

North Carolina Nonprofit Employment

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KEY FINDINGS

1. The charitable nonprofit sector is a major economic force in North Carolina, accounting for one out of every 18 paid workers (see page 3).
2. The 212,814 charitable nonprofit employees in North Carolina earned over \$6.6 billion in wages in 2003, or nearly 6 percent of the state's total. Through the wages they pay, North Carolina nonprofits contribute significantly to the state's economy and to the sales and income tax revenue of its government (see page 4).
3. While nonprofit employment in North Carolina is primarily concentrated in the Piedmont, it is not restricted to any one area. In fact, the nonprofit sector accounts for its largest share of total private employment in Western North Carolina, where it averages 9 percent (see page 4).
4. Over the past eight years, nonprofit employment grew by 35 percent—six times the growth rate achieved by the for-profit sector. Moreover, during the recent economic downturn of 2000-03, for-profit jobs actually declined while nonprofit jobs continued their upward trend (see page 6).
5. Nonprofit job growth was not confined to a few areas of North Carolina. Rather, in all regions of the state, nonprofits added jobs at a rate significantly above that of the for-profit sector (see pages 6 and 7).
6. Between 1995 and 2003, nonprofit job growth was especially strong in the fields of membership, civic, and advocacy organizations (149 percent) and elementary and secondary schools (101 percent). In contrast, nonprofit clinics and home health providers experienced a 14 percent decline in jobs (see page 7).
7. Over half of all nonprofit jobs in the state are in the health services field (see page 9).
8. Overall weekly wages of nonprofit employees are lower than those of for-profit and government workers. But, in industries in which nonprofits and for-profits are both significantly involved, nonprofit average weekly wages generally outpace for-profit wages (see page 10).

INTRODUCTION

Nonprofit organizations contribute to the quality of life for all North Carolinians through the health care, education, job training, youth development, elder and child care, arts, culture, and other services they provide, and through the opportunities they offer for democratic participation in the life of North Carolina communities. What is not widely appreciated, however, is that nonprofit organizations are also a major force in the state's economy, and in the economies of all the state's regions.

This report presents new information on the size, composition, distribution, and growth of paid employment in the private nonprofit sector in North Carolina as of the second quarter of 2003. The report draws on data generated by the North Carolina Department of Labor through the quarterly surveys of North Carolina workplaces it carries out under the national ES-202 labor market information program administered by the U.S. Bureau of Labor Statistics as part of the unemployment insurance program. These data are compiled from quarterly reports submitted by employers in compliance with U.S. and North Carolina law.

By law, all nonprofit employers with at least four employees are required to complete these quarterly surveys and either be covered by the federal unemployment insurance system or make other arrangements to provide unemployment coverage to laid-off workers. The one major exclusion is religious congregations, which are not required to take part in the unemployment insurance system, although the significance of this exclusion is unknown as some religious organizations nevertheless elect to be covered by unemployment insurance.

For the purpose of this report, we have chosen to focus on the "charitable" portion of the nonprofit sector. This includes organizations registered with the U.S. Internal Revenue Service under Section 501(c)(3) of the Internal Revenue Code, which embraces private, not-for-profit hospitals, clinics, colleges, universities, schools, human service organizations, child care centers, arts and environmental organizations, advocacy groups, and many more.

The remaining types of nonprofit organizations not included in the "charitable" portion of the nonprofit sector range from nonprofit trade associations, chambers of commerce, and labor unions to homeowners associations, cemetery associations, and credit unions. The exclusion of these types of organizations, many religious congregations, and nonprofits employing fewer than four people means that the nonprofit sector has an even greater impact on North Carolina's economy than shown in this report.

For further information on the ES-202 data source, the definition of the nonprofit sector, and the method used here to extract data on nonprofit organizations from the North Carolina ES-202 records, see Appendix A.

DETAILED FINDINGS

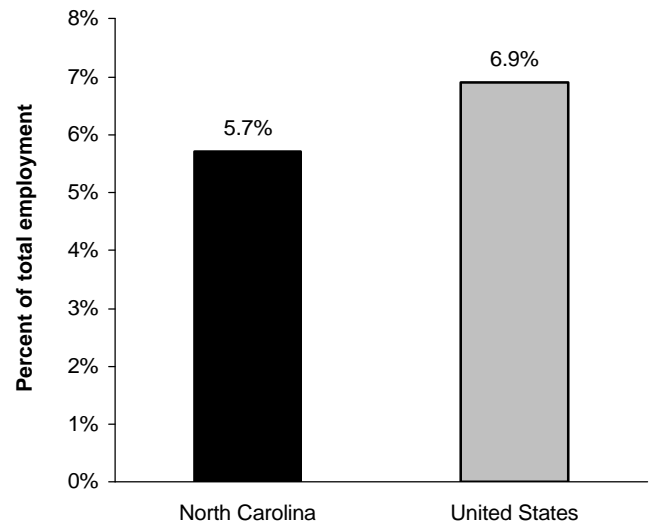
I. A MAJOR ECONOMIC FORCE

The private nonprofit sector is a major economic force in North Carolina. The sector includes private hospitals, clinics, colleges, universities, schools, child care centers, human service organizations, arts and environmental organizations, advocacy groups, and many more.

Employment: North Carolina's entire private, nonprofit sector employed 237,651 paid workers as of the second quarter of 2003. The charitable portion of North Carolina's nonprofit sector, which represents about two-thirds of all North Carolina nonprofits, employed 212,814 paid workers.

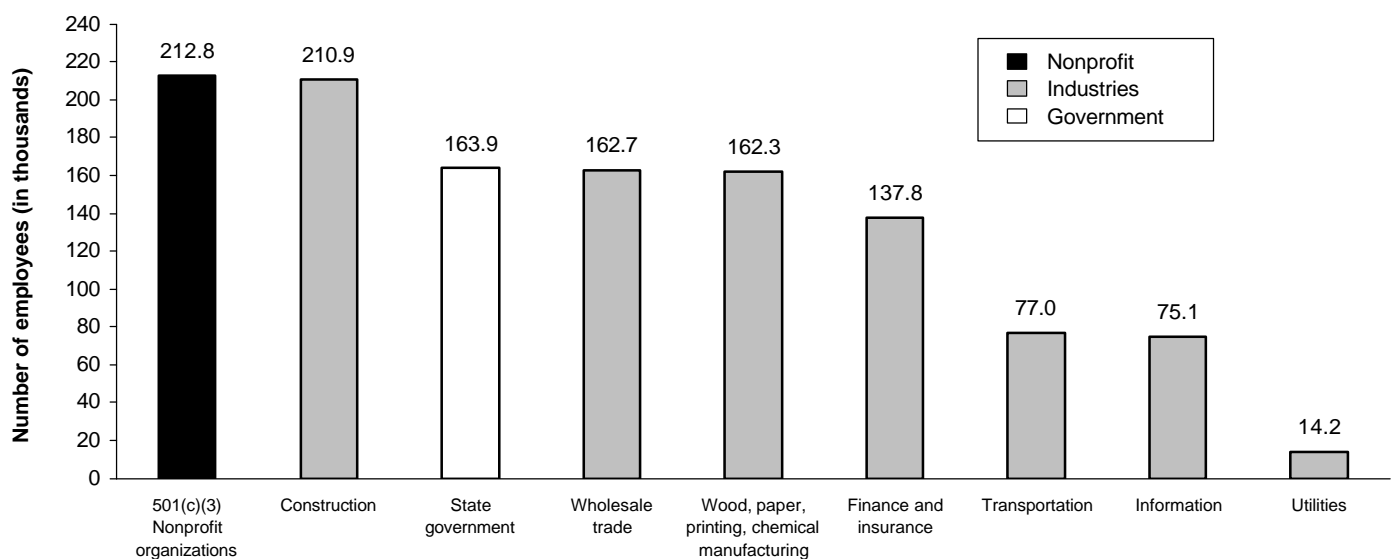
- These 212,814 workers employed in charitable nonprofits represent 5.7 percent of the total North Carolina workforce (or roughly 1 out of every 18 workers) and 6.9 percent of total private employment in the state (or roughly 1 out of every 14 private workers).
- Although, as shown in Figure 1, the nonprofit share of total employment in North Carolina is below the U.S. average (5.7 percent vs. 6.9 percent), this part of North Carolina's nonprofit sector still employs (see page 4):

Figure 1: 501(c)(3) Nonprofits' share of total employment, North Carolina vs. the nation, 2003



Source: Johns Hopkins Nonprofit Employment Data Project based on North Carolina ES-202 data, and Census of Service Industries (2002).

Figure 2: Employment in the North Carolina nonprofit sector compared to employment in selected North Carolina industries, 2003



Source: Johns Hopkins Nonprofit Employment Data Project based on North Carolina ES-202 data.

- Fifteen times as many workers as the state’s utilities industry¹ (see Figure 2);
- Nearly three times as many workers as the state’s transportation industry and as its information industry;²
- About one and a half times as many workers as the state’s entire finance and insurance industry;
- Nearly a third more people than the state’s wholesale trade industry; its wood, paper, printing and chemical manufacturing industry; and all of state government;
- Roughly the same number of workers as the state’s construction industry.

Payroll: The 212,814 charitable nonprofit employees in North Carolina earned nearly \$6.6 billion in wages in 2003.³

- Charitable nonprofit organizations thus accounted for 5.5 percent of the payroll of all North Carolina workers.
- Nonprofit payrolls exceeded those for:
 - Utilities (\$810 million);
 - Transportation (\$2.8 billion);
 - Information (\$3.5 billion);
 - Accommodation and food services (\$3.6 billion);
 - State government (\$5.7 billion); and
 - Food, textile, and apparel manufacturing (\$5.8 billion).

Through the wages they pay, North Carolina nonprofits thus contribute significantly to the state’s economy and to the sales and income tax revenues of its government.

¹ Utilities includes establishments that provide electric power, natural gas, steam supply, water supply, or sewage removal.

² Information includes publishing industries, broadcasting and telecommunications, information and data processing services, and the motion picture and sound recording industries.

³ All payroll data are annual estimates computed by multiplying second quarter data by 4. Actual annual payrolls may differ slightly due to seasonal variations.

II. SIGNIFICANT PRESENCE IN EVERY REGION

Nonprofit employment is not restricted to any one region in North Carolina. Rather, it is distributed broadly throughout the state.

Similar to North Carolina’s population, a majority of the state’s nonprofit employment is located in the Piedmont.

- The Piedmont accounts for 71 percent of nonprofit jobs in the state. The remaining nonprofit jobs are fairly evenly split between Eastern (13 percent) and Western (15 percent) North Carolina.
- The sub-regions with the largest shares of the state’s nonprofit employment are all within the Piedmont. These include the Triangle (25.7 percent), Triad (25.2 percent), and Charlotte (16.8 percent) areas. Combined, these areas account for two-thirds of the state’s nonprofit jobs (see Figure 3).

The Piedmont also has a higher nonprofit share of total private employment than the state as a whole. However, this is not the only region with an above-average nonprofit share of total private employment. In particular:

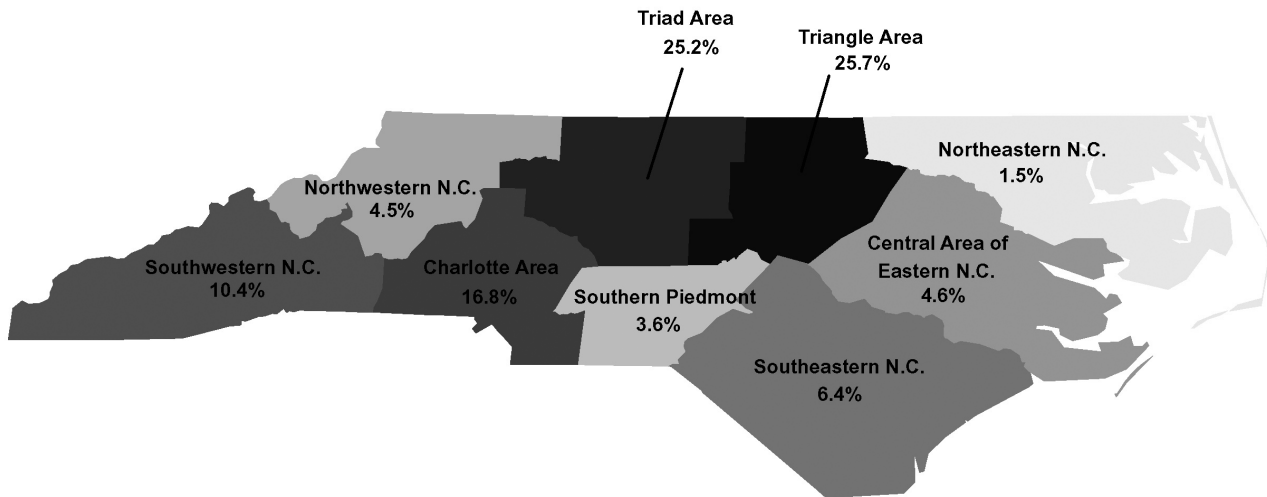
- Compared to a statewide average of 6.9 percent, the nonprofit share of total private employment stands at 7.6 percent in the Piedmont. In the Triangle, Triad, and Southern sub-regions of the Piedmont, the nonprofit share of private employment reaches 8.9 to 10.4 percent (see Figure 4).
- The Piedmont is not the region with the highest density of nonprofit employment in North Carolina, however. That distinction belongs, rather, to Western North Carolina—an area known for its robust environmental and arts and culture nonprofit groups—where nonprofit employment averages 9 percent of all private employment. Within the Southwestern sub-region, in fact, nonprofit employment reaches 10.5 percent of total private employment.

- In some counties, nonprofit employment accounts for an even larger share of total private employment, reaching close to 25 percent, or nearly 1 out of every 4 workers. This is true in rural Madison (24 percent) and Polk (23 percent) counties, as well as in urban Durham County (22 percent).

- The nonprofit share of total private employment is lowest in Eastern North Carolina, where it accounts for 4.1 percent of total private employment.

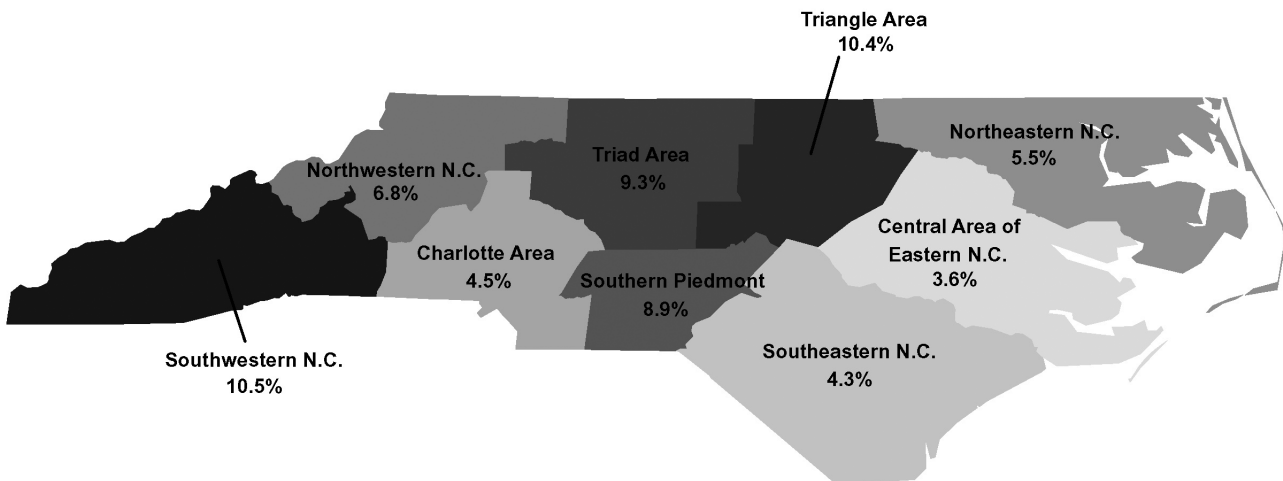
Clearly, the nonprofit sector has a widespread presence in North Carolina. For a county-by-county breakdown of nonprofit employment, see Appendix B.

Figure 3: Distribution of North Carolina nonprofit employment, by sub-region, 2003



Source: Johns Hopkins Nonprofit Employment Data Project based on North Carolina ES-202 data.

Figure 4: Nonprofit employment as a percent of total private employment, by sub-region, 2003



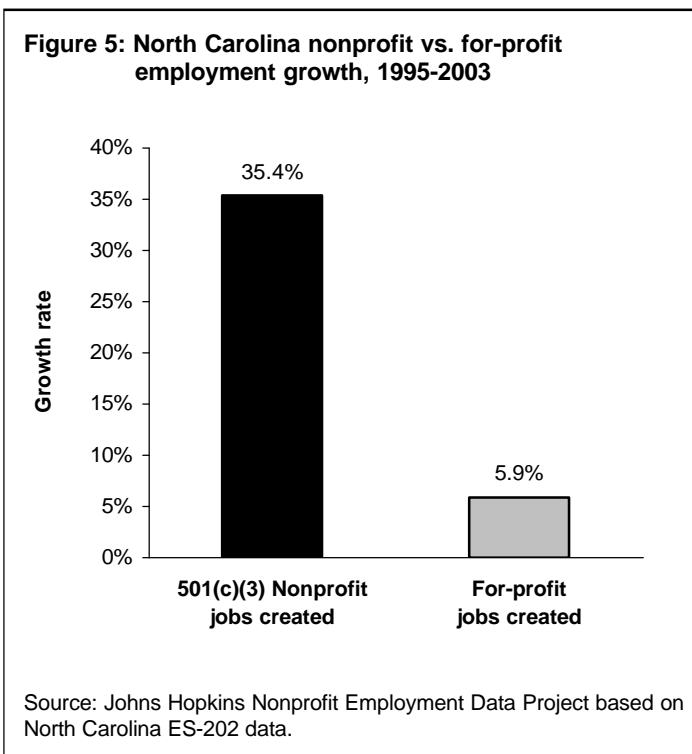
Source: Johns Hopkins Nonprofit Employment Data Project based on North Carolina ES-202 data.

III. A GROWING SECTOR OF THE ECONOMY

The nonprofit sector has been a particularly important driver of North Carolina's economy in recent years, adding jobs at a more rapid rate than the state's entire for-profit sector.

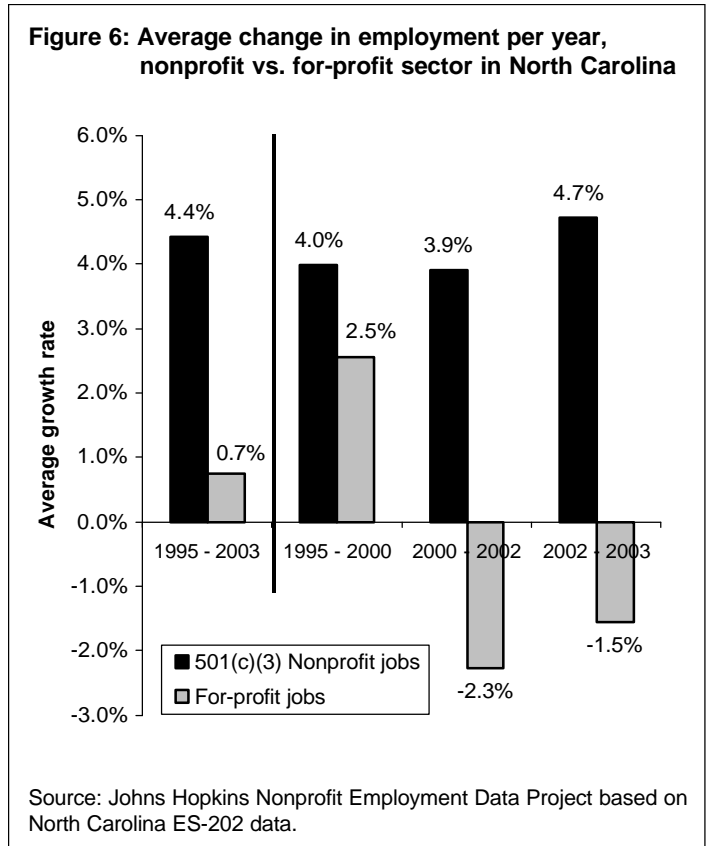
Overall growth. Between 1995 and 2003, nonprofit employment in North Carolina grew by 35 percent, or an average of 4.4 percent per year, adding about 55,700 jobs to the state's economy. This was six times the 6 percent growth rate achieved by the for-profit sector during this period, as shown in Figure 5.

- With about 5 percent of North Carolina's private employment when this period began, the nonprofit sector still accounted for an impressive 26 percent of the state's total private job growth between 1995 and 2003.



- The disparity between nonprofit and for-profit job growth was especially marked during the recent economic downturn of 2000-03, when for-profit jobs declined while nonprofit jobs continued their upward trend (see Figure 6). Between 2000 and 2002, nonprofit employment grew by an average of 3.9 percent per year while for-profit employment decreased by an

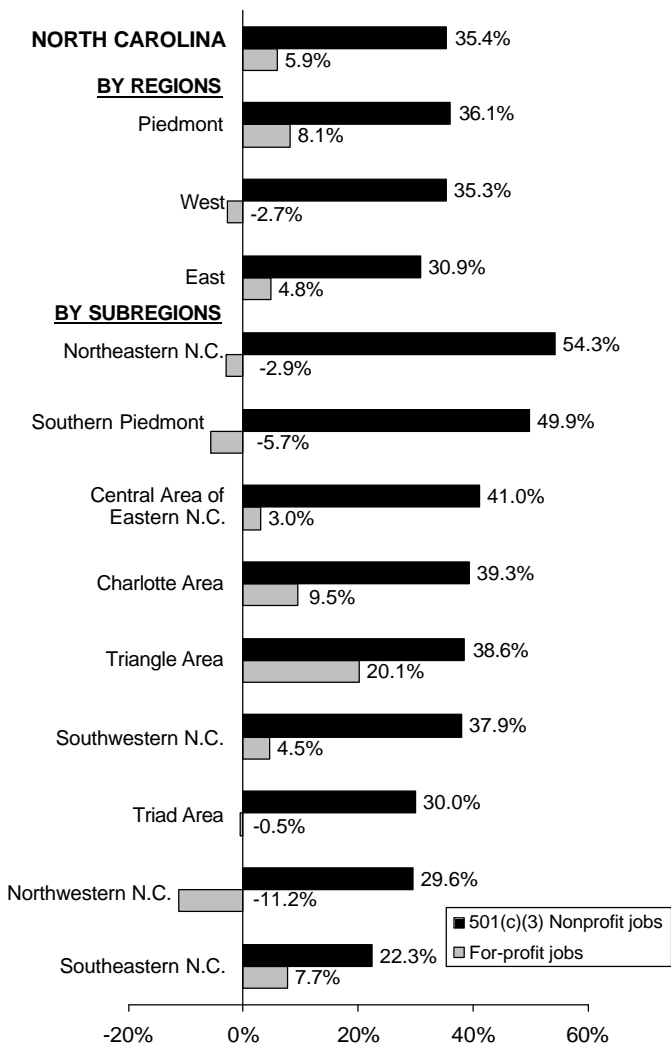
average of 2.3 percent per year. Between 2002 and 2003, nonprofit employment grew by 4.7 percent, while for-profit employment decreased by 1.5 percent.



Regional patterns. Nonprofit job growth was not confined to a few areas in North Carolina. In all regions of the state, nonprofits created jobs at a rate significantly above that of the for-profit sector (see Figure 7).

- At 36 percent, nonprofit job growth was most robust over this eight-year period in the Piedmont, although Western (35 percent) and Eastern (31 percent) North Carolina were not far behind.
- Sub-regions which experienced well above average nonprofit job growth include Northeastern North Carolina (54 percent), the Southern Piedmont (50 percent), and the Central Area of Eastern North Carolina (41 percent). In some counties, nonprofit job growth actually equaled or exceeded 100 percent, though it often started from a relatively low base. These counties include Edgecombe, Johnston, Pitt, and Richmond.

Figure 7: Changes in North Carolina nonprofit and for-profit employment by region and sub-region, 1995-2003



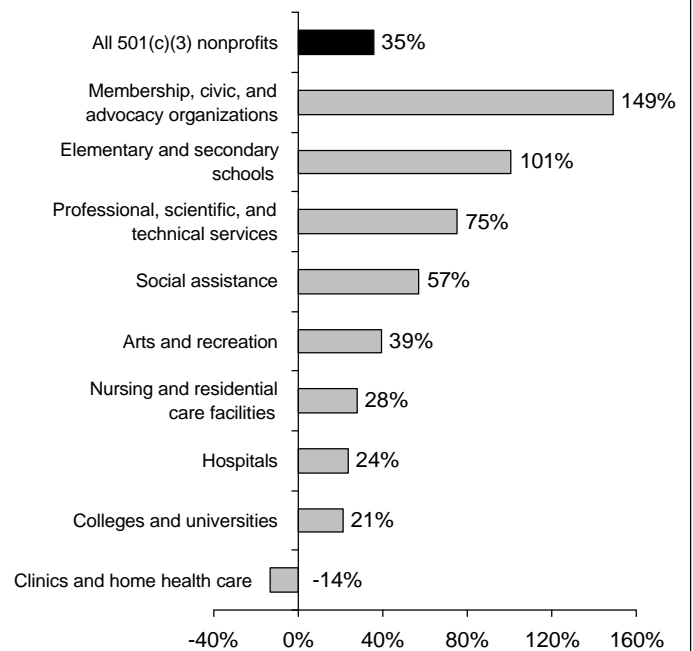
Source: Johns Hopkins Nonprofit Employment Data Project based on North Carolina ES-202 data.

Variations by field. Although overall nonprofit employment grew 35 percent between 1995 and 2003, growth rates varied considerably among fields. In particular, as shown in Figure 8:

- Nonprofit employment growth was especially strong in the fields of membership, civic, and advocacy organizations (149 percent) and elementary and secondary schools (101 percent). The former is very likely a consequence, in part, of the small base from which it started.

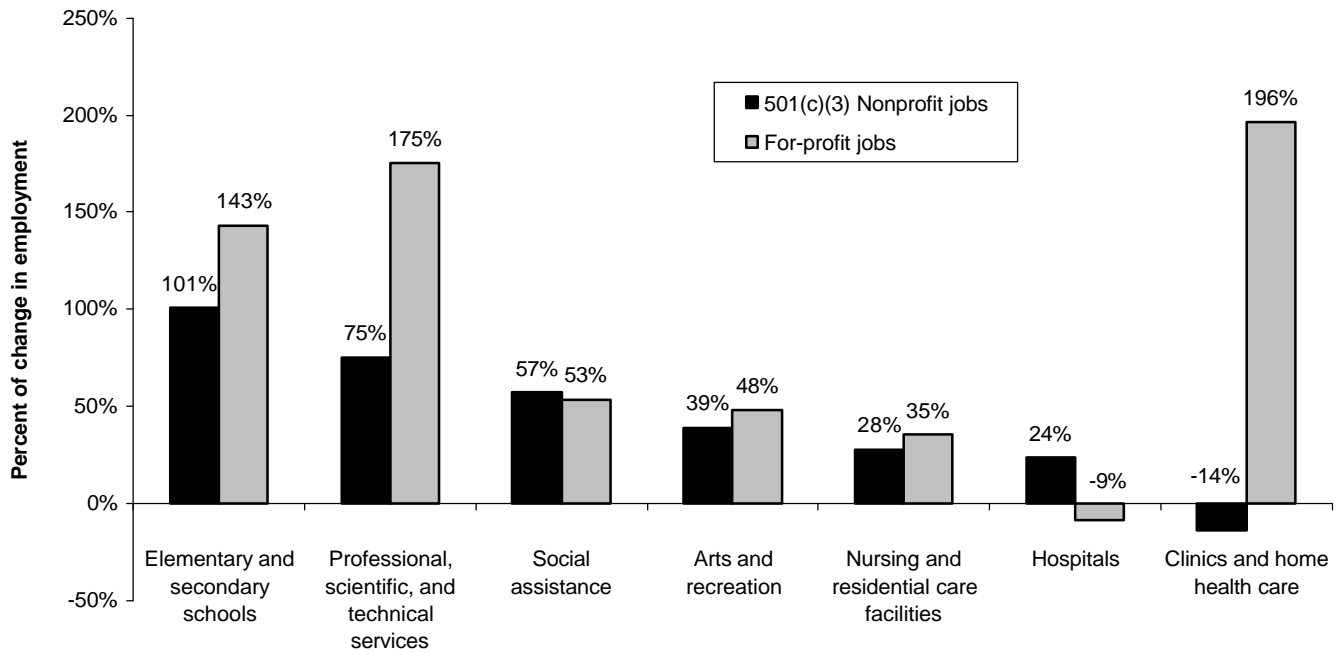
- Other fields that experienced above average nonprofit job growth include professional, scientific, and technical services (75 percent); social assistance (57 percent); and arts and recreation (39 percent).
- Nonprofit organizations in the fields of nursing and residential care, hospitals, and higher education also experienced employment growth, although somewhat below the state average.
 - Though hospitals lagged behind other fields in their rate of growth, they still accounted for 27 percent of the total increase in nonprofit jobs during this period.
- By contrast, clinics and home health services lost jobs during this period. This may reflect the Medicare regulations and technological innovations that resulted in an explosion of for-profits in this arena.

Figure 8: Changes in North Carolina nonprofit employment, by field, 1995-2003



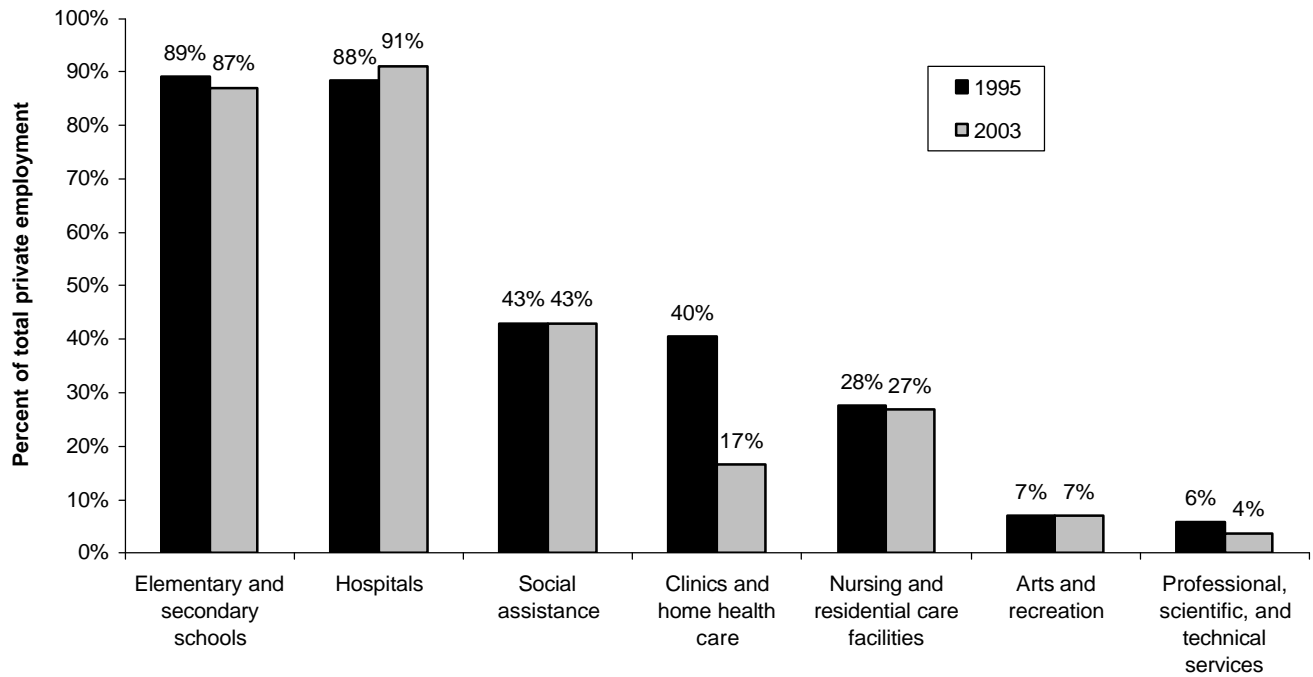
Source: Johns Hopkins Nonprofit Employment Data Project based on North Carolina ES-202 data.

Figure 9: Change in employment by field, nonprofit vs. for-profit sector in North Carolina, 1995-2003



Source: Johns Hopkins Nonprofit Employment Data Project based on North Carolina ES-202 data.

Figure 10: North Carolina nonprofits as a percent of total private employment, by field, 1995-2003



Source: Johns Hopkins Nonprofit Employment Data Project based on North Carolina ES-202 data.

Nonprofit employment grew significantly in most major fields and outdistanced overall for-profit employment growth. In some of the specific fields where nonprofits operate, however, for-profit employment grew faster than nonprofit employment (see Figure 9). As a result, in some fields nonprofits lost ground to for-profits over this eight year period. In particular:

- The change in market share between nonprofits and for-profits was most pronounced in the clinics and home health services field, where for-profit employment grew nearly 200 percent and nonprofits lost jobs. Consequently, the nonprofit share of total private employment in this field decreased by 23 percentage points (see Figure 10).
- In the other key fields of nonprofit activity, the nonprofit loss of market share was somewhat less severe. The nonprofit share of total private employment in professional, scientific, and technical services and elementary and secondary schools decreased by 2 percent, and the nonprofit share in nursing and residential care decreased by 1 percent.

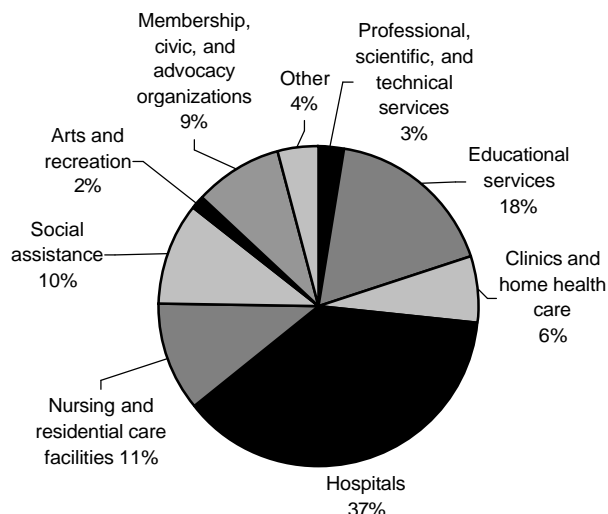
By contrast, for-profit employment in hospitals decreased by 9 percent while nonprofit employment increased by 24 percent. As a result, nonprofit hospitals expanded from 88 to 91 percent of private hospital employment during this period.

IV. HEALTH AND EDUCATION DOMINANT

Health organizations account for over half of North Carolina's nonprofit jobs, but educational services organizations also account for a significant share (see Figure 11 and Appendix C).

- Fifty-four percent of all charitable nonprofit jobs in North Carolina (nearly 117,300 jobs) are in health services. Hospitals account for the bulk of these jobs, employing 37 percent of the state's nonprofit workforce, or about 1 out of every 3 nonprofit workers, but health clinics, nursing homes, and other residential facilities account for a substantial 17 percent.
- Another 18 percent of all nonprofit jobs in North Carolina (37,330 jobs) are in educational services,

Figure 11: Distribution of North Carolina nonprofit employment, by field, 2003

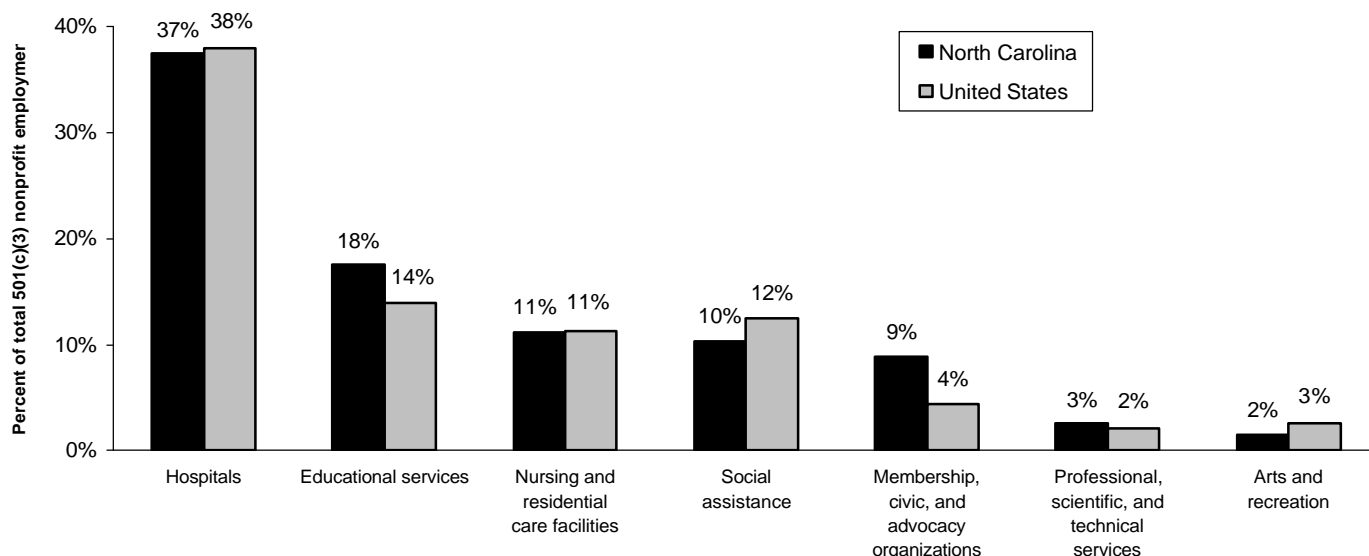


Source: Johns Hopkins Nonprofit Employment Data Project based on North Carolina ES-202 data.

which includes private elementary and secondary schools, colleges, and universities.

- Ten percent of all nonprofit jobs in North Carolina (nearly 22,000 jobs) are in social assistance. This includes employment in a wide range of human services such as family services, community nutrition, affordable housing, child care, senior services, and vocational rehabilitation.
- Nine percent of all nonprofit jobs are in various membership, civic, and advocacy organizations (close to 19,000 jobs). This includes jobs in religious organizations, grantmaking and philanthropic organizations, advocacy organizations, civic and social organizations, and the charitable arms of various professional associations.
- As shown in Figure 12, this distribution of nonprofit employment in North Carolina is similar to the national pattern, although North Carolina has a larger share of nonprofit employment in educational services and membership, civic, and advocacy organizations, and a slightly smaller share in social assistance.

Figure 12: Distribution of nonprofit employment, North Carolina vs. the nation, 2003



Source: Johns Hopkins Nonprofit Employment Data Project based on North Carolina ES-202 data.

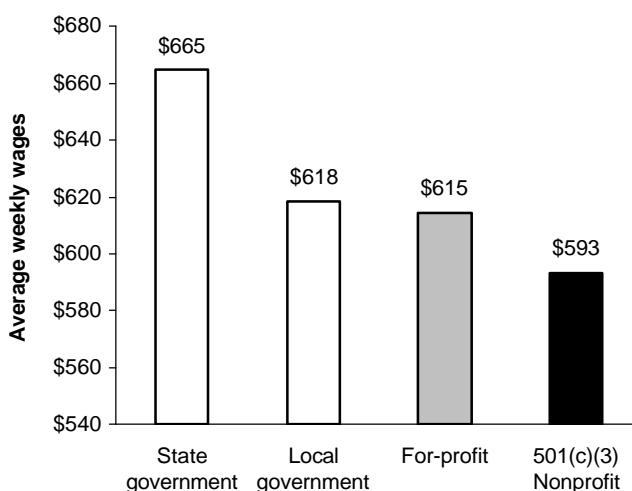
V. MIXED RESULTS ON WAGES

Overall average weekly wages of nonprofit employees are lower than those of for-profit and government employees in North Carolina. However, in industries in which nonprofits and for-profits are both significantly involved, average weekly wages of nonprofit employees often exceed those of for-profit workers.

- At \$593, average weekly wages of nonprofit workers are 4 percent below those of both for-profit workers and local government workers, and 11 percent below those of state government workers (see Figure 13).
- These averages obscure some significant variations in the average wages of nonprofit workers in different fields, however. As shown in Figure 14, average nonprofit weekly wages range from a low of \$391 in the social assistance field to a high of \$710 in the hospital field.
- In the fields where both nonprofits and for-profits are involved, the average weekly wage of the nonprofit workers is actually often higher than that of the for-profit workers (see Figure 14). This suggests that the lower overall average wage of nonprofit employees is

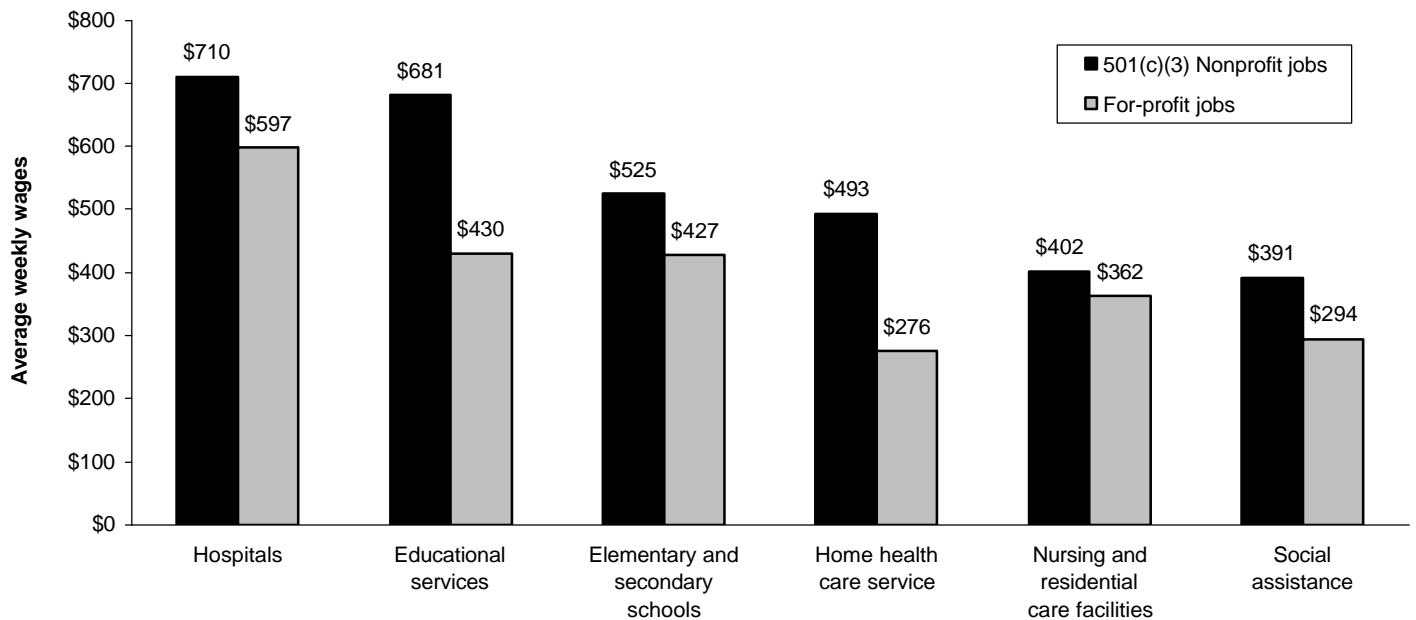
more a function of the industry mix of nonprofit employment than it is of the wage levels of nonprofit organizations. In fact, the nonprofit jobs in these industries tend to be better paying. For example:

Figure 13: Nonprofit, for-profit, and government average weekly wages in North Carolina, 2003



Source: Johns Hopkins Nonprofit Employment Data Project based on North Carolina ES-202 data.

Figure 14: Comparative nonprofit and for-profit average weekly wages in selected service fields in North Carolina, including both full-time and part-time workers, 2003



Source: Johns Hopkins Nonprofit Employment Data Project based on North Carolina ES-202 data.

- Nonprofit home health care workers earn close to two times more than their for-profit counterparts;
 - Nonprofit workers in educational services earn over one and a half times more than workers in for-profit organizations;
 - Similarly, in the field of social assistance, nonprofit salaries average a third more than for-profit ones.
- This pattern of comparative earnings may be because for-profit employers use more part-time workers than nonprofit employers, but it is not possible to determine this from the available data.⁴

CONCLUSION

Nonprofit organizations serve people and communities throughout the state of North Carolina, addressing issues of concern and improving the quality of life. North Carolina’s nonprofits range from hospitals to boys and girls clubs, from universities to environmental groups, and from museums and theaters to organizations working with the elderly, veterans, and people with disabilities.

In addition to improving North Carolina’s quality of life, the nonprofit sector is also a major force in the state’s economy and in the economies of every region in the state. The economic significance of the nonprofit sector as a source of jobs and wages, however, has often been ignored by state and local government. As a result, this sector is often overlooked in economic development as well as in education and training efforts that could prove extremely beneficial to the state’s economy in the long term. The data presented in this report are intended to correct this situation, promote greater understanding of the economic impact of the nonprofit sector, and demonstrate the immense stake that North Carolina has in this sector’s continued health.

⁴ The average weekly wage reported in the ES-202 survey data makes no adjustment for full-time or part-time work. Industries with a greater number of part-time workers could appear to have lower average weekly wages than those with fewer part-time workers even if the actual pay rates are equal.

APPENDIX A: THE ES-202 UNEMPLOYMENT INSURANCE LABOR MARKET INFORMATION PROGRAM

SOURCE OF DATA

The major source of employment and wage data for this report is the Covered Employment and Wages Program, commonly referred to as the ES-202 program, a cooperative initiative involving State Employment Security Agencies and the Bureau of Labor Statistics in the U.S. Department of Labor. The ES-202 program produces a comprehensive tabulation of employment and wage information for workers covered by state Unemployment Insurance (UI) laws and federal workers covered by the Unemployment Compensation for Federal Employees Program. Data contained in this report represent all employees covered by the Unemployment Insurance (UI) Law of North Carolina as well as federal workers covered by the Unemployment Compensation of Federal Employees Program. The data on state-insured workers are compiled from quarterly contribution reports submitted by employers subject to North Carolina law. Employment data pertaining to the federal government are obtained from similarly required reports submitted by the various government installations in North Carolina.

SCOPE OF COVERAGE

The ES-202 program accounts for approximately 98 percent of all wage and salary civilian employment nationally (the program does not cover self-employed and family workers). The principal exclusions from the ES-202 data set are employees of religious organizations, railroad workers, small-scale agriculture, domestic service, crew members on small vessels, state and local government elected officials, and insurance and real estate agents who receive payment solely by commission. In terms of nonprofit employment, the exclusion of religious organizations is the most significant; however, religious organizations may elect to be covered by the UI program and those that do are covered in the data. At this time, the level of noncoverage of employment in religious organizations is unknown.

Under federal law, all nonprofit places of employment with four or more employees are required to participate in the unemployment insurance system. At their discretion, states can extend this requirement to nonprofit places of employment with one or more employees. North Carolina has

chosen not to extend coverage to nonprofit organizations with fewer than four employees. This may result in some underreporting of nonprofit employment in North Carolina, although our previous research indicates that this underreporting is very small—usually less than five percent of total nonprofit employment.

The number of employees is measured by the number of filled jobs for the pay period that includes the 12th day of each month as reported by the employer. Both part-time and full-time employees are included in the data set. If a person holds two jobs, that person would be counted twice in the data set. Wages include bonuses, stock options, the cash value of meals and lodging if these are provided by the employer, and tips and other gratuities.

The employment data for nonprofit organizations were identified by matching ES-202 files for North Carolina with registries of tax-exempt organizations provided by the U.S. Internal Revenue Service.

For the purpose of this report, we have chosen to focus on the “charitable” portion of the nonprofit sector. This includes organizations registered with the U.S. Internal Revenue Service under Section 501(c)(3) of the Internal Revenue Code, which embraces private, not-for-profit hospitals, clinics, colleges, universities, elementary schools, social service agencies, child care centers, orchestras, museums, theaters, homeless shelters, soup kitchens, advocacy organizations, and many more. In addition to Section 501(c)(3), the Internal Revenue Code contains 25 other subsections under which organizations can claim exemption from federal income taxation as nonprofit organizations. Section 501(c)(3) is the one that covers the bulk of nonprofit organizations and the one with the organizations most commonly associated with the nonprofit sector by the general public.

APPENDIX B: NONPROFIT EMPLOYMENT IN NORTH CAROLINA, SUB-REGION AND COUNTY, COMPARED TO TOTAL PRIVATE EMPLOYMENT AND EMPLOYMENT IN THE FINANCE AND INSURANCE INDUSTRY, 2003

Region	Sub-region and county	Nonprofit employment in 501(c)(3) organizations only	Total private employment	Finance and insurance industry employment	Nonprofit employment as a percent of total private employment
EAST*		26,773	649,230	19,581	4.1%
	Northeastern N.C.				
	Bertie	339	5,483	82	6.2%
	Camden	D	NR	NR	NR
	Chowan	D	NR	NR	NR
	Currituck	D	NR	NR	NR
	Dare	473	17,612	437	2.7%
	Gates	D	NR	NR	NR
	Halifax	444	12,948	345	3.4%
	Hertford	1,046	7,715	162	13.6%
	Hyde	D	NR	NR	NR
	Martin	D	NR	NR	NR
	Northampton	212	3,710	37	5.7%
	Pasquotank	570	9,951	360	5.7%
	Perquimans	D	NR	NR	NR
	Tyrrell	D	NR	NR	NR
	Warren	210	2,597	45	8.1%
	Washington	D	NR	NR	NR
	Sub-Region Total*	3,294	60,016	1,948	5.5%
	Central Area of Eastern N.C.				
	Beaufort	996	13,214	380	7.5%
	Carteret	450	18,415	434	2.4%
	Craven	905	26,200	729	3.5%
	Edgecombe	789	17,461	355	4.5%
	Greene	162	2,367	46	6.8%
	Johnston	788	29,526	669	2.7%
	Jones	D	NR	NR	NR
	Lenoir	958	20,609	577	4.6%
	Nash	967	34,484	1,687	2.8%
	Pamlico	D	NR	NR	NR
	Pitt	1,370	46,333	1,684	3.0%
	Wayne	1,307	32,529	1,148	4.0%
	Wilson	1,083	31,676	731	3.4%
	Sub-Region Total*	9,776	272,814	8,470	3.6%
	Southeastern N.C.				
	Bladen	172	10,537	132	1.6%
	Brunswick	164	18,674	402	0.9%
	Columbus	814	13,176	487	6.2%
	Cumberland	2,678	78,182	2,378	3.4%
	Duplin	262	16,608	206	1.6%

Region	Sub-region and county	Nonprofit employment in 501(c)(3) organizations only	Total private employment	Finance and insurance industry employment	Nonprofit employment as a percent of total private employment
	Harnett	1,664	16,866	501	9.9%
	Hoke	189	5,349	76	3.5%
	New Hanover	2,167	71,777	2,461	3.0%
	Onslow	606	26,306	830	2.3%
	Pender	D	NR	NR	NR
	Robeson	3,189	29,351	1,037	10.9%
	Sampson	385	14,557	314	2.6%
	Scotland	1,414	15,017	248	9.4%
	Sub-Region Total*	13,703	316,400	9,163	4.3%
WEST*		31,628	350,946	8,893	9.0%
	Northwestern N.C.				
	Alexander	D	NR	NR	NR
	Alleghany	270	2,791	76	9.7%
	Ashe	625	6,878	209	9.1%
	Avery	1,068	6,013	66	17.8%
	Burke	2,137	25,858	403	8.3%
	Caldwell	1,000	26,881	383	3.7%
	Mitchell	623	4,222	116	14.8%
	Surry	1,188	27,305	589	4.3%
	Watauga	1,935	15,919	446	12.2%
	Wilkes	529	20,626	1,063	2.6%
	Yancey	110	3,260	69	3.4%
	Sub-Region Total*	9,486	139,752	3,578	6.8%
	Southwestern N.C.				
	Buncombe	11,694	89,858	2,300	13.0%
	Cherokee	971	6,557	213	14.8%
	Clay	D	NR	NR	NR
	Graham	D	NR	NR	NR
	Haywood	654	12,682	385	5.2%
	Henderson	2,035	30,743	935	6.6%
	Jackson	1,395	9,216	171	15.1%
	Macon	893	9,420	306	9.5%
	Madison	715	3,016	85	23.7%
	McDowell	546	14,283	160	3.8%
	Polk	839	3,708	78	22.6%
	Rutherford	1,025	20,410	321	5.0%
	Swain	333	4,002	72	8.3%
	Transylvania	1,043	7,299	208	14.3%
	Sub-Region Total*	22,142	211,194	5,314	10.5%
PIEDMONT*		151,825	1,993,100	107,318	7.6%
	Charlotte Area				
	Cabarrus	905	48,054	865	1.9%
	Catawba	2,155	77,386	1,511	2.8%
	Cleveland	3,175	28,140	659	11.3%
	Gaston	4,892	59,553	1,540	8.2%

Region	Sub-region and county	Nonprofit employment in 501(c)(3) organizations only	Total private employment	Finance and insurance industry employment	Nonprofit employment as a percent of total private employment
	Iredell	1,034	47,858	921	2.2%
	Lincoln	242	16,049	357	1.5%
	Mecklenburg	19,262	446,379	47,930	4.3%
	Rowan	3,285	39,446	813	8.3%
	Union	855	39,000	621	2.2%
	Sub-Region Total	35,805	801,863	55,216	4.5%
	Triad Area				
	Alamance	3,363	52,688	1,841	6.4%
	Caswell	126	1,759	44	7.2%
	Davidson	2,267	38,650	657	5.9%
	Davie	318	8,673	183	3.7%
	Forsyth	25,679	157,204	10,101	16.3%
	Guilford	17,393	237,236	14,607	7.3%
	Randolph	1,499	40,776	777	3.7%
	Rockingham	2,036	27,066	497	7.5%
	Stokes	591	5,347	114	11.1%
	Yadkin	418	7,903	183	5.3%
	Sub-Region Total	53,692	577,302	29,004	9.3%
	Southern Piedmont				
	Anson	D	NR	NR	NR
	Lee	326	23,396	374	1.4%
	Montgomery	409	8,714	170	4.7%
	Moore	4,012	25,716	660	15.6%
	Richmond	905	11,548	264	7.8%
	Stanly	1,973	16,074	385	12.3%
	Sub-Region Total*	7,625	85,448	1,987	8.9%
	Triangle Area				
	Chatham	1,037	13,722	200	7.6%
	Durham	32,250	143,757	4,064	22.4%
	Franklin	164	7,687	119	2.1%
	Granville	D	NR	NR	NR
	Orange	2,284	30,582	2,463	7.5%
	Person	605	9,792	203	6.2%
	Vance	993	13,405	241	7.4%
	Wake	17,370	309,543	13,642	5.6%
	Sub-Region Total*	54,703	528,487	21,110	10.4%
Grand Total for State*		212,814	3,102,265	137,754	6.9%

[D] Data unavailable because of federal restrictions on the disclosure of data that can identify individual employers. The total nonprofit employment in the counties with such disclosure restrictions is 2,530, or 4.0 percent of total private employment.

[NR] Not reported due to unavailability of data on nonprofit employment in this county.

* Totals may be greater than the sum of individual counties due to the restrictions on the disclosure of data that can identify individual employers.

APPENDIX C: DISTRIBUTION OF NONPROFIT EMPLOYMENT IN NORTH CAROLINA, BY INDUSTRY, 2003

NAICS codes ⁵	Industry	Types of organizations	Number of nonprofit employees	Percent of total nonprofit employment
541	Professional, Scientific, and Technical Services	Legal services; accounting and tax services; computer services; management, scientific and technical consulting services; and research and development services	5,482	2.6 %
611	Educational Services	Elementary and secondary schools, junior colleges, colleges, universities, professional schools, and technical and trade schools	37,330	17.5 %
621	Ambulatory Health Care Services	Outpatient care centers, family planning centers, medical laboratories, and home health care services	13,809	6.5 %
622	Hospitals	General medical and surgical hospitals, psychiatric and substance abuse hospitals, specialty hospitals	79,747	37.5 %
623	Nursing and Residential Care Facilities	Nursing care facilities; residential mental retardation, mental health, and substance abuse facilities; and elderly community care facilities	23,742	11.2 %
624	Social Assistance	Individual and family services, youth services, elderly and disabled services, community food services, community housing services, emergency and relief services, vocational rehabilitation services, and child day care services	21,974	10.3 %
711, 712, 713	Arts and Recreation	Performing arts companies, museums, historical sites, zoos and botanical gardens, nature parks, recreation centers and facilities	3,232	1.5%
813	Membership, Civic, and Advocacy Organizations	Religious organizations, grant making and giving services, social advocacy organizations, professional associations, and civic and social organizations	18,918	8.9 %
All other	Other	Credit intermediation, visitors bureaus, waste management and remediation services, and others	8,581	4.0 %
			212,814	100.0%

⁵ NAICS codes are based on the *North American Industry Classification System* (U.S. Office of Management and Budget, 2002).

The Johns Hopkins Nonprofit Employment Data Project

The Nonprofit Employment Data (NED) Project is utilizing a previously untapped source of up-to-date data to shed new light on nonprofit employment and wages in the U.S. and to chart the relationship among nonprofit, for-profit, and government employment both nationally and locally. To do so, the project is drawing on data compiled as part of the U.S. Unemployment Insurance program. A collaboration between the Center for Civil Society Studies and state employment security agencies, the U.S. Bureau of Labor Statistics, and state nonprofit associations, the NED Project is yielding a vital new resource for understanding the nonprofit sector.

The Johns Hopkins Center for Civil Society Studies

The Johns Hopkins Center for Civil Society Studies seeks to improve understanding and the effective functioning of not-for-profit, philanthropic, or “civil society” organizations in the United States and throughout the world in order to enhance the contribution these organizations can make to democracy and the quality of human life. The Center is part of the Johns Hopkins Institute for Policy Studies and carries out its work through a combination of research, training, and information-sharing both domestically and internationally.

The North Carolina Center for Nonprofits

The North Carolina Center for Nonprofits is a 501(c)(3) nonprofit organization that serves as a statewide network for nonprofit board and staff members, an information center on effective organizational practices, and an advocate for the nonprofit sector as a whole. The Center was created in 1990 with grassroots input from 2,153 nonprofit leaders. Now more than 1,500 nonprofits and foundations from all 100 counties across the state have joined this coalition of nonprofits working together for a better North Carolina.

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