

A light orange map of Pierce County, Washington, is centered on the page. The title text is overlaid on the map.

Nonprofit Landscape: Pierce County, WA

Original Research - June 2022

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Executive Summary

We used X4Impact Research Technology to process over 850 million data points to create a Nonprofit Landscape in Pierce County, WA.

This report aims to inform funding, partnerships, go to market, and engagement strategies with the answers to these fundamental questions:

1. **How can your outreach strategy use data to understand Washington State-based nonprofit organizations?**
2. **What are the Service Deserts in Pierce County where Human Services Organizations seem to be underfunded?**
3. **Where are the Pierce County opportunity zones when defining an impact plan?**

National and State Level Data (Pages 3-10)

We set the stage with an overview of the US nonprofit sector with \$3.1 trillion in annual income. Then we look at the state of Washington and finally offer details on Pierce County.

Throughout the report, we provide a specific focus on Human Services organizations as a proxy for local resources to serve local individual needs. While in the US, Human Services

We include an infographic to help visualize the Human Services Sector in the context of the overall landscape where Religious organizations, Education, and Healthcare command most of the revenue at the national, state, and county levels.

We also provide an analysis of the revenue growth from 2018 to 2020 by the size and age of the organization. Smaller organizations are the ones receiving less funding and growing slower.

Pierce County Data (Pages 11-18)

After providing an overview at the state level, we explore the nature of 3,700 charitable organizations in Pierce County, WA. Nine of every ten organizations in Pierce County are small organizations with revenues of up to \$1M per year.

We analyze the core verticals in Pierce County. Details are available in a companion file with over 600 records, including the organization's name, EIN, address, NTEE code, and other financial and operational data.

We identify Service Deserts in the county related to organizations that directly serve populations in need. See our Service Desert Map? section.

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US Nonprofits - The Big Picture

Each year, over 1.7 million nonprofit organizations in the US work tirelessly to help mitigate our urgent social issues. They support over 550,000 individuals facing homelessness in the US and 39 million people living under the poverty line. They advocate and take action to help one million individuals without access to toilets and clean water, or the 12% of the population that avoid going to a doctor because they cannot afford medical care. They also work to address long-term strategic issues such as Climate Change, Responsible Consumption & Production, and managing the many inequity gaps in our society.

The nonprofit sector in the US is a \$3T economy. The two largest categories in the nonprofit sector are Higher Education with over 9,000 entities (0.5% of the total nonprofits) and \$278 Billion in annual income (9%), and Healthcare (Hospitals, Clinics, and Medical Research), with around 39,000 entities (2.2%) and \$1 Trillion in annual income (33%).

The two smallest segments are Military and Veterans Affairs, and the arts, culture, and recreation.



\$3.1T Annual Income

\$40B Information Technology Spending

\$21M Employees

% of Annual Income by Source

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The US Human Services Sector

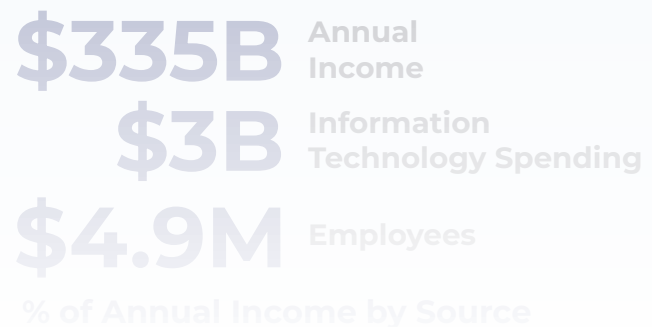
While Hospitals, Clinics, Related Health Services, Medical Research, and Higher Education account for less than 3% of the total tax-exempt entities in the US, they represent \$1.8T of annual income (58%).

Since those are well-understood sectors, we want to focus most of our analysis on the Human Services sector.

We define Human Services as the set of organizations that provide direct services to individuals or families; we include community clinics and service centers related to addiction, mental health, and related areas.

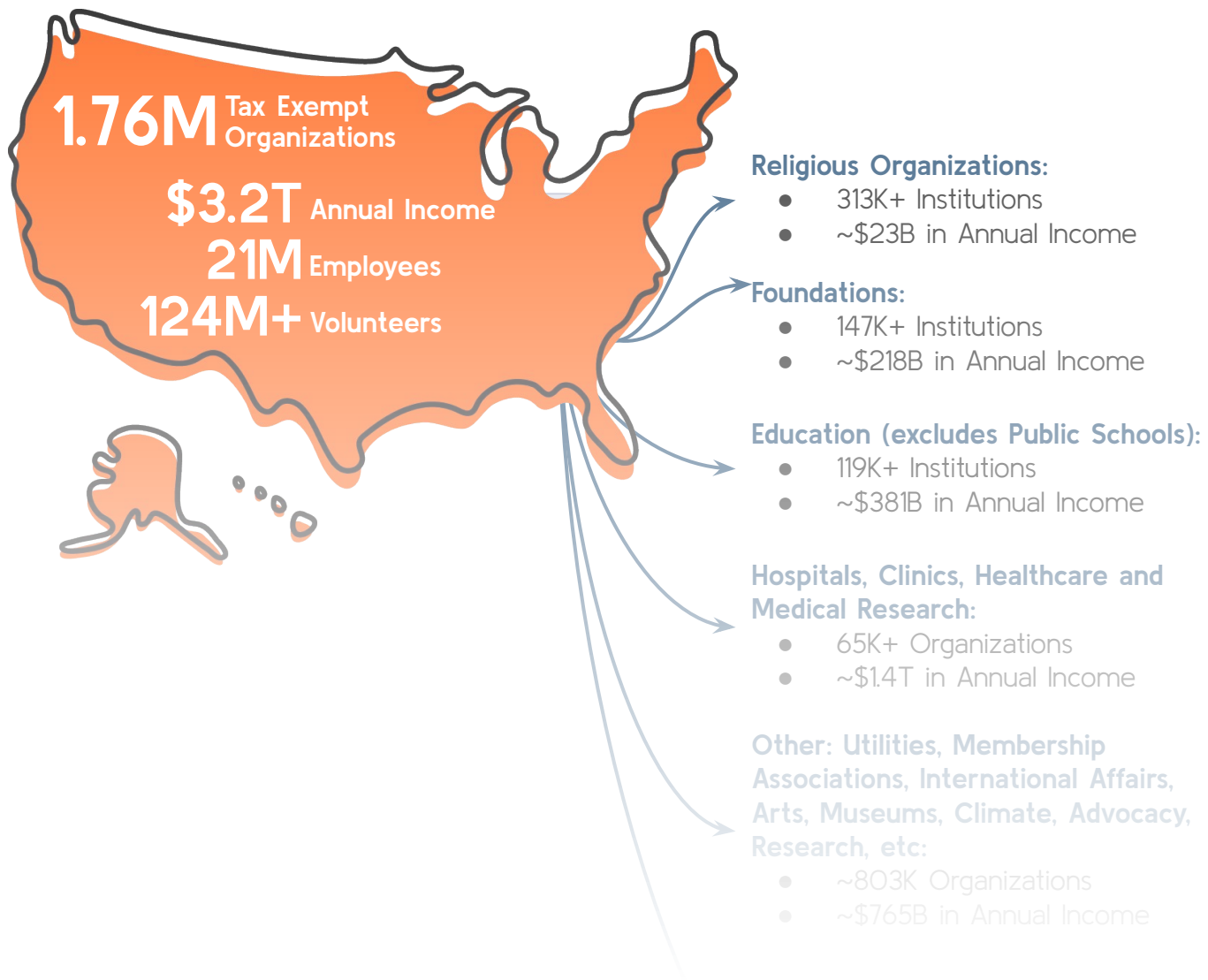
Exclusions to our definition of Human Services:

- We exclude 130K Foundations (\$218 Billion/year) and 312K religious organizations (\$23 Billion/year) as they act as intermediaries in the flow of money towards operating nonprofits.
- Many organizations act as intermediaries collecting private and government grants for other nonprofits.



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The US Human Services Sector



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US Charitable Human Services Organizational Growth by Annual Income

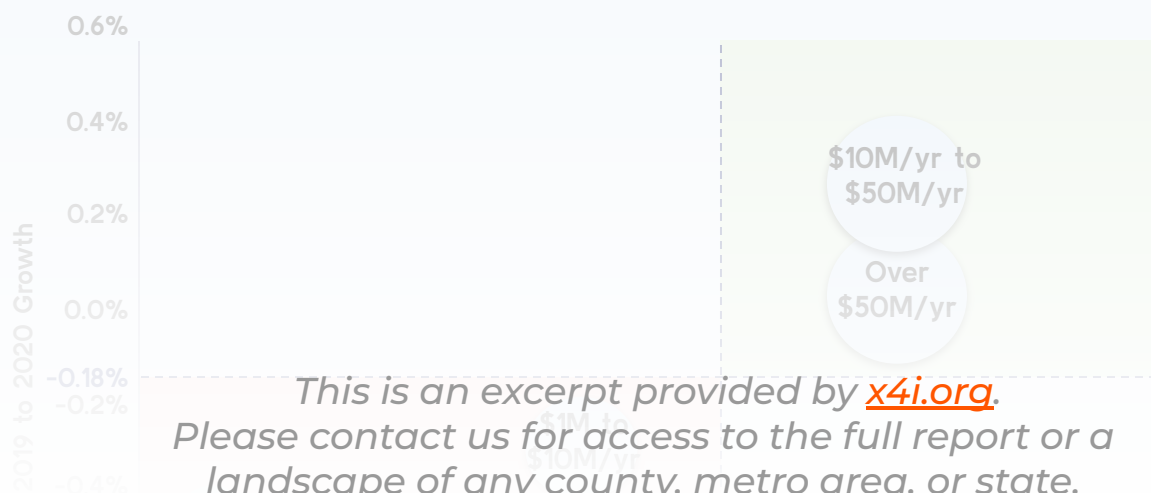
To understand the rate of growth by revenue as a benchmark, X4Impact analyzed tax returns of **96,425 501(C)(3) charitable human services organizations in the US that filed taxes between 2018 and 2020**. This included organizations of all ages and sizes in order to understand the baseline.

To keep statistical relevance of the results, we looked at two dimensions for analysis:

1. Organizations by Annual Income
2. Organizations by Age (based on IRS ruling date)

Between 2018 and 2020, the Compounded Annual Growth Rate (CAGR) of the Median Annual Income across the defined income level groups was 0.21%. In the 2019 to 2020 period, the median growth rate was -0.18%.

Organizations with annual incomes below \$10M/yr reported a decline in revenues since 2018. Organizations that had the highest annual growth rate were sized in the upper mid-market, between \$10M-\$50M per year in annual revenue.



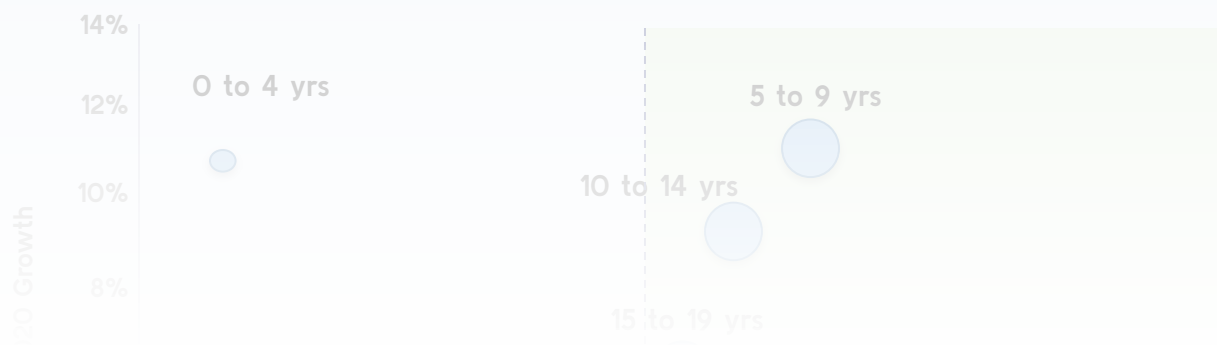
US Charitable Human Services Organizations Growth by Age

We based our calculations of an “Organization’s Age” on the IRS Ruling Date, which is the year in which an organization received its 501(C)(3) status. By grouping organizations in segmented bands of 5 or more years, we mitigate common data challenges to the queries, including those listed below:

1. Most charitable organizations incorporate before they register with the IRS. Obtaining the 501(C)(3) status takes time and operations typically start earlier than the IRS ruling date. Some organizations begin without any formal legal structure.
2. Many organizations, as they grow, create branches. These branches might have a recent ruling, even when the organization previously started operations under the 501(C)(3) status of the parent organization.
3. Before the 1960s, The IRS maintained nonprofit information in paper form only, and the recording of ruling dates is subject to data entry issues or misreadings by machine scanning technology (OCR). For example, many organizations are listed as the year 2000, but are classified as 1800 or 1900 because the year was recorded as “00” on paper.

Between 2018 and 2020, the Compounded Annual Growth Rate (CAGR) of the Median Annual Income across the defined organizational age/stage groups was 3.3%. In the 2019 to 2020 period, the median growth rate was 6.4%.

Organizations between 5-9 years old have shown the highest growth, followed by those aged 10-14, with above average growth rates in the 15-19 year range.



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Washington Charitable Orgs

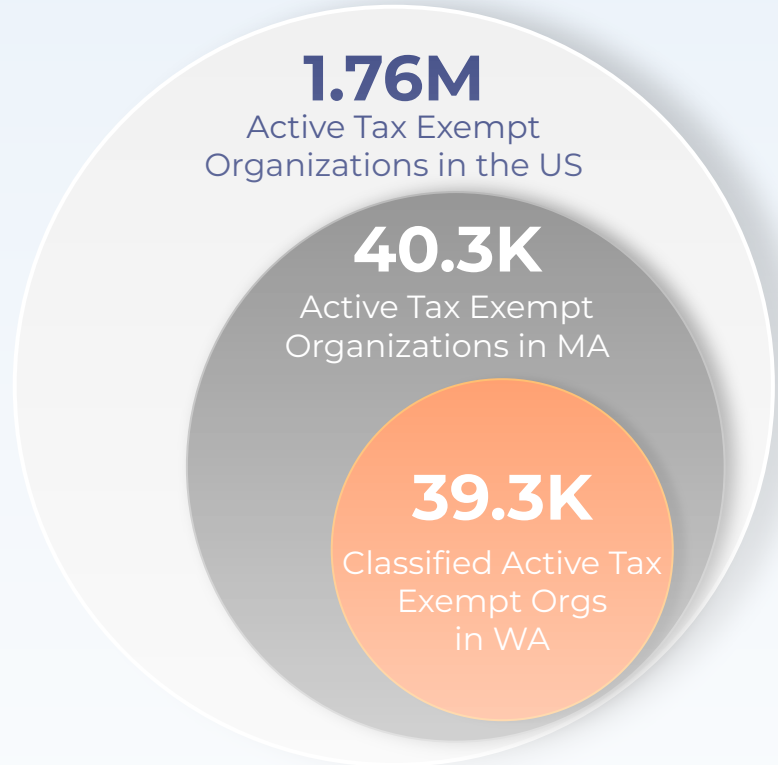
How can your outreach strategy utilize data to understand Washington State-based nonprofit organizations?

To answer this question, we looked at active tax exempt organizations in the state of Washington with a valid National Taxonomy of Exempt Entities (NTEE) Code.

Washington State Organizations at-a-Glance

There are over **39,000 organizations** included in this report, with **\$86B** in annual revenue. They are staffed by 478,820 employees and over 1 million volunteers. The median income for these organizations is \$154,160 per year. The average (mean) income is \$2.7M per organization.

These organizations rely primarily on the sale of products and services to fund most of their work. Sales generate **78%** of their income (**\$67B**) while charitable grants account for **10%** (**\$8.6B**). They are less reliant on government grants, which represent just **6%** of their annual



\$86B Annual Income

479K Employees

% Of Annual Income by Source

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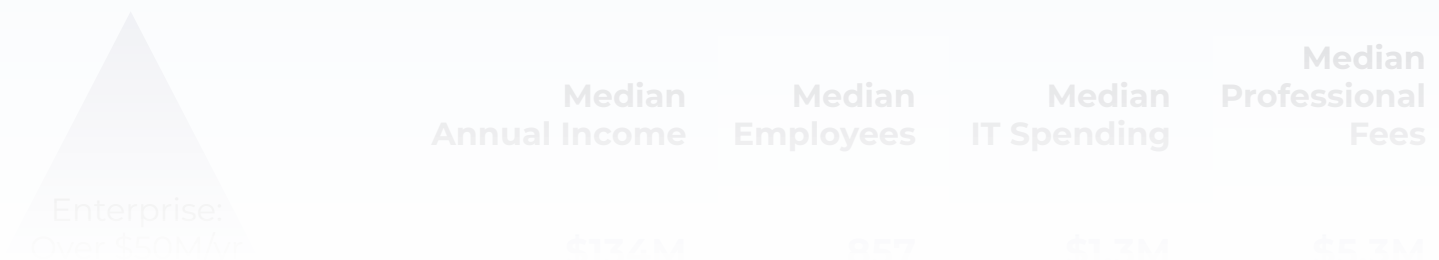
Washington Charitable Orgs

The ecosystem of Charitable Organizations across Washington is composed almost entirely of organizations with annual incomes under \$50M. The vast majority (92%) are small organizations with annual incomes under \$1M.

Their income from sales, charitable donations and government grants remains **stable during periods of economic recession**, as observed during the 2008-10 and 2020-21 economic downturns.

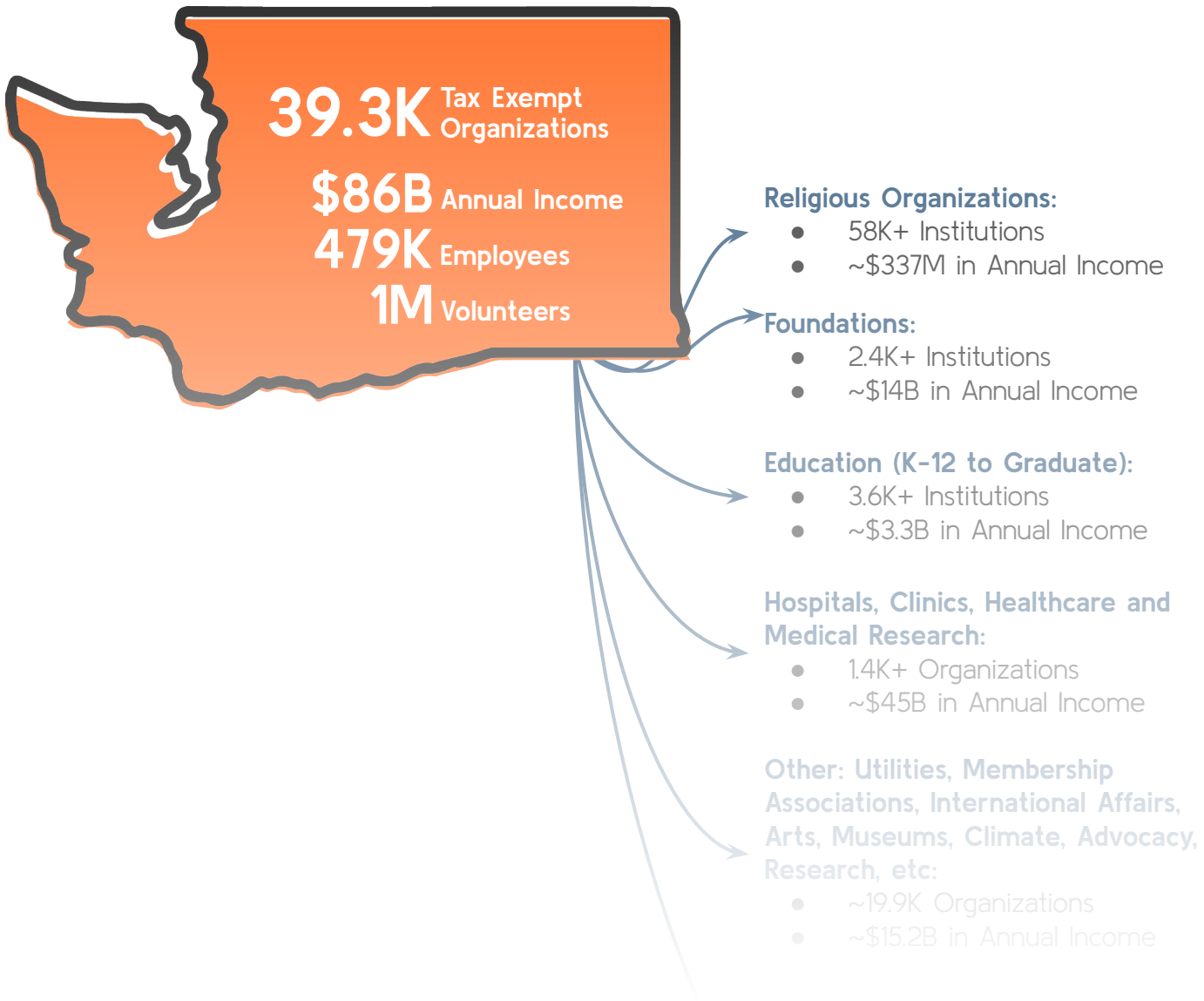
Washington State Nonprofit Organizations spend over **\$727M on IT** each year, and **\$7.95B on professional fees** related to accounting, fundraising, lobbying, legal services, investments and more. In many cases, these contracts are with Consultants to provide one-off solutions and services that address the needs of a particular nonprofit, failing to take a systematic approach to address the needs of the sector at large.

Selected Median Annual Figures*



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WA State Human Services Sector



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Pierce County Charitable Organizations

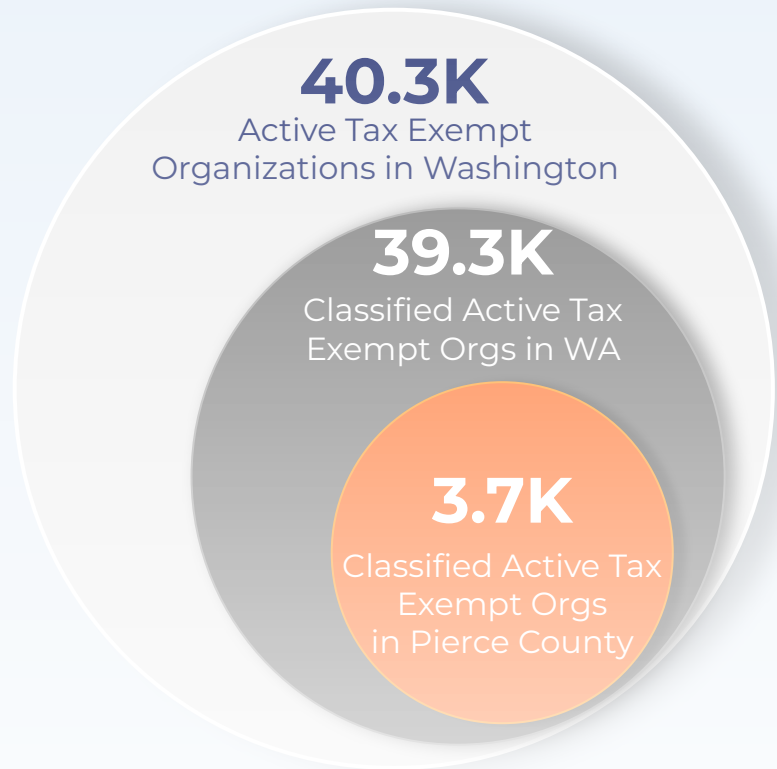
To further refine results from the total Washington organizations, we applied a filter to look at just the active tax exempt organizations in Pierce County.

There are roughly **3,700 active tax exempt organizations** in Pierce County, with **\$7.2B** in annual revenue. They are staffed by 59,280 employees and over 50,000 volunteers. The median income for these organizations is \$128,740 per year. The average is \$2.5M per organization.

The two largest categories of Pierce County nonprofits are:

- Healthcare (Hospitals, Clinics and Medical Research), with around 100 entities (3%) and \$5B in annual income (70%).
- Education with 475 entities (2.5%) and \$452M in annual income (6%)

The two smallest segments are International/Foreign Affairs, Peace, & National Security with 16 entities (0.55%) and \$556K in



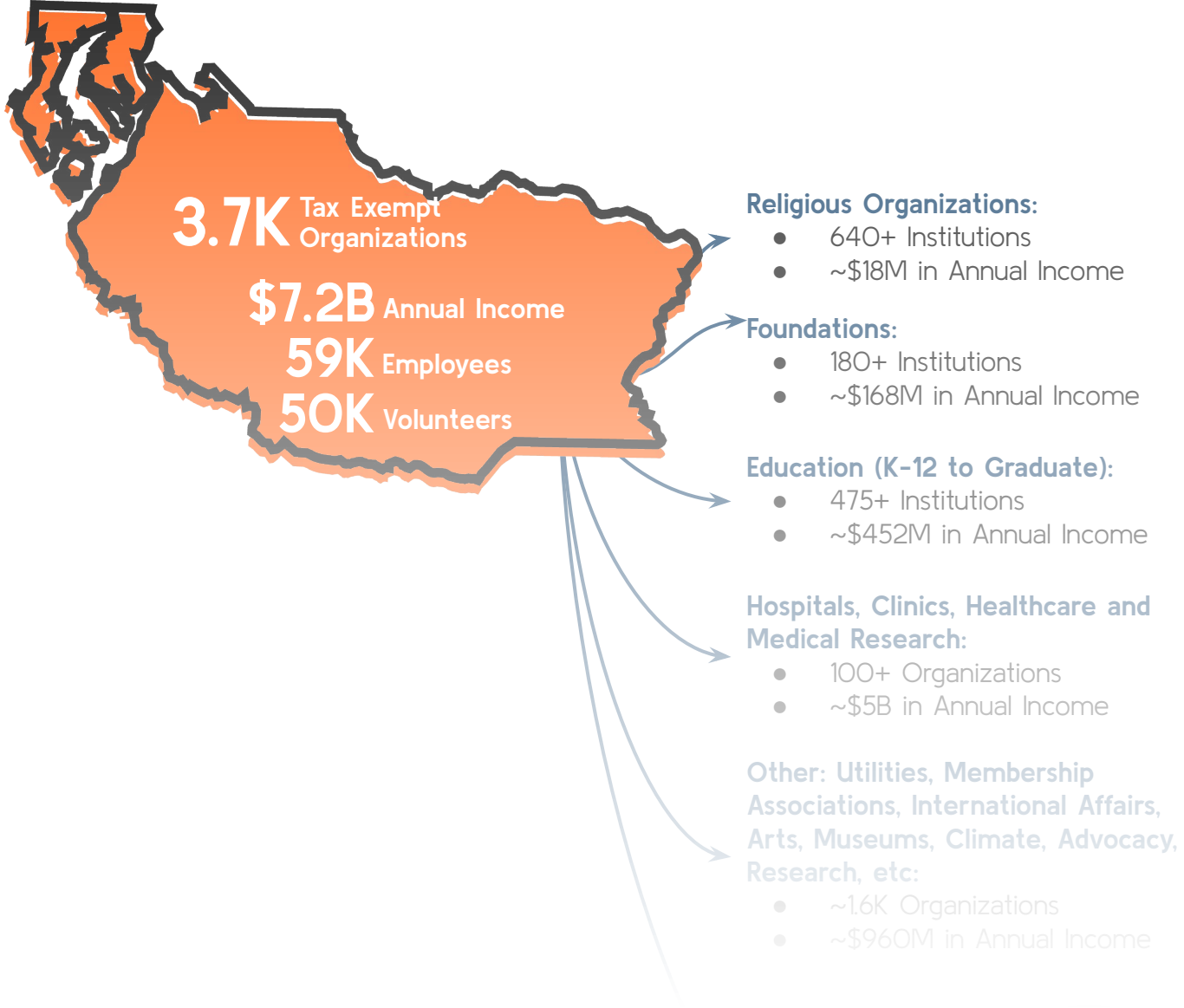
\$7.2B Annual Income

59.3K Employees

% Of Annual Income by Source

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Pierce County Human Services Sector



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Pierce County Charitable Organizations

These organizations generate over **\$5.7B (88%)** of their annual income from sales. It is important to note that **this includes the funding from government incentives related to pay for services provided to individuals, for example: healthcare, workforce development, housing, etc**

Charitable and Government grants represent 6% (\$432M) and 4% (\$288M) of their annual income.


Nine of every ten organizations in Pierce County are small organizations with revenues of up to \$1M per year.

These small organizations, with a median annual income of **\$89.5K** have a median IT spending of **\$3.2K**, and **\$4.9K on professional fees** related to accounting, fundraising, lobbying, legal, investment and more.

The 5 largest organizations are:

- [MULTICARE HEALTH SYSTEM](#)
- [FRANCISCAN HEALTH SYSTEM](#)
- [FRANCISCAN MEDICAL GROUP](#)
- [THE UNIVERSITY OF PUGET SOUND](#)
- [PACIFIC LUTHERAN UNIVERSITY](#)

Selected Median Annual Figures*



	Median Annual Income	Median Employees	Median IT Spending	Median Professional Fees
Enterprise: Over \$50M/yr	\$96.6M	2.7K	\$2.1M	\$4.3M
Small: \$1M-\$50M/yr	\$89.5K	10	\$3.2K	\$4.9K
Micro: Under \$1M/yr	\$100K	5	\$1.5K	\$1.5K

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Pierce County Charitable Organizations Spending Insights

The roughly **3,700** organizations in Pierce County report annual spending of over **\$40M** in advertising per year.

Organizations report annual spending of over **\$65M** on travel and conferences and **\$222M** on rent, utilities and related expenses.

Legal spending is over **\$22M** per year

Spending on Facilities as well as Travel and Conferences are **expected to decrease**, with some money **shifting to IT spending** as nonprofits accelerate the deployment of virtual conferences and remote work due to the COVID-19 pandemic.



Median Spending by Organization*












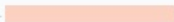



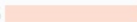










Advertising	Travel & Conferences	Rent & Utilities	Legal
\$707.7K	\$1.5M	\$3.7M	\$138.4K

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Pierce County Charitable Organizations by Focus Area, excluding Healthcare

Of the ~3,700 organizations in Pierce County, **70% of the total income** is driven by Healthcare. On this page we provide an analysis of the other vertical focus areas.

Education and Workforce Development are the two largest areas, after Healthcare, in terms of annual funding, Civing Rights, Liberties and Social Action, Food Programs, National Security and Agriculture are underfunded compared to national averages

Vertical Focus Area	Total Annual Income of Reporting Organizations**	Active Organizations*
Education	\$452.0M 	475 
Workforce & Employment	\$168.6M 	86 
Foundation	\$168.0M 	186 
Utilities & Transportation	\$144.6M 	27 
Youth Development	\$90.0M 	114 
Recreation & Sports	\$86.9M 	284 
Human & Family Services	\$78.6M 	176 
Community Development	\$62.6M 	226 
Support Centers (Disabilities, Immigration, LGBTQ, Seniors & ...)	\$61.8M 	59 
Housing & Shelter	\$56.4M 	83 
Food Programs	\$45.8M 	27 
Museums, Historical Orgs, Zoos & Aquariums	\$27.5M 	80 
Public Safety, Disaster Preparedness & Relief, Emergency Assist	\$23.7M 	53 

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Pierce County Human Services Organizations



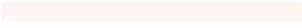
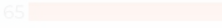
We can further refine results by excluding advocacy groups and organizations that are not impacting an individual directly. **We call this subsegment the “Human Services” sector. There are approximately 669 Human Services organizations in Pierce County, with a total annual income of \$525M.**

The top subsegments based on funding within Human Services are:

1. Employment: Jobs, Training, & Procurement
2. Healthcare (Community Clinics, Mental Health, Addiction, Crisis Support and Other)
3. Youth Development

There are several opportunities for injecting money into areas that seem to be lacking funding, compared with peer groups, including:

- Child Abuse, Abuse Prevention & Protection
- Military & Veterans
- Civil Rights, Social Action & Advocacy
- Family Services
- Public Safety, Disaster Preparedness & Relief, Emergency Assistance

Vertical Focus Area	Total Annual Income of Reporting Organizations**	Active Organizations*
Employment: Jobs, Training, Procurement, & Other	\$98.2M 	16 
Healthcare (Community Clinics, Mental Health, Addiction, Crisis Support and Other)	\$93.9M 	65 

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Top 40 Human Services Orgs in Pierce County by Employee Count

- 1 [YOUNG MEN'S CHRISTIAN ASSOCIATION OF PIERCE AND KITSAP COUNTIES](#)
- 2 [GOODWILL OF THE OLYMPICS AND RAINIER REGION](#)
- 3 [KOREAN WOMEN'S ASSOCIATION](#)
- 4 [GREATER LAKES MENTAL HEALTHCARE](#)
- 5 [COMPREHENSIVE MENTAL HEALTH CENTER OF TACOMA-PIERCE COUNTY](#)
- 6 [TACOMA LUTHERAN HOME & RETIREMENT COMMUNITY](#)
- 7 [FRANKE TOBEY JONES](#)
- 8 [VADIS](#)
- 9 [THE RESCUE MISSION](#)
- 10 [HOPESPARKS](#)
- 11 [EDUCATIONAL PROGRAMS IN HOME LIVING](#)
- 12 [PIERCE COUNTY ALLIANCE](#)
- 13 [MULTICULTURAL CHILD AND FAMILY HOPE CENTER](#)
- 14 [STEP BY STEP FAMILY SUPPORT CENTER](#)
- 15 [YWCA PIERCE COUNTY](#)
- 16 [L'ARCHE TAHOMA HOPE COMMUNITY](#)
- 17 [LINDQUIST DENTAL CLINIC FOR CHILDREN](#)
- 18 [TAHOMA ASSOCIATES](#)
- 19 [NW FURNITURE BANK](#)
- 20 [TACOMAPIERCE COUNTY HABITAT FOR HUMANITY](#)
- 21 [SOUTH SOUND OUTREACH SERVICES](#)
- 22 [SHARE & CARE HOUSE](#)
- 23 [CENTERFORCE](#)
- 24 [PARTICULAR COUNCIL OF TACOMA SOCIETY OF ST VINCENT DE PAUL DISTRICT COUNCIL](#)
- 25 [YOUTH FOR CHRISTTACOMA AREA INC](#)

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Pierce County Service Desert Map™

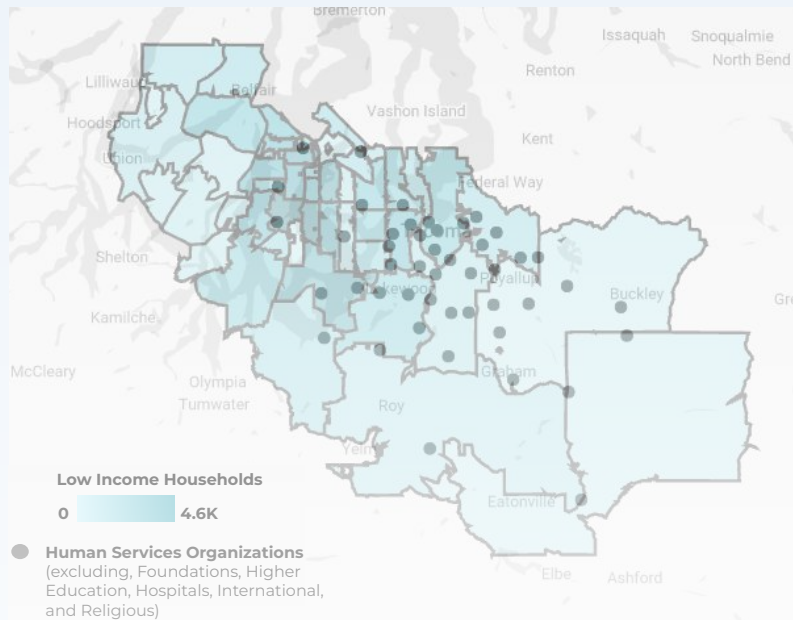
To inform outreach strategies in Pierce County, we created this Service Desert Map™ for Human Services Organizations. The map showcases the gaps, per zip code, between low-income households and the availability of local nonprofit organizations focused on Human Services.

There are over **70,000 low income households** (21.5% of all households) in Pierce County*. **1,451 households currently reside in a service desert**.**

There are **669 organizations** providing Human Services to households in Pierce County, reporting **\$525M** in annual income. The top 5 subsegments by number of organizations are:

- General Human Services
- Youth Development
- Housing & Shelter
- Healthcare (Community Clinics, Mental Health, Addiction, Crisis Support and Other)

Service Desert Map™



1,451 Low-income households living in a service desert**.

Service Providers & Social Funding



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Appendix

Washington - UN Sustainable Development Goals

Washington ▼

Below you'll find details for Washington for 17 key indicators related to each of the UN SDGs, including how Washington ranks against the other states on each indicator, as well as a list of the top nonprofit organizations working on select issue areas related to human services, climate change & clean energy, social justice & inequality.

Selected State

WA

States are ranked from 1-50, where 1 is closest to the goal for each indicator. For NGOs, 1 represents the state with the most organizations in that impact area.

SDG	Indicator	Indicator Rank [?]	# of NGOs	NGO Rank [?]	Money Deployed
 1 NO POVERTY	21.6K Homeless individuals	46	1K	18	\$4B
 2 ZERO HUNGER	10% Food insecure households	10	424	15	\$2B
 3 GOOD HEALTH AND WELL-BEING	1.7 Hospital beds per 1,000 people	49	1K	20	\$48B
 4 QUALITY EDUCATION	\$35K Average student debt	28	1K	14	\$4B
 5 GENDER EQUALITY	-34% Gender pay gap	44	266	18	\$900M
 6 CLEAN WATER AND SANITATION	21.5K People without access to toilets, sinks, or clean water	34	126	10	\$392M
 7 AFFORDABLE AND CLEAN ENERGY	75% Electricity generated from renewable sources	5	106	8	\$377M
 8 DECENT WORK AND ECONOMIC GROWTH	730.2K People living below poverty line	32	674	19	\$3B
 9 INDUSTRY INNOVATION AND INFRASTRUCTURE	73% Roads in good or fair condition	42	422	16	\$526M
 10 REDUCED INEQUALITIES	26 Equal Employment Complaints per 1,000 workers	18	603	15	\$2B
 11 SUSTAINABLE CITIES AND COMMUNITIES	269M Trips on public transportation	9	2K	16	\$3B
 12 RESPONSIBLE CONSUMPTION AND PRODUCTION	\$1K Value of groceries wasted per capita	37	135	8	\$162M
 13 CLIMATE ACTION	11.2 Per capita CO2 emissions (metric tons)	9	77	13	\$49M
 14 LIFE BELOW WATER	65 Marine Protected Areas	3	199	12	\$198M
 15 LIFE ON LAND	48% Forest coverage	19	261	10	\$293M
 16 PEACE, JUSTICE AND STRONG INSTITUTIONS	124.9K People in the correctional system	35	569	18	\$861M
 17 PARTNERSHIPS FOR THE GOALS	83% Percent of population with access to broadband internet	31	212	15	\$267M

Note: it may be possible for two or more states to have the same value for an indicator. In these instances they receive the same ranking.

Select nonprofit organizations are listed below in 3 areas in the public conversation. Additional data available at x4i.org/sdg including clickable links to organizational details. Sample organizations shown for reference as an example of the types of organizations in each category.

Environment, Climate Action & Clean Energy in Washington

Organization	\$/yr
MARINE STEWARDSHIP COUNCIL LIMITED	\$5M
CLIMATE SOLUTIONS	\$3M
SIGHTLINE INSTITUTE	\$3M
CONSERVATION NW	\$3M
GREENHOUSE GAS EXPERTS INC	\$2M
1-5 of 69 < >	

* Excludes Public Utilities

Social Justice & Inequalities in Washington

Organization	\$/yr
NORTHWEST JUSTICE PROJECT	\$33M
PUBLIC DEFENDER ASSOCIATION	\$19M
NATIONAL COURT APPOINTED SPECIAL ADVOCATE ASSOCIATION	\$13M
NORTHWEST IMMIGRANT RIGHTS PROJECT	\$12M
SNOHOMISH COUNTY PUBLIC DEFENDER ASSOCIATION	\$12M
1-5 of 108 < >	

Human Services in Washington

Organization	\$/yr
CATHOLIC COMMUNITY SERVICES OF WESTERN WASHINGTON	\$212M
FOOD LIFELINE	\$148M
SECOND HARVEST INLAND NORTHWEST	\$134M
THE YOUNG MEN'S CHRISTIAN ASSOCIATION OF GREATER SEATTLE (6871)	\$114M
PIONEER HUMAN SERVICES INC	\$99M
1-5 of 1784 < >	

* Excludes Hospitals and Clinics

Visit x4i.org for More Data & Insights

Other Reports you might find useful

- [Nonprofit & Tech for Good Compensation](#)
- [US Nonprofit Landscapes by UN SDG](#)
- [Technology Innovation in the US](#)

Our Data

This report is based on analyzing over 850 million data points gathered from the United States Internal Revenue Service (IRS), The National Center of Charitable Statistics (NCCS), and our proprietary Database of Technology Solutions.

We also conduct primary research to complement our understanding of the sector.

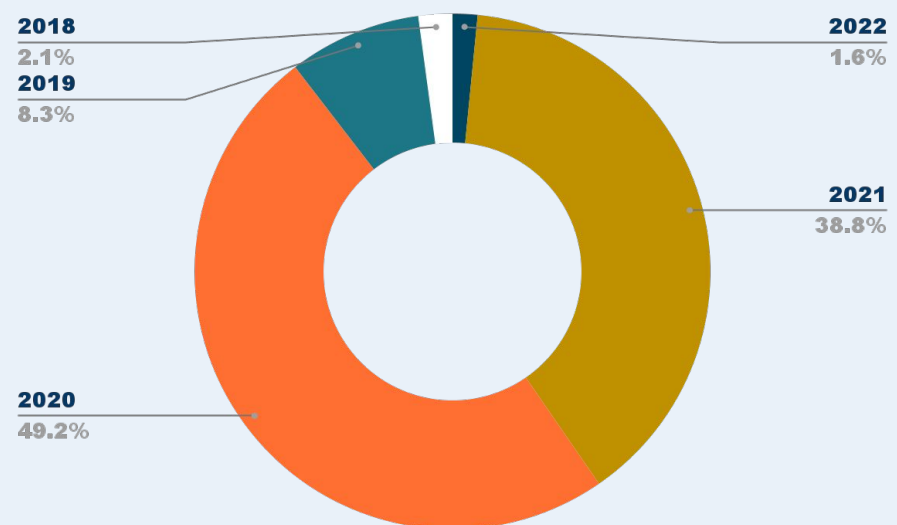
We update our datasets periodically to get the most representative sample of the US nonprofit sector.

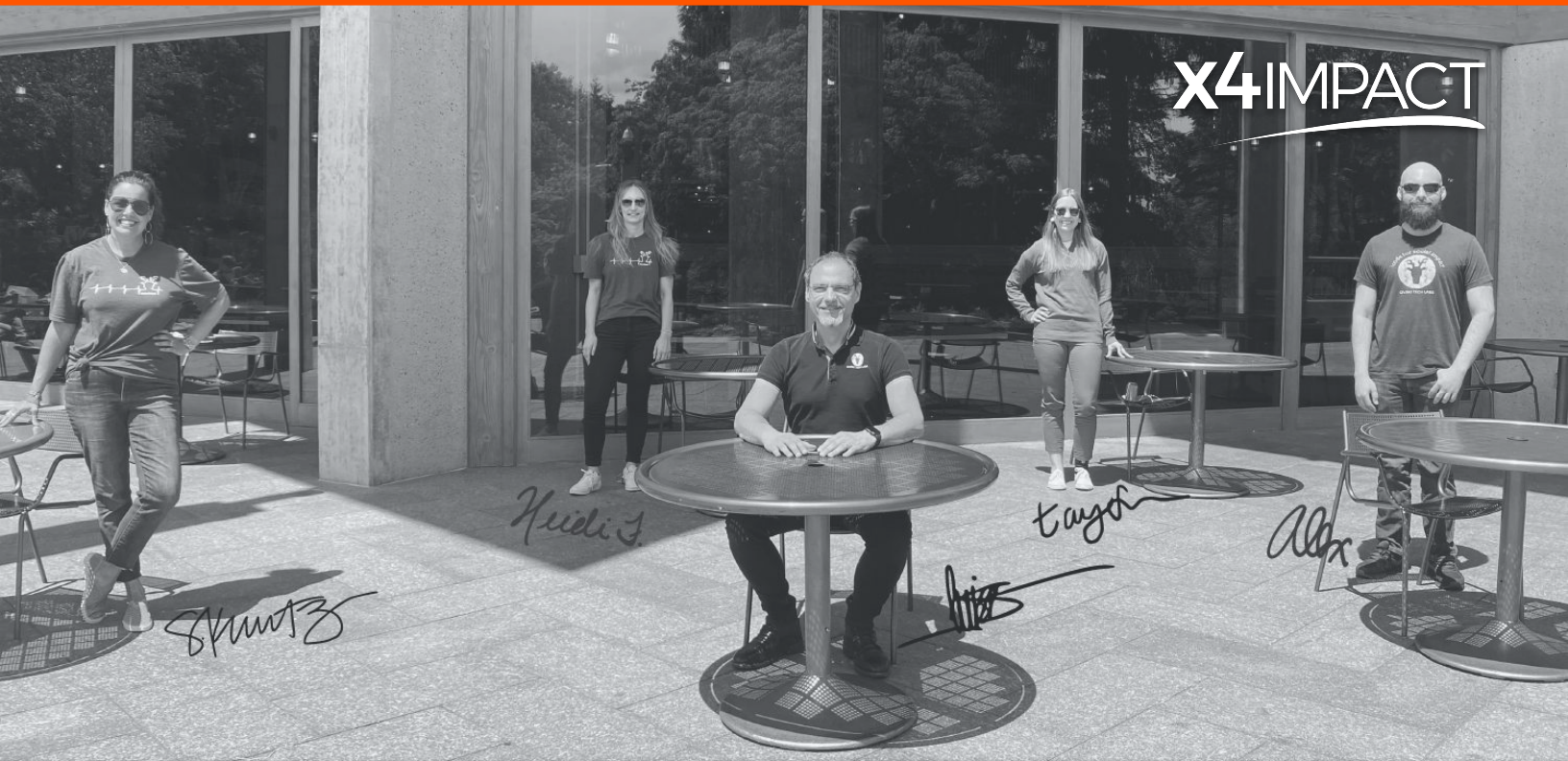
Our classification is based on the NTEE codes reported by the IRS, the National Center for Charitable Statistics, and the mission statement reported by organizations in their filings with the IRS.

Margin of error

- Organization Classification under Human Services Sector: +/-10%.
- IT Spending Analysis: +/-3%.
- Professional Fees, Legal, Travel, Rent and other Spending Analysis: +/-10%.
- Employment, Volunteering and other metrics: +/- 10%

Data Freshness:





X4Impact - Data Intelligence for Social Innovation

(The Gartner™ for Social Impact, as some leaders refer to us!)

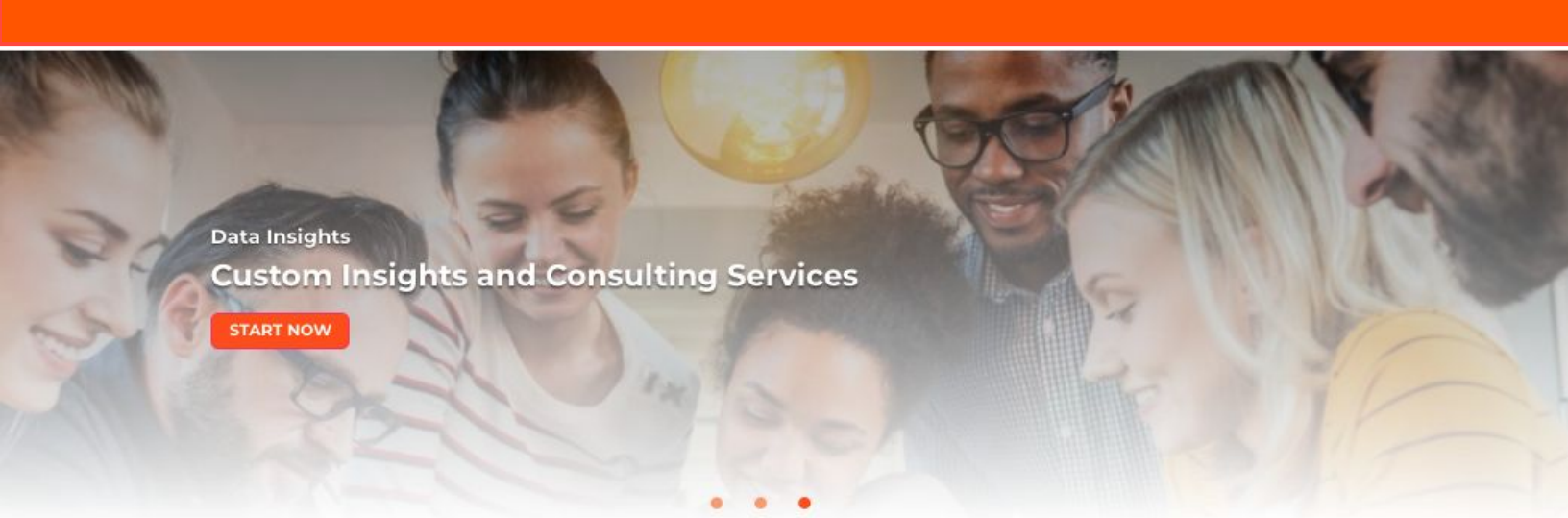
Credits

Key Sources

- X4Impact Analysis of the IRS and NCCS data sets 2017 - 2022
- [X4Impact Tech & Services Solutions Directory 2022](#)
- [X4Impact - Money Flow in the Nonprofit Sector](#) - Interactive Report 2022
- [Nonprofits in America](#) US Bureau of Labor Statistics
- [Research Data on the Nonprofit Sector](#) US Bureau of Labor Statistics
- [X4Impact UN SDG Interactive Reports](#)
- [State by State Guide](#) - X4Impact

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Interactive Tool
NTEE Code Finder



Interactive Tool
Nonprofit Compensation Tool



Interactive Tool
\$2.9T of Social Funding & Software Spending



Infographic
Safe and Affordable Housing - US Landscape

About X4Impact

X4Impact, Inc. is the leading Insights as a Service Platform for the US \$2.9 Trillion per year Nonprofit Sector. Our technology processes billions of social impact data points to help foundations, tech companies, nonprofits, social innovators, academia, and investors build tomorrow's social impact organizations and initiatives. X4Impact was honored in *Fast Company's* World Changing Ideas 2022 Awards in two categories. Visit x4i.org and follow us at www.linkedin.com/company/x4impact.

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