOUSE	\$ 71,372,789.00
CINCINNATI-HAMILTON COUNTY COMMUNITY ACTION AGENCY	\$ 51,573,356.00
ZOOLOGICAL SOCIETY OF CINCINNATI	\$ 51,240,308.00

Nonprofits by Age

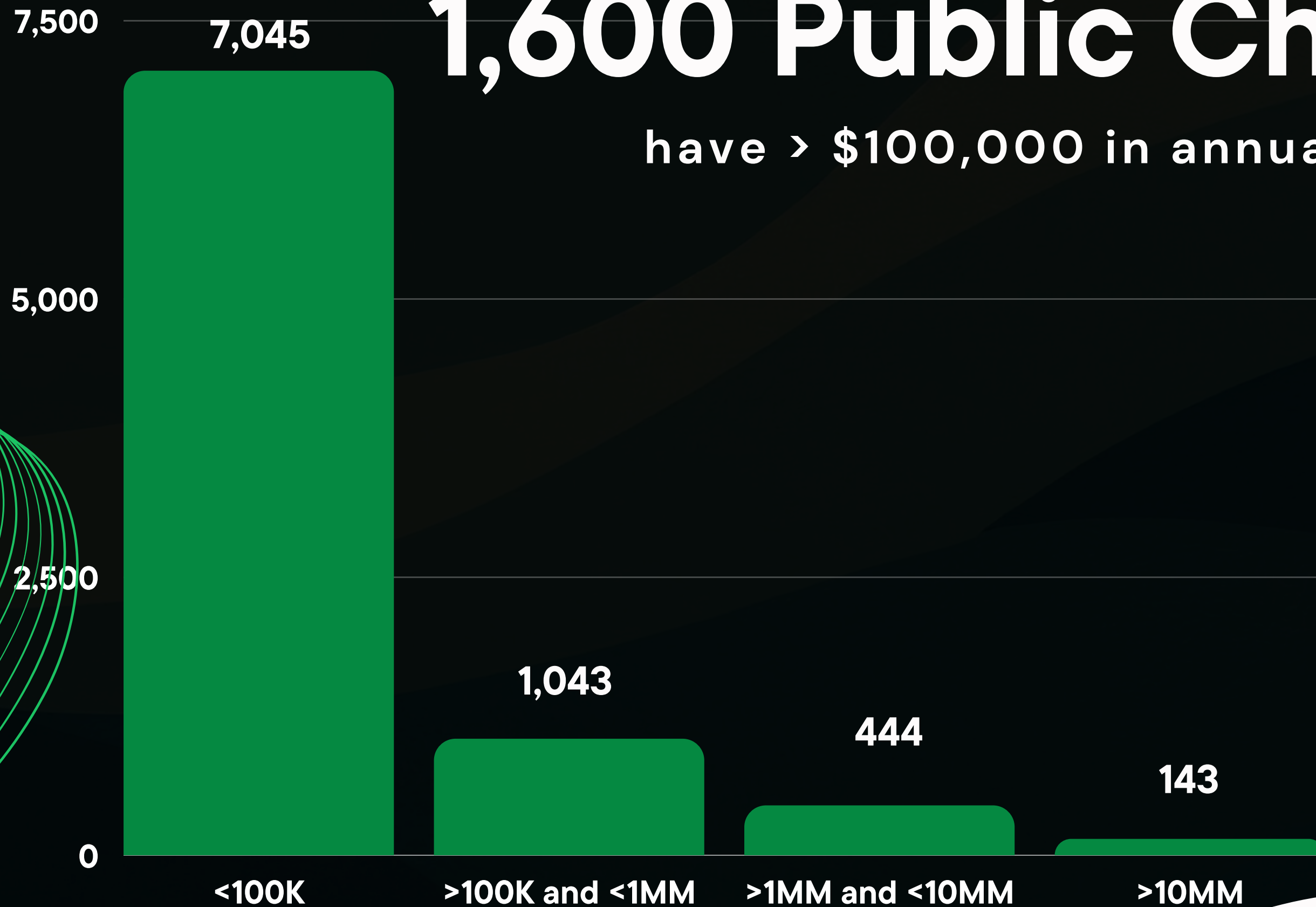


1,500 501(c)(3)s were started since 2020



1,600 Public Charities

have > \$100,000 in annual revenue



The background features abstract green line art. In the top-left corner, there is a complex, overlapping pattern of lines that resembles a stylized leaf or a fan. In the bottom-left corner, there are several concentric, curved lines that form a shape similar to a rainbow or a wide smile. On the right side, there are vertical, wavy lines that create a sense of movement and depth. The overall aesthetic is clean, modern, and organic.

WHERE WE'VE BEEN

EMPLOYEE CHANGE

2019 to 2021

Employees in 2019

32,576

28,392

Employees in 2021

CASH CHANGE

2019 to 2021

Total Cash in 2019

\$320 Million

\$415 Million

Total Cash in 2021

30% INCREASE

REVENUE CHANGE

2019 to 2021

Total Revenue in 2019

\$2.11 Billion

\$2.46 Billion

Total Revenue in 2021

16.8% INCREASE

FUNDRAISING EXPENSE

2019 to 2021

*Avg Fundraising
Expense in 2019*

\$78,161.23

\$43,636.69

*Avg Fundraising
Expense in 2021*

44.05% DECREASE

FUNDRAISING INCOME

2019 to 2021

*Avg Fundraising
Income in 2019*

\$34,715.97

\$31,389.76

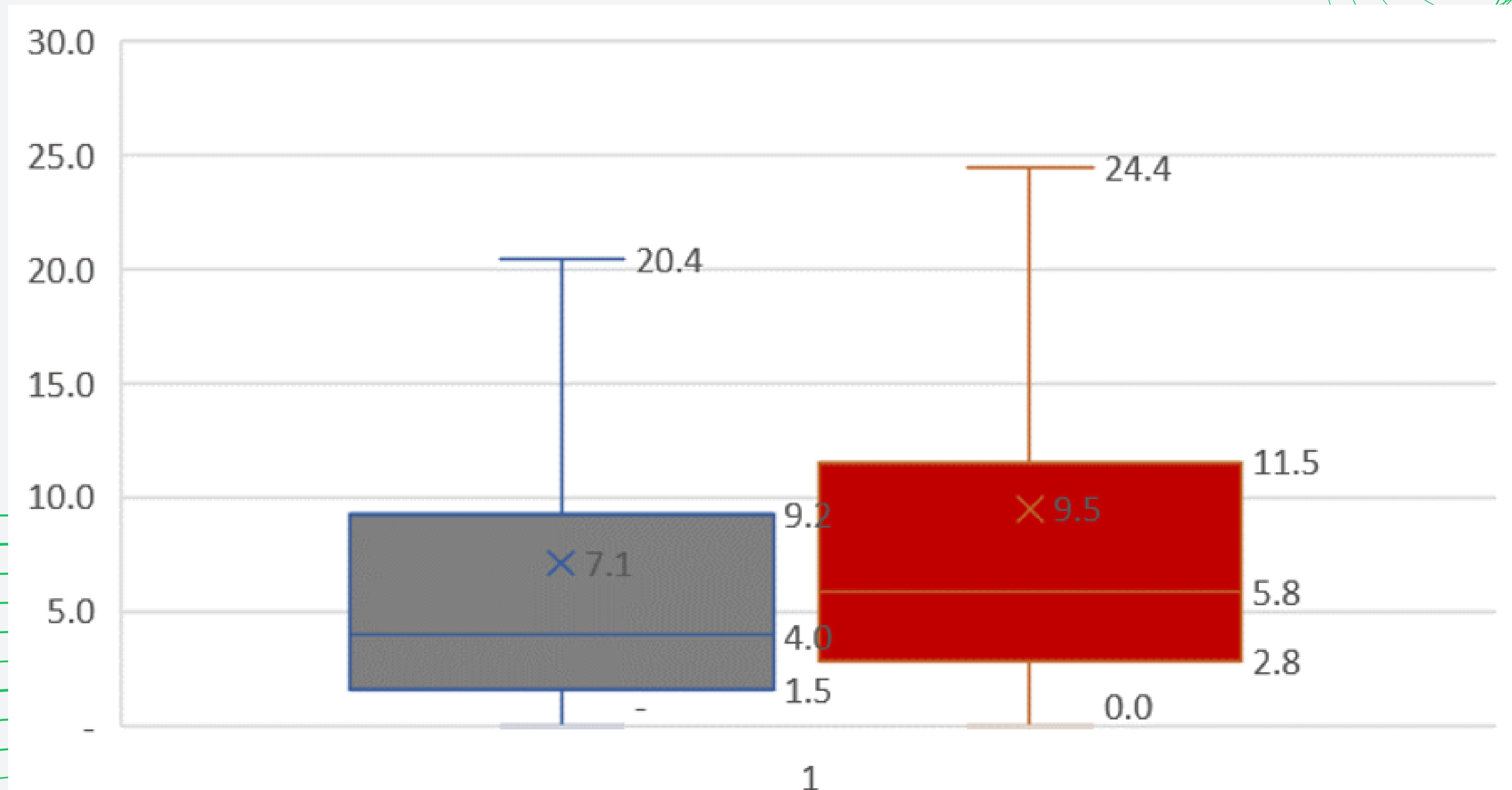
*Avg Fundraising
Income in 2021*

9% DECREASE

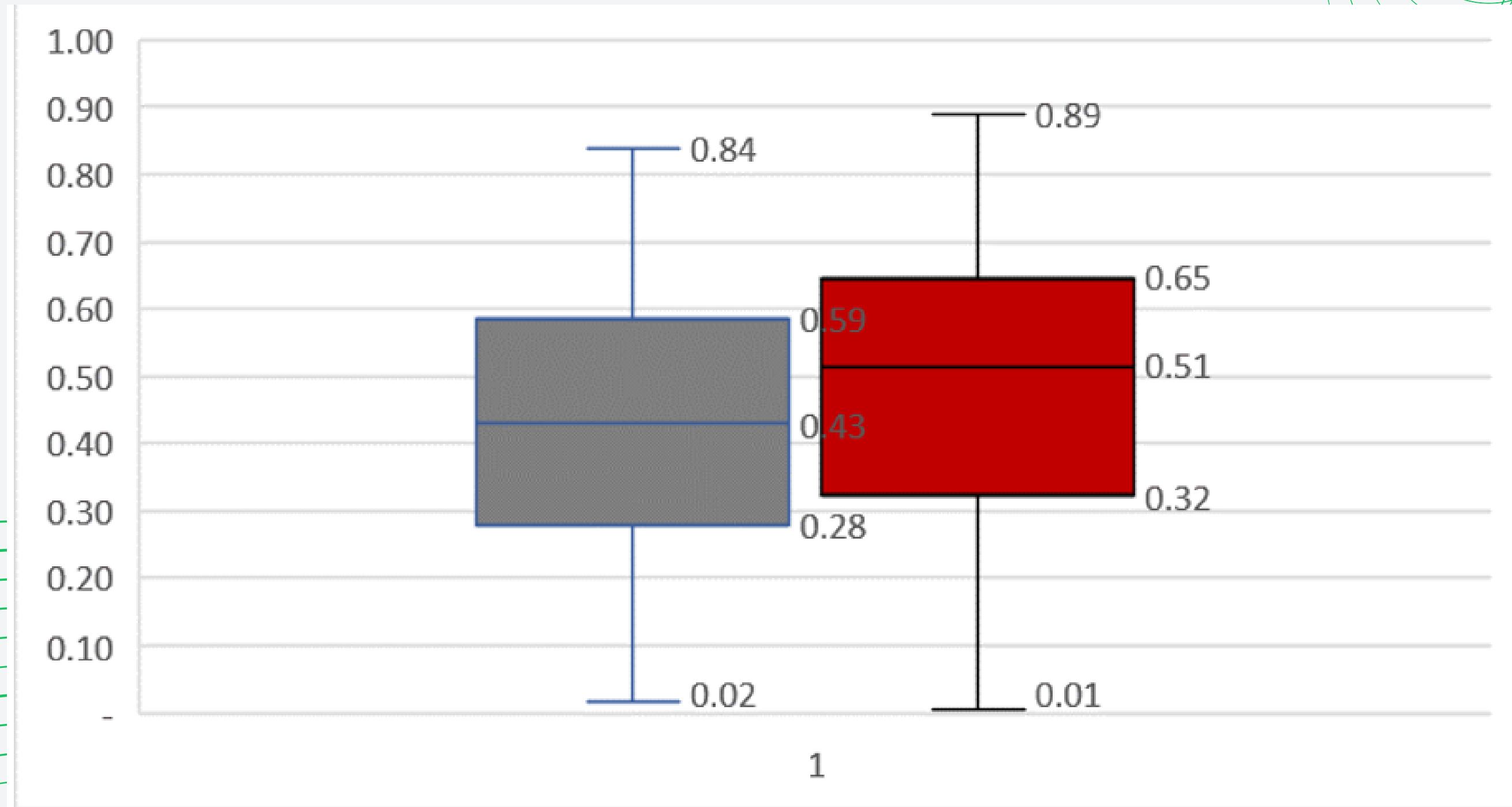
Organizations

INCREASED CASH

on hand by two months



Compensation now **REPRESENTS >50%** of expenditures



WHERE WE ARE GOING

Labor Market



Giving



Artificial Intelligence



The background features a black field with vibrant green, wavy, and overlapping lines that create a sense of motion and depth. The lines are thin and vary in frequency, with some areas being more densely packed than others.

GIVING

NONPROFIT GIVING



DONORS

-7.1%

(+/- 2.0%)

YOY change



DOLLARS

4.7%

(+/- 2.0%)

YOY change



RETENTION

-3.1%

(+/- 1.0%)

YOY change

Personal Saving Rate:

the percentage of disposable personal income that is saved by household

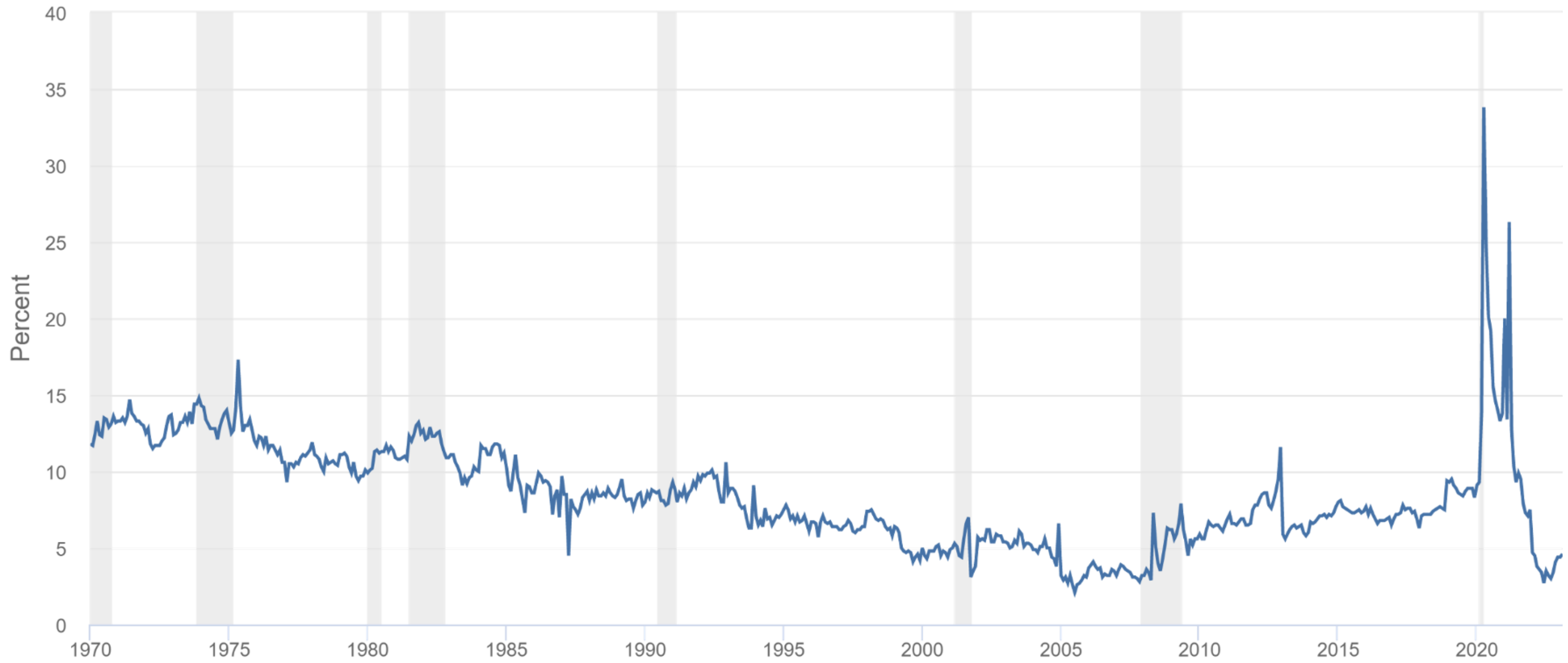
Increase in

Personal Savings:

household saving more income + spending less which reduces aggregate demand and slows economic growth

Personal Saving Rate

MACRO SNAPSHOT
by the St. Louis Fed



Seasonally adjusted annual rate. Recessions are shaded. Source: Bureau of Economic Analysis. Powered by FRED.

Housing Prices:

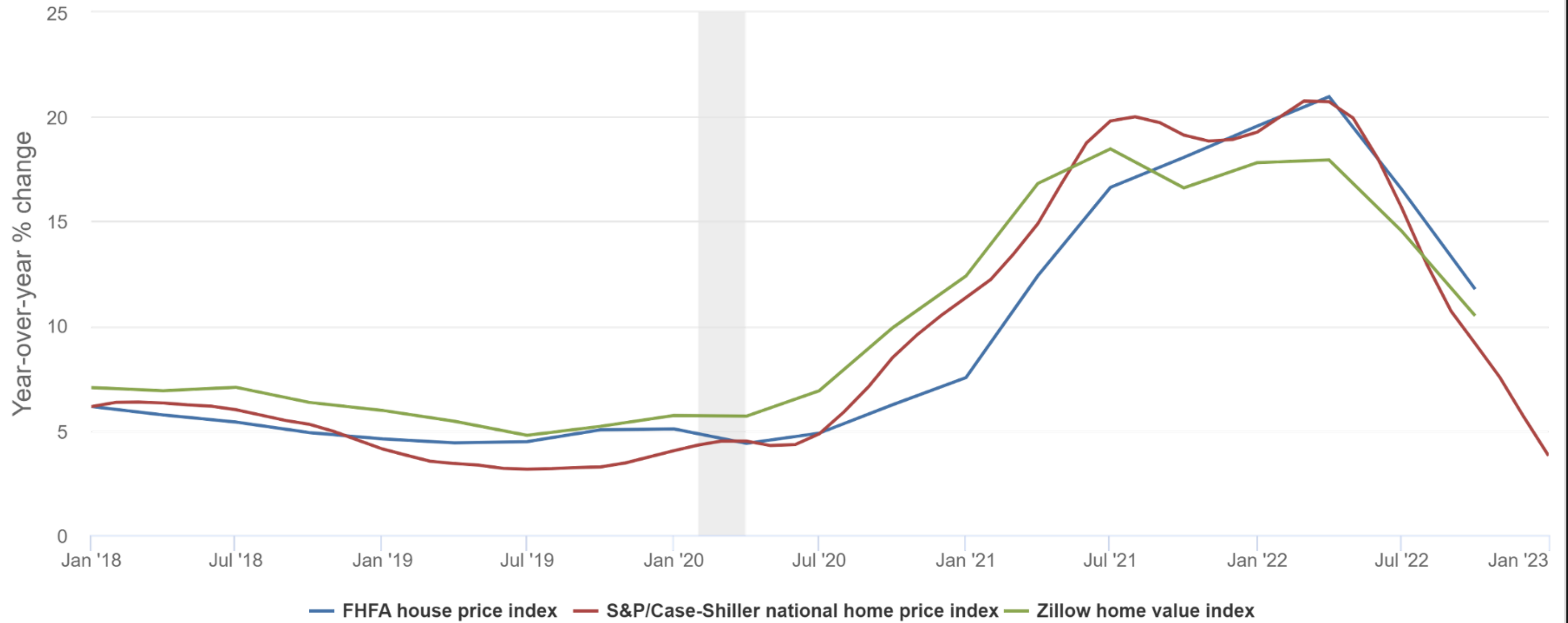
important indicator of the health of the economy

Rising House Prices:

the economy is having strong growth; leading to high consumer confidence and which can lead to a boost in spending

Housing Prices

MACRO SNAPSHOT
by the St. Louis Fed



The S&P index is seasonally adjusted. Recessions are shaded. Sources: Federal Housing Finance Agency; S&P Dow Jones Indices, LLC; and Board of Governors of the Federal Reserve System. Powered by FRED.

Mortgage Rates:

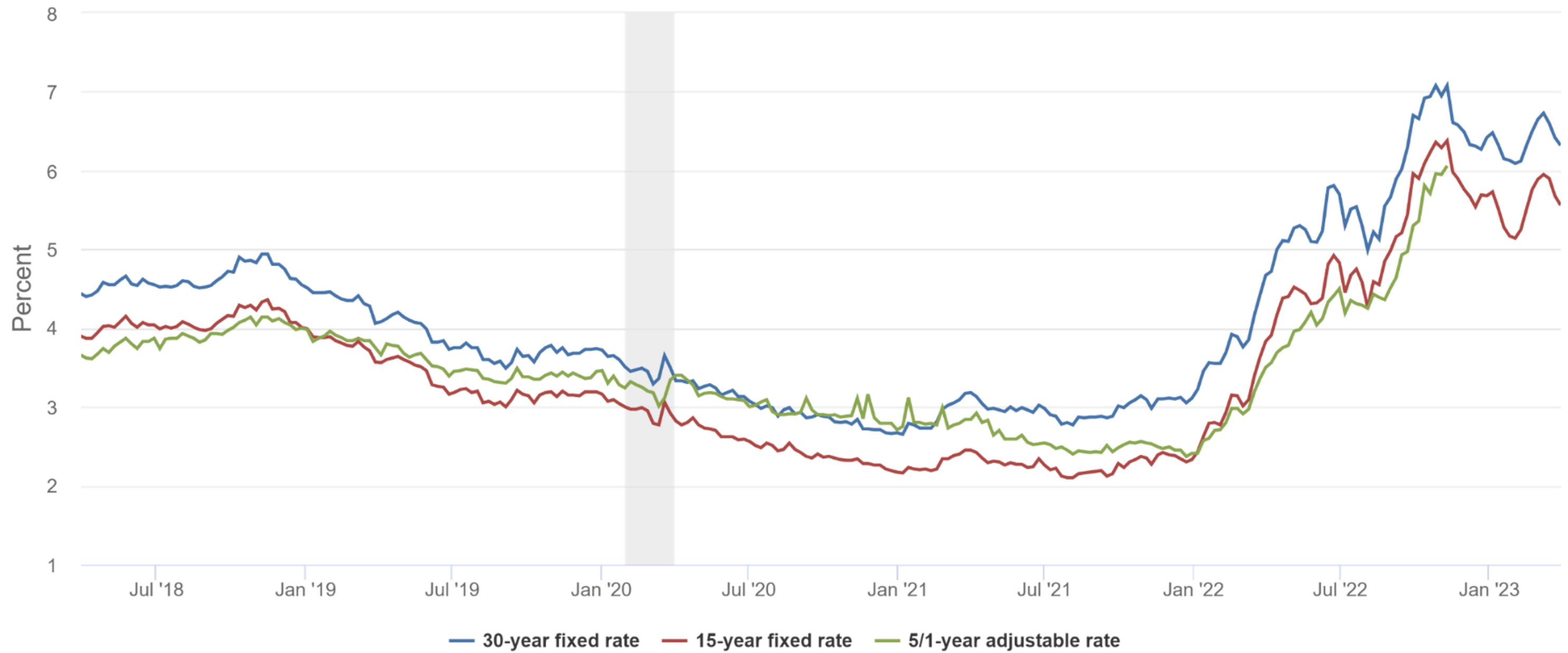
the trend in interest rates charged by lenders on mortgage loans over time

High Mortgage Rate:

it can make it more difficult for people to afford homes, leading to decreased demand for homes and weaker housing market

Mortgage Rates

MACRO SNAPSHOT
by the St. Louis Fed



Recessions are shaded. Source: Freddie Mac. Powered by FRED.

Stock Market Indices:

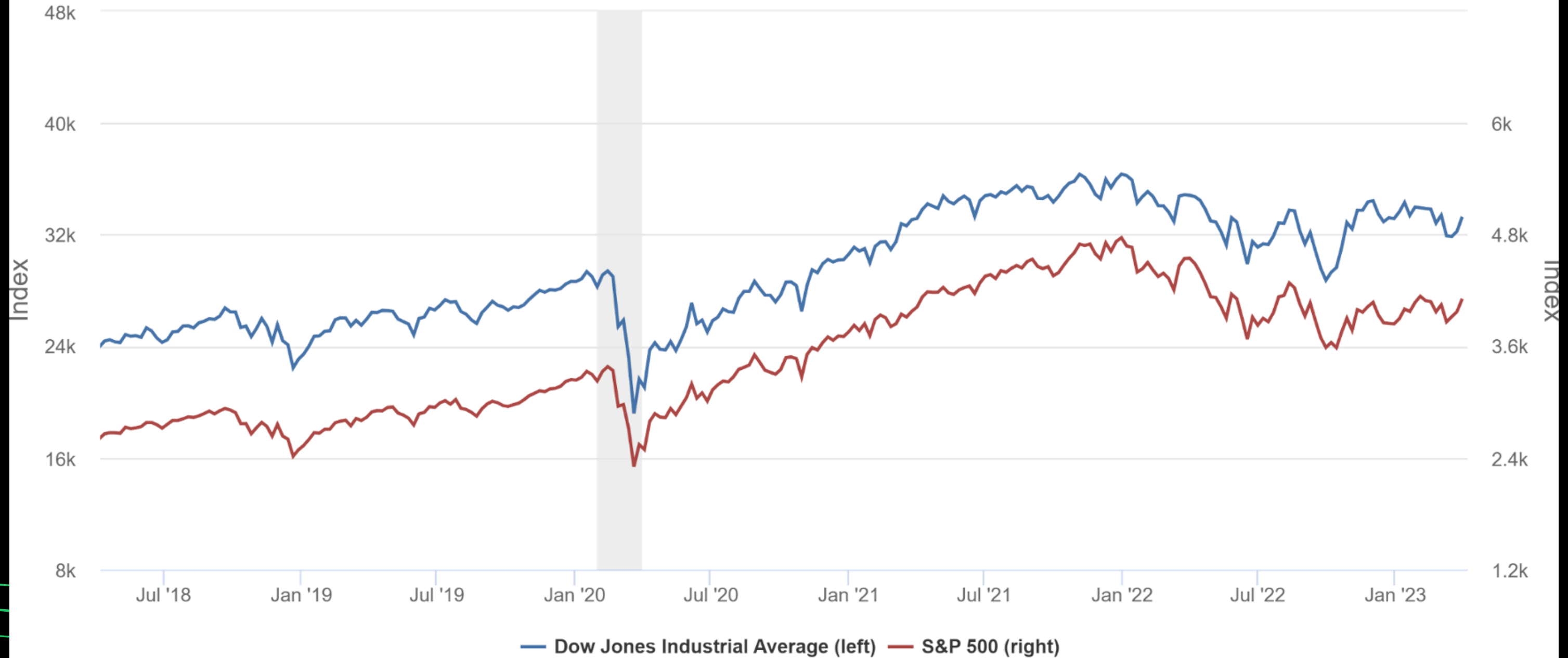
shows the trends in the performance of the stock market over time

changes in the stock market indices:

can have significant implications for investors, businesses, and the broader economy

Stock Market Indices

MACRO SNAPSHOT
by the St. Louis Fed



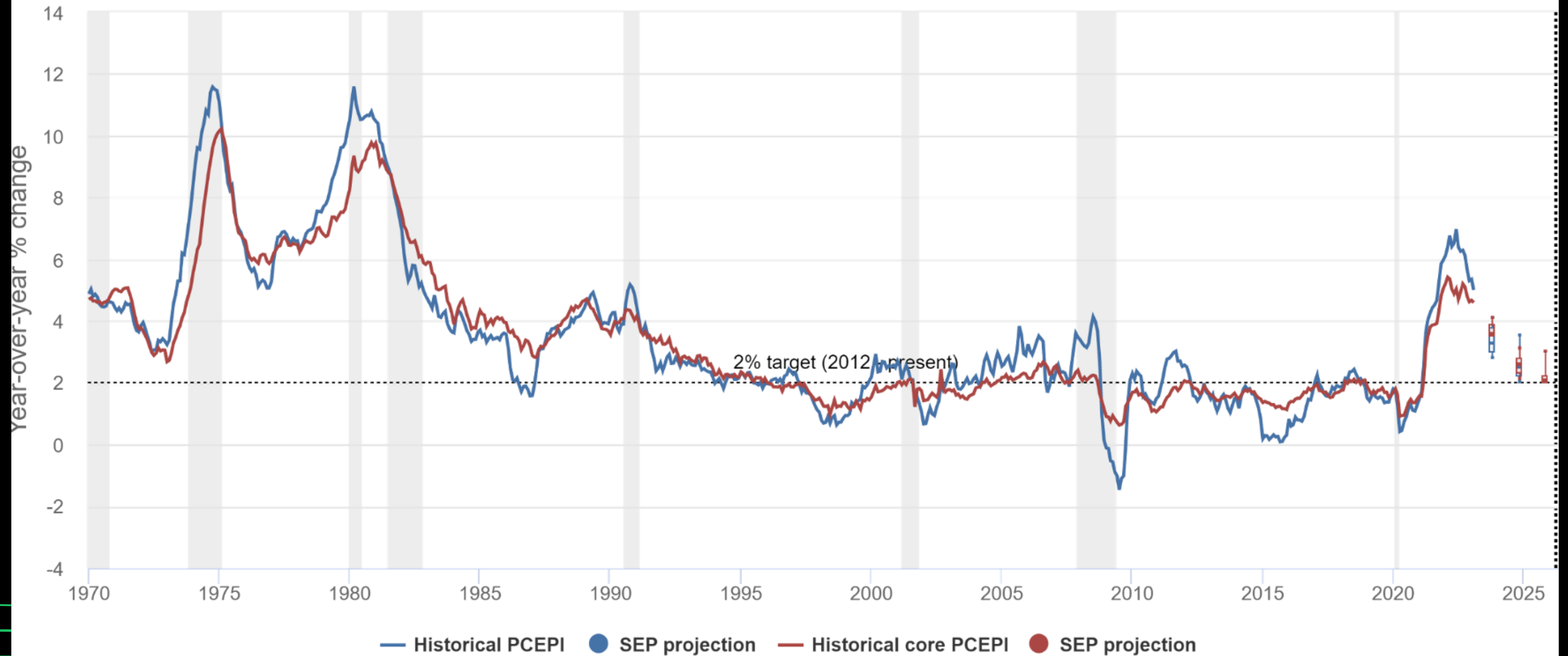
Recessions are shaded. Source: S&P Dow Jones Indices, LLC. Powered by FRED.

Personal Consumption Expenditures Inflation: shows the trend in the prices of goods purchased by households over time.

changes in the PCE Inflation graph: is an important indicator of the overall level of inflation in the economy

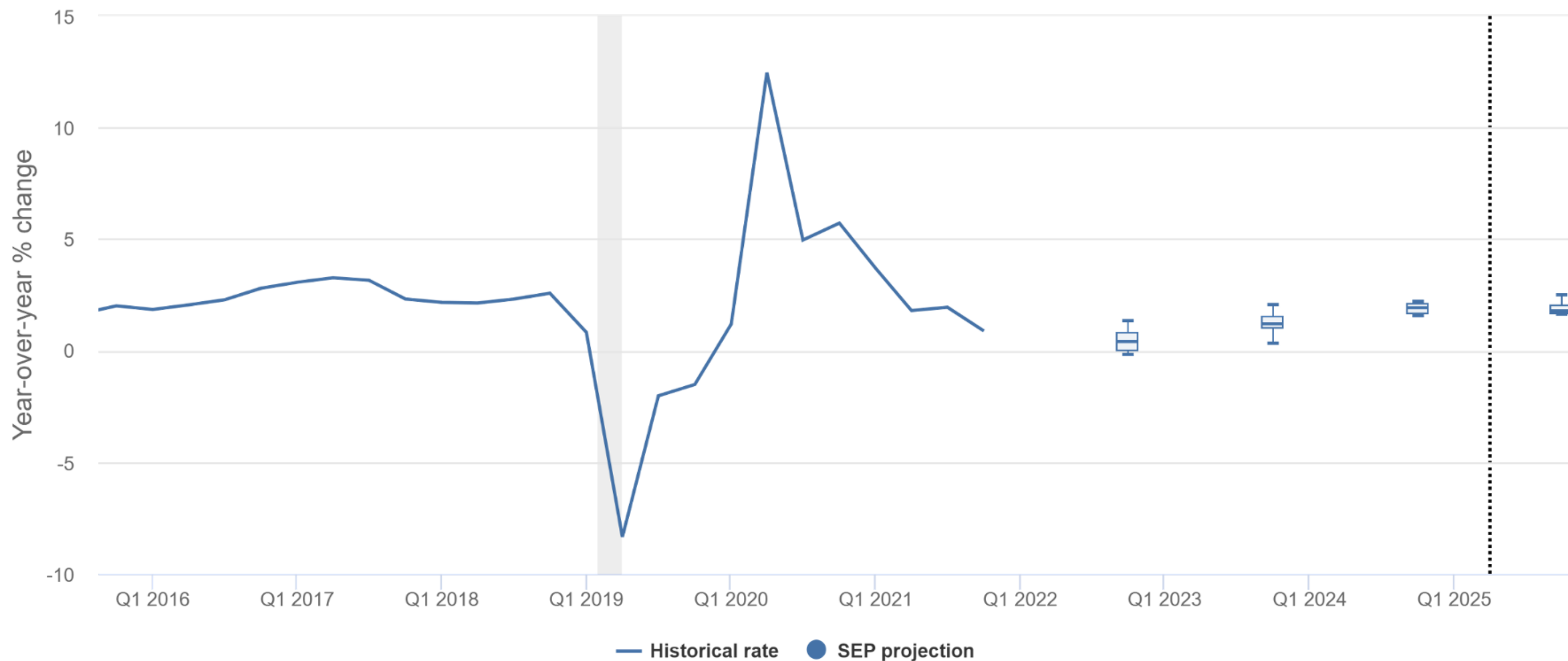
Personal Consumption Expenditures (PCE) Inflation

MACRO SNAPSHOT
by the St. Louis Fed



Seasonally adjusted. Projections are from the latest SEP. Recessions are shaded. Source: Bureau of Economic Analysis. Powered by FRED.


Real Gross Domestic Product (GDP) Growth



Seasonally adjusted annual rate. Projections are from the latest SEP. Recessions are shaded. Source: Bureau of Economic Analysis. Powered by FRED.

Real Gross Domestic Product (GDP) Growth:

shows the percentage change in the inflation-adjusted value of all goods and services produced in the economy

The background features abstract, flowing green line art on a black field. On the left, a series of lines converge and fan out, resembling a stylized leaf or a dynamic wave. On the right, multiple parallel, wavy lines flow vertically, creating a sense of movement and depth. The overall aesthetic is modern and minimalist.

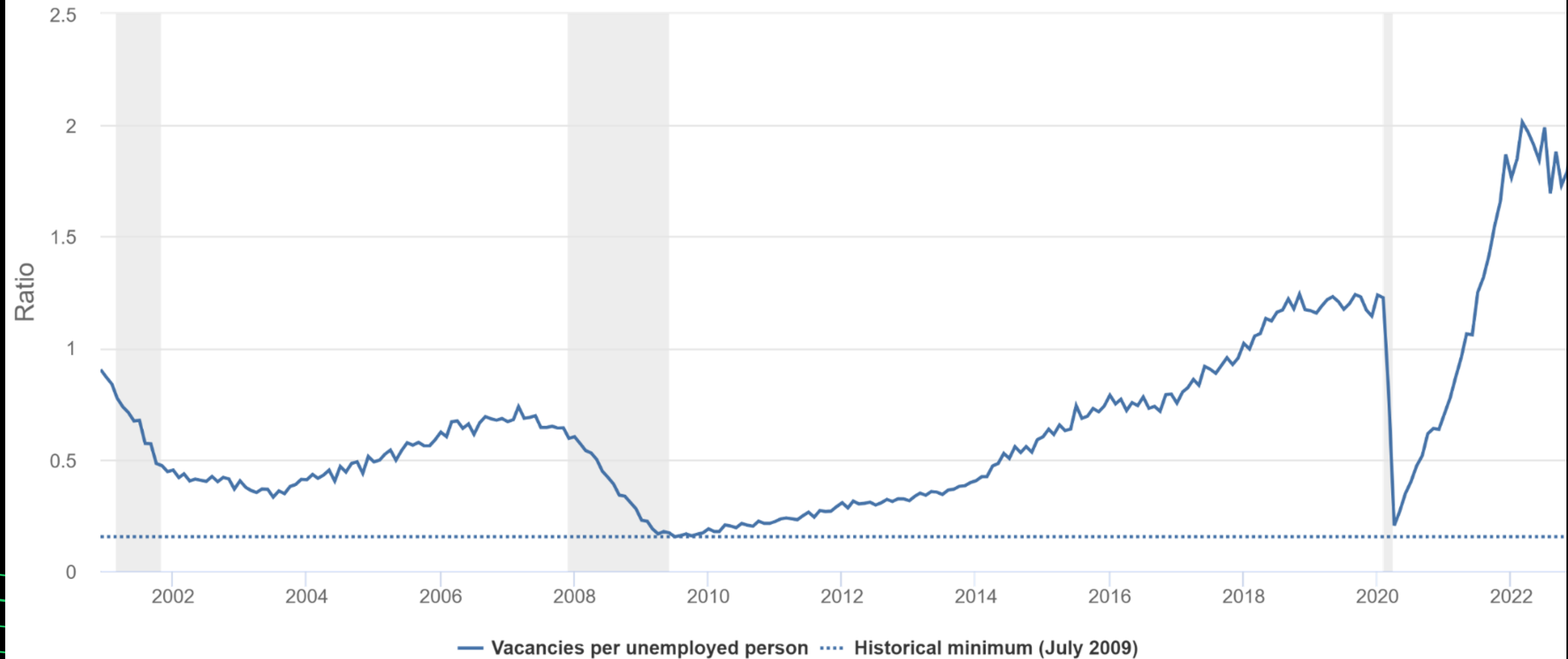
LABOR TRENDS

Vacancies per Unemployed Person: shows the ratio of job openings to the number of unemployed individuals in a given period

High Ratio: of vacancies to unemployed indicates a labor market with a shortage of available workers which may lead to upward pressure on wages and can signal a strong economy

Vacancies per Unemployed Person

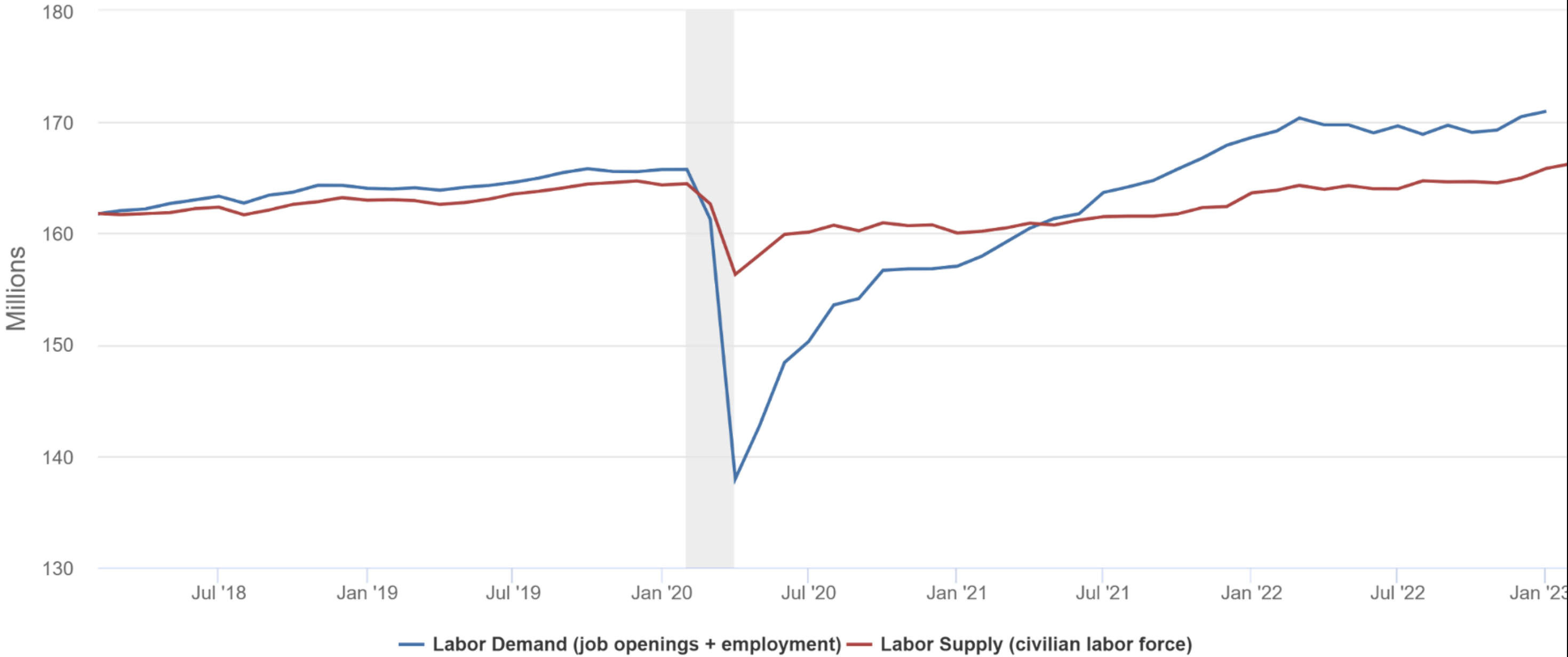
MACRO SNAPSHOT
by the St. Louis Fed



Seasonally adjusted. Recessions are shaded. Source: Bureau of Labor Statistics. Powered by FRED.

Labor Demand and Labor Supply

MACRO SNAPSHOT
by the St. Louis Fed



Seasonally adjusted. Recessions are shaded. Source: Bureau of Labor Statistics. Powered by FRED.

Labor Demand and Labor Supply:

shows how the labor demand and labor supply curves have shifted over time + how equilibrium wage rate and employment level have changed as a result

The background features abstract green line art. On the left, a series of lines converge and fan out, resembling a stylized leaf or a network structure. On the right, several parallel, wavy lines flow vertically, creating a sense of movement and depth. The overall aesthetic is clean, modern, and tech-oriented.

ARTIFICIAL INTELLIGENCE

LABOR MARKET IMPACT OF AI

80% of Workforce will be Impacted

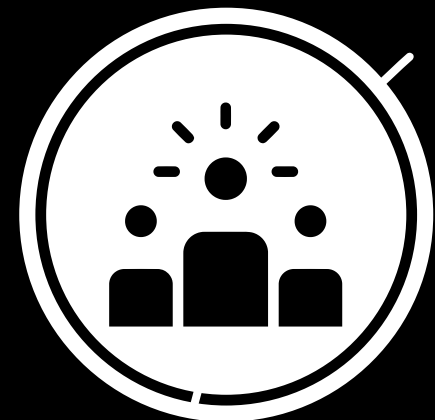
Around 80% of the U.S. workforce could have at least 10% of their work tasks affected, while approximately 19% of workers may see at least 50% of their tasks impacted.

High Income Jobs Impacted Most

Workers facing higher barriers to entry in their jobs tend to experience more exposure to LLMs

Critical Thinking vs Content Generation

Roles heavily reliant on science and critical thinking skills are impacted least, while programming and writing skills are positively associated with LLM exposure.



THANK YOU ! QUESTIONS?

for more questions, you can
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