

Independent
Sector

DECEMBER 2025

HEALTH OF THE U.S. NONPROFIT SECTOR



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Acknowledgments

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Foreword

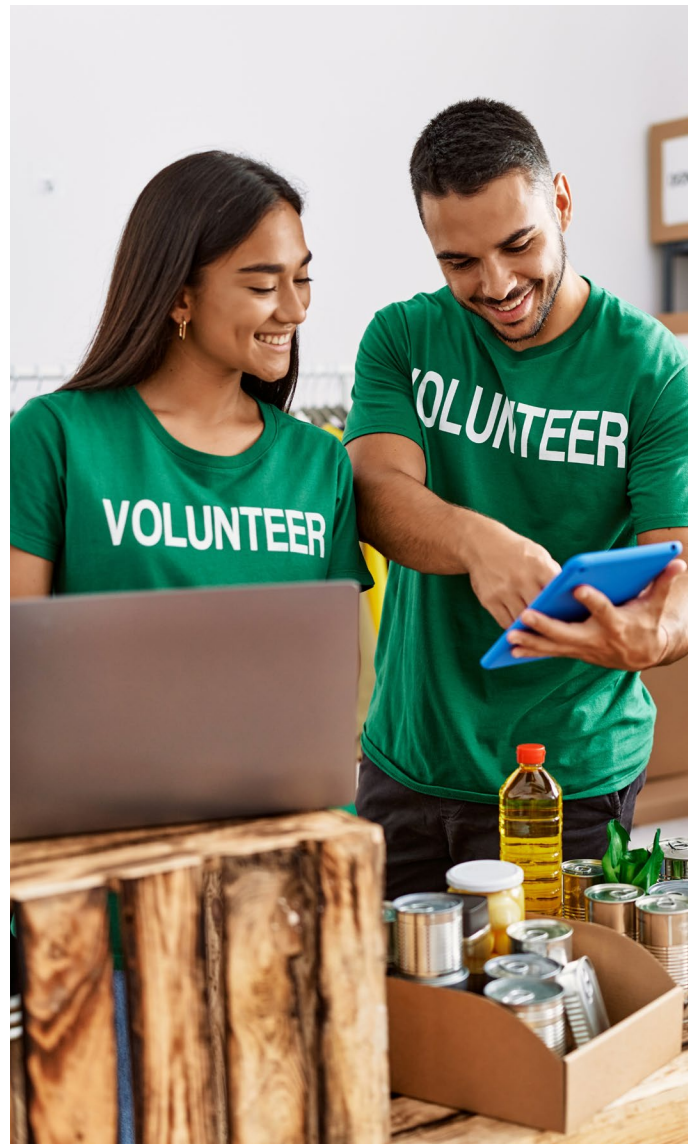
A charitable sector that is healthy, trusted, and equitable is essential to a nation where all people thrive in a vibrant civil society and a just democracy.

There are 1.9 million registered nonprofit and philanthropic organizations in the United States (Internal Revenue Service, 2025). These organizations play a critical role in helping communities meet human service, healthcare, and educational needs. They enrich our lives through their support of faith-based, arts, and cultural institutions, and they are instrumental in efforts to protect the environment. They strengthen social connections and encourage civic engagement.

Nonprofits are among the most trusted institutions in America. Today, the public sees nonprofits as better equipped than any other part of society to bridge the social divisions that dominate our landscape.

For nonprofits to sustain these vital roles, Independent Sector believes that four conditions must hold true when we assess the health of the charitable sector:

- Charitable organizations must be **financially robust**.
- Charitable organizations must be powered by a **thriving workforce** that reflects the communities we serve.
- Charitable organizations must be **trusted, well-governed, and effective**.
- Charitable organizations must be **informed and active advocates**, as allowed by law.



Comprehensive data are crucial for charitable sector leaders, policymakers, and other stakeholders to understand how the nonprofit sector is faring against these and other benchmarks of health. This annual report aims to address that need by providing a timely, holistic picture of the health of the U.S. nonprofit sector.

We hope that charitable sector leaders, policymakers, and other stakeholders will use this information to inform decisions that affect economies, employment, and the critical roles nonprofits play in their local communities.

Letter from the CEO

As I traveled the country on a listening tour in 2023 and 2024, I heard about challenges being faced by nonprofit organizations, their communities, and the sector: increasing costs of operating for all nonprofits; the physical and psychological burnout of staff and leadership; insufficient support for leaders of color; and difficulty recruiting, retaining, and supporting staff with the right training and skills to meet nonprofit missions. Workforce concerns are an old story in the sector, and they are closely tied to ongoing concerns about funding and resources: How can our organizations do everything expected of us while being asked to make do with limited dollars and staff? Beyond resources and staff, we also ask ourselves: How can our organizations continue to strengthen relationships with our funders and communities while effectively advocating for ourselves and others? In 2025, we also face more urgent challenges: disruptions to government grants and programs, a new tax code with concerning implications for our sector, looming cuts to the social safety net, and a political environment that makes it even more challenging to find a path to stability for our organizations and the communities we serve.

These challenges—old and new, chronic and acute—happen in real time. In this report, we use the best and most timely data available to illuminate the issues the sector is facing, but data on the sector are not always as timely and precise as we would like. Independent Sector is advocating for timelier sector-specific data, an issue that feels more urgent than ever in a year when many organizations have laid off staff in response to funding cuts and policy shifts. What's more, we are concerned about the possibility that the data we currently have on our sector may be rendered less

timely or reliable due to changes at the agencies that produce these data resources.

As you read this report, I would like to highlight a few crucial points: first, not only does our sector help weave the social fabric of America, it also is the third largest private employer. Second, our sector is an economic driver to the tune of \$1.5 trillion annually, over 5% of America's GDP. We have power! Lastly, conducting and understanding research allows Independent Sector to fine-tune its strategies to defend and strengthen the sector.

At Independent Sector, we take a long view of the health of the sector. But we also prioritize advocating for what the sector needs right now and defending the sector from immediate threats. This annual report focuses on the long view of the health of the sector, but we have attempted to share information on more urgent concerns as well. I hope that as you review the data and research shared here, you better understand the challenges we face and the enormous potential of collective action to address those challenges.

Dr. Akilah Watkins
President and CEO,
Independent Sector



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Economy & Finance

Nonprofits make up a vital part of our society and our economy, fueled by giving from individuals, foundations, and corporations; revenue from programs and fees; and government contracts and grants. It is imperative that nonprofit leaders and policymakers track the economic and financial condition of the nonprofit sector — on its own and in comparison to other sectors of the economy — to have a complete understanding of how nonprofits are faring and what steps need to be taken to strengthen the sector.

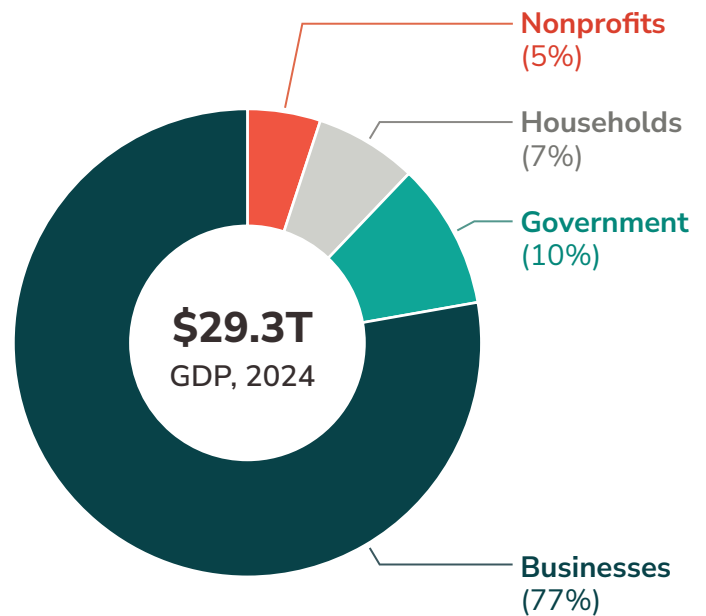
Nonprofit finances are currently being crunched from several directions: In addition to the perennial struggle to balance budget and mission, nonprofits are facing increased costs of operations, disruptions to their government funding, and looming cuts to federal safety net programs that are likely to further increase demand for services.

The Nonprofit Sector's Economic Contribution Is Substantial and Underestimated

The nonprofit sector contributes over 5% of the U.S. gross domestic product, or over \$1.5 trillion in 2024 (U.S. Bureau of Economic Analysis, 2025b). Because the Bureau of Economic Analysis estimates the contributions of nonprofits by their expenditures — the people served by charitable nonprofits don't pay for those services so the “value” can't be estimated by price paid — this is a likely underestimate of the impact of nonprofits on communities. This is especially true during economic downturns and other crises, when the nonprofit sector may play a stabilizing role. Despite the important role of the sector in the economy, these data and others (see Workforce section) are not always as accurate and timely for the nonprofit sector as for other sectors. Accurately assessing, measuring, and communicating the broader impact of nonprofit organizations is necessary for the sector to advocate for itself and the people we serve, but doing so remains a challenge.

FIGURE 1

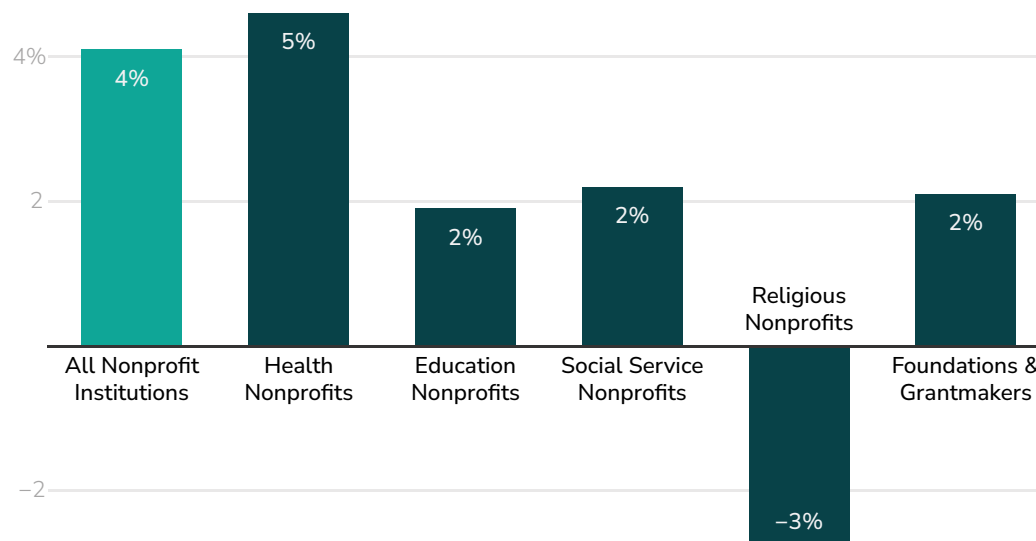
Gross Value Added of Nonprofits as Percent of Gross Domestic Product, 2024



Source: U.S. Bureau of Economic Analysis, 2025b

FIGURE 2

Inflation-Adjusted Change in Gross Outputs by Nonprofit Industry, 2023–2024



Source: U.S. Bureau of Economic Analysis, 2025c

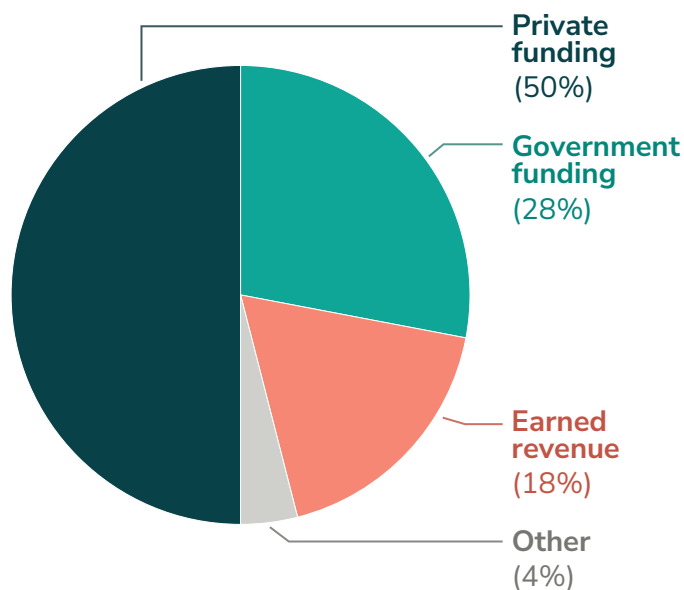
In 2024, the nonprofit sector grew slightly more slowly (2.6% over 2023) than business (3.0%) or the economy as a whole (2.8%; U.S. Bureau of Economic Analysis, 2025a). Health nonprofits had a faster growth rate in gross outputs than most nonprofit industries, see **Figure 2** (U.S. Bureau of Economic Analysis, 2025c).

Nonprofits Rely on Varied Funding Streams Beyond Individual Donations

The charitable sector relies on a variety of funding streams: individual donations, foundation grants, corporate donations and grants, and government contracts and grants, as well as program revenue, dues, and other income sources. In 2022, nearly one-third of the average nonprofit's revenue came from individual donations, with foundation and corporate grants, government funding, and program revenue making up most of the remainder (Faulk et al., 2023). In 2024, the typical nonprofit received half of its funding from private sources (including individual donations, foundation grants, and corporate funds), 28% from government sources, 18% from earned revenue, and 4% from other sources (Figure 3; Tomasko et al., 2025).

FIGURE 3

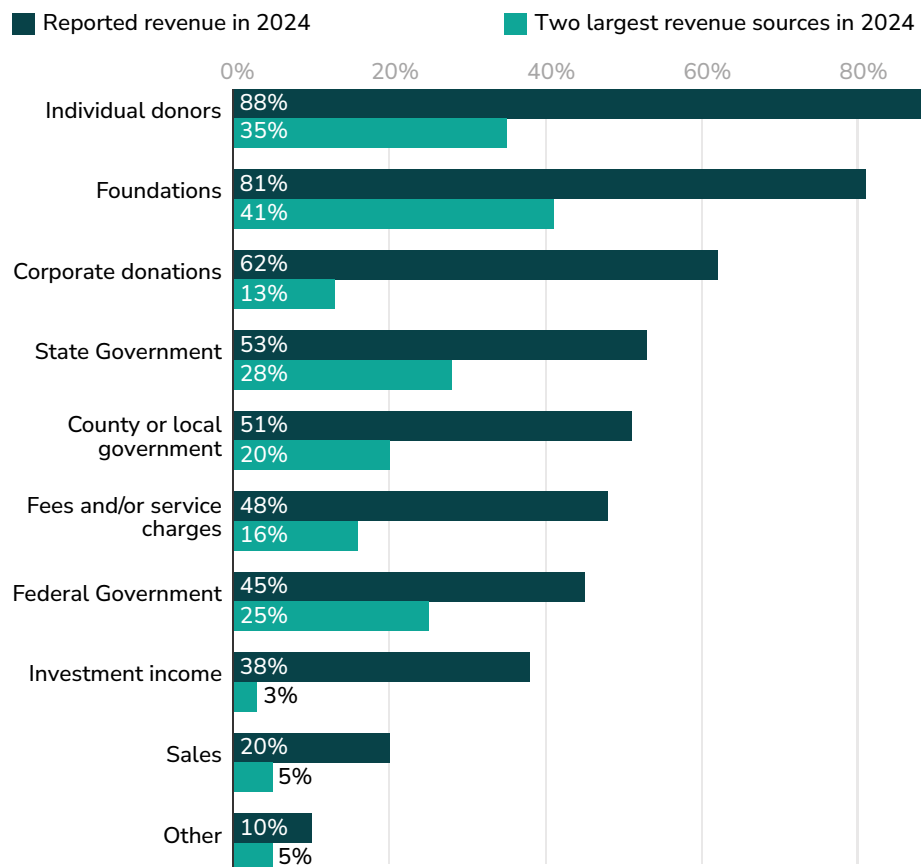
Average Nonprofit Organization Revenue, 2024



Source: Nonprofit Trends and Impacts Study (Tomasko et al., 2025)

FIGURE 4

Revenue Sources Reported by Nonprofit Organizations in 2024



Source: Nonprofit Finance Fund, 2025

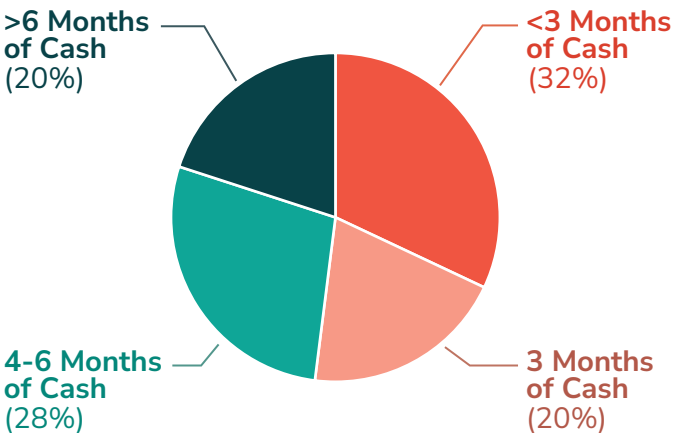
Different types of nonprofit organizations have different funding models. In Nonprofit Finance Fund's State of the Nonprofit Sector Survey, nearly nine in ten nonprofit organizations (88%) say they receive individual donations, but only a bit more than a third (35%) say individual donations are one of their two largest revenue sources (Nonprofit Finance Fund, 2025). Individual giving — from both small and large donors — is important for the sector, but by no means the whole story. Two in five organizations (41%) responding to the survey say foundation grants are a top funding source, and many organizations identify government grants (federal, state, or local) as top revenue sources.

Though most nonprofit organizations (62%) report corporate donations, few (13%) say corporate donations are a top funding source.

Many Nonprofit Organizations Are on the Financial Edge

The 2025 National Survey of Nonprofit Trends and Impacts, conducted by Urban Institute in collaboration with George Mason University and American University, found that more than half (55%) of nonprofit leaders said their organization's financial health was their biggest concern (Fallon et al., 2025). In their 2025 survey, Nonprofit Finance Fund (NFF) found that 81% of organizations struggled to raise enough funds to cover all of their costs, and 36% ended their most recent fiscal year with an operating deficit (Nonprofit Finance Fund, 2025). Best practice guidance recommends that nonprofits maintain three months of cash on hand (The Nonprofit Operating Reserves Initiative Workgroup, 2008). However, approximately one-third (32%) of organizations responding to the survey report having less than three months of cash available (see Figure 5).

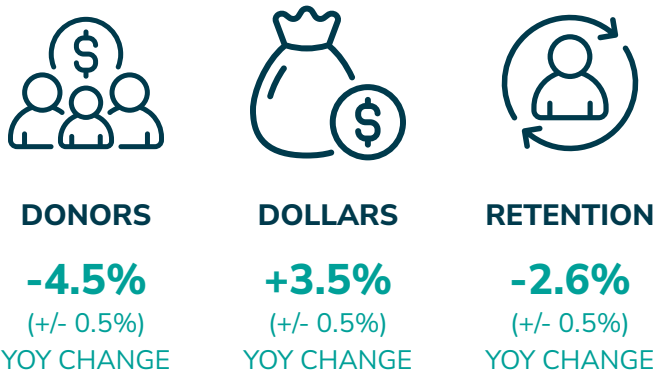
FIGURE 5
Nonprofit Organizations' Months of Cash on Hand, 2025



Source: Nonprofit Finance Fund, 2025

Charitable Giving Dollars Were Up and Donors Were Down in 2024

FIGURE 6
Charitable Giving Trends, 2024



Source: Fundraising Effectiveness Project, 2025

Total charitable giving in the U.S. — including individual, corporate, foundation, and bequest giving — reached an all-time high of \$592 billion in 2024, though that total remains below the all-time high in 2021 in inflation-adjusted dollars (Giving USA, 2025). The Fundraising Effectiveness Project estimates that in 2024, overall giving in dollars from individual donors increased by 3.5% relative to 2023, reversing the trend in the previous year. However, the number of donors and donor retention continued downward in line with the trend since 2021 (Fundraising Effectiveness Project, 2025). These 2024 numbers reflect an increase in large gifts (a 3% increase in those giving \$50,000 or more) and a substantial decrease in the smallest gifts (a 9% decrease in donors giving less than \$100). Though the increase in dollars is a positive sign for a sector where many nonprofits rely on individual gifts, the continued decrease in the number of donors suggests weakening connections to nonprofits. Fewer donors is a concerning signal for the ability of nonprofits to build and activate their networks, as monetary giving is strongly associated with other forms of charitable involvement such as volunteering.

Government Funding Is at Risk

The so-called Department of Government Efficiency (not a department of the U.S. government) disrupted government agencies and programs in 2025. These disruptions included halts or rescissions of funding streams as well as layoffs and personnel changes at government agencies with which many nonprofit organizations coordinate. The administration has also threatened other streams of funding critical for many nonprofit organizations.

Internal Revenue Service data on government funding for nonprofits — including both contracts and grants — have been insufficient to create a comprehensive picture of the flow of funding to the nonprofit sector, making it difficult to craft a correspondingly complete picture of the possible damage to nonprofit finances and operations from these funding disruptions. However, nationally representative survey data show that two-thirds of

nonprofit organizations report receiving some kind of government grant or contract, inclusive of local, state, and federal funds (Martin et al., 2025). Over one third (37%) of nonprofits specifically reported receiving federal government funding* in 2024, and one third (33%) of nonprofits reported experiencing disruptions to government funding in the first 4-6 months of 2025 (Tomasko et al., 2025). Government grants to nonprofits flow to every state, every congressional district, and 95% of U.S. counties; of the more than 100,000 nonprofits reporting government grants on their IRS form 990, two-thirds would be operating at a deficit without their reported grants (Tomasko, 2025). (See Workforce and Public Policy & Advocacy sections for more on effects on the nonprofit workforce and the impacts of other policy changes.)

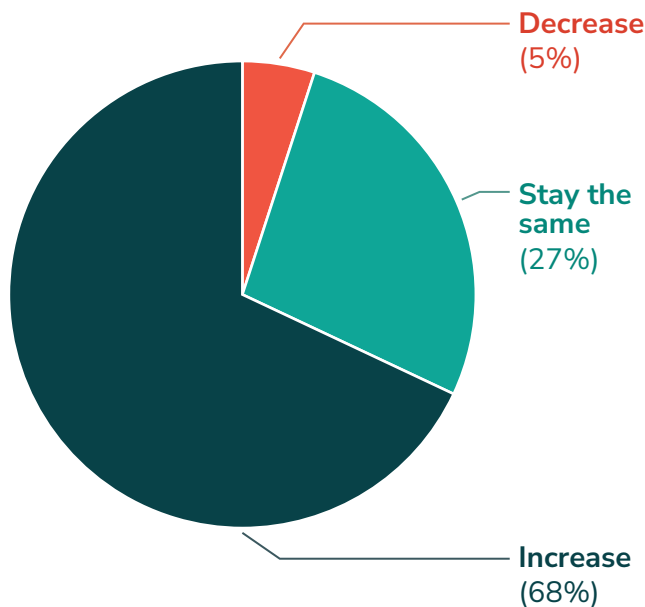
Costs of and Demand for Nonprofit Services Are Increasing

These disruptions to nonprofit revenue streams are occurring even as nonprofits face additional costs and demand for their services. Increasing operational costs were a prominent theme in Independent Sector's CEO listening tour, and that theme is corroborated by data from Nonprofit Finance Fund's 2025 State of the Nonprofit Sector Survey. When asked about the anticipated impact of current events and policy changes, more nonprofits (86%) said they were being impacted by higher costs driven by inflation than identified any other issue or current event.

In addition to higher costs of operation, most nonprofit organizations believe demand for their services is increasing, though they may not be able to meet that demand with the resources on hand. Most respondents (68%) to the Urban Institute's 2025 National Survey of Nonprofit Trends and

FIGURE 7

Expected Change to Nonprofit Organization Service Demand in the Following Year, 2025



Source: Nonprofit Trends and Impacts Study (Urban Institute, 2025a)

* Federal government funding includes federal grants, contracts or fee-for-service payments other than Medicare/Medicaid, and loans.

Impacts reported they expect demand for their organization's services to increase over the next year, but just 31% said they have been expanding how many people they are serving this year (Urban Institute, 2025b). The survey was fielded before passage of a bill that will significantly reduce access

to Medicaid, Medicare, and Supplemental Nutrition Assistance Program (SNAP) benefits for millions of Americans (see Public Policy & Advocacy section), suggesting that demand for services may increase beyond even what nonprofit organizations were already anticipating.

TAKE ACTION

A major concern for charitable giving over the next few years is the impact of changes to U.S. tax law as a result of this year's budget reconciliation law—often referred to as the One Big Beautiful Bill (OBBB). While there are some positive provisions, the overall impact of the legislation is projected to reduce giving from both corporations and high-income individuals. Harmful changes include a new “floor” that effectively disallows a deduction for the first 1% of taxable income donated by a corporation. The law also limits the value of all itemized deductions (including the charitable deduction) for high-income households that account for a disproportionate amount of charitable donations. These changes [may reduce giving by billions of dollars](#) (Independent Sector, 2025). Independent Sector and other national charitable sector organizations [opposed these harmful provisions](#) and will advocate for their elimination (Council on Foundations et al., 2025). [Learn more about how to contact your legislators and urge them to fix the damaging impacts of the corporate giving floor](#) (EY QUEST, 2025).

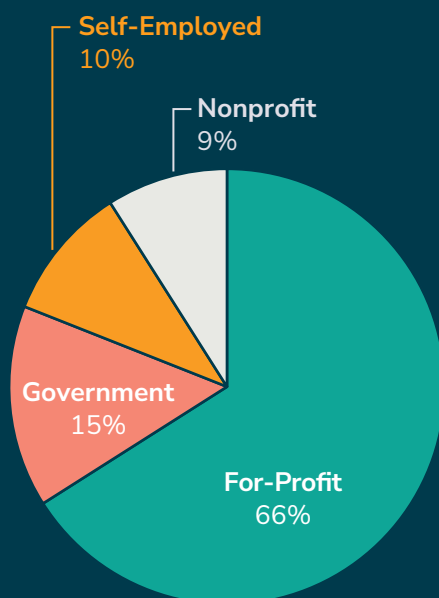


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Workforce

FIGURE 8

U.S. Employment by Sector, 2023



Source: American Community Survey
(United for ALICE, 2025)

The nonprofit sector employs about 9% of the U.S. workforce (United for ALICE, 2025). However, organizations frequently report struggling to recruit and retain talent. Data on nonprofit workforce composition provide nonprofit leaders with indicators of the potential impacts of ongoing and novel trends on staff, and identify the need and opportunities for action, but access to timely wage and employment data is a persistent issue. This complicates efforts of sector leaders and policy-makers to respond in real time to economic conditions, natural disasters, and other factors affecting the communities they serve.

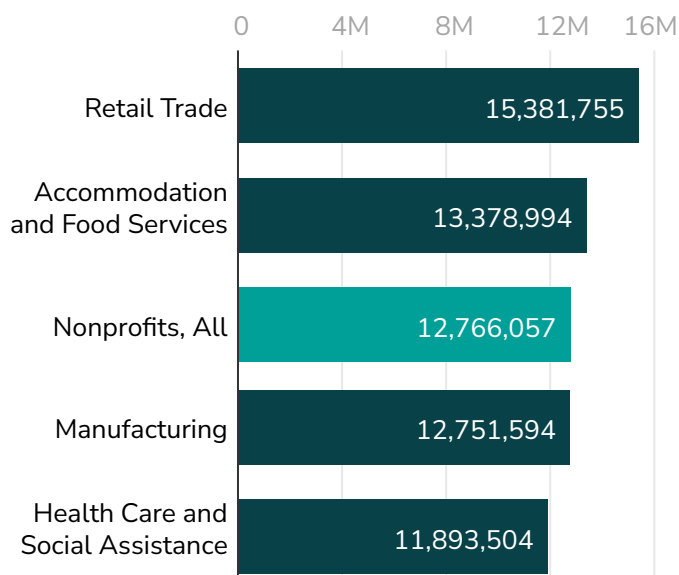
This year, in response to widespread concerns about workforce issues among our members and across the sector, Independent Sector announced the creation of its Center of Excellence on the Nonprofit Workforce. The center will engage the sector and its experts to develop research, policy, and practices that address the challenges facing the nonprofit workforce, mobilize nonprofit and philanthropic leaders to implement these solutions, and measure the change in the health of the workforce over time.

Nonprofits Are One of the Nation's Largest Employers, but Tracking Employment and Job Losses in the Sector Is Difficult

Data from the Bureau of Labor Statistics' Quarterly Census of Employment and Wages show that in 2022 nonprofits were the third-largest employer in the private workforce; more people worked for nonprofits than in manufacturing, see **Figure 9** (U.S. Bureau of Labor Statistics, 2024). However, these nonprofit statistics — estimating that about 12.8 million people work in the U.S. nonprofit sector — are only updated by the Bureau of Labor Statistics every five years, and the data may exclude the smallest employers. More frequently-released household survey data like that from the U.S. Census Bureau's American Community Survey have found that over 14 million people worked for nonprofits in 2023 (Independent Sector & United for ALICE, 2025).

FIGURE 9

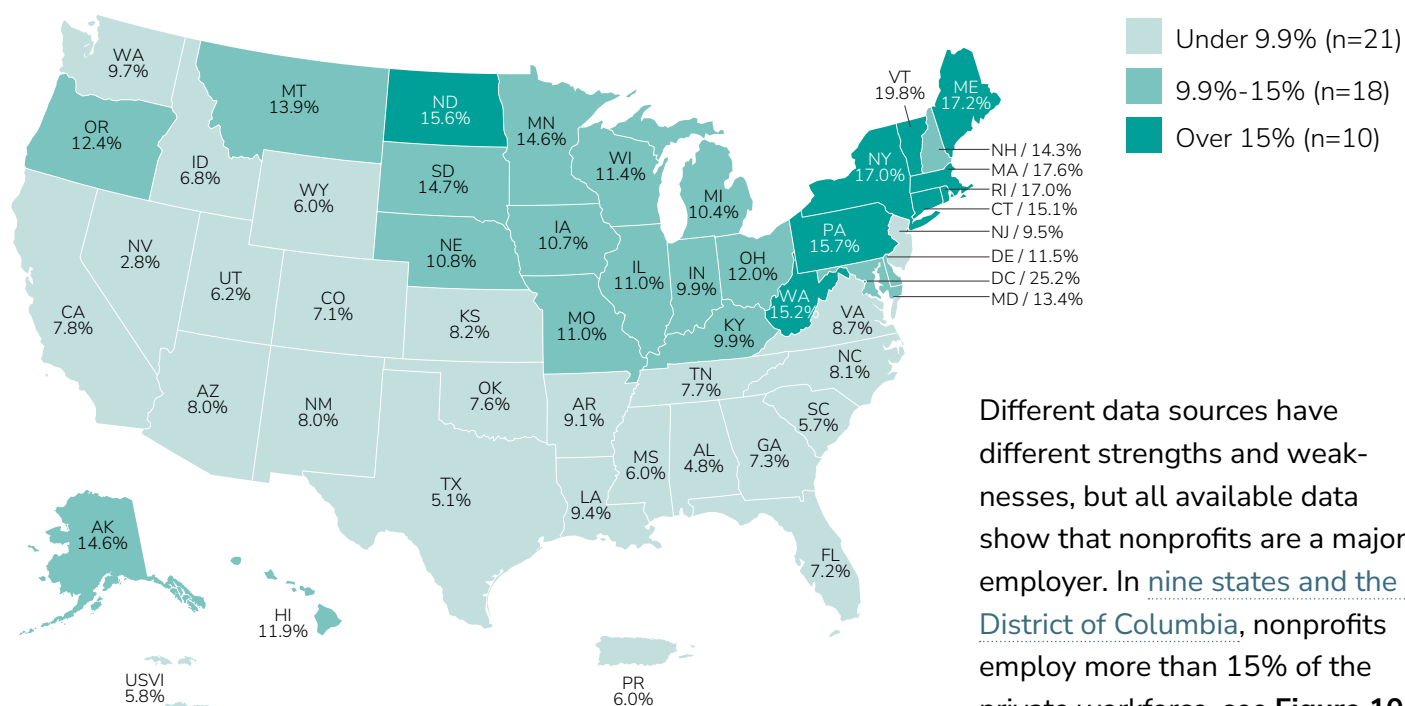
Nonprofit Employment Compared to For-Profit Industries, 2022



Source: U.S. Bureau of Labor Statistics, 2024

FIGURE 10

Nonprofit Share of Private Employment by State and Territory, 2022



Different data sources have different strengths and weaknesses, but all available data show that nonprofits are a major employer. In nine states and the District of Columbia, nonprofits employ more than 15% of the private workforce, see **Figure 10** (Newhouse & Abramson, 2025).

Source: Nonprofit Employment Data Project (Newhouse & Abramson, 2025)

This year, many nonprofit organizations—as well as other employers—have been directly impacted by government spending freezes and disruptions and in response have laid off workers or prepared to do so. However, comprehensive data on layoffs in the nonprofit sector are unavailable. The Chronicle of Philanthropy has [tracked over 22,000 layoffs](#) at nonprofit organizations between January and June of 2025, but believes this to be a significant underestimate due to limited data (Straus et al., 2025). The Job Openings and Labor Turnover Survey (JOLTS) from the Bureau of Labor Statistics provides estimates of layoffs and discharges monthly by industry but not by nonprofit status (U.S. Bureau of Labor Statistics, 2025). JOLTS data suggest that layoffs across all private industry in the U.S. in the first eight months of 2025 were about 5% greater than in the first eight months of 2024, while job openings during the same period were about 5% lower.

Nonprofit Workers Are Disproportionately Women and More Educated Than Average

Workers at nonprofit organizations can have the same jobs as workers at for-profit employers: administrative assistants, janitors, cashiers (e.g., at Goodwill stores), or bank tellers (e.g., at credit unions). The nonprofit workforce includes many workers in the health care and education industries, as well as in social assistance, religious organizations, civic organizations, and others. The nonprofit sector employs more women (66% of the nonprofit workforce) than are employed in the workforce as a whole (47%), and 72% of nonprofit workers hold a college degree, compared to 52% of all workers (IPUMS Current Population Survey, 2025). Hispanic workers are underrepresented in the nonprofit sector (11%) relative to the economy overall (17%).

FIGURE 11

Characteristics of Nonprofit Workforce Compared to Overall Workforce, 2025

Race & Ethnicity	Nonprofits	All Workers
Asian or Pacific Islander	7% <div></div>	7% <div></div>
Black	12% <div></div>	11% <div></div>
Hispanic	11% <div></div>	17% <div></div>
Multiple Races	3% <div></div>	2% <div></div>
Native American	1% <div></div>	1% <div></div>
White	67% <div></div>	63% <div></div>

Gender	Nonprofits	All Workers
Women	66% <div></div>	47% <div></div>
Men	34% <div></div>	53% <div></div>

Educational Attainment	Nonprofits	All Workers
Less than high school diploma	3% <div></div>	8% <div></div>
High school diploma or equivalent	14% <div></div>	26% <div></div>
Some college but no degree	11% <div></div>	14% <div></div>
Associate degree	10% <div></div>	11% <div></div>
Bachelor's degree	32% <div></div>	26% <div></div>
Graduate or professional degree	30% <div></div>	16% <div></div>

Source: Current Population Survey (IPUMS, 2025)

One in Five Nonprofit Workers Live in Households Experiencing Financial Hardship

As part of our ongoing partnership, Independent Sector and United For ALICE updated our analysis of economic hardship within the nonprofit workforce and shared the data as an interactive dashboard. We also entered a new partnership with the Black Wealth Data Center that highlights the need for race-disaggregated data and a framework for financial health for nonprofit workers that goes beyond making ends meet to focus on how workers create wealth and savings for long-term financial security.

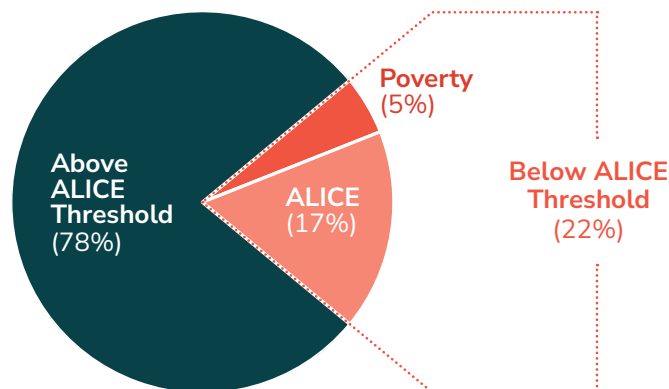
We encourage you to [explore the data on financial insecurity in the nonprofit workforce on our dashboard](#) and we also highlight some findings here.

In 2023, more than 3 million nonprofit workers (22% of the workforce) did not have incomes high enough to afford household expenses (Independent Sector and United for ALICE, 2025). Black, Hispanic, and American Indian workers in the sector were significantly more likely to struggle to make ends meet, as were workers with disabilities.

ALICE® – Asset Limited, Income Constrained, Employed – describes households that earn more than the official U.S. poverty level, but less than what it costs to survive in the counties where they live. Combined, ALICE households and households in poverty fall below the ALICE Threshold, the income needed to afford household basics: housing, child care, food, transportation, health care, and technology, plus taxes.

FIGURE 12

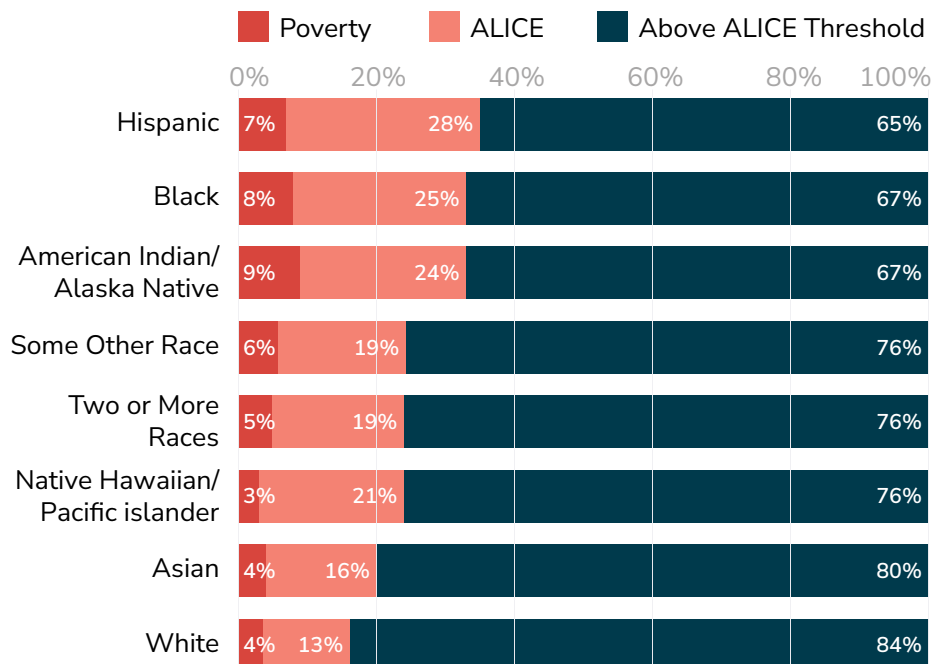
Nonprofit Workers Experiencing Financial Hardship, 2023



Source:
Independent Sector and
United for ALICE, 2025

FIGURE 13

ALICE Status of Nonprofit Workforce by Race/Ethnicity, 2023



Source: Independent Sector and United for ALICE, 2025

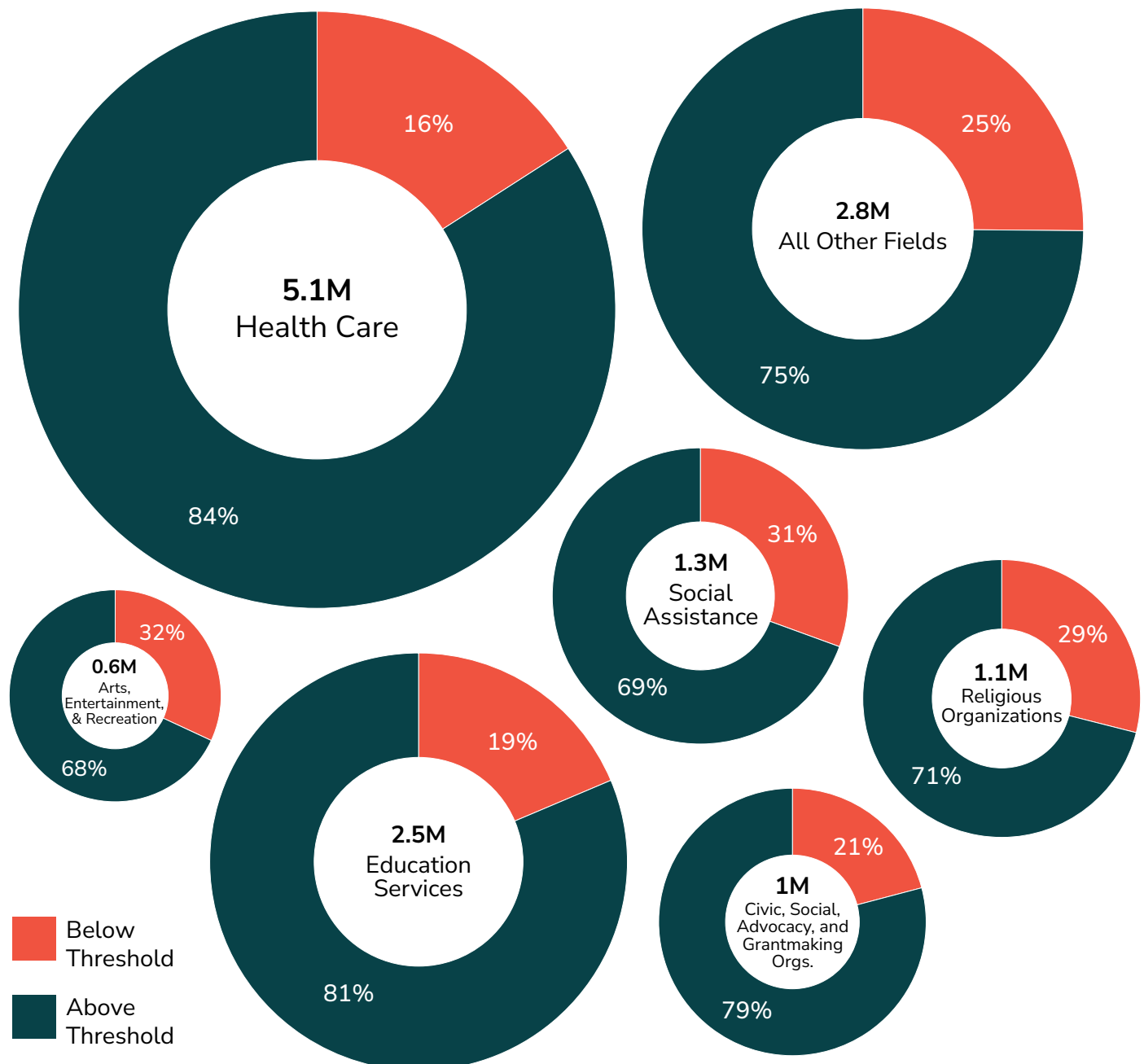
Across the major industries within the nonprofit sector, workers in the education and medical industries had the lowest rates of financial insecurity while workers in the arts, recreation, and social assistance industries had the highest rates. More than one-quarter (27%) of nonprofit workers outside the education and medical industries did not have incomes high enough to afford house-

hold expenses (Independent Sector & United for ALICE, 2025).

In a survey, just 41% of nonprofit organizations said they believe they pay all staff members a living wage. Most organizations identified inflation and other rising costs as a key challenge to paying staff a living wage (Nonprofit Finance Fund, 2025).

FIGURE 14

Workers Below the ALICE Threshold by Nonprofit Industry, 2023



Source: Independent Sector and United for ALICE, 2025

Many Nonprofits Struggle to Employ Enough Staff, Provide Comprehensive Benefits

When asked about management challenges, most nonprofit organizations identified employing enough staff to do programmatic and administrative work and finding staff with the right skill sets as obstacles, and frequently mentioned burnout. These survey data align with anecdotes and input provided to Independent Sector leadership and staff at 2024 listening sessions and in 2025 fo-

cus groups on the nonprofit workforce: Resource limitations make it difficult to employ enough staff, leading to higher workloads and proportionally higher levels of stress and burnout.

Though most nonprofit organizations (68%) expect demand for their services to increase in the next year, and few (5%) expect demand to decrease, more than one-quarter (28%) of organizations say they expect to decrease staff capacity in some way over the next year (Urban Institute, 2025d). Many organizations also report current vacancies: more

FIGURE 15

Nonprofits Reporting Selected Management Challenges in 2025

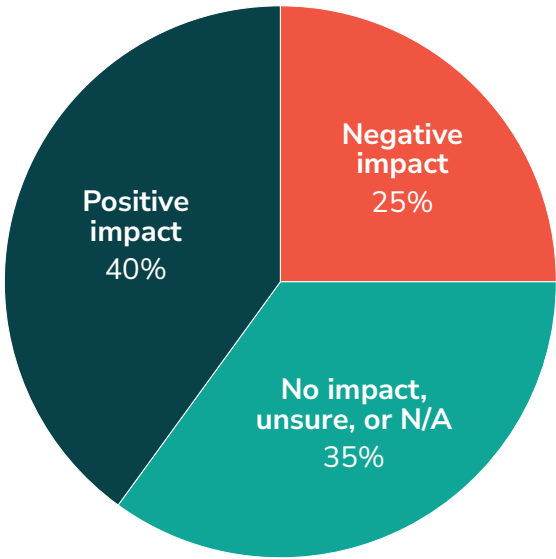


Source: Nonprofit Finance Fund, 2025

than one in ten (11%) of organizations surveyed say they have at least 21% of their staff positions vacant, and nearly half (44%) say that staff vacancies had a negative impact on their operations this year (Urban Institute, 2025d).

One area of both difficulty and opportunity for nonprofit organizations is job benefits. Some organizations, especially small organizations, struggle to provide benefits: According to Nonprofit Finance Fund's survey data, two-thirds of nonprofits say they provide health insurance, but that number was much lower (12%) at organizations with budgets of less than \$250,000 (Nonprofit Finance Fund, 2025). At the same time, some larger nonprofits enjoy a reputation for generous benefits relative to the for-profit sector, making this issue one where there is substantial variability across the sector.

FIGURE 16
Impact of Benefits Offered on Nonprofit Organization Staff Recruitment, 2025



Source: Nonprofit Trends and Impacts Study (Urban Institute, 2025d)

FIGURE 17
Nonprofit Organizations Reporting They Provide Selected Benefits, Among All Organizations and Among Organizations Who Report Their Benefits Help/Harm Their Staff Recruitment

Benefit	% of Nonprofits That Offer the Benefit, 2025		
	Among all nonprofits with staff	Among nonprofits that report benefits have a positive impact on recruitment	Among nonprofits that report benefits have a negative impact on recruitment
Group health insurance plan	45%	76%	18%
Health savings account (HSA)/flexible spending account (FSA)	21%	36%	8%
Dental	39%	68%	12%
Vision	34%	62%	9%
Retirement benefit with employer contribution	38%	62%	17%
Vacation	74%	88%	70%
Sick leave	65%	82%	58%
Paid parental leave	31%	48%	18%
Paid medical leave	31%	48%	18%
Dependent care benefits	5%	9%	2%
On-site childcare provided	3%	4%	1%

Source: Nonprofit Trends and Impacts Study (Urban Institute, 2025d)

When asked about whether the benefits they provide impact staff recruitment, 25% of nonprofit organizations say their recruitment is negatively impacted and 40% report a positive impact. Unsurprisingly, the benefits offered by organizations who say their benefits package helps them recruit staff are more generous than for the sector as a whole, and much more generous than at organizations that report their benefits package harms recruitment. Paid vacation and sick time are common throughout the sector, but health benefits show some of the widest variation: 76% of nonprofit organizations who say their benefits help their recruitment offer health insurance, compared to just 18% of those who say the benefits they offer harm recruitment (Urban Institute, 2025d).

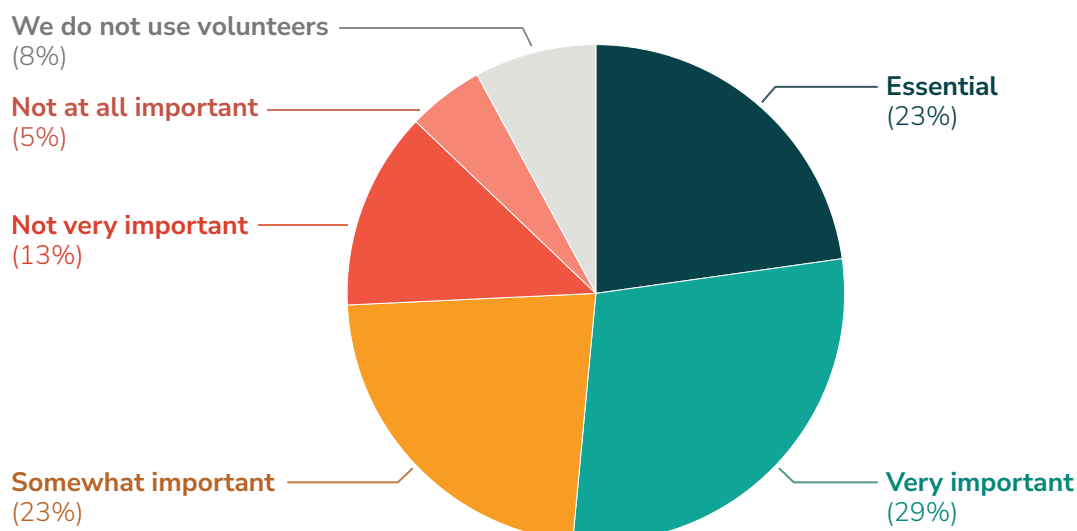
Volunteers Are a Critical Part of Many Nonprofits' Strategies

Though volunteers usually cannot replace professional staff, many organizations rely on them to fill various important roles. Three in four (75%) nonprofit organizations say that volunteers are important to their operations—they rely on volunteers for several key tasks (23%), a wide range of tasks are

done by volunteers (29%), or they depend entirely on volunteers (23%; Urban Institute, 2025c) (See **Figure 18.**) A nationally representative survey by Independent Sector found that about half of Americans say they've volunteered in the past year (Independent Sector & Edelman DXI, 2024). Independent Sector and the Do Good Institute estimate that the average value of an hour of volunteer time was \$34.79 in 2024 (Independent Sector & Do Good Institute, 2025). [AmeriCorps estimates](#) that nearly 5 billion hours were volunteered in 2023, suggesting a total value of volunteer time in the U.S. of over \$167 billion (Schlachter & Marshall, 2024).

However, formal volunteering for organizations has decreased in recent years. The beginning of the COVID-19 pandemic disrupted volunteering, creating a significant reduction early in the pandemic. Although volunteering rebounded afterward, [fewer people reported formal volunteering in 2023 \(28%\) than in 2017 or 2019 \(30%\), and those people also volunteered fewer hours](#) (Schlachter & Marshall, 2024). Organizational memberships also decreased, though informal helping increased. These findings suggest a decrease in involvement with organizations and associations.

FIGURE 18
Importance of Volunteers to the Work Nonprofit Organizations Conducted in 2024



Source: Nonprofit Trends and Impacts Study (Urban Institute, 2025c)

Because volunteerism is closely tied to other forms of involvement with nonprofit organizations, it is important for organizations that work with volunteers to do so strategically, building capacity and structures to engage volunteers meaningfully.

Independent Sector has built a [program on strategic volunteer engagement](#) and is working to develop practical insights and tools that can help both operating nonprofits and their funders better harness the power of volunteers.

TAKE ACTION

Nonprofit employers can support their workers with benefits that build long-term financial security. Independent Sector is urging legislators to provide nonprofit employers with [access to the same tax incentives](#) that for-profit businesses receive to provide child care, retirement plans, paid family and medical leave, and more. Bipartisan legislation has been introduced in both chambers of Congress that would give small nonprofits the same tax incentives to start a retirement plan that for-profit businesses currently receive. Workers shouldn't have to choose between pursuing mission-driven work and knowing they can retire securely. [Urge your legislators to cosponsor the Small Nonprofit Retirement Security Act today.](#)

The Department of Education recently proposed a significant change to the [Public Service Loan Forgiveness \(PSLF\)](#) program that could reshape how nonprofit employers are treated under the law (U.S. Department of Education, 2025). The proposal would give the department authority to exclude nonprofit organizations from PSLF eligibility. Independent Sector submitted [detailed comments](#) opposing the rule and helped member organizations submit their own feedback.



3

Trust & Governance

Public trust is the currency with which nonprofits conduct their work. The extent to which the public believes nonprofits operate ethically and transparently impacts whether individuals will invest in or utilize services from nonprofits. It also impacts the extent to which nonprofits can legitimately represent and are accountable to the communities they serve. Nonprofit leaders' daily choices regarding their organization's operations, transparency, strategy, mission, and workforce all influence levels of trust in individual organizations as well as the sector.

Trust in nonprofits and philanthropy, which Independent Sector measures annually in partnership with Edelman Data and Intelligence, is higher than trust in any other U.S. sector, and the charitable sector has a critical role to play in strengthening American civil society in an era of increasing division and disconnection. However, trust in nonprofits to act around policy and advocacy is lower than trust overall, and Americans are concerned about the influence of major funders on the sector, especially high-net-worth donors and governments.

Trust in Nonprofits Was Steady and High in 2025, but Trust in Philanthropy Remains Lower

Trust in nonprofits was unchanged in 2025 from 2024, with nonprofits remaining the most trusted sector in America; 57% of Americans indicated high trust in the sector (Independent Sector & Edelman DXI, 2025a). Trust in philanthropy remains lower than trust in nonprofits, with some variation within types of philanthropy. Lower trust in

philanthropic institutions is an ongoing concern because many nonprofits rely on various types of philanthropy to function (see Economy & Finance section).

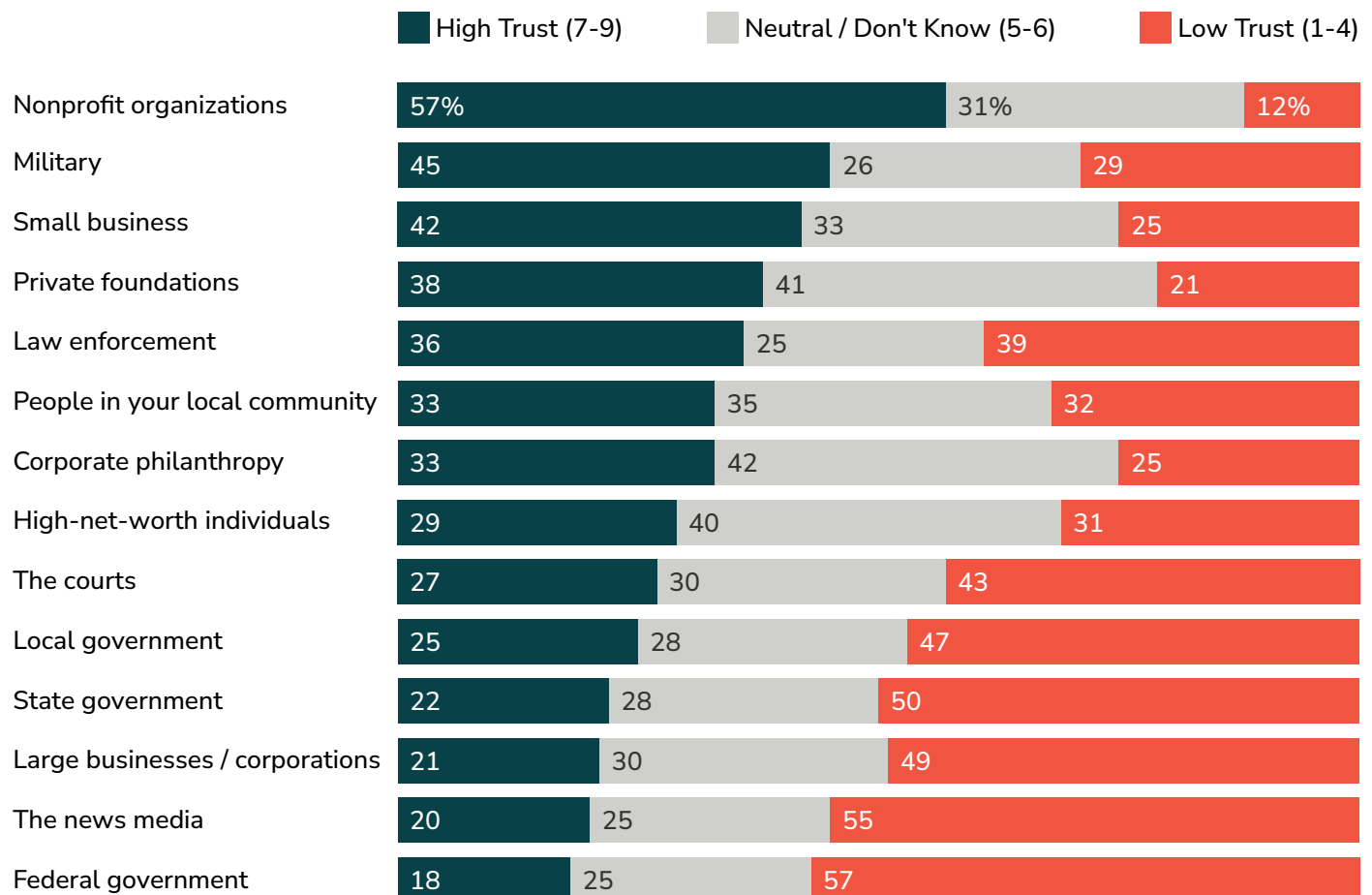
Private foundations are the fourth most-trusted sector in the US, with 38% of Americans indicating high trust, though that is nearly 20 percentage points lower than trust in nonprofits. Only 29% of Americans indicate high trust in high-net-worth donors; Independent Sector asked additional questions about high-net-worth

donors this year to understand this pattern better (see the following section).

Trust in other sectors was mostly steady this year, though trust in “people in your local community” slid another three points after a large decrease in 2024. This trend is alarming but consistent with other studies on broad social trust, which has been decreasing along with affiliation and membership in various types of associations and groups. Trust in government and the media remains very low.

FIGURE 19

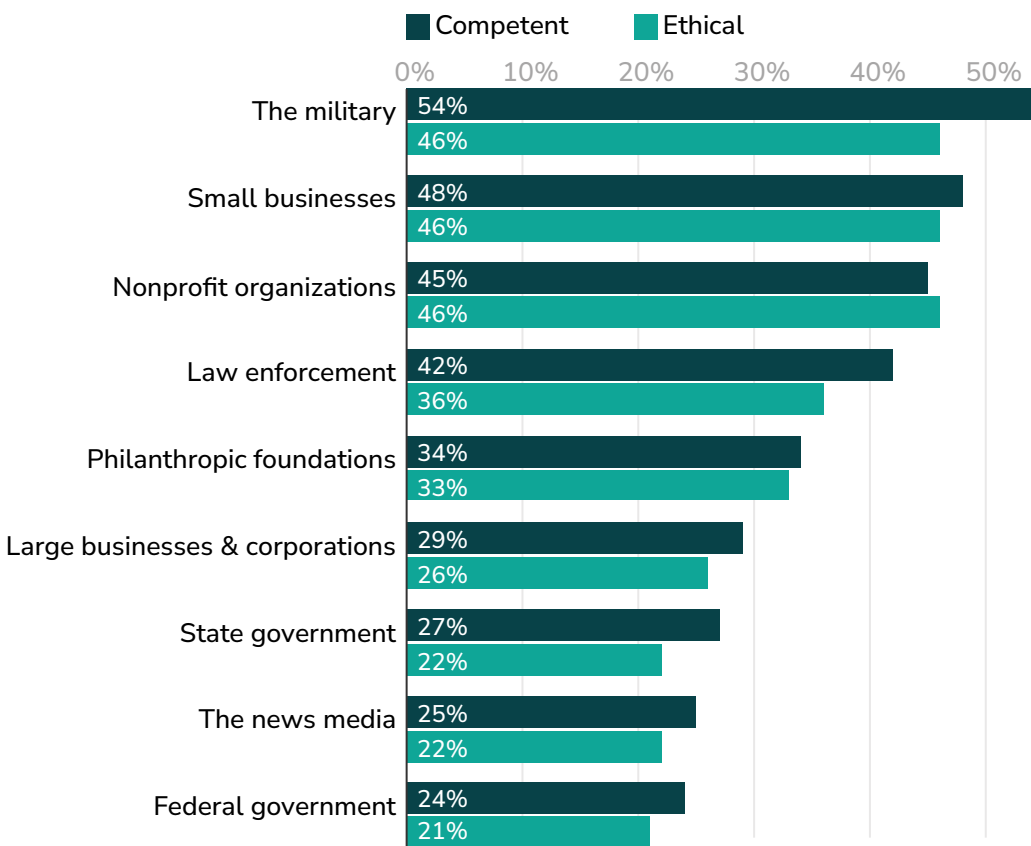
Public Trust in Nonprofits and Philanthropy vs. Other Sectors (%), 2025



Source: Trust in Nonprofits and Philanthropy Survey (Independent Sector & Edelman DXI, 2025a)

This year, Independent Sector asked about perceptions of how ethical and competent various sectors are. The military and small businesses were perceived as well or better than nonprofits on ethics and competence, but trust in those sectors is substantially lower, signaling that trust is driven by other factors. Independent Sector's previous surveys on trust found that the public's perception of the sector's charitable purpose drives high public trust, and Americans think the nonprofit sector is improving divisions in the U.S.

FIGURE 20
Public Perception of Competence and Ethics Among Sectors, 2025



Source: Trust in Nonprofits and Philanthropy Survey (Independent Sector & Edelman DXI, 2025a)

Americans Worry About Relationship of Nonprofits, High-Net-Worth Donors, and Government

This year, Independent Sector looked more closely at public perceptions regarding the relationships between nonprofits, government, and high-net-worth donors. Survey and open-response questions show that the public has concerns about these relationships, as well as some seemingly contradictory opinions.

Americans worry about the intentions and influence of high-net-worth individuals. A majority of Americans believe that high-net-worth individuals have too much influence on federal government

policymaking (62%) as well as the operations of nonprofits they fund (59%), and most (58%) believe high-net-worth individuals are more focused on their own interests than the public good (Independent Sector & Edelman DXI, 2025a). A decreasing number (53%, down from 57% in 2024) believe that high-net-worth individuals who give to charity are trying to have a positive impact on society.

American beliefs about the relationship between nonprofits and government are complicated. A plurality (44%) of Americans believe nonprofits are having a positive impact on national divisions, and a majority (56%) believe the federal government is making things worse (Independent Sector & Edelman DXI, 2024). Most Americans (69%) believe

government and nonprofits should work together to address societal issues, but most (59%) also believe the two sectors often have conflicting priorities. There is greater support (58%) for nonprofits to work on their own to assist people without access to government assistance than there is for nonprofits and political leaders to work together to address community needs (45%).

When asked to elaborate on these beliefs, many respondents were skeptical that nonprofits can be truly independent from the agendas of powerful sources of funding like high-net-worth donors and the federal government. When asked about how knowing an organization received most of its funding from a particular source would influence their trust in an organization, small individual donations were perceived most favorably, while funding from the federal government and donations from high-net-worth donors were perceived much less favorably. However, many organizations rely on government funds to operate, and though individual donations (large and small) are a common funding source, large gifts are making up a

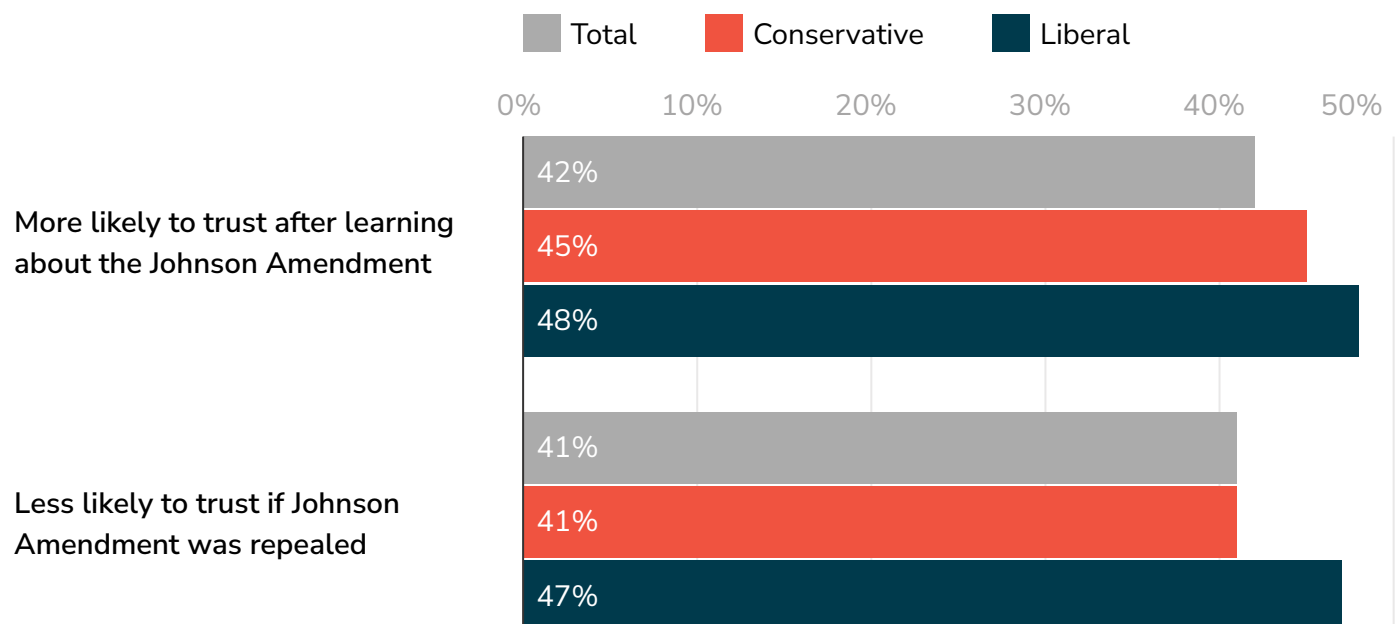
larger proportion of individual giving over time (see Economy & Finance section). It is infeasible for most organizations to fund their operations solely on small donations, so distrust of relationships with government and high-net-worth donors may put nonprofits in a bind.

Separation From Partisan Politics Builds Trust

This year, Independent Sector's trust survey looked more closely at American trust regarding nonprofit involvement in elections. Tax-exempt nonprofits are not legally permitted to endorse or oppose candidates in political elections — a rule known as the Johnson Amendment — but just 27% of Americans say they have high trust in nonprofits to remain neutral during elections. When the Johnson Amendment is explained to respondents, a plurality of both liberal and conservative respondents say the existence of the rule makes them more likely to trust nonprofits and repealing it would make them less likely to trust nonprofits (Independent Sector and Edelman DXI, 2025a).

FIGURE 21

Impact of Johnson Amendment on Public Trust in Nonprofits, 2025



Source: Trust in Nonprofits and Philanthropy Survey (Independent Sector & Edelman DXI, 2025a)

Maintaining Trust Is Possible but Complicated

Americans say they value transparency. Most (57%) say they would trust nonprofits more if nonprofits disclosed their funding sources in detail, and [transparency certifications like those from Candid](#) are associated with higher levels of donations (Sato, 2025). Independent Sector's research has also found that most Americans say they would be more likely to trust organizations that pass a course or certification or commit publicly to ethical principles for operation (Independent Sector & Edelman DXI, 2024).

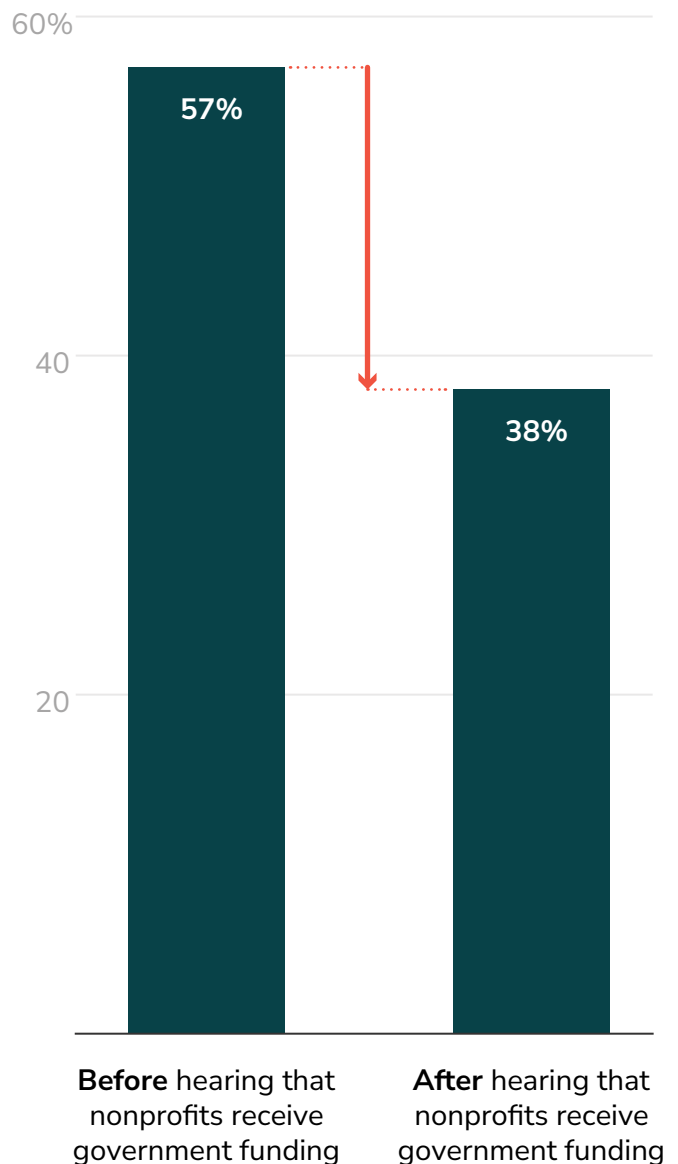
But [research on trust in science](#) and Independent Sector's polling this year suggest that the public can react badly to some information revealed by transparency (Hyde, 2025; Independent Sector & Edelman DXI, 2025a). After sharing information that nonprofits receive a significant amount of government funding, the proportion reporting high trust in nonprofits decreased from 57% to 38% — despite their assertion that more transparency would increase their trust (Independent Sector & Edelman DXI, 2025a). It is important to consider what types of information should be communicated to which audiences, as policymakers, funders, and other stakeholders may react differently from the general public.

Independent Sector's research on trust has repeatedly found that trust in the sector is driven by a sense of the sector's charitable purpose — the sense that nonprofits help those who most need help — and by proximity to and relationships with nonprofits. Four-fifths (79%) of people who volunteered with nonprofits said those experiences made their views of nonprofits more favorable. Engaging volunteers and building direct relationships with community members and stakeholders is a key

strategy for nonprofits. Relationships sustain monetary and volunteering support from communities, and connections with stakeholders are critical to the ability of nonprofits to work with policymakers to create systemic change.

FIGURE 22

Impact of Knowledge of Government Funding on Trust in Nonprofits



Source: Trust in Nonprofits and Philanthropy Survey (Independent Sector & Edelman DXI, 2025a)

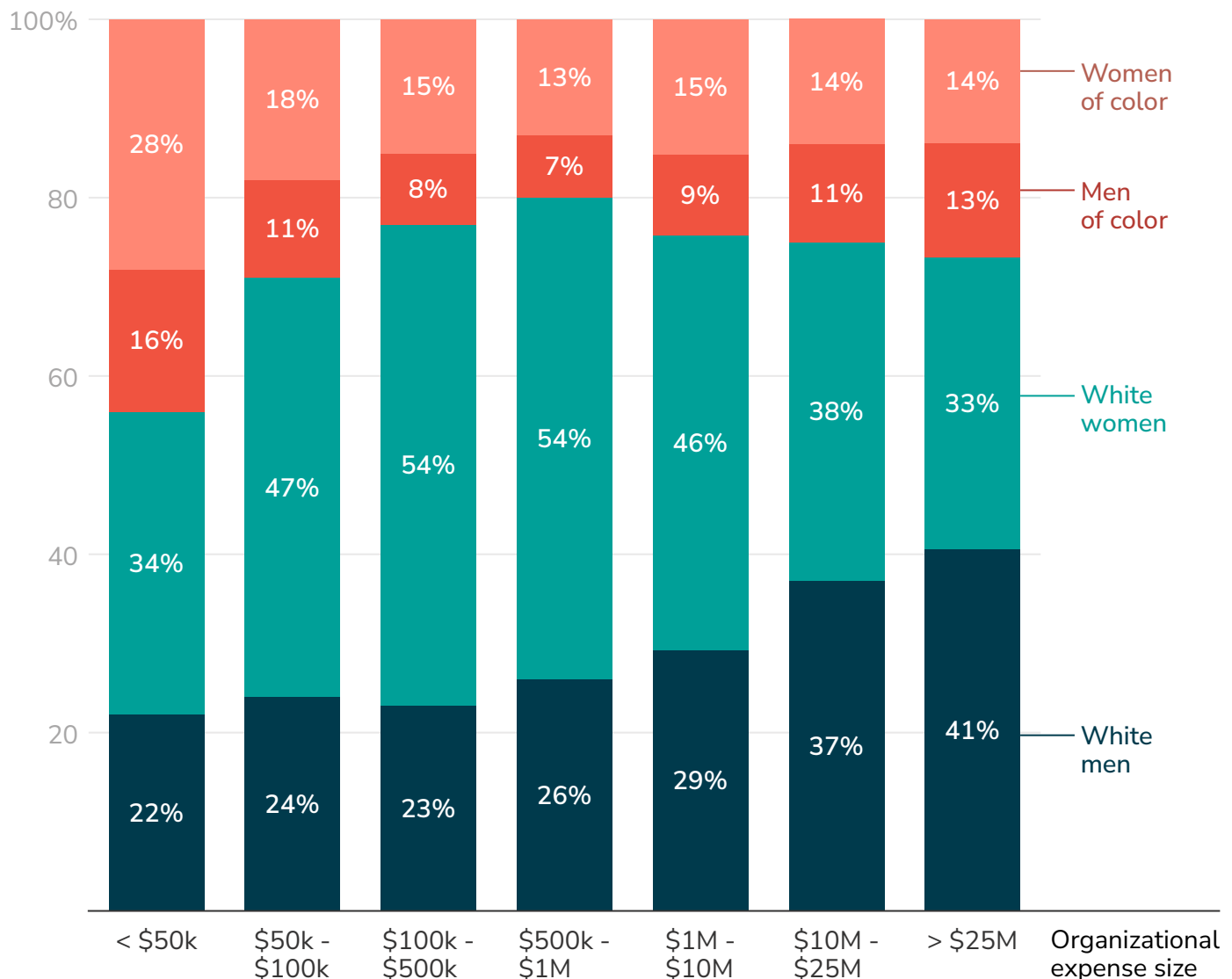
Nonprofit Governance Is Less Diverse Than Nonprofit Staffing, Especially at Larger Organizations

As noted in the Workforce section, the nonprofit workforce resembles the U.S. workforce in some ways, albeit with far more women and a higher average level of education. [Data from Candid](#) show that the sector's leadership, however, is unrepresentative of the sector's workforce; in Candid's data, women make up 69% of the non-

profit workforce but just 62% of CEOs and 52% of board members, and though 47% of staff are white, 70% of CEOs and 66% of board members are white. The pattern is starker when one considers organization size. At the smallest organizations (<\$50,000 in expenses), women of color (28%) outnumber white men (22%) as CEOs. The pattern reverses at the largest organizations (>\$25 million in expenses), where 41% of CEOs are white men and 14% are women of color (Clerkin et al., 2024).

FIGURE 23

Nonprofit CEO Gender and Race by Organizational Expense Size



Source: Candid (Clerkin et al., 2024)

TAKE ACTION

Independent Sector strongly supports retaining the Johnson Amendment to sustain public trust in the nonprofit sector. Tearing down the wall between the sector's charitable and public interest missions and partisan politics could seriously harm the ability of the sector to bridge societal gaps and provide vital services. [Contact your Members of Congress about protecting the Johnson Amendment.](#)

Healthy governance for the nonprofit sector requires that organizations can pursue their mission with independence. In recent months, actions by the Trump Administration, the courts, and legislators have created potentially significant impacts on nonprofit sector independence. Independent Sector has launched a series of [tracking tools on each of these topics](#), which are updated biweekly. In addition to using these trackers, we encourage Independent Sector members to sign up to receive free privileged legal analysis on these issues.



4

Public Policy & Advocacy

Public policy at the federal, state, and local levels creates the landscape in which nonprofit organizations operate. Federal tax policies shape the tax status and treatment of nonprofits and foundations. The act of advocating in the public policy space — whether on matters of tax policy, our workforce, or other issues confronting the communities we serve — is a key determinant of the ability of organizations to fulfill their missions. Advocacy is a core activity of high-impact nonprofits because it enables organizations to proactively shape their policy environments and strengthen their communities, not just react. Advocacy also strengthens other forms of civic engagement that support nonprofit work and a vibrant civil society: Individuals who advocate through nonprofits report higher rates of giving, volunteering, and voting.

Finally, it is not possible to make systems more equitable for all members of our community without advocating for change. Therefore, the capacity for nonprofits to advocate for solutions that align with their missions serves as a major indicator of the sector's agency and impact, providing critical insight into its overall health.

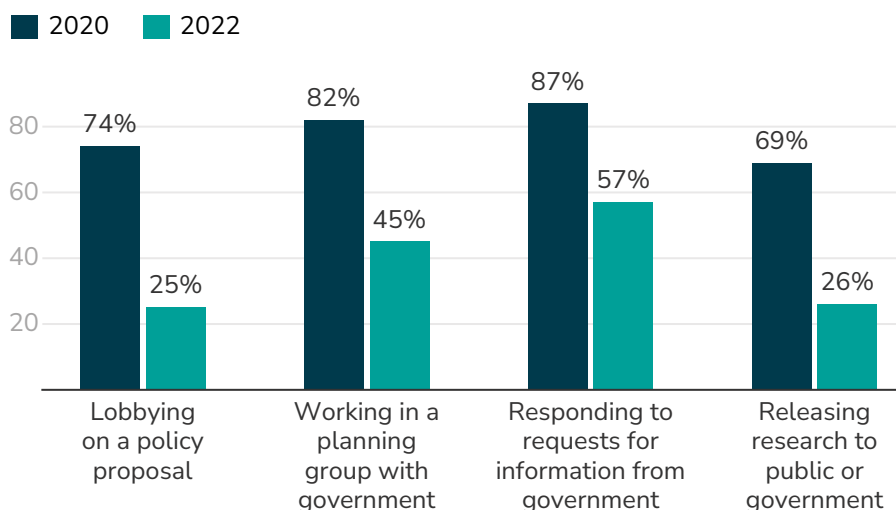
Engaging With Public Policy Is Critical, but Fewer Nonprofits Say They Lobby or Advocate Than Two Decades Ago

Between 2020 and 2022, the number of nonprofits who say they lobby or otherwise do public policy advocacy decreased from 74% to 31% (Faulk et al., 2023). The shift in organizations reporting never doing advocacy occurred across various types of activities. For example, in 2020, just one-quarter (26%) of nonprofits said they had never lobbied on a policy proposal, but in the 2022 survey, three-quarters (75%) said they had never lobbied.

Over the same period (from 2020 to 2022) nonprofit leaders showed a decreased understanding of which advocacy activities are legally permissible for nonprofits (see **Figure 25**). For instance, the number of nonprofit leaders who knew that nonprofits are legally permitted to talk to elected officials about public policy decreased from 91% to 69% over that period. This indicates that possibly some of the decrease in advocacy activity is explained not by a considered decision not to do advocacy, but by the belief that advocacy is not allowed. Lack of awareness and education on legally permissible advocacy has been identified by

FIGURE 24

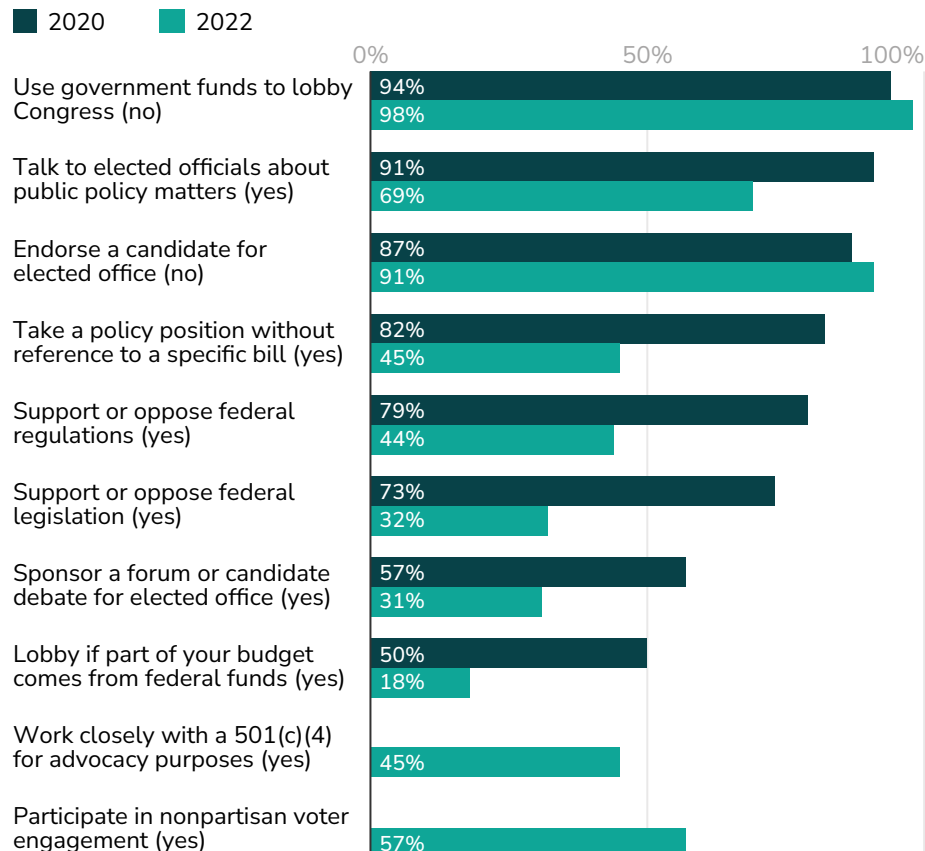
Nonprofit Organizations That Reported Ever Engaging in Advocacy or Lobbying (2022 vs. 2020)



Source: Public Engagement Nonprofit Survey (Faulk et al., 2023)

FIGURE 25

Nonprofit Understanding of Legal Advocacy Rules (2022 vs. 2020)



Source: Public Engagement Nonprofit Survey (Faulk et al., 2023)

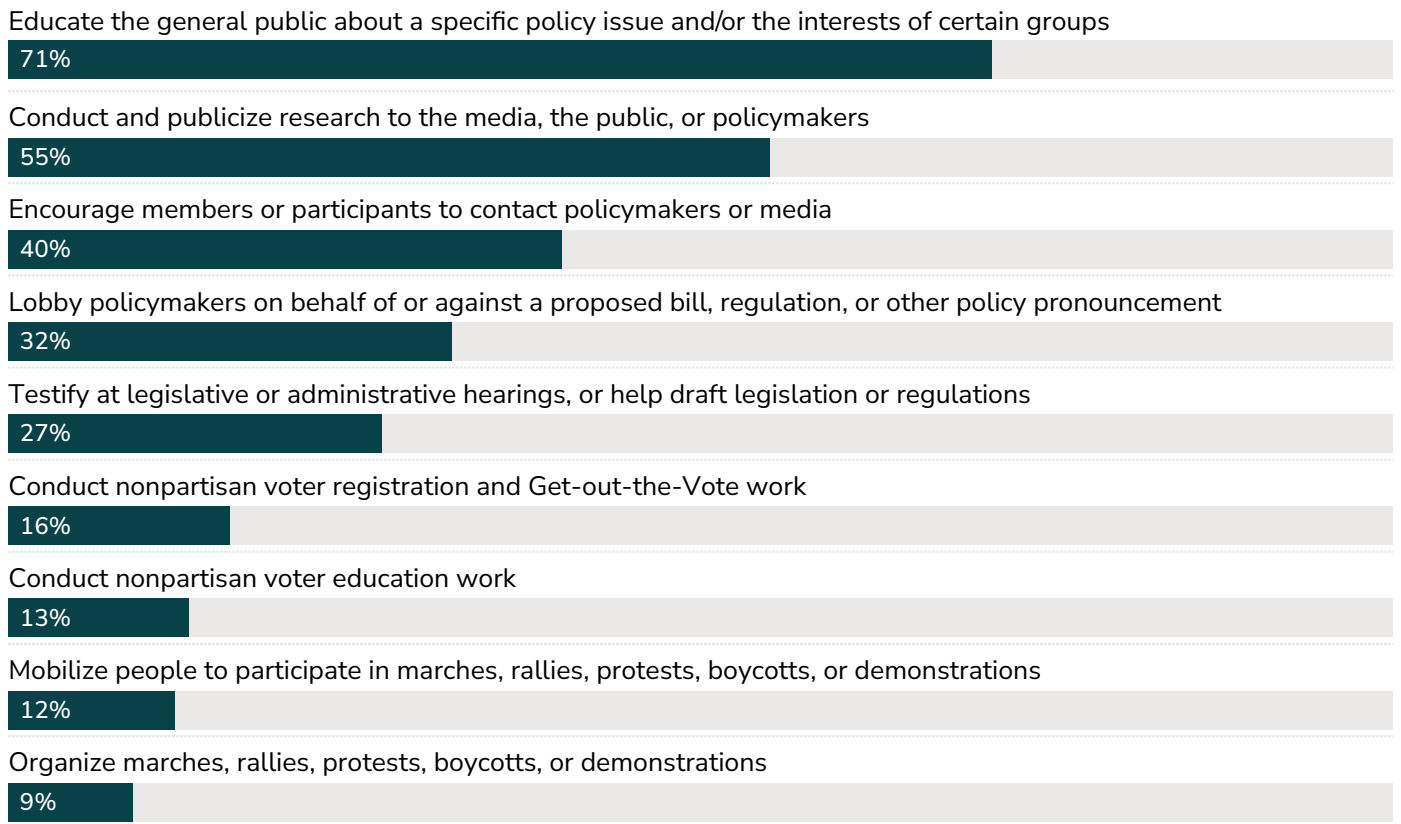
nonprofit leaders as one of the two largest obstacles to engaging in policy advocacy along with a lack of resources and capacity (Faulk et al., 2023), themes that were reaffirmed in a follow-up qualitative study (MacIndoe et al., 2024).

Given the importance of public policy in shaping the work of nonprofits and the communities where we operate, Independent Sector has created [recommendations to reverse these trends](#) in decreased activity and knowledge based on the findings of our research on nonprofit advocacy and reached in collaboration with nonprofit advocates (Rogers & Miller, 2025). We intend to revisit data collection on advocacy to track future trends as well.

Ongoing data from the Urban Institute’s National Survey of Nonprofit Trends and Impacts confirm that most nonprofit organizations do not engage

in various direct advocacy activities, with very few involved in mobilizing people to participate in rallies, protests, boycotts, or demonstrations (12%) or even conducting nonpartisan voter education (13%; Martin et al., 2024). More nonprofit organizations reported educating the general public about a specific policy issues and/or the interests of certain groups (71%) or conducting and publicizing research to the media, the public, or policymakers (55%; Martin et al., 2024). Of note is the discrepancy between the finding that just 31% of nonprofits say they do lobbying or advocacy and the larger portion who report doing more specific related activities (Faulk et al., 2023). Whether organizational leaders say they do lobbying and advocacy may be driven in part by understanding some activities as unrelated to lobbying or advocacy, or unwillingness to report those lobbying or advocacy activities under some circumstances.

FIGURE 26
Nonprofit Organizations Who Report Engaging in Advocacy-Related Activities in 2022-2023



Source: Nonprofit Trends and Impacts Study (Martin et al., 2024)

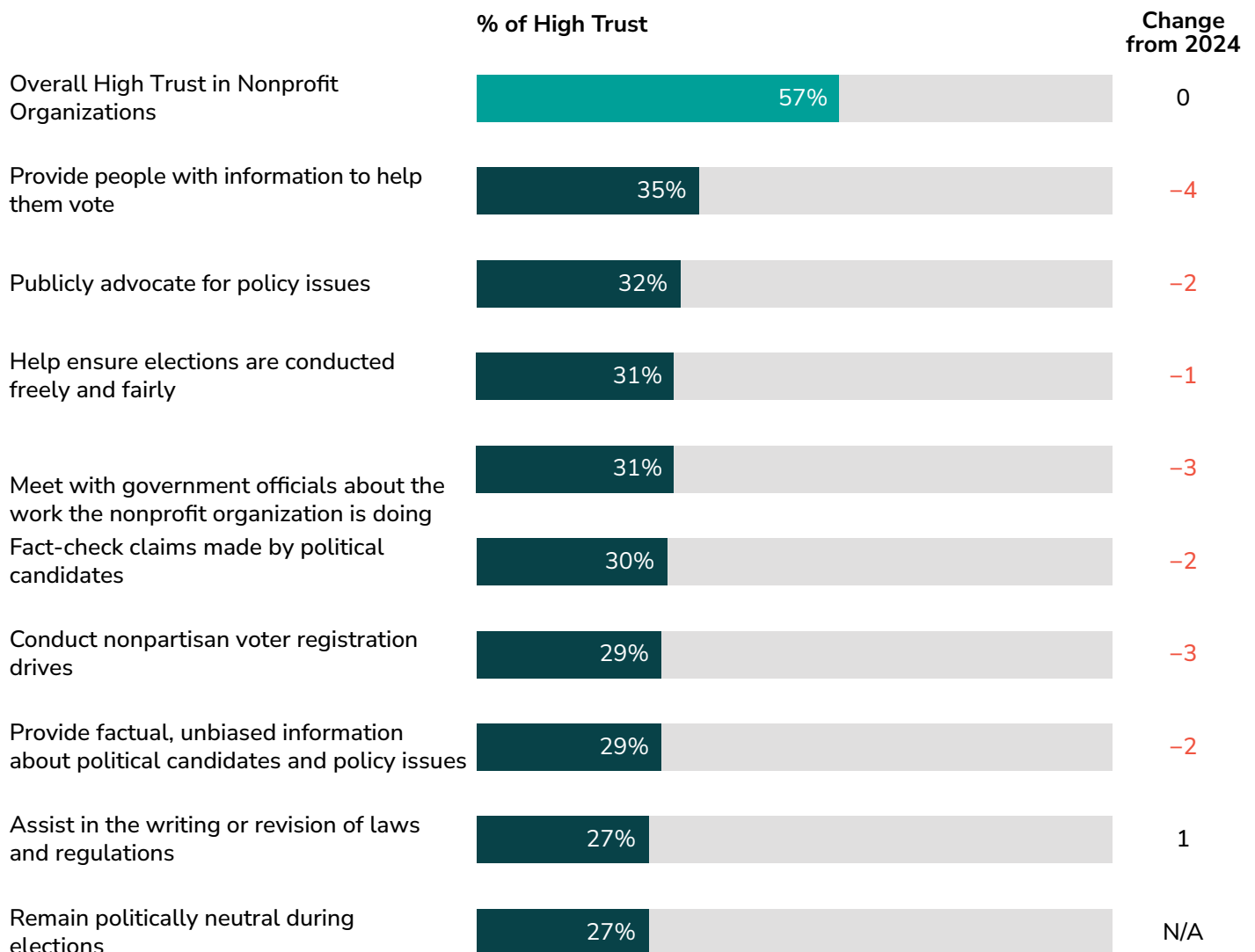
Nonprofits Walk a Fine Line with Public Perception of Advocacy

If nonprofit leaders are reluctant to acknowledge their advocacy and lobbying activities, there may be good reason. Data from Independent Sector’s trust report show that Americans, who generally have high trust in nonprofits, are less certain they can trust nonprofits when it comes to engaging in public policy advocacy (Independent Sector & Edelman DXI, 2025b). For instance, though 57% of Americans say they have high trust in nonprofits in general, just 33% say they have high trust in the

sector to publicly advocate for policy issues. These attitudes were slightly more negative in 2025, a worsening of already low trust in 2024. This likely reflects general skepticism about the role and trustworthiness of government and relationship of nonprofits to government rather than a specific belief that nonprofits are likely to be worse at advocacy than others would be, given that a plurality of Americans believe nonprofits are making things better in America (see Trust & Governance section). But nonetheless, low trust in nonprofits to act in the policy arena is a challenge for effective advocacy and maintaining public trust in the sector.

FIGURE 27

Trust in Nonprofits Related to Elections and Public Policy Activities, 2025



Source: Trust in Nonprofits and Philanthropy Survey (Independent Sector & Edelman DXI, 2025a, 2025b)

Public Policy Affects the Sector and Big Changes Are Coming

In addition to direct funding challenges nonprofits are already facing this year (see Economy & Finance section), the OBBB is expected to result in the largest cut to federal social services in history, reducing access to key supports for vulnerable Americans who also rely on nonprofit services. The OBBB is forecast to result in a loss of Medicaid for [10 million](#) Americans while also making recordkeeping and cost-sharing more onerous for Americans who are

enrolled (Congressional Budget Office, 2025). An estimated [22 million](#) American families will lose eligibility for SNAP. Cuts to Medicare are also expected to be substantial (Wheaton et al., 2025).

These massive reductions to the safety net in the U.S. will directly increase demand on nonprofits providing funding and services related to health care and food. Ripple effects will likely impact social service, community, and advocacy-focused organizations throughout the sector as families and communities experience increased hardship.

TAKE ACTION

Nonprofits have a right and responsibility to engage in public policy advocacy, but many nonprofit leaders and staff struggle to understand the activities that they and their organizations can and cannot legally engage in. This causes needless anxiety and stress, and it discourages policy engagement. These rules and how they are communicated can be made clearer. [Find out more about how we can clarify the rules.](#)

In partnership with a group of outstanding nonprofit sector advocates, Independent Sector recently released recommendations to boost nonprofit advocacy, informed by groundbreaking research and the group's own deep expertise. Learn more and contact us if you want to [partner on building the sector's capacity and activities in public policy advocacy.](#)



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