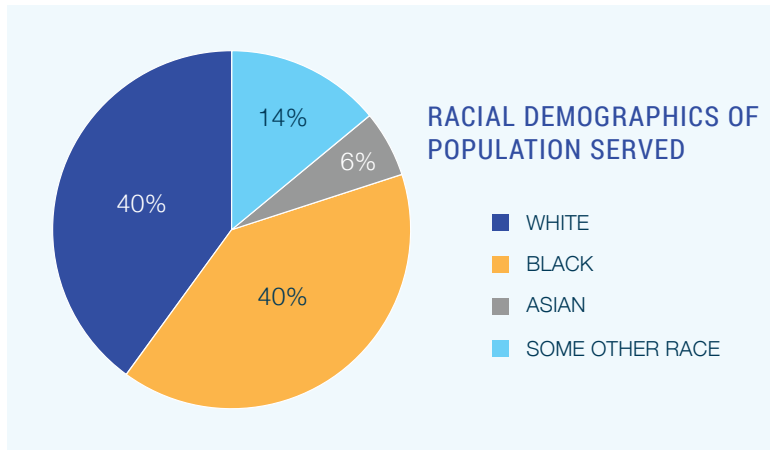
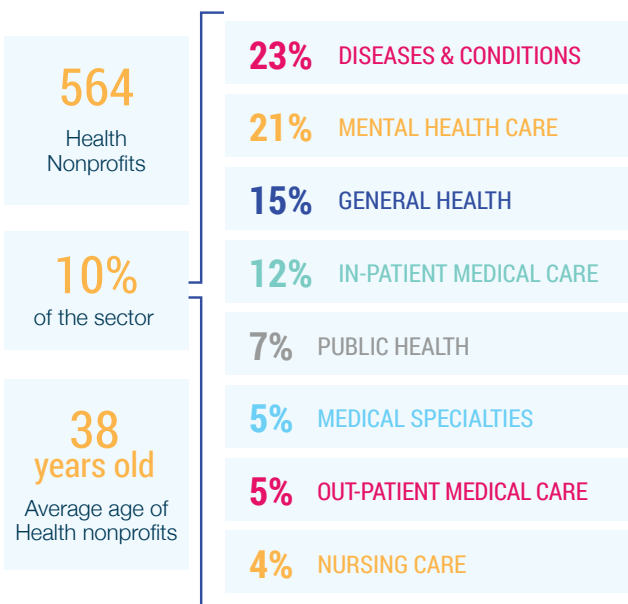


HEALTH

In Cuyahoga County, nearly 6,000 nonprofits make up an ecosystem of social impact support. Health nonprofits play a vital role in this ecosystem, encompassing over 560 organizations that focus on physical and behavioral health through treatment and services to the community, as well as health research that improves the overall social environment and the interest of public health. 77% of these organizations have an operating budget less than \$200,000 or are operating as a church or religious institution—meaning they are not required to report deeper data to the IRS. This snapshot provides a glimpse into the Health nonprofit landscape throughout the county, with a deeper dive into the ~29% of organizations reporting comprehensive data.

HEALTH NONPROFITS AT A GLANCE



REVENUE BY STAFF SIZE

STAFF SIZE	# OF ORGANIZATIONS	% OF ORGANIZATIONS	MEDIAN REVENUE
0	57	35%	\$258,000
1-2	14	9%	\$201,000
3-5	12	7%	\$495,000
6-10	15	9%	\$637,000
11-20	13	8%	\$1M
21-40	12	7%	\$3M
41-80	10	6%	\$3M
81-160	8	5%	\$5M
> 160	22	13%	\$25M

HEALTH NONPROFITS BY SIZE

77% of Health nonprofits have revenues under \$200,000. The remaining 29% that are required to report deeper data tend to be larger in revenue size and expenses than other nonprofits in Cuyahoga County, with the median revenues being \$307,000 compared to \$172,000 and the median expenses being \$279,000 annually. Compensation and operations make up a significant portion of Health nonprofits' expenses.

Of the 29% of nonprofits reporting data, it shows Health nonprofits vary significantly in staff size, with nearly 44% reporting staff sizes of two or less, and 13% reporting over 160 employees. Some Health organizations are large hospital systems like the Cleveland Clinic or University Hospitals, while others are neighborhood clinics or organizations focused on individuals with specific diseases or conditions. In-patient nonprofits report a large number of staff, while public health and those focused on specific diseases and conditions tend to be smaller.

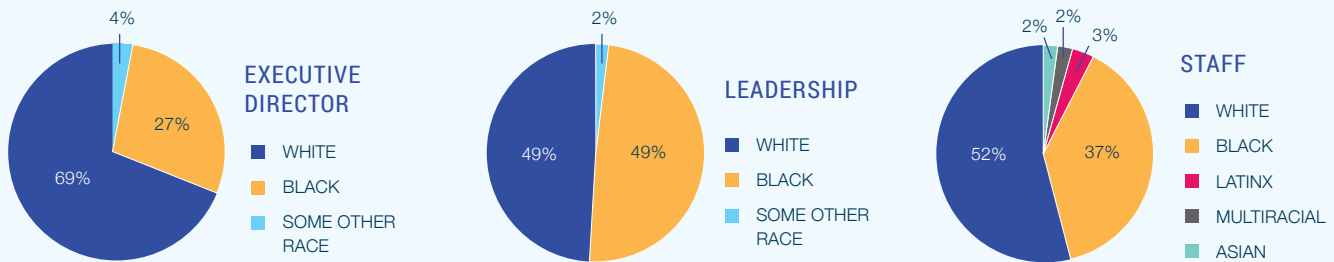
WORKFORCE AND COMPENSATION

BREAKDOWN OF STAFF, COMPENSATION, VOLUNTEERS, AND BOARD MEMBERS BY LARGEST SUBGROUP

TYPE OF ORGANIZATION	TOTAL STAFF	TOTAL STAFF COMPENSATION	MEDIAN STAFF COMPENSATION	TOTAL VOLUNTEERS	TOTAL BOARD MEMBERS
Diseases and Conditions	206	\$6M	\$30K	1,661	315
Mental Health Care	2,635	\$83.2M	\$23.4K	1,427	429
General Health	1,988	\$33.5M	\$28.1K	1,260	377
In-Patient Medical Care	76,586	\$4.6B	\$40.1K	5,519	501
Public Health	60	\$1.1M	\$20.5K	155	66
Medical Specialties	311	\$25M	\$52,900	11	61
Out-Patient Medical Care	489	\$20.4M	\$39,500	192	95
Nursing Care	1,536	\$44.7M	\$20,100	290	109
ALL HEALTH ORGANIZATIONS	85,563	\$4.8B	\$26,300	15,041	2,189

DEMOGRAPHICS OF HEALTH NONPROFIT EMPLOYEES

from the 2022 COVID-19 Nonprofit Recovery and Resiliency Survey



Compensation data is reported by organizations with annual revenues of \$200,000 or more and includes only full-time and year-round employees. Although low, Health nonprofits are paying their staff and leadership about 22% higher than the median nonprofit wages in Cuyahoga County. Demographic data was not available from a significant enough number of Black- and Brown-led Health organizations to disaggregate compensation by race.

MEDIAN STAFF SALARY: \$26,300

MEDIAN SENIOR LEADERSHIP SALARY: \$83,900

Story of Resiliency

"We rallied to deliver thousands of Covid-19 tests and vaccines to hard to reach patients and community members, even as larger partners retreated from the work. We pivoted to telehealth and kept our patients connected."

—Cuyahoga County Health Nonprofit Organization Leader, 2022



FINANCES

Since 2020, Health nonprofits and healthcare systems across the world have faced increased demands due to COVID-19, a challenge to keep up with non-pandemic related illnesses, staff burn-out and shortages, and the impending emotional health crises as a result of the pandemic and the global shutdown. Health organizations receive a majority of their revenue through program service revenue – including fees for services, contracts, and medical reimbursements. Overall, prior to the pandemic Health nonprofits reporting data were quite financially stable, with most covering all expenses through earned income.

OVERALL FINANCES BY ORGANIZATION TYPE

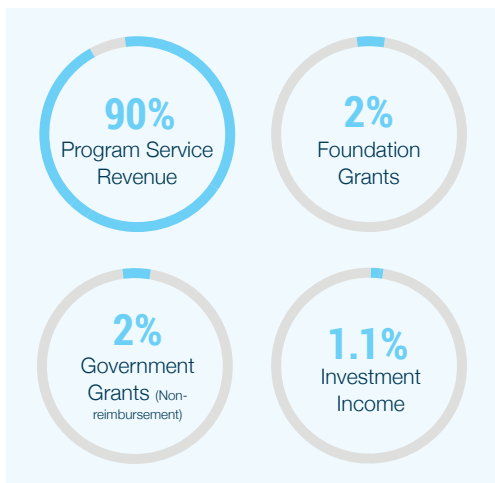
TYPE OF ORGANIZATION	TOTAL REVENUE	TOTAL EXPENSES	TOTAL ASSETS
Diseases and Conditions	\$27.6M	\$22.6M	\$97.6M
Behavioral Health	\$169.9M	\$139.5M	\$202.6M
General Health	\$98.9M	\$63.1M	\$304.8M
In-Patient Medical Care	\$11.5B	\$9.8B	\$18.6B
Public Health	\$9.8M	\$4.2M	\$16.5M
Medical Specialties	\$39.4M	\$49.8M	\$27.4M
Out-Patient Medical Care	\$72.4M	\$59.1M	\$143.5M
Nursing Care	\$78.3M	\$67.4M	\$81.7M
ALL HEALTH ORGANIZATIONS	\$12.1B	\$10.3B	\$19.6B

REVENUES




Health nonprofits play a significant role in the local economy, generating at least \$12B in annual revenue—more than any other nonprofit type. In-patient medical care and behavioral health have the largest revenues of all subgroups. Unlike other nonprofit industries, a very small portion of reported Health nonprofit revenue comes from foundation or government grants (approximately 3% combined). While in-patient medical care across Cuyahoga County brings in a large amount of money from government grants (\$185M), this accounts for only 2% of their total revenues. Foundation grants are provided through other types of nonprofits that may contribute to some medical costs or services. Examples include basic medical care for the unhoused or school health services which fall under a separate nonprofit category (i.e. Human Services or Education respectively).

\$12.1B TOTAL REVENUE

\$307,000 MEDIAN REVENUE



GOVERNMENT GRANTS BY SUBGROUP

TYPE OF ORGANIZATION	GOVERNMENT GRANTS	GOVERNMENT GRANTS AS % OF TOTAL REVENUE
In-Patient Medical Care	\$185M	2% 
General Health	\$464,000	+0% 
Nursing Care	\$197,000	+0% 

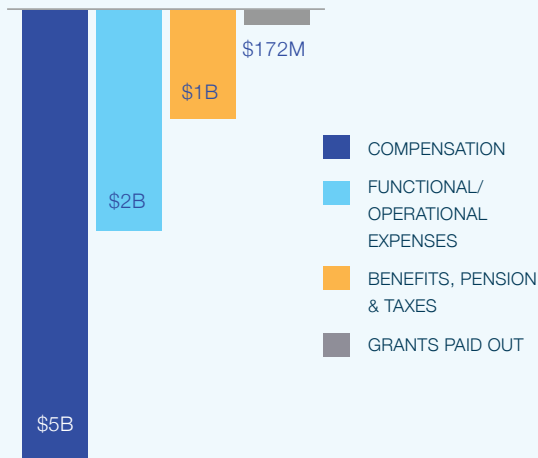
EXPENSES

Health nonprofits tend to have greater expenses than other nonprofits in Cuyahoga County, with a median amount per reporting organization of \$279,000, compared to \$154,000 for the entire nonprofit sector. Health nonprofits make up nearly one fourth of nonprofit expenses in the region. Office expenses and compensation make up a significant portion of this, with nearly \$5B going to compensation and another \$1B in benefits.

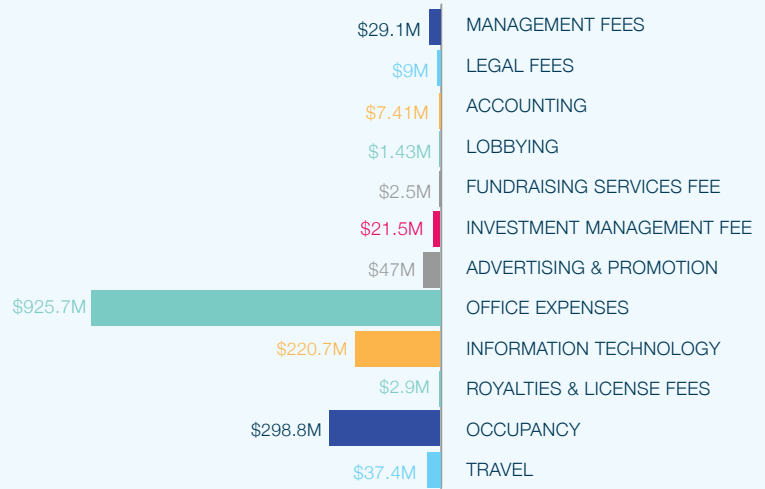
\$10.3B TOTAL EXPENSES

\$279,700 MEDIAN EXPENSES

TOP EXPENSE CATEGORIES



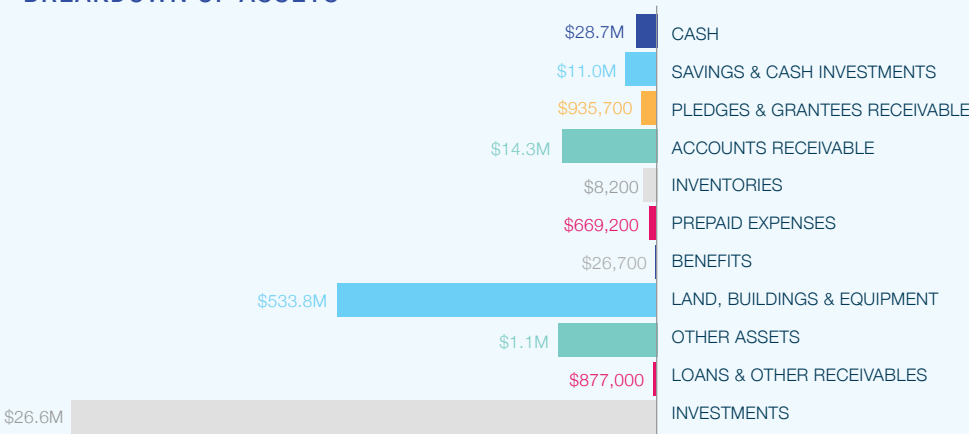
FUNCTIONAL / OPERATIONAL EXPENSE BREAKDOWN



ASSETS

Of the total \$51B in assets locally, Health nonprofits hold 39% (\$20B)—mainly in unrestricted funds. This helps because, of all assets, unrestricted funds are the easiest to use toward any expense. In-patient healthcare and behavioral health nonprofits, hold a majority of those assets, or \$18.8B, combined. A majority of the assets held are through investments and land, building, and equipment.

BREAKDOWN OF ASSETS



\$19.6M
TOTAL NET ASSETS

\$1.2M
TEMPORARILY RESTRICTED ASSETS

\$9.3M
PERMANENTLY RESTRICTED ASSETS

\$8.1B
UNRESTRICTED ASSETS

TOP 5 CAPACITY BUILDING NEEDS FOR HEALTH NONPROFITS

2022	2023 AND BEYOND
Fundraising and Grant Writing	Fundraising and Grant Writing
Strategic Planning or Long-term Planning	Diversity, Equity, and Inclusion
Staff Salaries	Staff Salaries
Diversity, Equity, and Inclusion	Strategic Planning or Long-term Planning
Board Development	Facilities and Operation Costs

KEY FINDINGS:

- A Booming Nonprofit Health Care Industry:** Cuyahoga County has a large nonprofit Health industry, making up a total of 10% of all nonprofits compared to Health organizations nationally which make up only 7% of the sector. Together these organizations bring over \$12B in annual revenue into the region and are responsible for nearly a quarter of all expenses by nonprofits in the region. The Health nonprofit industry employs over 85,000 workers (9% of the total Cuyahoga County workforce) and is supported by 2,000 board members and over 20,000 volunteers. Together these organizations are a huge piece of the Cuyahoga County economy.
- Financially Strong Pre-Pandemic:** Health nonprofits are overall financially stronger than other nonprofits, with 41% having six-months or more of operating dollars in the bank. Even so, Health nonprofits reported losing 25% of their revenue as a result of COVID-19 and while they did tap into their reserves much less than other nonprofits they have exacerbated challenges due to burnout and staffing shortages.
- Driven by Program Revenue:** Program service revenue such as payment for health services, reimbursements, and more account for nearly 90% of all Health nonprofit revenue. Overall, Health nonprofits receive a very small portion of their revenues from other government and foundation grants.
- There is Room for Increased Diversity in Leadership:** The directors of Health organizations do not represent the population served by Health organizations. The population served by Health nonprofits is 40% Black and 40% White, while almost 70% of Health nonprofits are White-led. This is less of an issue at the senior leadership level where ½ of all positions are held by individuals identifying as Black and ½ held by individuals identifying as White. Overall at the staff level, 52% of all staff identify as White, while 37% identify as Black—compared to the entire staff of Cuyahoga County nonprofits which is 48% White while 39% identify as Black, and the remaining representation is from other races.
- Health Nonprofits are More Likely to Engage with Policy and Advocacy:** 56% of all local Health organizations report currently engaging with policy and advocacy or wanting to in the future—compared to 47% of all Cuyahoga County nonprofits. Health nonprofits' advocacy efforts focus specifically on issues such as recovery & addiction, behavioral health, health care access, vaccination, and HIV, sexual, and reproductive health.

This snapshot was developed as part of the Cuyahoga County Nonprofit Landscape Assessment, funded by the Funders Collaborative on Covid Recovery and available to the public. Visit sangfroidstrategy.com/cuyahoga for much more detail on Health nonprofits and the sector as a whole!