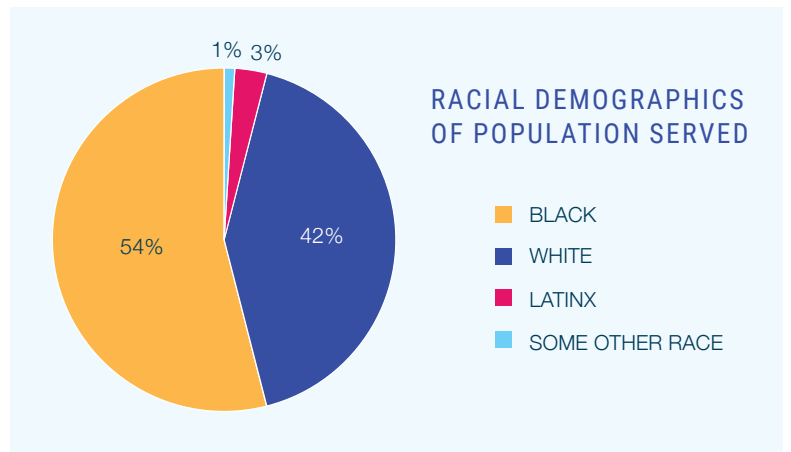
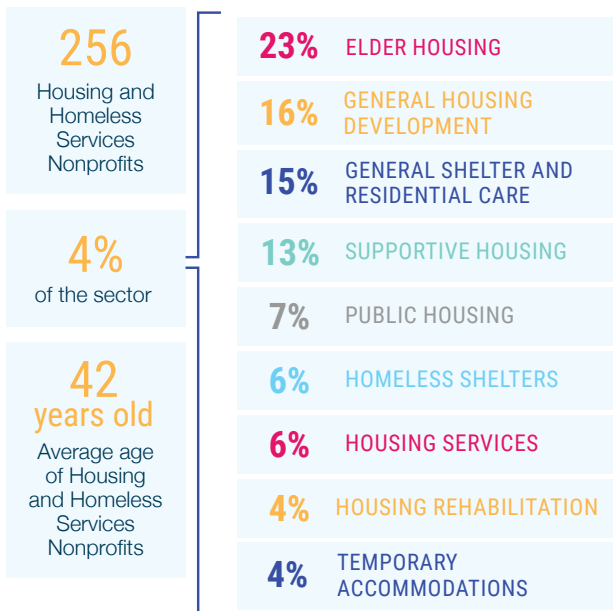
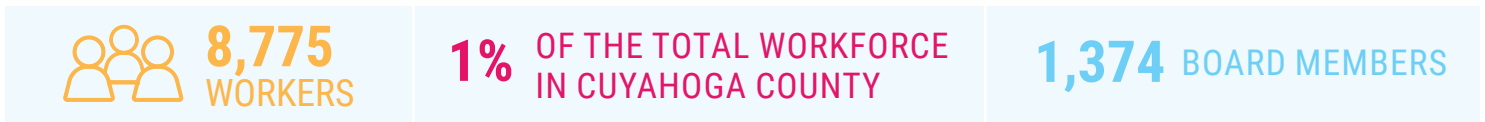


HOUSING AND HOMELESS SERVICES

In Cuyahoga County, nearly 6,000 nonprofits make up an ecosystem of social impact support. Housing and Homeless Services nonprofits play a vital role in this ecosystem, encompassing over 250 organizations that focus on finding, providing, and maintaining adequate shelter for individuals, families and groups. 67% 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 Housing and Homeless Services nonprofit landscape throughout the county, with a deeper dive into the ~41% of organizations reporting comprehensive data.

HOUSING AND HOMELESS SERVICES NONPROFITS AT A GLANCE



REVENUE BY STAFF SIZE

STAFF SIZE	# OF ORGANIZATIONS	% OF ORGANIZATIONS	MEDIAN REVENUE
0	38	37%	\$351,851
1-2	7	7%	\$191,244
3-5	17	16%	\$504,130
6-10	4	4%	\$1M
11-20	9	9%	\$1.1M
21-40	5	5%	\$1.7M
41-80	8	8%	\$2M
81-160	3	3%	\$4.4M
> 160	13	13%	\$20M

HOUSING AND HOMELESSNESS NONPROFITS BY SIZE

67% of Housing and Homeless Services nonprofits have revenues under \$200,000. The remaining ~41% that are required to report deeper data tend to have larger revenues and expenses than other nonprofits in Cuyahoga County, with the median revenues being \$404,253 compared to \$172,000 for all nonprofits included in the study, and median expenses being \$495,535 annually.

Of the ~41% of nonprofits reporting data, only 36% have staff sizes of two or less people, this is below that of the nonprofit sector as a whole.

HOUSING AND HOMELESS SERVICES



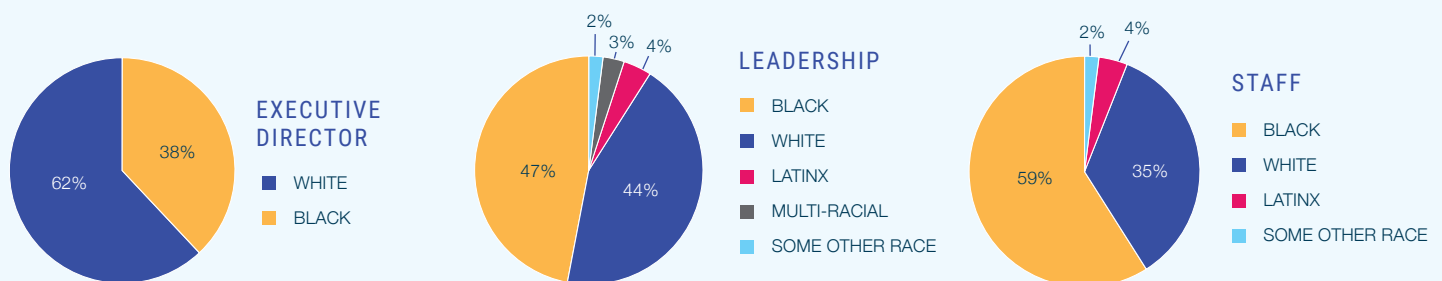
WORKFORCE AND COMPENSATION

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
Elder Housing	5,507	\$128M	\$21,600	3,121	638
General Housing Development	74	\$4.3M	\$24,200	86	119
Homeless Shelters	67	\$904,300	\$20,300	789	123
Temporary Accommodations	5	\$62,900	\$12,600	No Data Available	2
General Services for Unhoused Individuals	188	\$4.1M	\$25,700	126	106
Supportive Housing	2,541	\$49.4M	\$16,200	2,116	175
Public Housing	45	\$634,200	\$5,900	102	120
Housing Services ¹	277	No Data Available	\$36,400	224	56
Housing Rehabilitation	71	No Data Available	\$26,500	330	35
ALL HOUSING AND HOMELESS SERVICES NONPROFITS	8,585	\$201.2M	\$21,550	6,376	1,100

DEMOGRAPHICS OF HOUSING AND HOMELESS SERVICES 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. Housing and Homeless Services nonprofits are paying their staff similar to the median nonprofit wages in Cuyahoga County—however, the median leadership salary is nearly 84% lower than other nonprofits. Demographic data was not available from a significant enough number of Black and Brown-led organizations to disaggregate pay by race.

MEDIAN STAFF SALARY: \$21,550

MEDIAN SENIOR LEADERSHIP SALARY: \$65,000

¹This subcategory includes programs focused on home accessibility, repairs, rent and mortgage assistance, and utility assistance.

HOUSING AND HOMELESS SERVICES

FINANCES

Throughout the pandemic, individuals and families struggled with safe, affordable housing that met the needs of them and their health and safety. Greater Cleveland has the highest poverty rate in the country (30.8%) and affordable housing for one-income families remains a significant struggle. There are thousands of individuals with immediate housing and shelter needs in Cuyahoga County, and likely many more struggling to meet mortgage and rental requirements with current inflation and economic challenges.

OVERALL FINANCES BY ORGANIZATION TYPE

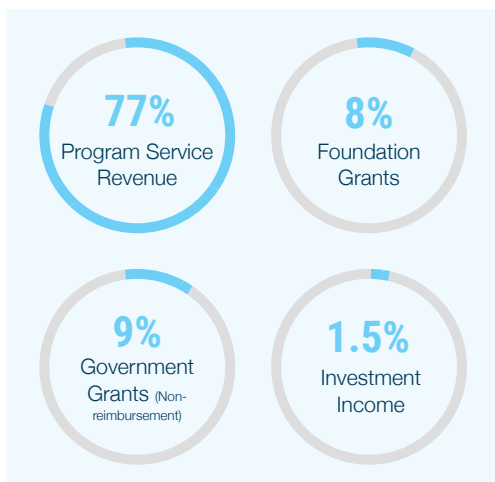
TYPE OF ORGANIZATION	TOTAL REVENUE	TOTAL EXPENSES	TOTAL ASSETS
Elder Housing	\$276.8M	\$234.5M	\$607.7M
General Housing Development	\$28.5M	\$18.2M	\$156.5M
Shelters & Temporary Accommodations	\$2.7M	\$1.7M	\$7.9M
General Services for the Homeless	\$12.7M	\$7.3M	\$17.3M
Supportive Housing	\$82.9M	\$65.1M	\$74.2M
Public Housing	\$5.3M	\$4.3M	\$16.8M
Housing Services ²	\$39.6M	\$38M	\$63.5M
Housing Rehabilitation	\$7.5M	\$5M	\$51.7M
ALL HOUSING AND HOMELESS NONPROFITS	\$456.1M	\$374.1M	\$995.6M

REVENUES

Housing and Homeless Services nonprofits play a significant role in the local economy, generating at least \$416M in annual revenue. The largest subgroups of the industry by both revenue and staff size are supportive housing and elder housing focused nonprofits. While a significant portion of reported Housing and Homeless Services income comes from program service revenue, 9% of all funding comes from government grants which is double the average for Cuyahoga County.

\$416.1M TOTAL REVENUE

\$404,200 MEDIAN REVENUE



GOVERNMENT GRANTS BY SUBGROUP

TYPE OF ORGANIZATION	GOVERNMENT GRANTS	GOVERNMENT GRANTS AS % OF TOTAL REVENUE
Elder Housing	\$9M	3%
General Housing Development	\$8M	28%
Homeless Shelters	\$637,000	24%
General Services for Unhoused Individuals	\$5M	39%
Supportive Housing	\$2M	2%
Public Housing	\$1M	19%
Housing Services ³	\$12M	30%
Housing Rehabilitation	\$2M	27%

^{2,3} This subcategory includes programs focused on home accessibility, repairs, rent and mortgage assistance, and utility assistance.

HOUSING AND HOMELESS SERVICES

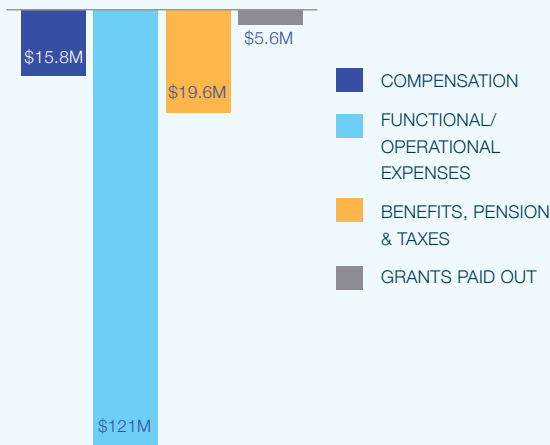
EXPENSES

Housing and Homeless Services nonprofits on average have greater expenses than other nonprofits in Cuyahoga County with a median expense amount per reporting organization of \$495,535 compared to the sector as a whole \$154,000 for the entire nonprofit sector.

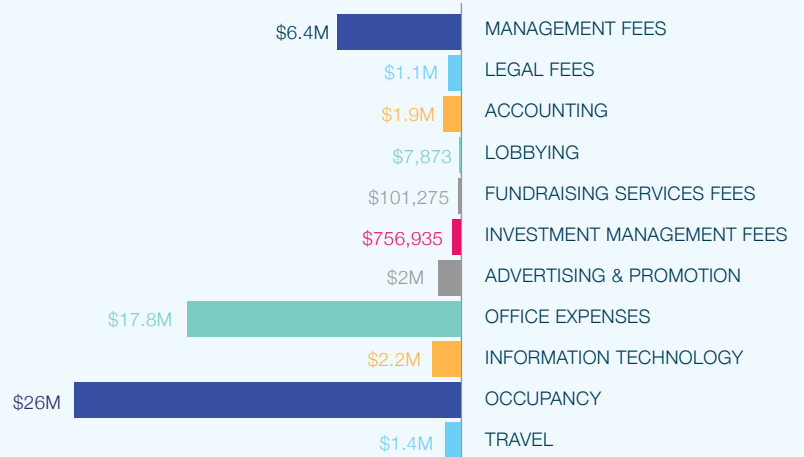
\$374.1M TOTAL EXPENSES

\$495,500 MEDIAN EXPENSES

TOP EXPENSE CATEGORIES



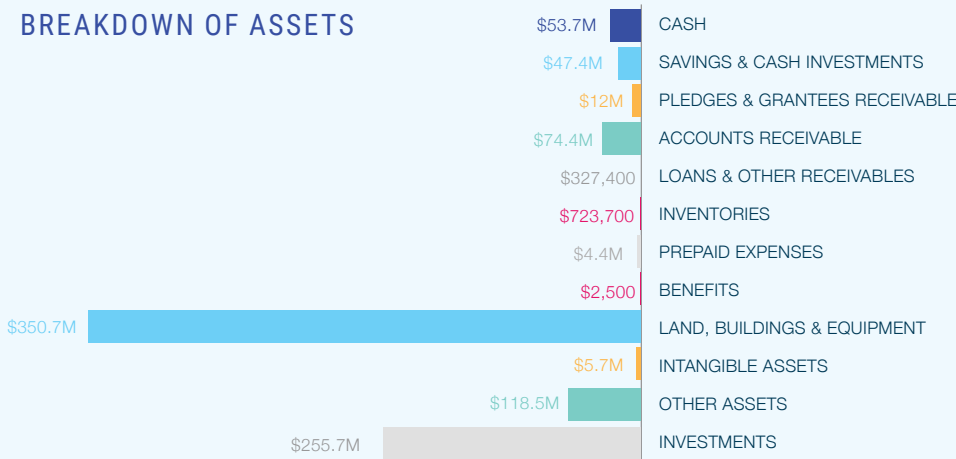
FUNCTIONAL / OPERATIONAL EXPENSE BREAKDOWN



ASSETS

Of the total \$51B in nonprofit assets locally, Housing and Homeless Services organizations hold 2% (\$1B)—mainly in unrestricted funds. A majority of their assets are land, building, and equipment assets, although they hold a significant amount in investments as well.

BREAKDOWN OF ASSETS



\$1B
TOTAL NET ASSETS

\$4.3M
TEMPORARILY RESTRICTED ASSETS

\$258.1M
UNRESTRICTED ASSETS

HOUSING AND HOMELESS SERVICES

TOP 5 CAPACITY BUILDING NEEDS FOR HOUSING AND HOMELESS SERVICES NONPROFITS

2022	2023 AND BEYOND
 Fundraising and Grant Writing	 Strategic Planning or Long-term Planning
 Strategic Planning or Long-term Planning	 Staff Salaries
 Program Development	 Evaluation
 Collaboration Development	 Fundraising and Grant Writing
 Diversity, Equity, and Inclusion	 Board Development

KEY FINDINGS:

- Racial Disparities Across Industry - From Staff, to Leadership, and Population Served:** Housing and Homeless Services organizations are not reflective of the demographics of the county as a whole—with only 38% of their leadership teams and 54% of their staff identifying as people of color (compared to 52% and 60% for the county as a whole, respectively). While a majority (58%) of their population served are people of color, 62% of all reporting organizations were led by White executives. Additional data estimates over 76% of individuals experiencing homelessness in Cuyahoga County are people of color. This indicates that the staff working in this industry are not representative of the population in need, and that the demographics of the population served is not representative of the population in need. Together, these findings indicate Black and Brown individuals are not getting access to homeless services at the same rate that White individuals are, even though the need is greater.
- Lack of Understanding of Full Need:** The U.S. Department of Housing and Urban Development (HUD) requires counts of sheltered and unsheltered persons for those communities receiving federal funding from the Continuum of Care (CoC) and Emergency Solutions Grant Programs; these are called Point-in-Time Counts (PIT), as they occur during one day in the last ten days of January. Cuyahoga County's PIT Count for 2022 is 1,324 total people estimated to be experiencing homelessness. Even though this is the number used to gauge the state of homelessness nationwide many organizations feel that this count does not accurately represent the full population experiencing homelessness. For example, the Northeast Ohio Coalition for the Homeless estimates there are 19,000 people who at one point experienced homelessness in 2020 in Cuyahoga County and 5,470 individuals who used emergency shelter services; while there are only 884 units of permanent supportive housing available in the County.
- Large Housing and Homeless Services Organizations Focus on Older Adults:** Housing and Homeless Services nonprofits vary significantly in size and focus areas. A majority of small Housing and Homeless Services organizations focus on shelter, supporting housing, and housing development, while 60% of all Housing and Homeless Services nonprofits over \$2M in revenue identify as elder housing nonprofits. These organizations are part of the care continuum for aging members of Cuyahoga County.

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 Housing and Homelessness nonprofits and the sector as a whole!