



COVID-19 JOBS UPDATE, NOVEMBER 2021: Nonprofits add just 5,000 jobs in November

December 10, 2021

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Online at: <http://ccss.jhu.edu/november-2021-jobs>

In our [continuing effort](#) to track the ongoing impact of the coronavirus pandemic on nonprofit employment, this report documents our estimates of COVID-induced nonprofit job losses through November 2021, as reflected in the [November BLS Employment Situation Report](#). On the heels of a strong recovery in October, the nonprofit workforce added just 5,000 jobs in November during a weak month overall.

Part 1 of this report spotlights the changes in nonprofit employment in November 2021. **Part 2** then details the recovery of nonprofit jobs over the past several months and notes where that leaves nonprofit employment as of November compared to the pre-pandemic period. Against this backdrop, **Part 3** provides an updated estimate of the time it will take the nonprofit sector to return to pre-pandemic employment levels based on the recovery record from January through November 2021.

PART 1: CHANGE IN NONPROFIT JOBS IN NOVEMBER 2021

As shown in **Figure 1**, November saw a small gain of 5,274 nonprofit jobs, reducing the total lost jobs by just 1% of the 490,464 jobs still estimated to be as of October.¹

Of the major fields of nonprofit activity that we track, religious, grantmaking, civic, professional, and similar organizations recovered the most jobs in November, gaining 2,809 workers, reducing the number of missing jobs in these institutions by 7.1%. This gain followed an overall loss of nearly 1,800 jobs in October. Social assistance organizations added nearly 1,500 workers during the month, reducing the number of jobs missing in this field by 2.6%. Nonprofit health care institutions, meanwhile, followed a strong month of job gains in October with a lackluster recovery of just 900 jobs in November, or just .5% of the October jobs deficit in this field. Nonprofit arts, entertainment, and recreational organizations added an estimated 800 jobs during the month, or 1.7% of the still-missing jobs in this field.

FIGURE 1 • Estimated changes in nonprofit jobs, November vs. October 2021, by field

	Nonprofit jobs lost as of October 2021 [^] vs. February 2020	Change in nonprofit jobs in November vs. October 2021 [^]	Percent of remaining lost nonprofit jobs regained or lost in November 2021 [^]
Educational services	-125,208	-1,632	-1.3%
Religious, grantmaking, civic, professional, & similar	-39,716	2,809	7.1%
Arts, entertainment, & recreation	-46,919	791	1.7%
Social assistance	-57,605	1,480	2.6%
Health care	-197,321	912	0.5%
Other fields*	-773	1,834	
TOTAL, ALL FIELDS	-490,464	5,274	1.1%

[^] Reflects BLS adjustments for September and October 2021.

* Includes: Construction; Manufacturing; Wholesale trade; Retail trade; Professional and technical services; Transportation and warehousing; Information; Finance and insurance; and Accommodation and food services. Totals ~4.4% of total nonprofit employment. As of November 2021, this aggregate field has exceeded estimated pre-pandemic employment levels.

Educational institutions, on the other hand, suffered a marginal loss of approximately 1,600 jobs in November, increasing the percent of jobs missing in this field by 1.3%. At the same time, the aggregate “other” fields category—embracing the small number of nonprofit workers in a diverse array of 9 primarily for-profit fields such as retail trade, accommodation and food services, construction, and transportation and warehousing—added over 1,800 jobs during

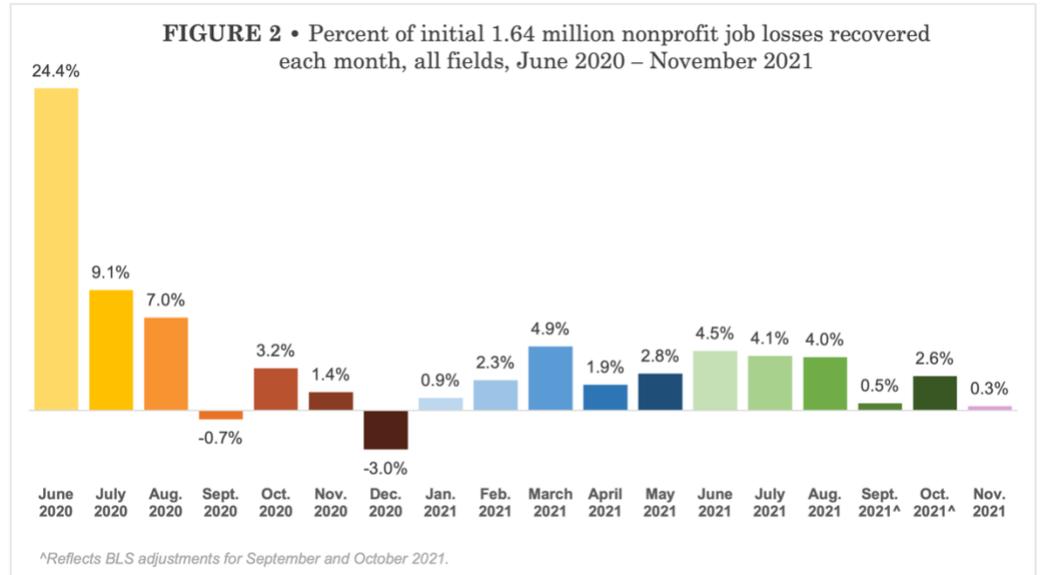
¹ Our [October update](#) found that, as of October 2021, nonprofit job losses stood at an estimated 491,497. However, BLS routine revisions for September and October resulted in this new estimate, which we have incorporated in Figure 1. BLS monthly revisions result from additional reports received from businesses and government agencies since the last published estimates and from the recalculation of seasonal factors. For more information, see: [U.S. Bureau of Labor Statistics November Employment Situation Report \(12/3/2021\)](#).

November, bringing overall nonprofit employment in these fields approximately 1,000 workers above estimated pre-pandemic numbers.

PART 2: TRACKING THE RECOVERY OF NONPROFIT JOBS

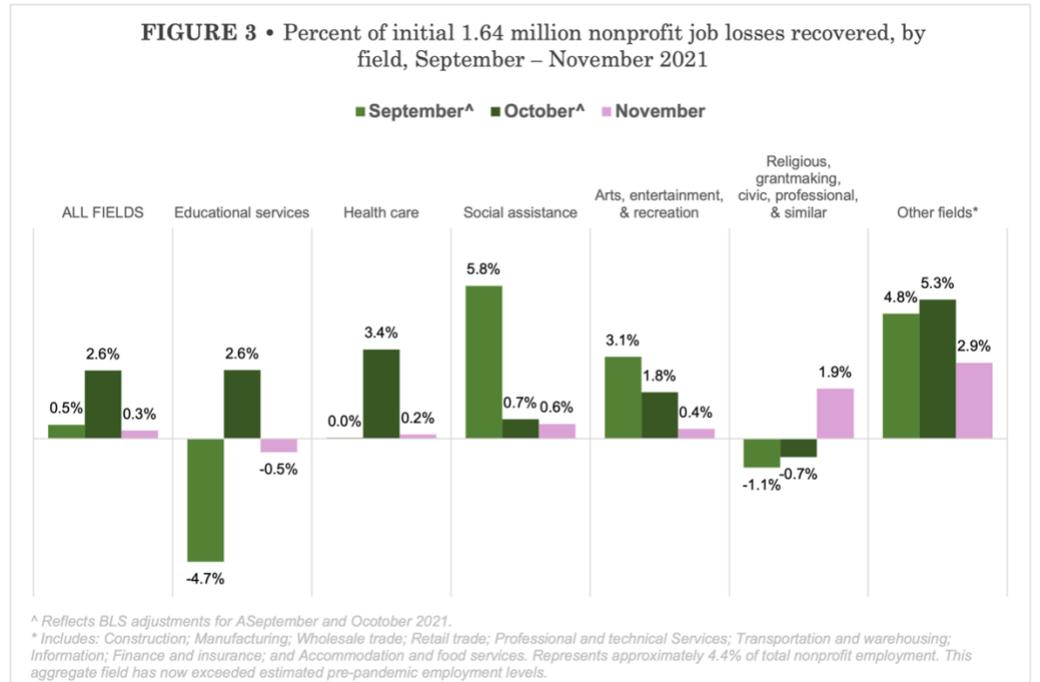
Prior to the onset of the COVID-19 pandemic, U.S. nonprofit institutions accounted for at least 12.5 million total jobs. As reported in our [2020 Nonprofit Employment Report](#), during the first three months of the pandemic (i.e., March, April, and May 2020), nonprofits lost a conservatively estimated 1.64 million of those jobs, reducing the nonprofit workforce by 13.2% as of May 2020. This section examines the progress made by nonprofits in recovering those lost jobs over the ensuing months.²

As shown in **Figure 2**, in June, July, and August 2020 40.6% of these initial 1.64 million lost nonprofit jobs were recovered. Beginning in September 2020, however, this recovery slowed significantly, with the months of September 2020–February 2021 seeing a combined recovery of just 4.2% of the initial lost jobs overall. A stronger recovery trend began in March 2021, with March through August seeing a combined recovery of 22.3% of initial estimated job losses. The Fall of 2021 ushered in a period of more uneven job growth, with 3.1% of initial job losses recovered during September and October. November continued this uneven trend, with a recovery of just 0.3% during the month based on preliminary data. Thus, over the full recovery period (i.e., June 2020–November 2021), **nonprofits have recovered approximately 70.5% of the jobs lost as of May 2020.**



As shown in **Figure 3**, all but one major field of nonprofit activity recorded a positive recovery during November 2021. Among the major fields of nonprofit activity, the largest recovery was in religious, grantmaking, civil, and professional associations, which regained nearly 2% of their initial job losses during the month. Nonprofits operating in social assistance, arts, entertainment, and recreation, and health care, all saw small—but still positive—recoveries of 0.6%, 0.4%, and 0.2% respectively.

The sole exception was nonprofit educational institutions, which



² To estimate nonprofit job losses, we began with the latest available BLS data on nonprofit employment by field, which cover 2017, and calculated the nonprofit shares of total private employment by field as of this date. We then applied these shares to the monthly changes from pre-COVID (i.e., February 2020) levels in private employment by field as reported in the monthly BLS Employment Situation Reports to derive our estimates of monthly changes in nonprofit employment by field, such as those reflected in Figures 1 and 3 of this report. For more on these estimates, see: Salamon & Newhouse, "The 2020 Nonprofit Employment Report," *Nonprofit Economic Data Bulletin no. 48*, (Baltimore: Johns Hopkins Center for Civil Society Studies, June 2020), available at: bit.ly/2020-NP-Empi-Rpt

experienced fresh losses, setting the jobs recovery in this field back by 0.5% in November.

Over the full recovery period from June 2020 through November 2021, educational institutions have thus recovered approximately 61% of the estimated 323,000 jobs lost as of May 2020; health care institutions have recovered 64% of their estimated 547,500 early job losses; social assistance organizations have recovered 78% of their initial estimated 259,000 job losses; arts, entertainment, and recreational institutions recovered approximately 77.6% of the initial 206,000 jobs lost; and religious, grantmaking, civic, professional, and similar organizations have recovered 75% of their estimated 147,000 job losses. [Click here to view field-level recovery data for all months.](#)

As shown in **Figure 4**, the nonprofit workforce as of November 2021 is estimated to be approximately 485,000 jobs—or 3.9%—smaller vs. its estimated pre-pandemic level. These missing jobs included 13% of pre-pandemic workers in nonprofit arts and entertainment organizations; 6.3% of those in education; 4.5% of workers in religious, grantmaking, and civic associations; and 3.7% of workers in nonprofit social service institutions.

Of particular note, while the overall nonprofit health care workforce remained down by over 196,000 estimated jobs, or 2.9% of the pre-pandemic workforce, 145,500—or nearly three-quarters of these missing jobs—were identified as being in nursing and residential care facilities.

FIGURE 4 • Estimated nonprofit job losses, November 2021 vs. February 2020, by field

	Estimated number of jobs as of February 2020 ^o	Estimated nonprofit job losses, November 2021 [^] vs. February 2020	Percent of jobs lost, November 2021 [^] vs. February 2020
Health care	6,777,730	-196,409	-2.9%
Educational services	2,003,634	-126,840	-6.3%
Social assistance	1,528,920	-56,125	-3.7%
Arts, entertainment, & recreation	355,965	-46,128	-13.0%
Religious, grantmaking, civic, professional, & similar	818,562	-36,907	-4.5%
Other fields*	555,421	1,060	0.2%
TOTAL, ALL FIELDS	12,482,741	-485,190	-3.9%

^o Based on 2017 BLS data, latest year available.

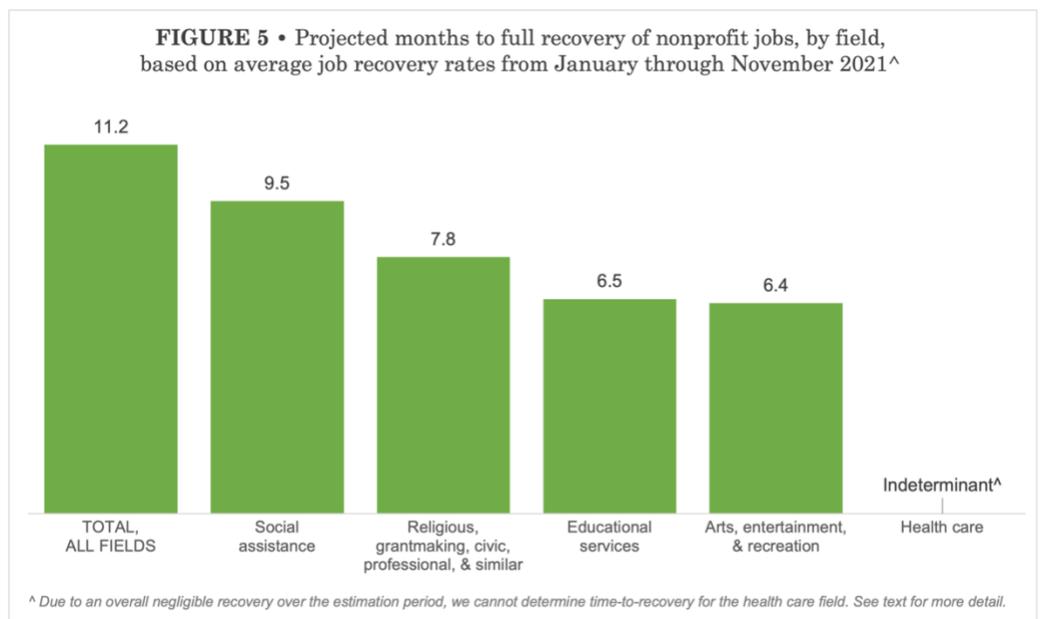
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PART 3: ESTIMATED MONTHS TO RECOVERY

Following the process developed for our [June 2021 report](#), we have updated our estimates of the likely time to full recovery of nonprofit employment back to pre-pandemic levels. To do so, we assumed that the average rate of nonprofit job recovery from January through November 2021 will prevail moving forward. With an estimated 485,190 nonprofit jobs still lost as of the end of November, and an average of 43,252 nonprofit jobs recovered per month over this period, this suggests it would take the sector **11.2 months to return to its pre-COVID level of**

FIGURE 5 • Projected months to full recovery of nonprofit jobs, by field, based on average job recovery rates from January through November 2021[^]



[^] Due to an overall negligible recovery over the estimation period, we cannot determine time-to-recovery for the health care field. See text for more detail.

employment, as shown in **Figure 5**. This estimate represents a modest increase over our October prediction of 10.5 months.

Also shown in Figure 5 are the projected times to full recovery of nonprofit employment in the various fields of nonprofit activity using the same approach.³ However, as reflected in the figure, we are unable to estimate a time-to-full-recovery for the health care field, which has seen an average of just 2,400 jobs recovered per month over this period, largely due to continued losses in the nursing and residential care field. As such, we have no reliable basis for estimating its future recovery.

CONCLUSION

While nonprofits were able to recover a marginal number of jobs in November 2021, the increasing uncertainty of the near-term course of the COVID-19 pandemic occasioned by the emergence of the Omicron variant, coupled with the uneven recovery recorded over the Fall months, makes the future recovery of nonprofit workforce more difficult to predict as we enter into the holiday season.

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About the Johns Hopkins Nonprofit Economic Data Project (NED) | [link](#)

Nonprofit organizations are facing increased pressures in states and localities throughout the United States, but the nonprofit sector's ability to respond to these pressures has been limited by a lack of timely information about how prevailing economic realities are affecting the sector. The Johns Hopkins Nonprofit Economic Data Project (NED) is helping to tackle this problem by charting economic trends in the nonprofit sector including how employment, wages, and finances have changed over time and in relation to other industries. Moreover, the project is able to analyze these data at the national, regional, state, and local levels, and to focus on particular subsectors—such as nursing homes, hospitals, home health centers, education, social services, and the arts. A collaboration between the Johns Hopkins Center for Civil Society Studies, state employment security agencies, the U.S. Bureau of Labor Statistics, and state nonprofit associations, the NED Project has thus far produced almost 50 state, county, and regional [Nonprofit Economic Data Bulletins](#) since its founding in 2001, yielding a vital resource for understanding the nonprofit sector.

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³ Note that the aggregate "other fields" category has now recovered all jobs estimated to have been lost as of May 2020 and has therefore been removed from this figure.