



INDIANA NONPROFITS PROJECT
NONPROFIT EMPLOYMENT: REGIONAL SERIES
REPORT #06

Nonprofit Paid Employment in Economic Growth Region 05, Indiana, 2000-2019

May 2021

A joint product of

The O'Neill School of Public & Environmental Affairs at Indiana University
and the Lilly Family School of Philanthropy

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Acknowledgments

This report is part of an ongoing project on the **Indiana Nonprofit Sector: Scope and Community Dimensions**, made possible by the support for the Efroymsen Chair in Philanthropy (2001-2020) by the Efroymsen Fund at the Central Indiana Community Foundation, the Lilly Family School of Philanthropy's Indiana Research Fund (2001-2020), supported in part by Lilly Endowment Inc., and the O'Neill School of Public and Environmental Affairs at Indiana University Bloomington.

We are grateful to Carol O. Rogers and Victoria Nelson at the Indiana Business Research Center for making the data on which this report is based available to us and for very helpful comments on the draft. We thank the many research assistants working on the Indiana Nonprofit Sector project for their contributions to developing the data series and prior reports upon which this report is based: Tyler Abbott, Andrea (Lewis) Appeltranger, Rachel Breck, Pauline Campbell, Anthony Colombo, Kristen Dmytryk, Lauren Dula, Erich Eschmann, Apurva Gadde, Jessica Hilton, Jacob Knight, Hannah Martin, Kellie McGiverin-Bohan, Weston Merrick, Rachel Miller, Kathleen Novakosky, Hun Myoung Park, Deb (Oonk) Seltzer, Lauren Shaman, Virginia Simpson, Alexandra (Buck) Toledo, and Kathleen Zilvinskis. We thank members of the Advisory Board for the Indiana Nonprofit Sector: Scope and Community Dimensions project for helpful comments and suggestions. We also thank AJ Wheeler for making the maps within the report.

Copies of this report are available on the Indiana Nonprofit Sector Website (www.indiana.edu/~nonprof).

Suggested Citation

Nonprofit Paid Employment in Economic Growth Region 5, Indiana, 2000-2019, Nonprofit Employment Series, Regional Series, Report 6, by Kirsten A. Grønberg and Anjali Bhatt. (Bloomington, IN: Indiana University O'Neill School of Public and Environmental Affairs), May 2021. DOI: 10.13140/RG.2.2.17806.69441.

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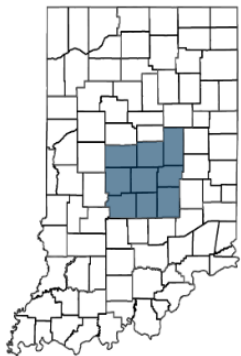
Introduction

Nonprofits employed 301,000 workers in Indiana in 2019 – about 10 percent of all paid workers in the state. These workers play a vital role by providing Hoosiers with key services in health care, social assistance, education, arts, culture, and recreation, and more.

Additionally, nonprofits also have a significant impact on the state’s overall economy. The \$15 billion¹ earned by nonprofit employees in 2019 benefit the general economy when nonprofit workers buy goods and services from local businesses or own homes in the region. These workers also contribute to state and local government finances, when they pay state income taxes, state and local sales taxes, and local property taxes.

In this report we examine the economic impact of the nonprofit sector in Central Indiana, Economic Growth Region 5, and how that compares to the state of Indiana. We also compare nonprofit employment and payroll to other industries, and to the for-profit and government sectors.

Economic Growth Region 5: Central Indiana



Economic Growth Region (EGR) 5 is composed of nine counties – Boone, Hamilton, Hancock, Hendricks, Johnson, Madison, Marion, Morgan, and Shelby. The region includes Anderson and all but two counties (Putnam, Brown) of the Indianapolis-Carmel-Anderson Metropolitan Statistical Area (MSA). EGR 5 is a

major economic force in Indiana, employing 1 million workers, or one-third of Indiana’s paid workers, with a total payroll of over \$54 billion.

Employment and Payroll

Of the 1 million paid employees in the region in 2019, nonprofits employed over 103,000 with a payroll of over \$6.3 billion. Figure 1 shows how the region’s nonprofit employees are distributed among the nine counties. Marion County (Indianapolis),

Quick Facts

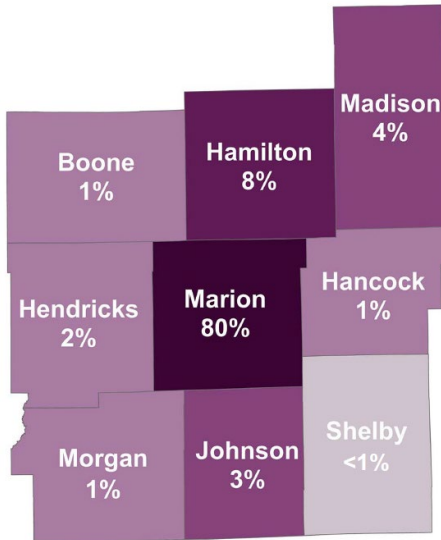
- Nonprofits employed 103,000 workers in the region with a total payroll of \$6.3 billion in 2019 – 10 percent of all paid employees and 12 percent of the total payroll in the region.
- As of 2019, total nonprofit jobs exceeded employment in all major for-profit industries in the region, surpassing retail trade jobs in 2018 (Fig. 4).
- Nonprofit payroll trails only manufacturing, and that gap has narrowed considerably (Fig. 5) since 2000.
- Nonprofit employment and payroll (adjusted for inflation) have grown considerably more than in the for-profit or government sectors (Fig. 6 and 7).
- Nonprofit employment has grown every year since 2000 (Fig. 8).
- Most nonprofit employees work in health care (61%) with the rest fairly distributed across membership, education, and all other industries, including the smaller social assistance and AER industries (Fig. 9).
- Nonprofit employees account for about half (47 percent) of all health care (Fig 10).
- The subindustries of the major nonprofit industries differ considerably in nonprofit shares of total employment and payroll.
- Nonprofits have more employees on average than for-profit establishments in the same industries. The average size for government is even larger than nonprofits in every major nonprofit industry (Fig. 17).
- Average wages are higher for nonprofit employees than for-profit workers and roughly equal to government in most major nonprofit industries (Fig. 19).

accounts for the vast majority (80 percent) of EGR 5’s nonprofit employees, with Hamilton as a distant second at 8 percent. The remaining 12 percent of

¹ All payroll values in this report are adjusted to 2019 inflation.

the region’s nonprofit workers is distributed among the remaining seven counties, each accounting for between 1 and 4 percent of the total. Since 2000, the distribution of nonprofit employment has changed no more than 3 percentage points for any one county.

Figure 1: Distribution of Nonprofit Paid Employment (2019) by County for EGR 5



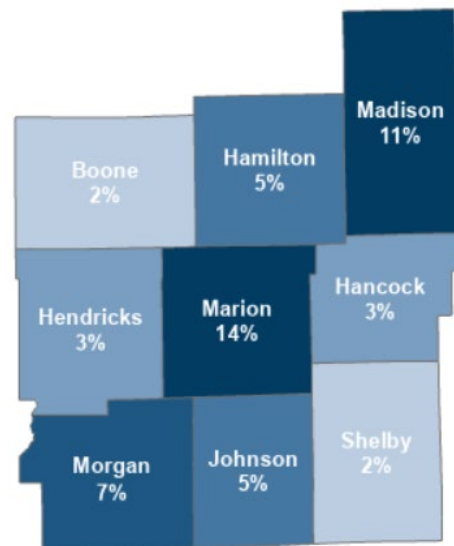
Nonprofit payroll is similarly distributed among the nine counties except that Marion County accounts for 85 percent of EGR 5’s payroll, with Hamilton County once again a distant second at 7 percent. The remaining 7 percent is split among the seven counties, ranging between less than 1 percent and 3 percent of the region’s nonprofit payroll. The distribution of nonprofit payroll remained largely unchanged over the 20-year period. See Figure B1 in Appendix B for more details.

At the center of EGR 5 is Marion County and Indianapolis. Not only is it the largest city in the state but it is also the state capital and the headquarter of many nonprofit associations and key philanthropic institutions. Not surprisingly, Marion County’s share of Indiana’s nonprofit employment (28 percent) is the highest of all 92 counties in Indiana. The second largest share of the state’s nonprofit employment is in St. Joseph County (8 percent). Marion County similarly has the highest share of the state’s nonprofit payroll at 35 percent, with St. Joseph County second at 9 percent. The entire EGR 5 accounts for 34 and 41 percent of Indiana’s total nonprofit workforce and payroll, respectively.

Nonprofit employment as a percentage of total employment in EGR 5 is more suggestive of the important role nonprofits play in the region. The percentage is highest in Marion County at 14 percent, although that is only the eighth highest share among the state’s 92 counties (St. Joseph’s County takes the top spot at 20 percent). Madison County ranks fifteenth in the state at 11 percent. In the remaining seven counties, only between 2 and 7 percent of all paid employees work for nonprofits. Since 2000, the nonprofit share of total employment increased in every county except for Boone and Hendricks Counties. None of the counties changed by more than 3 percentage points, except for Marion County which grew 5 percentage points.

The nonprofit share of total payroll shows a similar pattern. Marion and Madison County have the highest nonprofit shares of total payroll, at 15 and 12 percent respectively. In the remaining counties, the nonprofit share of total payroll is 7 percent or less. Since 2000, nonprofit shares of payroll, in constant 2019 dollars, has increased for every county except for Boone County. The largest increase was in Marion County which grew 8 by percentage points from 2000 to 2019. See Figure B2 in Appendix B for more details.

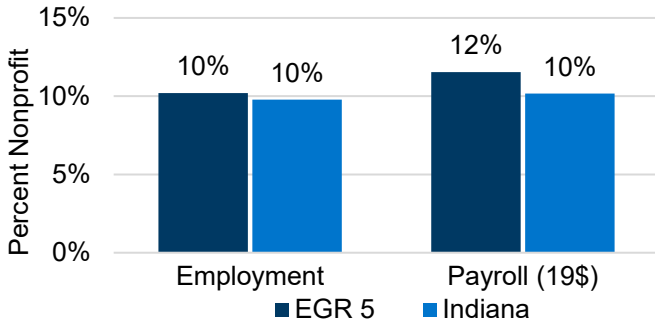
Figure 2: Nonprofit Share of Total Paid Employment (2019) by County for EGR 5



Among the state’s 11 Economic Growth Regions, EGR 5 ranks seventh in nonprofit share of total employment, on par with the corresponding percentage at the state level (see Figure 3). Nonprofit workers account for a higher percent of total payroll in EGR 5 (12 percent) than for the state

as a whole (10 percent). Since 2000, nonprofit workers have increased their share of total employment (from 8 to 10 percent) and payroll (from 6 to 12 percent) in EGR 5.

Figure 3: Nonprofit Share of Total Paid Employment and Total Payroll (2019), EGR 5 and Indiana



Industry Comparisons

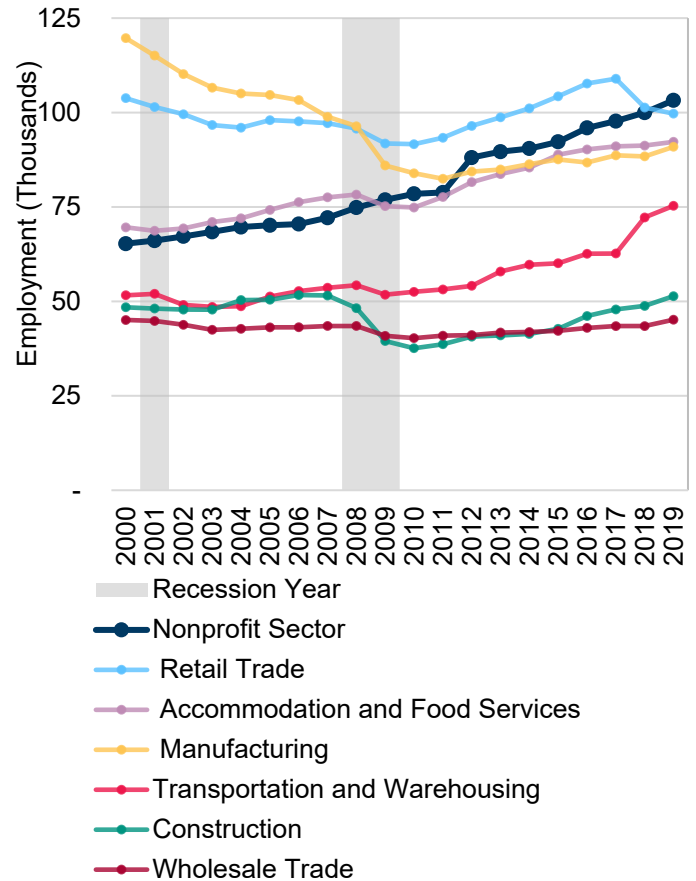
Compared to major for-profit industries, total nonprofit employment of 103,000 workers in EGR 5 in 2019 surpassed retail trade with 100,000 employees, having trailed it by between 8,000 and 14,000 workers from 2010-2017 (Figure 4). Retail trade is followed by accommodation and food services and manufacturing with 92,000 and 91,000 employees, respectively. Transportation and warehousing ranks fifth with 75,000 employees, followed by construction (51,000) and wholesale trade (45,000).

These industries have changed significantly over time in EGR 5, as Figure 4 shows. In 2000, the manufacturing industry ranked first, employing 120,000 workers in the region. Since then, it decreased by almost a third (31 percent) to only 82,000 in 2011. From there, it has recovered some, growing by 8,500 employees from 2011 to 2019. It now is the fourth largest industry in the region. Over the same period, the nonprofit sector grew from ranking fourth with 65,000 employees in 2000 to ranking first with 103,000 employees in 2019.

Retail trade ranked second and accommodations and food services ranked third in both 2000 and 2019. However, retail trade remained between 92,000 and 109,000 employees, decreasing through the first half of the period, then increasing from 2010 to 2017, before seeing a significant drop in the number of employees in 2018. By contrast, accommodation and food services grew from 70,000 employees in 2000 to 92,000 in 2019.

The remaining industries remained at or below 75,000 jobs. Among these, transportation and warehousing grew the most, rising from 52,000 employees in 2000 to 75,000 in 2019. Construction had a net increase of 3,000 jobs over the period, up from 48,000 in 2000 to 52,000 in 2007 before dropping during the Great Recession to 38,000 jobs in 2010 before beginning a steady increase until 2019. Wholesale trade has remained fairly steady between 40,000 and 45,000 over the whole period.

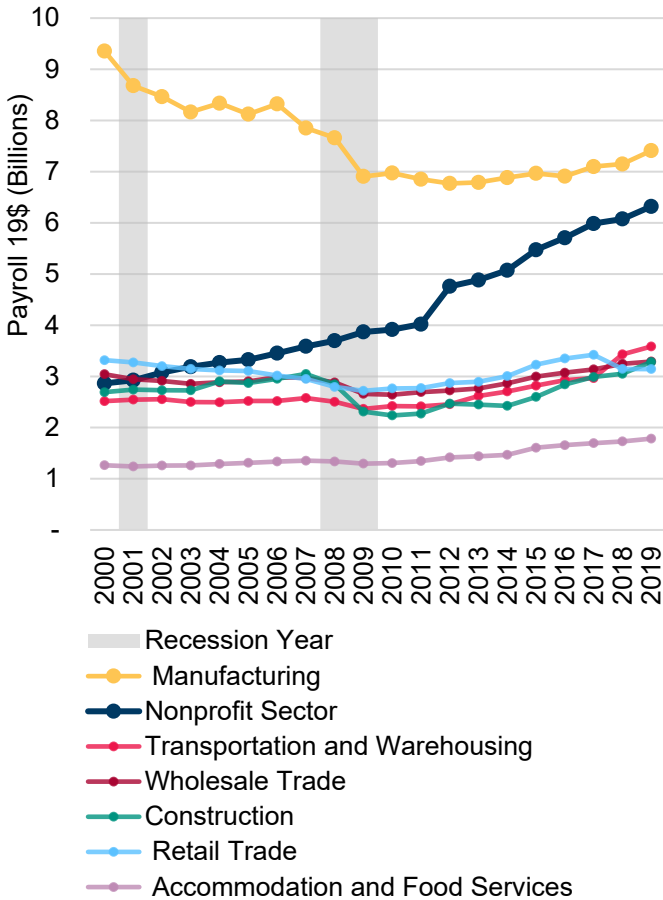
Figure 4: Nonprofit Paid Employment Compared to Key Private Sector Industries (2000-2019) for EGR 5



Trends in payroll differ notably from trends in employment in EGR 5, especially for manufacturing and the nonprofit sector. As Figure 5 shows, manufacturing payroll declined significantly from \$9.4 billion in 2000 to \$7.4 billion in 2019 (adjusted for inflation). However, it has retained its status as the largest payroll over the entire period, although manufacturing employment declined from being the largest industry in terms of jobs in 2000, to falling below nonprofit jobs as well as jobs in retail trade and accommodation and food services by 2019. By contrast, nonprofit payroll has ranked second

since 2003, growing considerable from \$2.9 billion in 2000 to \$6.3 billion in 2019, in constant 2019 dollars.

Figure 5: Nonprofit Payroll (2019\$) Compared to Key Private Sector Industries (2000-2019) for EGR 5



Other for-profit industries, regardless of whether they are comparable to the nonprofit sector in terms of jobs (retail trade and especially accommodation and food services) or trail nonprofit jobs (transportation and warehousing, construction, and wholesale trade), lag far behind in terms of payroll. Transportation and warehousing, wholesale trade, construction, and retail trade all had payrolls ranging between \$2 and 4 billion over the 2000 to 2019 period, adjusted for inflation, while nonprofit payroll increased from \$2.9 billion to \$6.3 billion.

Accommodation and food services payroll is lower still (increasing from \$1.3 billion in 2000 to \$1.8 billion in 2019). The differences between trends in total employment and in total payroll, suggests that wages are highest in manufacturing and also

relatively high in the nonprofit sector and construction, but quite low in retail trade and accommodation and food services.

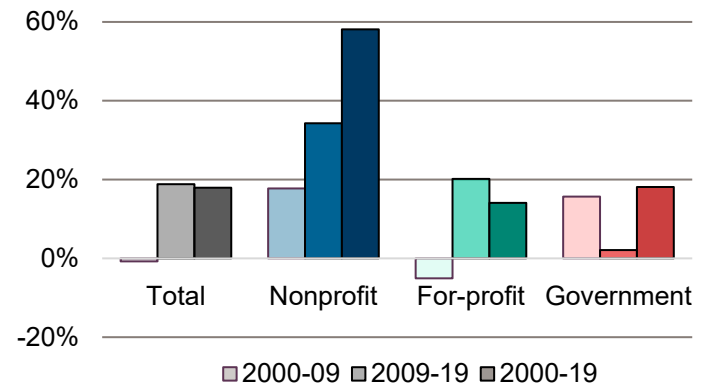
Growth in Nonprofit Employment and Payroll

From 2000 to 2019, total paid employment in EGR 5 increased 18 percent and payroll increased by 23 percent, adjusted for inflation. Below, we explore overall and average growth rates for the three sectors in the region and then compare these rates to the state as a whole.

The growth in total employment in EGR 5 is a result of growth in all three sectors, but particularly nonprofit employment, which increased 58 percent, up from 65,000 jobs in 2000 to 103,000 in 2019. Government and for-profit employment grew at 18 and 14 percent, respectively. Still, the overall growth rates fail to capture the changes over the period.

Figure 6 shows the percent change in employment by sector separately for 2000-2009 (lightest bar) and 2009 to 2019 (middle bar), as well as the change for the entire period (darkest bar). Looking at the first period, we see that both total and for-profit employment decreased, at 1 and 5 percent, respectively. The losses are largely due to the loss in manufacturing during the first half of the period. In contrast, both nonprofit and government employment increased by respectively 18 and 16 percent.

Figure 6: Percent Change in Total Paid Employment in EGR 5 by Sector, 2000-09, 2009-19, 2000-19



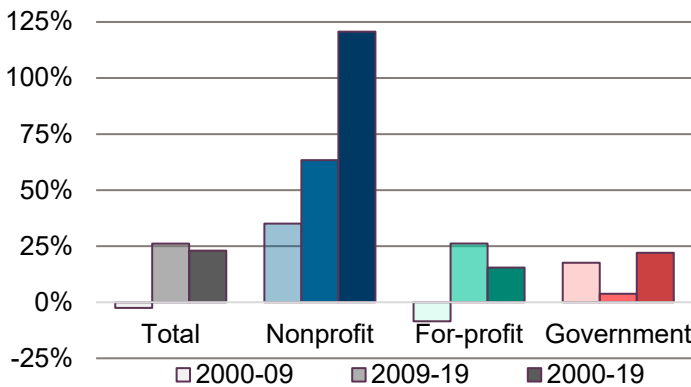
In the second period from 2009 to 2019, employment grew across all sectors, with overall employment rising 19 percent. The key drivers of growth were nonprofit (up 34 percent) and for-profit (up 20

percent) employment. Government employment grew much slower in the second half, increasing only 2 percent.

Total payroll in EGR 5 increased by 23 percent from 2000 to 2019, adjusted for inflation. This growth was driven by nonprofit payroll which more than doubled (up 121 percent), as shown in Figure 7. For-profit and government payrolls increased much more modestly, up by 15 percent and 22 percent respectively over the period.

Similar to employment, there are notable differences in payroll growth between the first and second period. In the first period, total payroll declined 2 percent, mainly due to the 9 percent decline in for-profit payroll, which can largely be attributed to the manufacturing industry (down \$2.4 billion or 26 percent), in constant 2019 dollars. In the second half, payroll grew for all three sectors. However, growth in the second period was slow in government where payroll increased by 4 percent.

Figure 7: Percent Change in Constant 2019 Dollars in Total Payroll in EGR 5 by Sector, 2000-09, 2009-19, 2000-19

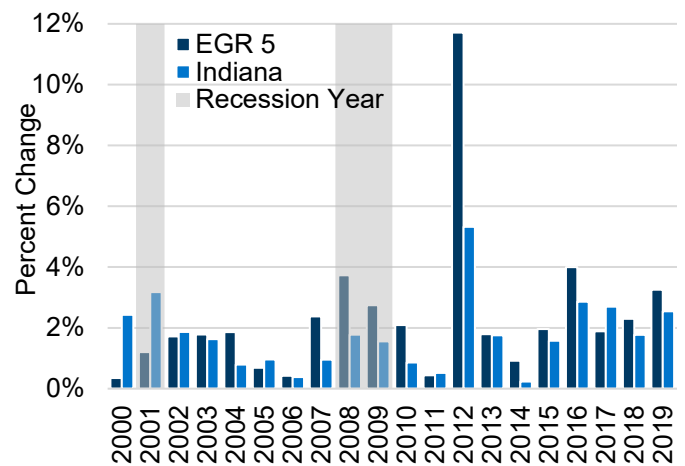


We explore trends in nonprofit employment in more detail by looking at annual growth rates. In EGR 5, nonprofit employment grew at a faster average annual rate (2 percent) than total, for-profit, and government employment (0.9, 0.8, and 1 percent respectively). Indeed, nonprofit employment grew in all 20 years in the period. By comparison, total, for-profit, and government employment decreased for 4, 6, and 3 years, respectively. Overall, nonprofit employment grew the fastest for 10 years in the 2000-2019 period, for-profits for 6 years, and

government for 4 years. The annual changes in payroll largely mirrors growth in employment. For more details see Figures C1 and C2 in Appendix C.

The average annual growth of nonprofit employment was slightly higher (by 0.6 percentage points) for EGR 5 than the statewide average of roughly 2 percent. In fact, for 14 years in the period, nonprofit employment in EGR 5 (dark blue bars) grew faster than the corresponding statewide annual growth rate (light blue bars), as shown in Figure 8.²

Figure 8: Percent Annual Change in Total Non-profit Paid Employment (2000-2019), EGR 5 and Indiana



The annual trends shown in Figure 8 should be treated with caution. For smaller units of aggregation (such as EGRs or smaller industries), changes in how data are reported and/or establishments are classified by reporting organizations and/or the Bureau of Labor Statistics become more evident. These technical changes may account for at least some of the variations in annual growth rates shown here. We don't know the true incident of such changes but we have identified some for virtually all Indiana EGRs.

Nonprofit payroll in EGR 5 similarly increased in every year from 2000 to 2019, and at a faster rate than for the state as a whole for 14 of those years. The average annual growth for EGR 5 was 4 percent and 3 percent for the state. See Figure B3 in Appendix B for more details.

² The major growth in 2012 is related to a growth in ambulatory health care services establishments as well as in arts, entertainment, and recreation. The former is associated with a corresponding decline in for-profit employment in the same period, suggesting a change in ownership for some establishments. The latter may be related to March Madness, the Super Bowl, and festivals during that year.

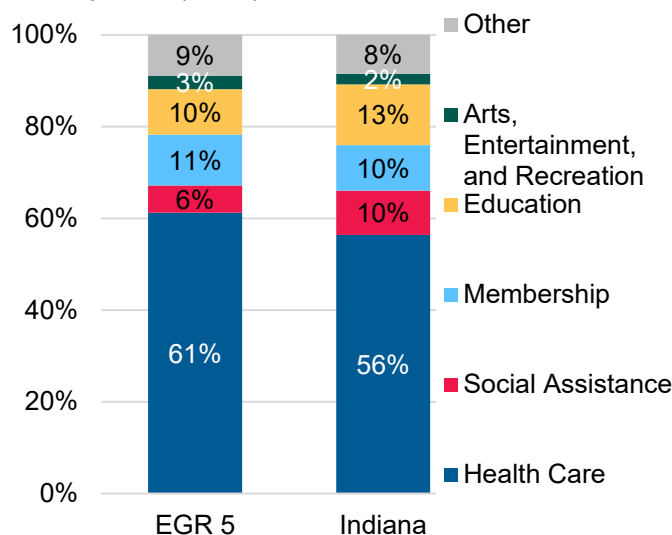
Major Nonprofit Industries

Five major nonprofit industries – health care, social assistance, education, membership association, and arts, entertainment and recreation – jointly account for 91 percent of total nonprofit employment in both EGR 5 and 92 percent for the state as a whole. The rest are spread across all other industries, except for mining, quarrying, and oil and gas extraction, as well as public administration.

As Figure 9 shows, the distribution of nonprofit employment among the major nonprofit industries is largely similar between EGR 5 and Indiana, although there are some differences. Health care accounts for more than half of all nonprofit employees in both EGR 5 (61 percent) and for Indiana as a whole (56 percent). Most of the rest (30 percent in EGR 5 and 35 percent in Indiana overall) are spread across four other major nonprofit industries.

In EGR 5, the second largest industry is membership (this includes religious, grantmaking, civic, professional, and similar organizations), which employs 11 percent of all nonprofit employees, comparable to 10 percent statewide. Education, the third largest industry in EGR 5 (at 10 percent) is the second largest for Indiana (13 percent). Social assistance is a smaller portion of the EGR 5 nonprofit employment than for the state, at 6 and 10 percent, respectively. Arts, entertainment, and recreation (2-3 percent) and other industries (8-9 percent) have similar percentages for both regions.

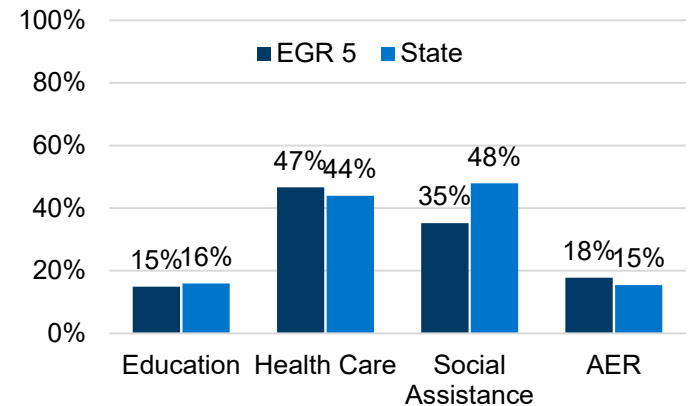
Figure 9: Industry Distribution of Paid Nonprofit Employment (2019), EGR 5 and Indiana



The distribution of total nonprofit payroll is roughly similar to nonprofit employment. However, it is skewed towards health care, which accounts for 72 percent of total nonprofit payroll in EGR 5 and 67 percent for Indiana overall, suggesting that jobs in this industry pay relatively better than in other nonprofit industries. The remaining nonprofit industries have correspondingly lower shares of total nonprofit payroll. See Figure B4 in Appendix B for more details.

We also examine how important nonprofit employment is in each of the major nonprofit industries. In EGR 5, nonprofits (dark blue bars in Figure 10) account for almost half (47 percent) of all workers in health care, more than a third (35 percent) in social assistance, but only 18 and 15 percent in arts, entertainment, and recreation (AER) and education, respectively. Not surprisingly, the “membership” industry is entirely nonprofit (and is omitted from Figure 10).

Figure 10: Percent Nonprofit of Total Paid Employment, by Industry (2019), EGR 5 and Indiana



Nonprofits account for a larger share of total employment in EGR 5 than for the state as a whole in health care and AER, roughly the same share for education, and a lower share for social assistance. The difference is no more than 3 percentage points except for social assistance where the nonprofit share of total employment is notably lower, by 13 percentage points, in EGR 5 (35 vs. 48 percent).

For EGR 5, the nonprofit share of total employment in these industries has changed considerably since 2000. The share has increased in education (from 9 to 15 percent) and slightly in health care (from 45 to 47 percent) but decreased in AER (from 23 to 18 percent) and especially in social assistance (from 51 to 35 percent). See Figures C3 and C4 in Appendix C for more details on nonprofit shares in

EGR 5.

Nonprofit share of total payroll for select industries looks largely similar to employment. See Figure B5 in Appendix B for more details. We turn now to a closer look at subindustries in each of the five major nonprofit industries.

Health Care

We begin with the largest nonprofit industry in EGR 5, health care. This industry includes hospitals, ambulatory services, and nursing and residential services. As noted above, the industry accounts for 61 percent of all nonprofit employees in EGR 5.

Total employment in the health care industry has grown 63 percent, up from 83,000 in 2000 to 136,000 in 2019. While employment in all three sectors grew, nonprofit jobs grew the fastest, rising 71 percent, up from 37,000 in 2000 to 63,000 in 2019.

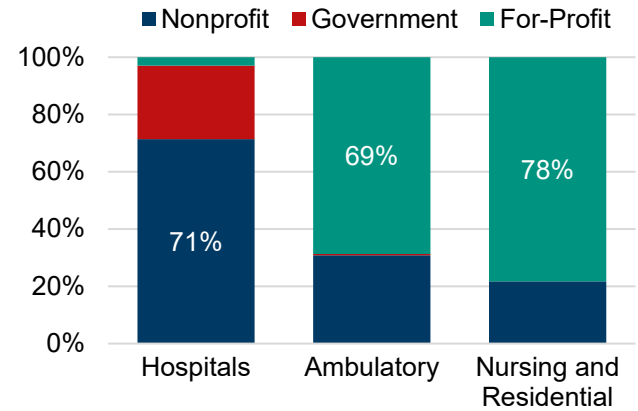
Within the health care industry, each of the three major subindustries grew in total employment over 2000-2019 period. Ambulatory services grew at the highest rate, up 108 percent from 27,000 workers in 2000 to 57,000 in 2019. Next, hospitals grew 42 percent from 40,000 in 2000 to 58,000 in 2019, driven mostly by growth in nonprofit employment. Nursing and residential services grew the slowest, up 39 percent from 15,000 in 2000 to 21,000 in 2019, despite net losses in the nonprofit sector.

Figure 11 shows the sector break down of each of the major subindustries in health care as of 2019. The large hospital subindustry is dominated by the nonprofit sector, which accounts for 71 percent of all jobs. By contrast, employment in both nursing and residential and ambulatory services are predominately for-profit (green segments), with 78 and 69 percent shares, respectively. Government employment is considerably larger than for-profit employment in the hospital subindustry but is virtually absent in the other two. See Figure B6 in Appendix B for details on percentage shares of total payroll.

In EGR 5, the health care subindustries differed notably in how the nonprofit share of employment has changed since 2000. For ambulatory services, the nonprofit share of employment grew from 11 to 31 percent over the 2000-2019 period. For hospitals, the share stayed at 71 percent. Meanwhile,

nonprofit employment in nursing and residential services dropped from 35 to 22 percent. See Figure C5 in Appendix C for more details on nonprofit employment shares in health care subindustries.

Figure 11: Health Care Subindustry Percentage Share of Total Employment by Sector in EGR 5 (2019)



The total payroll in health care is \$8.5 billion in EGR 5, and nonprofit payroll account for more than half (54 percent, \$4.5 billion) of that. For hospitals, nonprofit workers account for 71 percent of both total jobs and total payroll and both percentages have remained fairly steady over the 2000-2019 period. However, the nonprofit share of payroll has increased considerably in ambulatory care (from 10 to 45 percent), more so than the nonprofit share of employment (from 11 to 31 percent). By contrast, in nursing and residential care, the nonprofit share of payroll has decreased from 35 to 22 percent, exactly on par with employment. See Figure C6 in Appendix C for details.

Membership

We turn now to the industry that includes the second largest number of nonprofit employees in EGR 5, membership. The industry is officially titled religious, grantmaking, civic and professional associations according to the North American Industrial Classification System (NAICS). This industry includes organizations ranging from business organizations, social advocacy organizations, grantmaking and giving services, civic and social organizations, and religious organizations. The industry employs 11 percent of the nonprofit

workers in EGR 5 and nearly all of its employees work for nonprofits.³

Nonprofit employment in membership in the region has grown from 9,000 in 2000 to 11,500 in 2019, up 28 percent. In fact, each of the five subindustries had a net increase in employment from 2000 to 2019. Social advocacy grew the fastest, up 150 percent from almost 400 employees in 2000 to 1,000 in 2019. The very few religious organizations included in our employment data grew slightly slower, increasing 109 percent from 155 employees in 2000 to 323 employees in 2019.⁴ Even slower were grantmaking services, up 33 percent from 688 in 2000 to 917 nonprofit employees in 2019, and civic organizations, up 28 percent from 4,400 in 2000 to 5,600 in 2019. Business and professional organizations grew the slowest, increasing only 9 percent, from 3,300 to 3,600 over the 20-year period.

Nonprofit payroll in membership EGR 5 grew faster than nonprofit employment, increasing 46 percent from \$346 million in 2000 to \$506 million in 2019, adjusted for inflation. Payroll for each subindustry grew at similar rates to employment, except for business and professional organizations, where payroll grew from \$166 million in 2000 to \$254 million in 2019, or by 53 percent (much faster than the 9 percent increase in employment).

Education

The third largest nonprofit employer in EGR 5 is education (the second largest in Indiana). This industry includes all sorts of education establishments that teach students or provide relevant services to schools or students. The industry employs 10 percent of all EGR 5 nonprofit employees.

In EGR 5, the education industry grew from 53,000 total employees to 69,000, or by 30 percent, from 2000 to 2019. Total nonprofit employment in education grew more than four times faster, up 126 percent over the period, up from 4,500 to 10,000. Growth in for-profit (39 percent) and government (20 percent) employment trailed far behind.

The growth in total education employment in EGR 5 hides considerable variations among major educational subindustries. The two tiny education subindustries grew the fastest. Educational support services (e.g., testing and guidance counseling services) was up 162 percent from more than 600 total employees in 2010 to almost 1,700 in 2019 while junior colleges grew 106 percent, from about 800 in 2000 to more than 1,600 employees in 2019.⁵

Other schools (fine arts, language, automobile driving, exam preparation, etc.) followed at 57 percent (up from about 1,800 in 2010 to 2,900 in 2019). Growth was notably lower for the two largest subindustries colleges and universities (up 27 percent from 12,100 to 15,400 over the 2000 to 2019 period) and elementary and secondary schools (up 22 percent from 37,700 to 46,000 over the period). Technical schools (cosmetology, flight training, and the like) barely grew during the 2010-2019 period, up only 3 percent reaching 800 employees by 2019 while business and secretarial schools (including computer training and professional and management development training) actually lost 58 percent of their employment over the period, down from slightly more than 700 workers in 2010 to just over 300 in 2019.

As Figures 12 and 13 show, these subindustries also differ considerably in which sector dominates. Figure 12 concentrates on the government-heavy subindustries, where the majority of employees work for government establishments and where almost all others work for nonprofit establishments. These are also the three largest subindustries. At the college and university level, nonprofits employ a sizable segment, but the balance is still heavy towards government employment (65 percent). For elementary and secondary schools, government heavily dominates with 90 percent, followed by the much smaller junior college subindustry, which is nearly 100 percent government employees.

Figure 13 shows the distribution of workers by

³ We treat all employees in this industry as nonprofit, although there are a few government establishments included. However, the government numbers are tiny – 10 or fewer establishments for the state as a whole, with 65 or fewer employees total.

⁴ Religious organizations are not required to report to the IRS and thus are not accurately portrayed in our data. We conservatively estimate that there are roughly 8,800 congregations in Indiana, although only 2 percent (174) are included in our nonprofit employment data for Indiana. We expect at least an additional 26,500 workers, but perhaps as many as 77,300. For more details, see Appendix A.

⁵ Our data for education subindustries is limited to the 2010-2019 period, except for elementary and secondary education, junior colleges, and colleges and universities where our data extends for the whole 2000-2019 period.

sector for the remaining – and smallest – subindustries. Only in the educational support services subindustry, do nonprofits employ about as many as for-profits. This subindustry is also the only one with a notable segment employed in government (a significant change from the three largest education industries shown in Figure 12). In the three remaining subindustries, between 75 and 90 percent of all workers are employed by for-profit establishments. The rest are working for nonprofit establishments.

In EGR 5, the nonprofit share of employment has increased in every education subindustry except for other schools, where the nonprofit share decreased from 27 percent in 2010 to 21 percent in 2019, and junior colleges, which is all government employment. The nonprofit share of educational support services increased the most, up 15 percentage points from 33 percent in 2010 to 48 percent in 2019. See Figures C7 and C8 in Appendix C for more details.

Figure 12: Select Education Subindustry Percentage Share of Total Employment by Sector in EGR 5 (2019)

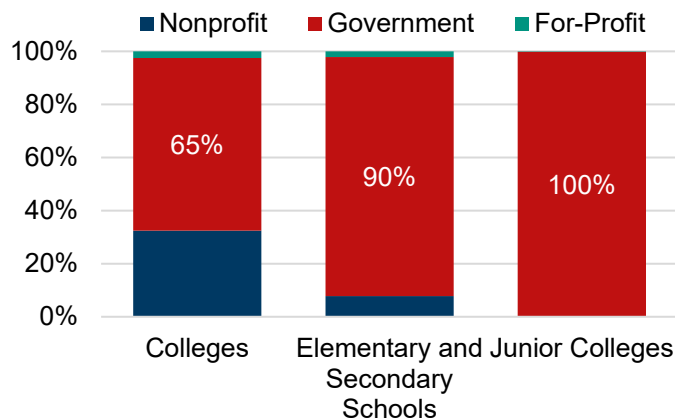
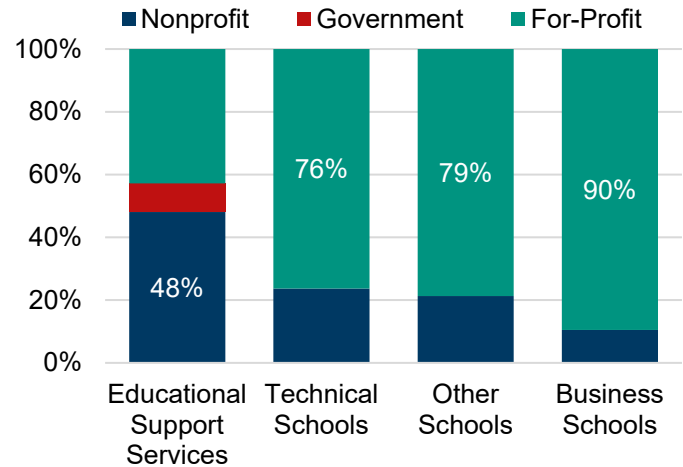


Figure 13: Select Education Subindustry Percentage Share of Total Employment by Sector in EGR 5 (2019)



The total payroll in education is \$3.1 billion in EGR 5, with nonprofits accounting for \$440 million of it, or 14 percent – just under the nonprofit share of total employment in the industry. The distribution of payroll within each of the major subindustries by sector is very similar to what it is for the number of employees. See Figures B7 and B8 in Appendix B for more details. Changes in the nonprofit share of total payroll in the subindustries are very similar to trends in the nonprofit share of employment. See Figure C9 and C10 in Appendix C for details.

Social Assistance

Next is the social assistance industry which employs 6 percent of the nonprofit labor force in EGR 5 (compared to 10 percent for the state overall). The industry includes services such as community relief services, child day care services, vocational rehabilitation services, and individual and family services.

Total employment in social assistance grew 83 percent in EGR 5, up from 9,500 employees in 2000 to 17,400 in 2019. However, most of the increase reflects growth in for-profit jobs – up 142 percent, compared to only a 26 percent increase in nonprofit employment.

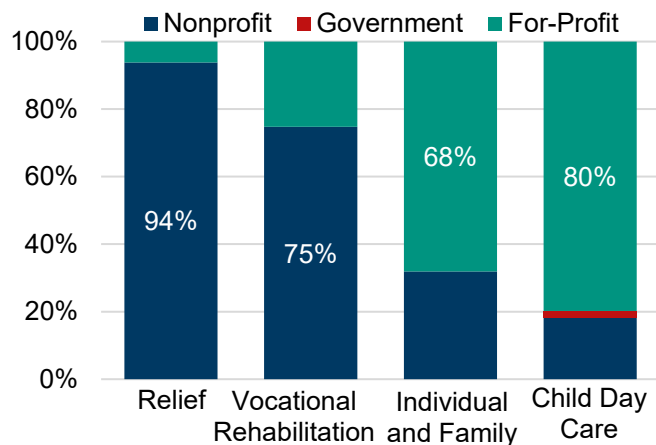
The social assistance industry has four major industries, each with different patterns of growth for total employment. Individual and family services grew the fastest, more than quadrupling (up 313 percent) from 2,300 in 2000 to 9,400 in 2019 to become the largest of the four subindustries in social assistance. The tiny relief services grew somewhat slower, but still more than doubled (up 161 percent) from 300 to almost 800 employees. In

contrast, child day care services only grew 8 percent, from 4,900 to 5,300 employees. Finally, the fairly small vocational services faced a net loss of employment, losing 4 percent, down from 2,000 employees in 2000 to 1,900 in 2019.

Figure 14 shows how jobs are distributed across the three sectors for each of the social assistance subindustries in order of most to least nonprofit share. We see that both the tiny relief and the larger vocational rehabilitation services are dominated by nonprofits with 94 and 75 percent of the subindustry’s employees working for nonprofits (blue segments), respectively. The opposite is true for child day care and the much larger individual and family services, where for-profit employment (green segments) takes the lead. Government employment accounts for a minimal share in each subindustry.

Of the four subindustries of social assistance, only the tiny relief services increased in the nonprofit share of total employment since 2000 in EGR 5. The three other subindustries lost nonprofit share of total employment. Individual and family services faced the steepest loss, dropping from more than three-quarters (78 percent) in 2000 to less than a third (32 percent) in 2019, largely consistent with statewide patterns. See Figure C11 in Appendix C for more details.

Figure 14: Social Assistance Subindustry Percentage Share of Total Employment by Sector in EGR 5 (2019)



Total payroll for social assistance was \$451 million in 2019 in EGR 5. The nonprofit payroll is roughly \$183 million, or 41 percent of the total payroll. Still

the percentage share of payroll among sectors is similar to the employment shares. See Figure B9 in Appendix B for more details. Changes in the nonprofit shares of payroll is also similar to changes in share of employment. See Figure C12 in Appendix C for more details.

Arts, Entertainment, and Recreation

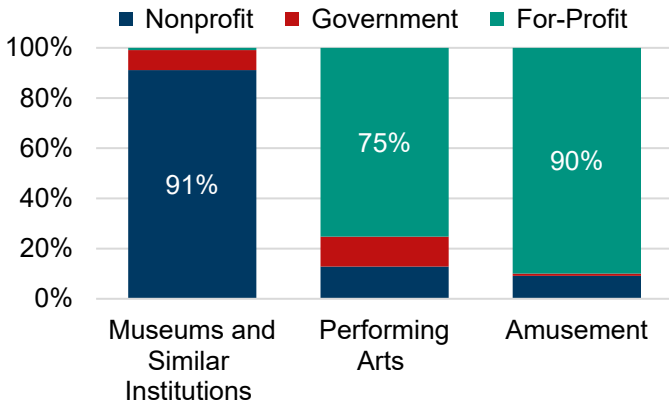
Finally, we look into the smallest of the major nonprofit industries, arts, entertainment, and recreation (AER). This industry includes performing arts and spectator sports, museums and historical sites, and amusement, gambling and recreation. This industry only accounts for 3 percent of total nonprofit employment in EGR 5.

The arts, entertainment, and recreation industry in EGR 5 has grown 28 percent, up from 13,200 to 17,000 employees over the 2000-2019 period. For-profit and government employment both increased moderately during the period, up by 38 and 20 percent, respectively during this period. By contrast, nonprofit employment declined slightly but stayed at roughly 3,000 employees over the period. As a result of the differential growth rates, the nonprofit share of total employment in AER dropped from 23 to 18 percent in EGR 5 over the period.

The AER subindustries grew at different rates. The amusement subindustry grew 66 percent, up from 5,900 workers in 2000 to 9,900 in 2019. The small museums subindustry grew somewhat slower at 29 percent, up from 1,200 to 1,500 employees. Finally, performing arts actually lost employees, down from 6,100 in 2000 to 5,500 employees in 2019, a 9 percent decrease.

Figure 15 shows how AER subindustry employment is distributed among the three sectors, in order of highest to lowest nonprofit share. We see that the small subindustry of museums and similar institutions is dominated by nonprofits, with a 91 percent share of total employment. Performing arts and amusement are both for-profit heavy, with 75 and 90 percent for-profit shares of total employment in the two subindustries, respectively.

Figure 15: Arts, Entertainment, and Recreation Subindustry Percentage Share of Total Employment by Sector in EGR 5 (2019)



The nonprofit share of employment in the arts, entertainment, and recreation subindustries declined for both museums and similar institutions, down from 98 percent to 91 percent of total employment, and amusement, down from 18 percent to 9 percent of total employment. Performing arts stayed at about 13 percent nonprofit share over the 20-year period. See Figure C13 in Appendix C for more details.

The AER industry in EGR 5 had a payroll of \$892 million, in constant 2019 dollars, in 2019. The nonprofit sector accounts for \$113 million or 13 percent of the total payroll. The share of total payroll by sector looks largely similar to employment shares for museums and similar industries, but the nonprofit share is lower in payroll than employment for the performing arts (5 percent vs. 13 percent) and slightly higher in the amusement subindustry (13 vs. 9 percent) suggesting corresponding differences in average wages in the subindustries. See Figure B10 in Appendix B for more details. Trends in the nonprofit share to total payroll over the 20-year period are roughly similar for the three subindustries. See Figure C14 in Appendix C for details.

Average Size of Nonprofit Establishments

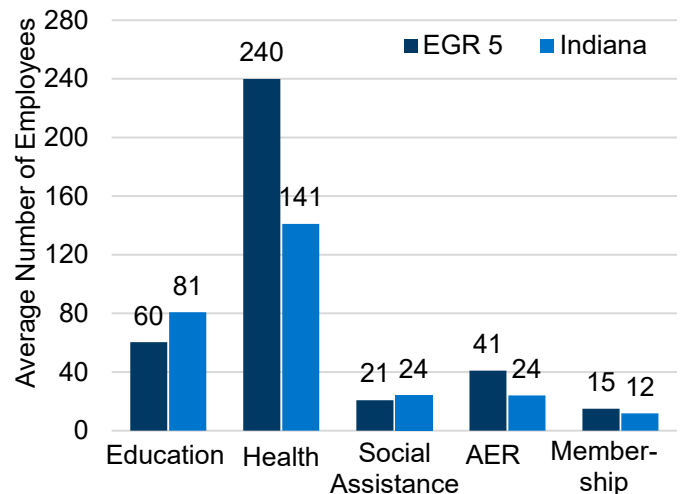
We use the average size of establishments to get a better sense of how industries are structured. These averages should be interpreted with caution, however, since they may hide very large or very small establishments. They also do not distinguish between full-time and part-time workers. Both of these features likely vary considerably among industries and sub-industries (e.g., hospitals vs. clinics in health care). Nor do these figures adequately

capture the size of nonprofit (or for-profit) organizations, since some larger organizations may operate multiple establishments both in the region and elsewhere.

As expected for a region that includes the largest city in the state, nonprofit establishments in EGR 5 (dark blue bars) are larger on average than for the state as a whole (light blue bars) with 55 versus 43 employees per establishment, respectively. Figure 16 shows that nonprofit establishments are the largest in health care in EGR 5 (240 employees per establishment), followed by education (60 employees per establishments) and arts, entertainment and recreation (41 employees per establishment). Social assistance and membership establishments are the smallest, with respectively 21 and 15 employees per establishment.

For three of the industries – health, arts, entertainment, and recreation, and membership – the average size of establishments in EGR 5 are larger than those for the state as a whole. The most notable difference is in health care where EGR 5 establishments (240 employees on average) have almost 100 more employees than Indiana establishments (141 employees on average). The gap for arts, entertainment and recreation is notably smaller at 17 employees. It is smaller still – only 3 employees – for membership associations. In the remaining two industries, nonprofit establishments in EGR 5 are smaller on average than for the state as a whole – a gap of 20 for education, but only 3 for social assistance.

Figure 16: Average Size of Nonprofit Establishments by Select Industries (2019), EGR 5 and Indiana

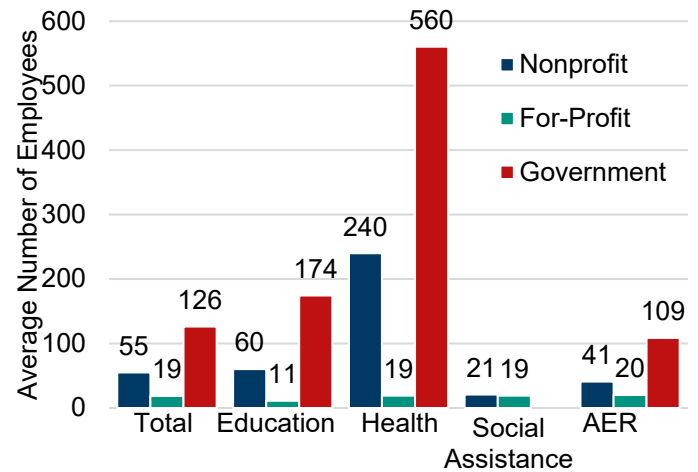


From 2000 to 2019, the average size of nonprofit establishments in EGR 5 increased from 42 to 55 employees. This increase was due largely to the growing size of health care (from 161 to 240 workers per establishment). Social assistance and membership associations also increased but at a lower rate, from 20 to 21 and 12 to 15 employees per nonprofit establishments, respectively. There were drops in the average size of establishments in education (90 to 60 employees) and AER (49 to 41 employees).

Nonprofit establishments in EGR 5 are significantly larger than for-profits (55 vs. 19 employees per establishments overall, Figure 17).⁶ However, they are notably smaller than government establishments (126 employees on average), likely reflecting in part the concentration of state offices in the capital. The size discrepancy is especially pronounced in health care, where the average government establishment (560 employees) is more than twice the size of nonprofit establishments (240 employees), and 29 times larger than for-profit establishments (19 employees).

The size difference is also noteworthy in education, and in AER. In education the average government establishment (primarily public schools, junior colleges and universities) have 174 employees on average, compared to 60 for nonprofit establishments and only 11 for for-profit establishments. In AER, the pattern is very similar with 109 workers per government establishment compared to 41 for nonprofit establishments and 20 for for-profit establishments. Social assistance is the only industry where the size difference is close between nonprofits and for-profits (21 vs. 19 employees).

Figure 17: Average Size of EGR 5 Establishments by Sector (2019)



For-profit average size changed minimally since 2000. In comparison, government average size decreased notably for health care (from 616 to 560 employees) and AER (from 145 to 109 employees) and increased significantly in social assistance (from 10 to 52 employees) and education (160 to 174).

Average Annual Nonprofit Wages

Finally, we look at average wages in major nonprofit industries. Average wage is calculated as total payroll, adjusted for inflation, divided by the number of employees. As with average size of establishments, these values should be interpreted with caution, since averages may hide very large or very low annual wages in some establishments or subindustries (e.g., hospitals vs. nursing homes). In addition, the number of employees includes both part-time and full-time workers, so industries with many part-time workers may appear to have very low average annual wages. Total payroll includes monetary compensation (e.g., salary, wages, bonuses, commissions, incentive payments, and tips), but not deductions (such as taxes) or fringe benefits.

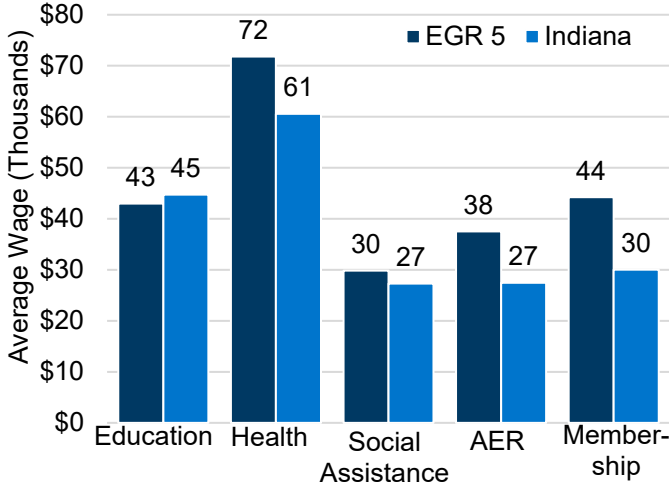
The average annual nonprofit wages are highest in health care (\$72,000), followed by the membership (\$44,000) and education (\$43,000) industries. Nonprofit employees in arts, entertainment and recreation earned somewhat less (\$38,000) and those in social assistance the least (\$30,000).

Overall average nonprofit wages are higher for EGR 5 than Indiana (\$61,000 versus \$51,000). In fact, as Figure 18 shows, the average wage for

⁶ Because we assume there are no for-profit membership establishments and few government establishments, Figures 15 and 17 do not show membership. Due to confidentiality, we do not show the average size for social assistance government establishments.

EGR 5 (dark blue) establishments is higher than their Indiana counterparts (light blue) for every major nonprofit industry, except for education. However, the difference is small in education (\$2,000).

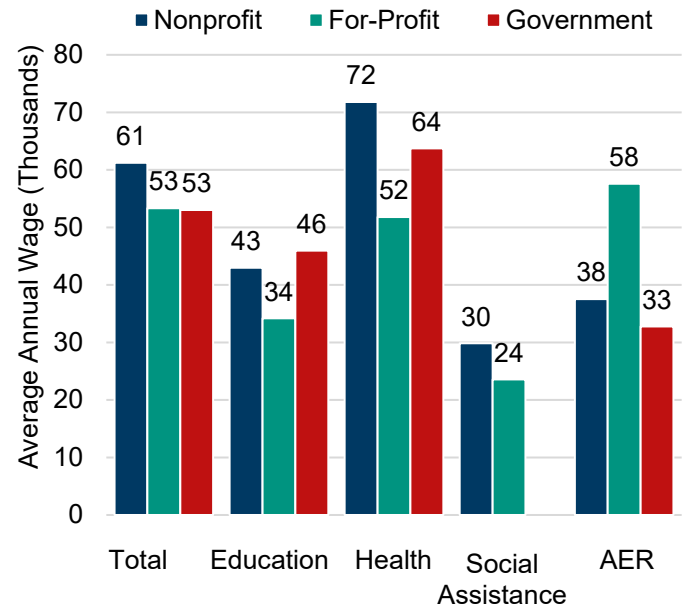
Figure 18: Average Annual Nonprofit Wage for Select Industries (2019), EGR 5 and Indiana



Adjusted for inflation, average annual wages for nonprofit workers increased for all industries. The largest growth occurred in health care which increased by \$25,000 in constant 2019 dollars. The smallest change was an increase of less than \$700 in social assistance.

Next, we compare annual wages across sectors in the major nonprofit industries for EGR 5. Figure 19 shows that average annual wages are not consistently larger for any of the three sectors.

Figure 19: Average Annual Wage in EGR 5 for Select Industries (2019) by Sector



This is especially the case in health care, where nonprofit workers on average earn \$8,000 more than government workers and \$20,000 more than for-profit workers. Nonprofit workers also earn higher wages than for-profit workers in education (\$9,000) and social assistance (\$6,000), but considerably less (\$20,000) in arts, entertainment and recreation. Nonprofits employees earn more than government workers in arts, entertainment, and recreation (\$5,000), but slightly less in education (\$3,000).

From 2000 to 2019, for-profit average wages increased for all of the major nonprofit industries, except for health care, where average for-profit wages decreased by \$5,300 in constant dollars. Over the same 20-year period, government average wages increased for every major nonprofit industry except for education, where average wages decreased \$5,000.

Summary and Conclusion

The nonprofit sector is a large economic force in EGR 5, employing more than 100,000 workers and accounting for 10 percent of all employees in the region, the same as Indiana. Those nonprofit workers had a combined payroll of more than 6.3 billion in 2019, or 12 percent of the region's total payroll (compared to 10 percent for Indiana).

Importantly, nonprofit employment in EGR 5 grew considerably between 2000 and 2019, up 58 percent, while total, for-profit, and government employment increased by much smaller percentages (14-18 percent). For-profit jobs actually

declined during the first part of the period, reflecting major losses in manufacturing.

By 2019, nonprofit employment was larger than total employment in any major for-profit industry in EGR 5, including manufacturing (which nonprofit employment surpassed in 2012) and retail trade (surpassed in 2019). Nonprofit payroll has trailed only total manufacturing payroll since 2003 and the gap between the two has narrowed considerably (from a gap of \$6.5 billion in 2000 to only about \$1 billion in 2019 (adjusted for inflation).

Nonprofit employment is concentrated in five major industries in the region: employment in health care, education, social assistance, membership associations, and arts, entertainment and recreation account for 92 percent of all nonprofit employees. Health care and membership are the two largest nonprofit industries, jointly accounting for 72 percent of all nonprofit jobs in EGR 5. Health care and AER both have higher nonprofit shares in EGR 5 than Indiana, by five and one percentage point, respectively.

Nonprofits have the largest role in health care, accounting for almost half (47 percent) of jobs in the industry. Social assistance is the next largest (35 percent) followed by AER and education with respectively 18 percent and 15 percent of all workers working for nonprofits. Nonprofits have lost employment shares in social assistance (down 16 percentage points), and AER (down 5 percentage points), but gained in education (6 percentage points), and health care (only 2 percentage points).

We also looked into the subindustries of the major nonprofit industries and saw differing nonprofit shares of employment in the subindustries. The growth rate and patterns for each industry varied. All education subindustries, except for other schools, saw an increase in the nonprofit share of employment over time. In contrast, nonprofits lost shares of total employment in all social assistance subindustries, except the tiny relief services, and in all AER subindustries, except performing arts. In health care, the nonprofit share increased in ambulatory services, stayed the same in the hospital subindustry, but declined in the nursing and residential services.

Nonprofits in EGR 5 tend to employ more workers per establishments on average than for the state,

especially in health care, but also in AER and membership. In health care, nonprofits in EGR 5 (240 employees) are much larger than the state as a whole (141 employees). The same holds for average annual wage where the average nonprofit wage is higher in EGR 5 than it is for Indiana in each of the major nonprofit industries, except for education.

Nonprofits have more employees on average than for-profit establishments in the same industries. The average size for government is even larger than nonprofits in every industry. The size difference is most prominent in health care where government had 560 employees on average per establishment, compared to nonprofit (240) and for-profit (19) establishments. Average wages are higher for nonprofit employees than for-profit workers and roughly equal to government in most major nonprofit industries.

Overall, EGR 5 faced notable economic growth over the 20-year period, despite some challenges in manufacturing and in other major for-profit industries during the Great Recession of 2008-09. The region's overall positive growth appears to be due in large part to the health and vitality of the nonprofit sector in the region.

Appendix A: Methodology

Source of Data

The two sources of data for this report are the Quarterly Census of Employment and Wages (QCEW) and the IRS Exempt Organization's Master File/Business Master File (EOMF/BMF). We use both sources in order to construct the best possible estimate of nonprofit employment in Indiana.

Scope of Data

The QCEW is a cooperation between the U.S. Bureau of Labor Statistics, the U.S. Department of Labor, and State Employment Security Agencies. In Indiana, the Department of Workforce Development works with the Indiana Business Research Center (IBRC) to produce quarterly counts of employers, employees, and wages for the state, Metropolitan Statistical Areas (MSA), Economic Growth Regions (EGR), and counties by industry as defined by the North American Industry Classification System (NAICS). Nationwide, the QCEW covers over 95 percent of U.S. jobs.⁷

The BMF lists all tax-exempt entities registered under section 501(c) of the Internal Revenue Code. Among other fields, it includes the exempt entity's name, reporting address, Federal Employer Identification Number (EIN), and the Internal Revenue Code Subsection under which it is recognized and registered by the Internal Revenue Service. We include all twenty-six subsections of 501(c) entities in the BMF, of which most (74 percent in Indiana) are registered under subsection 501(c)(3) and are commonly referred to as charities. Nationally, the BMF includes 1.8 million exempt organizations.⁸

Data Processing and Cleaning

The Indiana Business Research Center (IBRC) at Indiana University reconciles the data in the two sources using EINs to identify private nonprofit establishments in the QCEW files. IBRC then aggregates the data by industry, region, and sector (nonprofit, for-profit, and government), and applies legally mandated confidentiality screens. Thus, data are suppressed if the aggregate includes less than three establishments, if one establishment comprises more than 80 percent of the employment of a data grouping, or if suppressed data can be estimated from other available data. We standardize the names of data fields, compute annual counts of establishments, number of employees, total payroll, and average annual wages by industry and subindustry for all sectors, and by region.

Limitations

The QCEW covers an estimated 95 percent of all paid employees.⁹ However, certain employees are not required to participate, including religious organizations and charities with less than four employees.¹⁰ These omissions from the QCEW data are important for our analysis since it means we underestimate nonprofit employment in Indiana. To quantify the extent of the underestimation, we rely on data obtained from our large 2017 Indiana Nonprofits Survey, based on a randomly selected sample of all types of Indiana nonprofits. This survey effort involved combining and de-duplicating nonprofits registered with the IRS under all sub-sections of 501(c), incorporated nonprofits from the Indiana Secretary of State (SOS), and Yellow Page Listing of Churches (Infogroup).¹¹

The exclusion of religious organizations is likely to be most important source of underestimation. Congregations are neither required to register as tax-exempt entities with the IRS nor participate in the QCEW reporting system. We estimate

⁷ The U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages. United States Department of Labor, 2020. Available at <https://www.bls.gov/cew/>, retrieved January 13, 2020.

⁸ Internal Revenue Services, Exempt Organizations Business Master File Extract. Internal Revenue services, 2019. Available at www.irs.gov/charities-non-profits/exempt-organizations-business-master-file-extract-eo-bmf, retrieved November 15, 2020.

⁹ The U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages. United States Department of Labor, 2020. Available at https://www.bls.gov/cew/overview.htm#data_available, retrieved February 10, 2020.

¹⁰ Exceptions include proprietors, unincorporated self-employed, unpaid family members, certain farm and domestic workers, certain railroad workers, some workers who earned no wages during the entire applicable pay period (e.g., because of work stoppages, temporary layoffs, illness, or unpaid vacations), select elected officials, members of the armed forces, certain short-term government employees. In Indiana, insurance agents on commission, casual labor not in course of employer's business, part-time service for nonprofits, student nurses and interns, and students working for schools are not required to participate.

Employment and Training Administration, ETA Overview. United States Department of Labor, 2020. Available at <https://oui.doleta.gov/unemploy/pdf/uilawcompar/2019/coverage.pdf>, retrieved February 10, 2020.

¹¹ The 2017 Indiana Nonprofits Survey allows a clearer picture of unaccounted nonprofit employees. Using the sample statistics, we estimated the mean and median number of paid employees per establishment. These numbers were then used on the de-duplicated universe of nonprofits in Indiana created using the IRS, Secretary of State, and Infogroup data. For more details, see "Surveying Nonprofits: Sampling Strategies and Quality, by Kirsten A. Grønberg, Ashley Clark, Hannah Martin, Tyler Abbott, and Anthony Colombo (Bloomington, IN: Indiana University School of Public and Environmental Affairs, November, 2017).

that there are about 8,800 congregations in Indiana,¹² but only 174 were included in the QCEW data for 2019. Using a conservative estimate of 3 paid employees per congregation, the 8,800 congregations are likely to have at least 26,500 paid employees, but perhaps as many as 77,300.¹³ The QCEW only reports 1,426 employees of religious establishments, suggesting that our estimate of nonprofit employees in Indiana is undercounted by at least 25,100 religious employees, but the true underestimate is likely closer to 75,800.

Charities with less than four employees are also not required to participate in QCEW. Based on the 2017 Indiana nonprofit survey, we estimate that there are almost 3,700 IRS-charities that are not churches and that have at least 1 but less than four paid employees. The survey also shows that these small charities employ an average of 1.7 employees, suggesting that there should be a total of 6,400 employees in the QCEW data. Although some of these are indeed included in the QCEW data, that is the case for only 943 establishments with 1,814 paid employees. Consequently, our estimate of nonprofit employees in Indiana is underestimated by about 4,600 employees.¹⁴

Finally, not every nonprofit in Indiana registers with the IRS, but some nevertheless are incorporated with the Indiana Secretary of State (SOS). As part of our efforts to develop the sample for our 2017 survey, we estimate that roughly 18,566 nonprofits were incorporated with the SOS, but not registered with the IRS. From our 2017 Indiana Nonprofit Survey, we estimate that about 14 percent of these (corresponding to about 2,700 nonprofits statewide) had employees with a median of 6.5 employees, for a total of roughly 17,200 employees.¹⁵ If those employers report to the QCEW system, they would be classified as for-profit employers under our methodology because their EIN is not included in the IRS BMF. It seems clear that the actual number of nonprofit paid employees is substantially higher, probably by at least 46,950 than the numbers we are able to document.

There are other potential sources of error in the QCEW data. Thus, 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. There is no distinction between part-time and full-time employees in this count. Under this system, a person working two jobs would be double counted.

Similarly, the BMF used to identify nonprofits in the QCEW data is not comprehensive. Some nonprofits are not required to register with the IRS as exempt entities. In addition to religious organizations, nonprofits with less than \$5,000 in revenues, political groups, and homeowners' associations do not need to register.¹⁶ Unfortunately, we can only identify private establishments as nonprofits in the QCEW data, if they are registered with the IRS; all other nonprofits that have paid employees in the QCEW data will by necessity be classified as for-profit establishments.

In addition, some for-profit companies may have nonprofit subsidiaries and the QCEW would not identify the subsidiaries as nonprofit in their records. The reverse is also true – if nonprofits have commercial subsidiaries, the latter would be counted as a nonprofit. Regarding wages, the QCEW counts bonuses, stock options, the cash value of meals and lodging, and tips and gratuities in addition to wage. However, fringe benefits (such as employer contributions to health insurance or pensions) are not included.

Finally, the IRS status in the EOMF is as of March or April of the data year in question. Any newly registered exempt entities may not be included, since the process to identify nonprofits may take up to several months. We believe the error is relatively insignificant, but we cannot confirm that assumption. The same situation occurs for entities that convert to for-profits during the data year. Then, although the EOMF lists them as nonprofits, they technically would cease to be nonprofits during the year. In either case, if these entities have employees and payroll during the year, they would be counted as for-profits. These limitation leads to discrepancies between the true count of Indiana nonprofit employment and the estimates developed by the Indiana Nonprofits Project.

¹² The Infogroup (yellow page) listing includes about 9,600 congregations; de-duplication leaves just over 8,800.

¹³ The underestimate of 25,100 employees is conservative as a result of using the median number of employees per congregation from the 2017 Indiana Nonprofit survey. Using the mean value of 8.75, the underestimation would be closer to 75,900 employees. The latter is likely more valid, since the 174 congregations included in the QCEW data for 2019 have an average of 8.2 employees, very close to the survey mean.

¹⁴ The QCEW data show that charities with less than four paid employees on average have 1.92 employees. This is very close to average estimate based on the survey (1.7) suggesting that this underestimate is likely to be fairly accurate.

¹⁵ The employee estimate is conservative using the low median of 6.5. The mean number of employees is 17.5 which suggests an employee count of nearly 46,000.

¹⁶ Internal Revenue Services, Tax-Exempt Status for Your Organization. United States Department of the Treasury, 2020. Available at <https://www.irs.gov/pub/irs-pdf/p557.pdf>, retrieved February 10, 2020.

Appendix B: Payroll Graphs

Figure B1: Distribution of Nonprofit Payroll (2019\$) by County for EGR 5

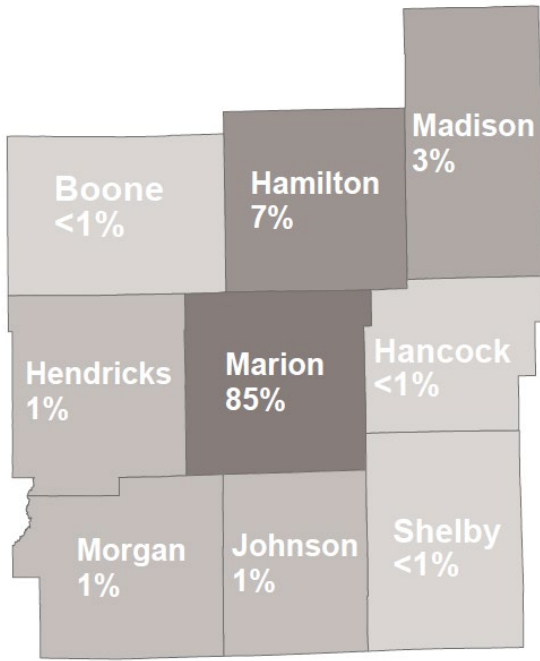


Figure B2: Nonprofit Share of Total Payroll (2019\$) by County for EGR 5

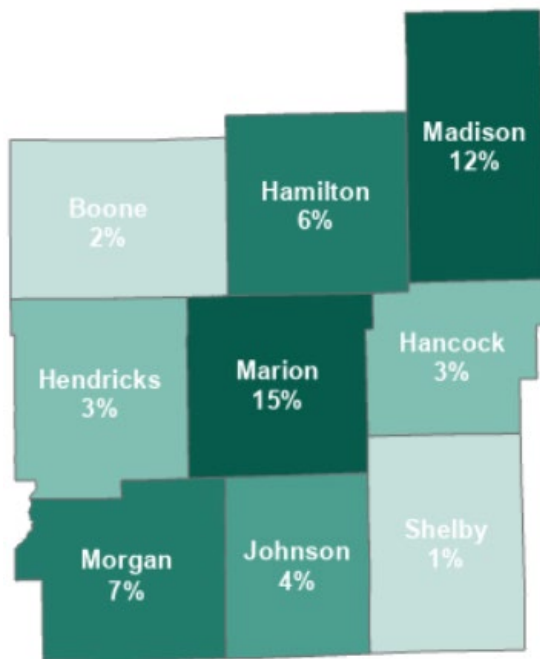


Figure B3: Percent Annual Change in Total Nonprofit Payroll in Constant Dollars (2000-2019), EGR 5 and Indiana

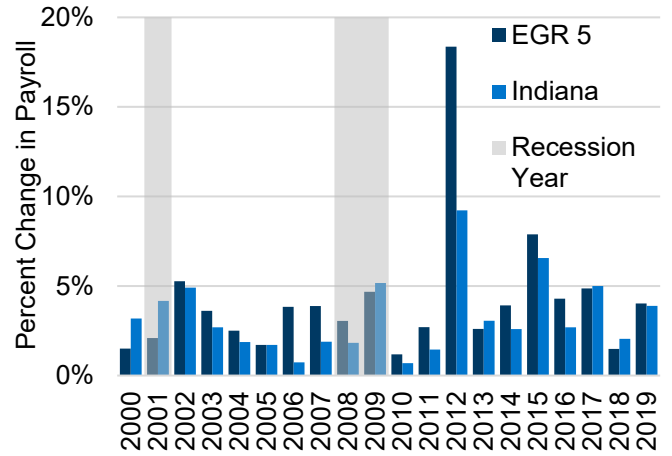


Figure B4: Industry Distribution of Nonprofit Payroll (2019\$), EGR 5 and Indiana (2019)

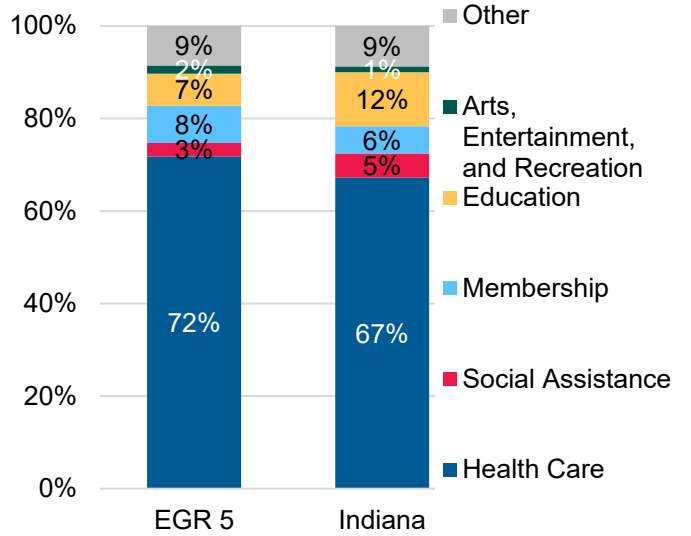


Figure B5: Nonprofit Payroll as Percent of Total Payroll (2019\$), by Select Industries (2019)

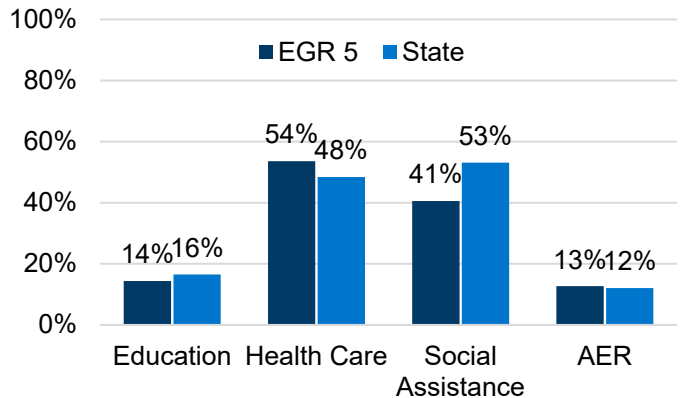


Figure B6: Health Care Subindustry Percentage Share of Total Payroll (2019\$) by Sector in EGR 5 (2019)

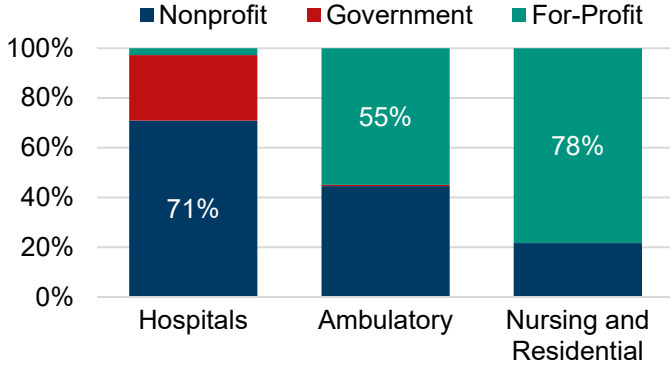


Figure B9: Social Assistance Subindustry Percentage Share of Total Payroll (2019\$) by Sector in EGR 5 (2019)

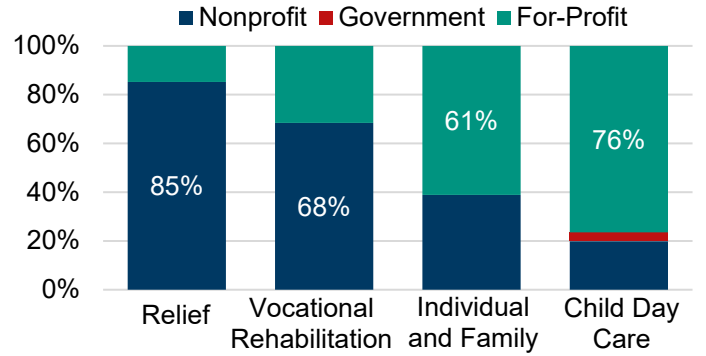


Figure B7: Select Education Subindustry Percentage Share of Total Payroll (2019\$) by Sector in EGR 5 (2019)

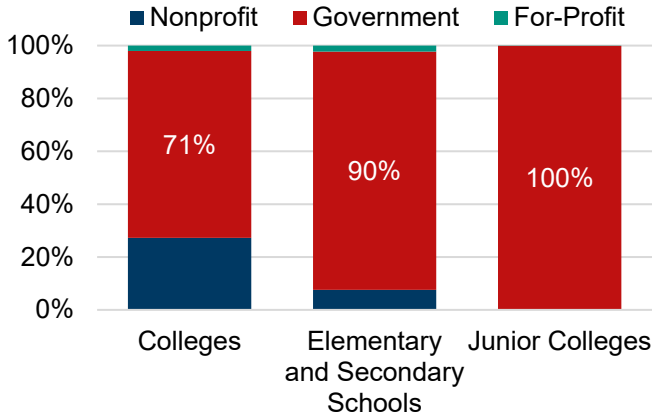


Figure B10: Arts, Entertainment, and Recreation Subindustry Percentage Share of Total Payroll (2019\$) by Sector in EGR 5 (2019)

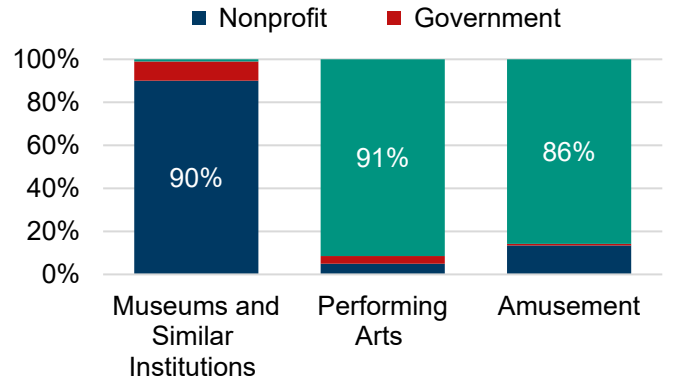
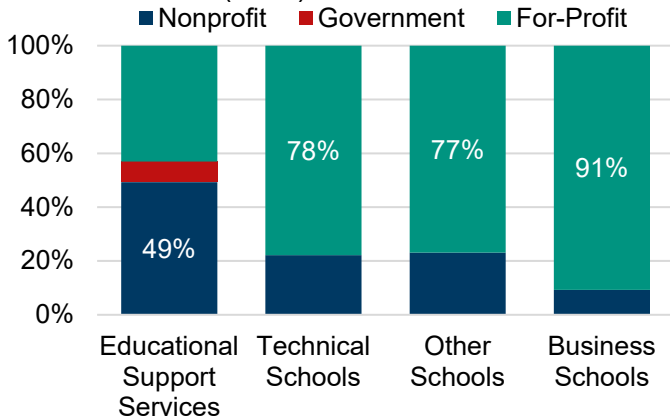


Figure B8: Select Education Subindustry Percentage Share of Total Payroll (2019\$) by Sector in EGR 5 (2019)



Appendix C: Annual Trend Graphs

Figure C1: Percent Change in Employment by Sector in EGR 5 (2000-2019)

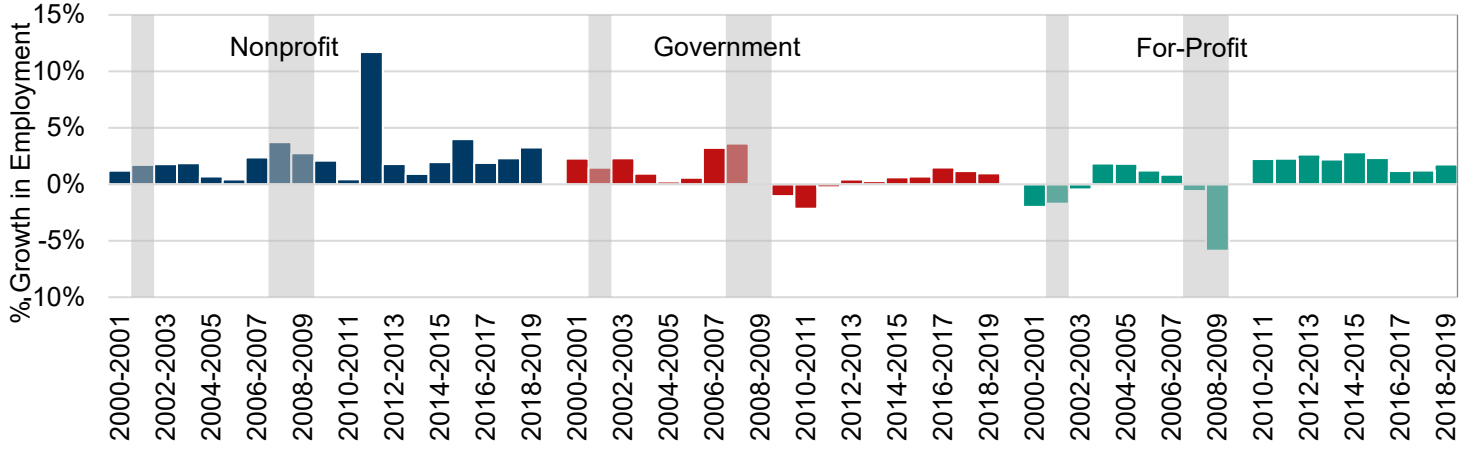


Figure C2: Percent Change in Payroll (2019\$) by Sector in EGR 5 (2000-2019)

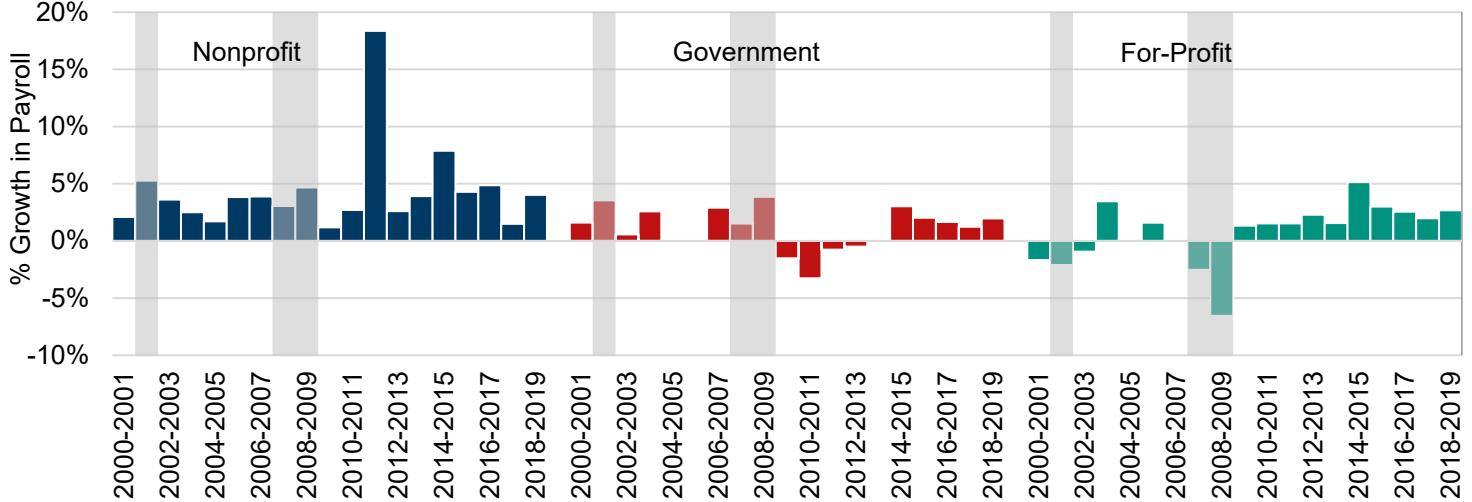


Figure C3: Percent Nonprofit Share of Total Employment in EGR 5 for Major Nonprofit Industries (2000-2019)

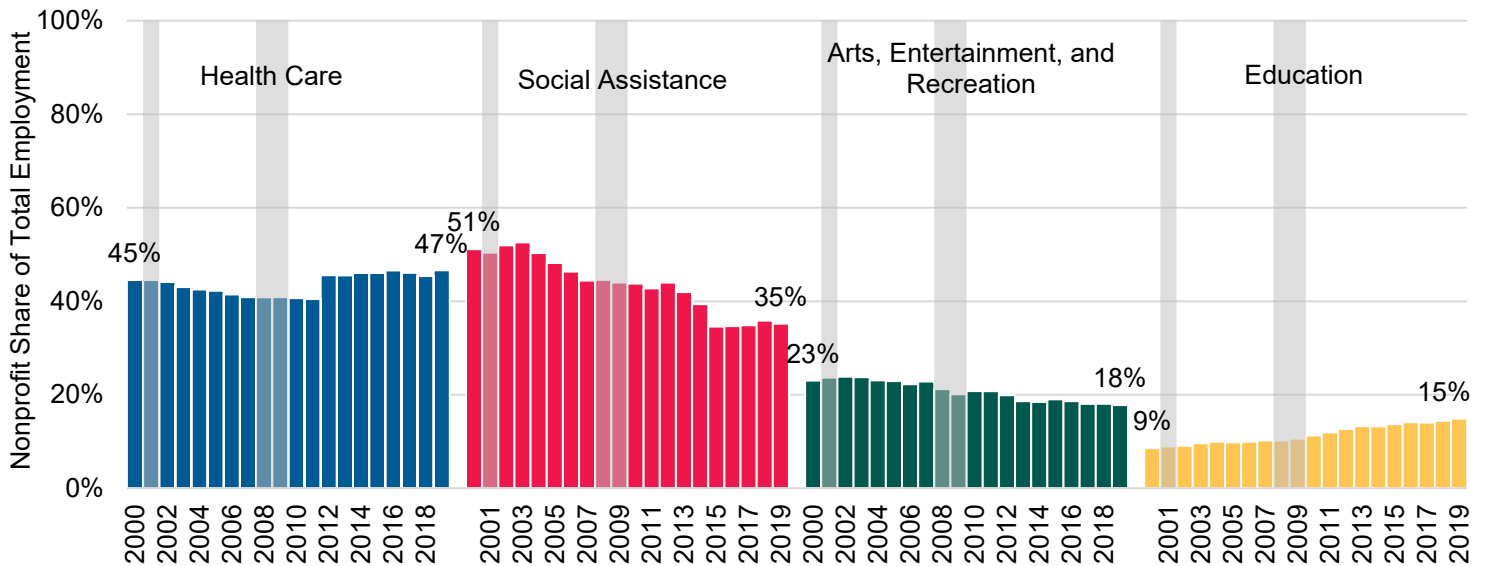


Figure C4: Percent Nonprofit Share of Total Payroll (2019\$) in EGR 5 for Major Nonprofit Industries (2000-2019)

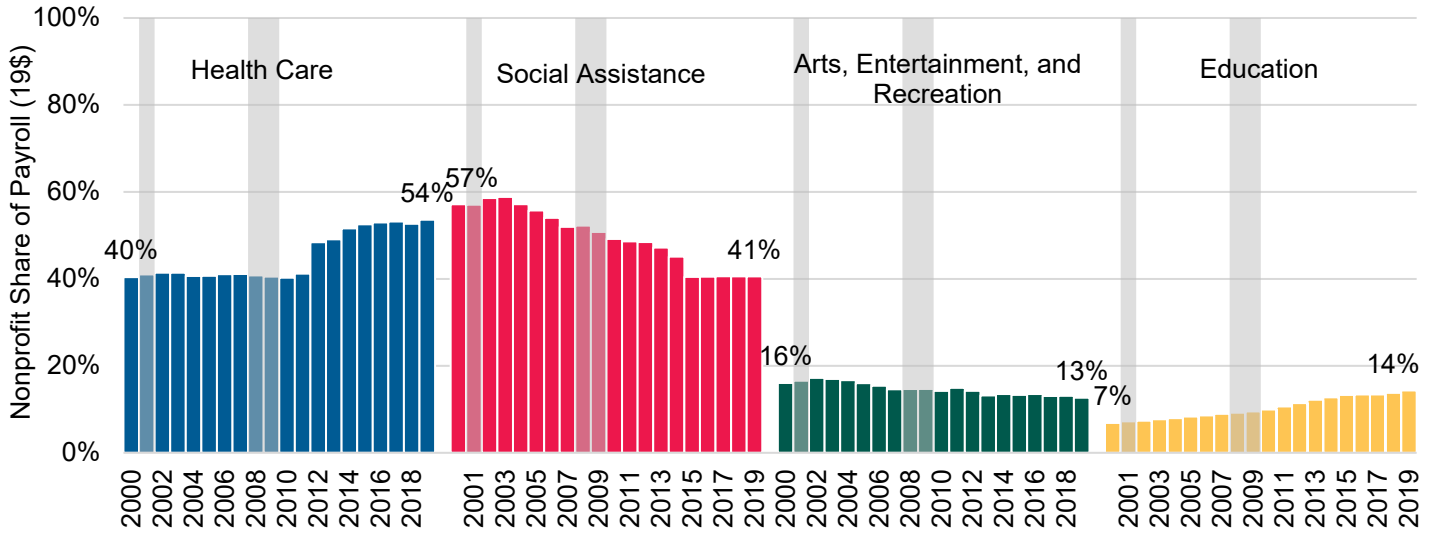


Figure C5: Percent Nonprofit Share of Total Employment in EGR 5 for Health Care Subindustries (2000-2019)

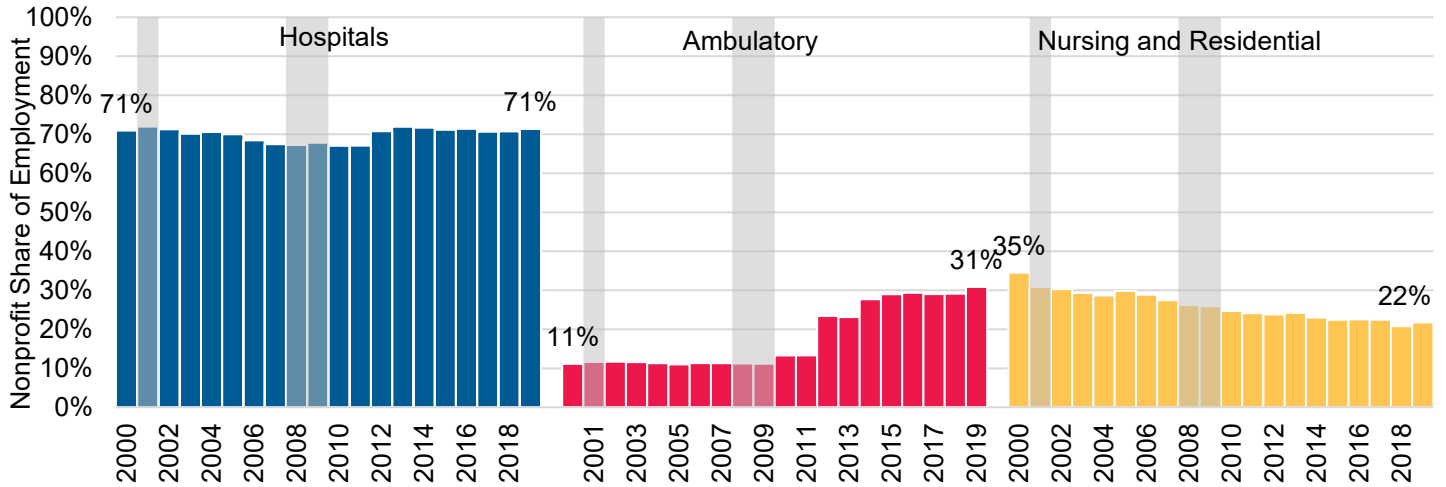


Figure C6: Percent Nonprofit Share of Total Payroll (2019\$) in EGR 5 for Health Care Subindustries (2000-2019)

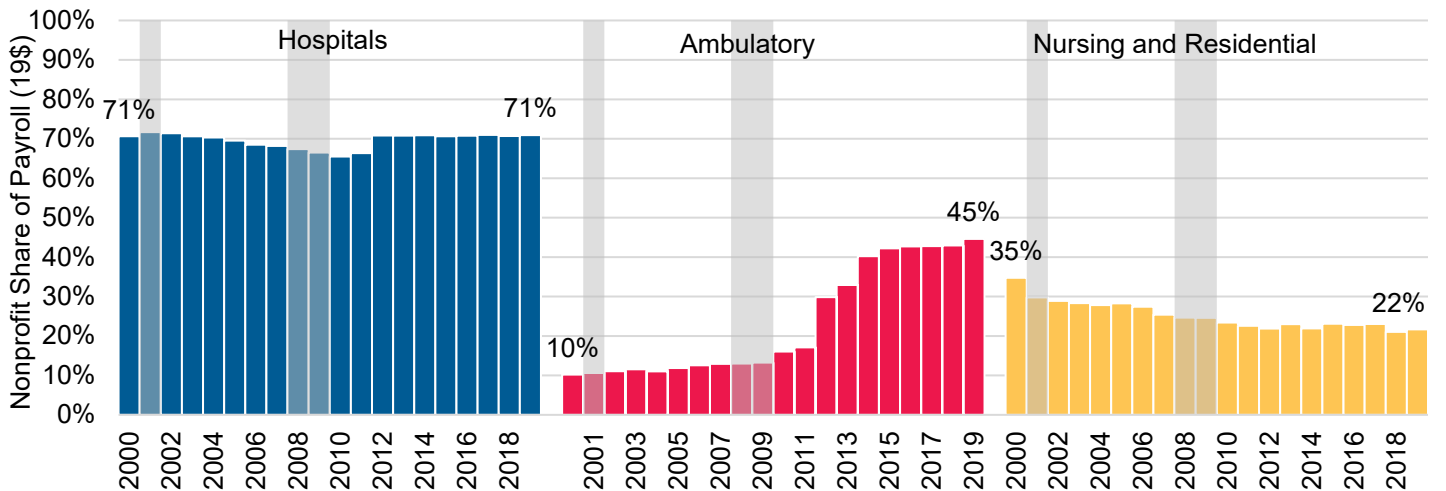


Figure C7: Percent Nonprofit Share of Total Employment in EGR 5 for Select Education Subindustries (2000-2019)

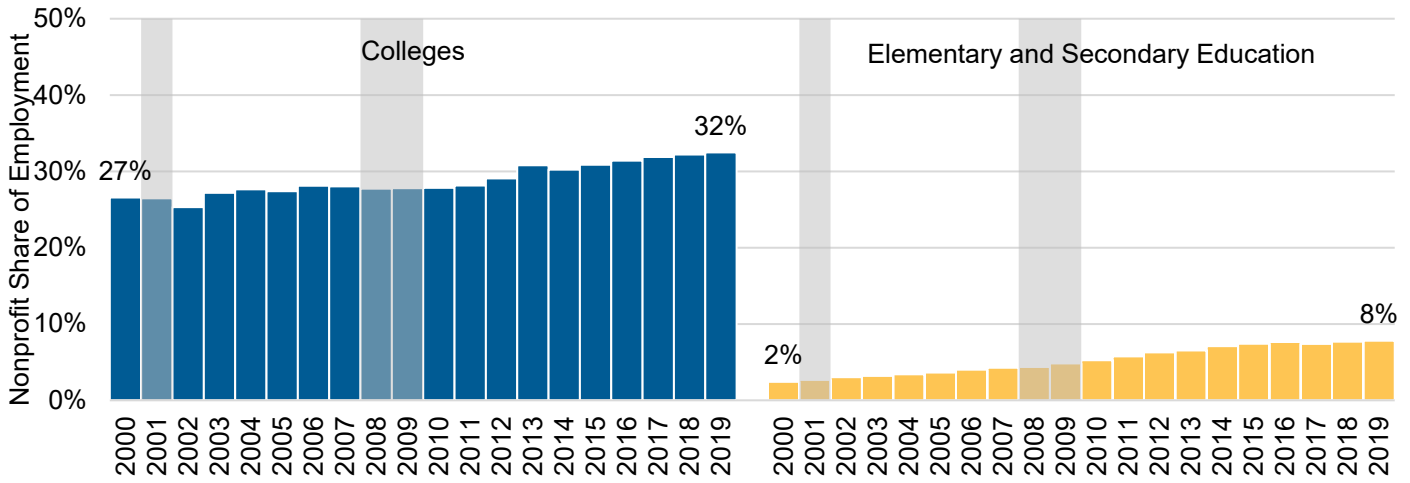


Figure C8: Percent Nonprofit Share of Total Employment in EGR 5 for Select Education Subindustries (2010-2019)

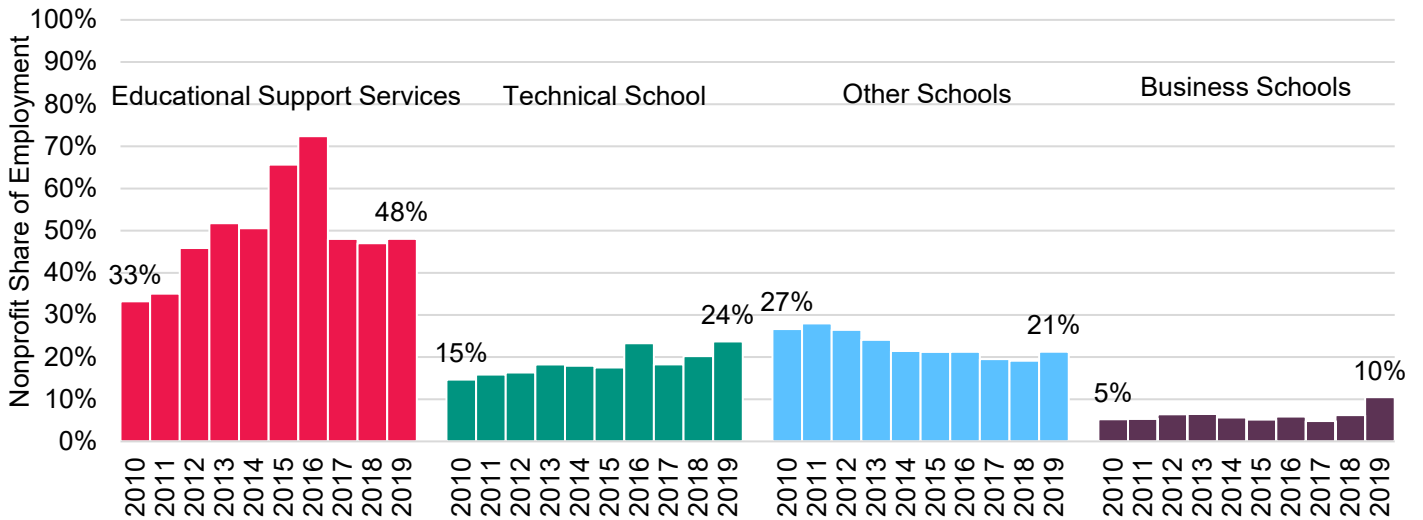


Figure C9: Percent Nonprofit Share of Total Payroll (2019\$) in EGR 5 for Select Education Subindustries (2000-2019)

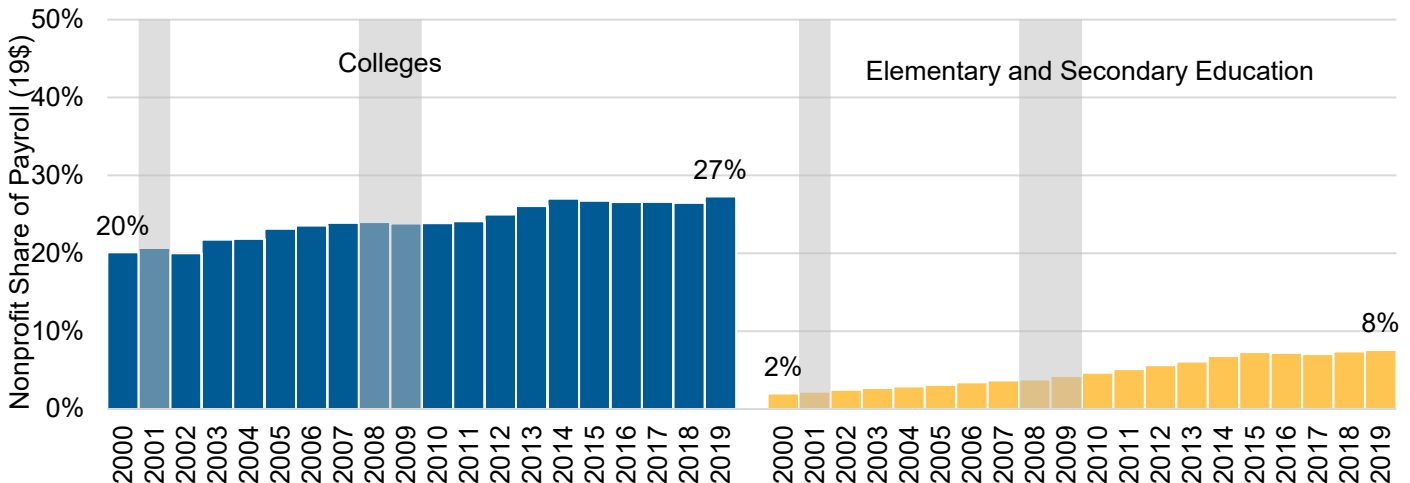


Figure C10: Percent Nonprofit Share of Total Payroll (2019\$) in EGR 5 for Select Education Subindustries (2010-2019)

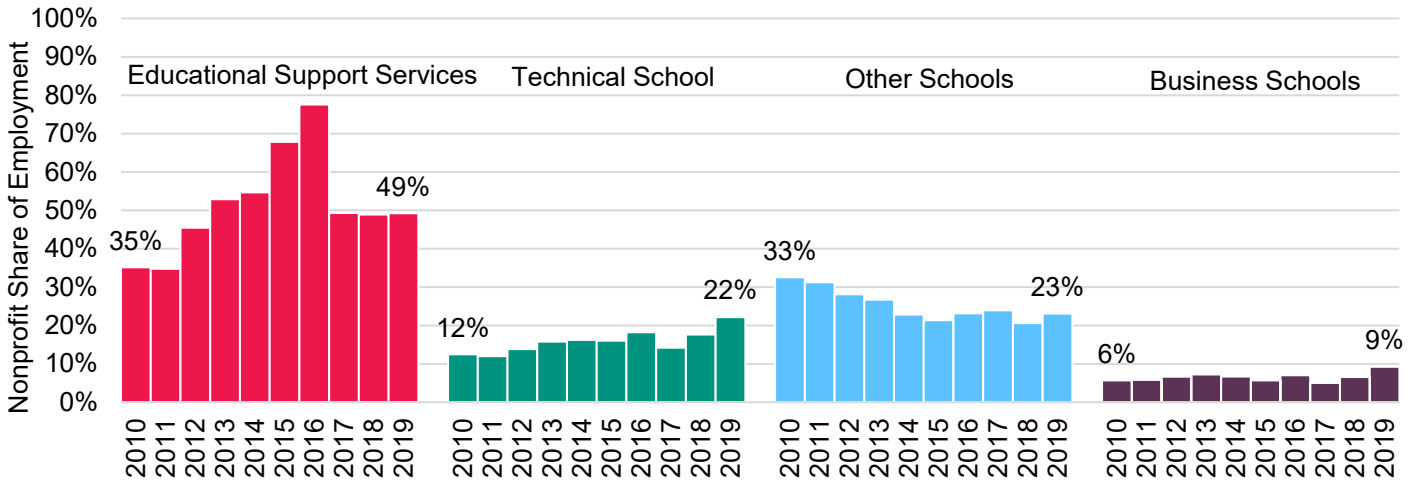


Figure C11: Percent Nonprofit Share of Total Employment in EGR 5 for Social Assistance Subindustries (2000-2019)

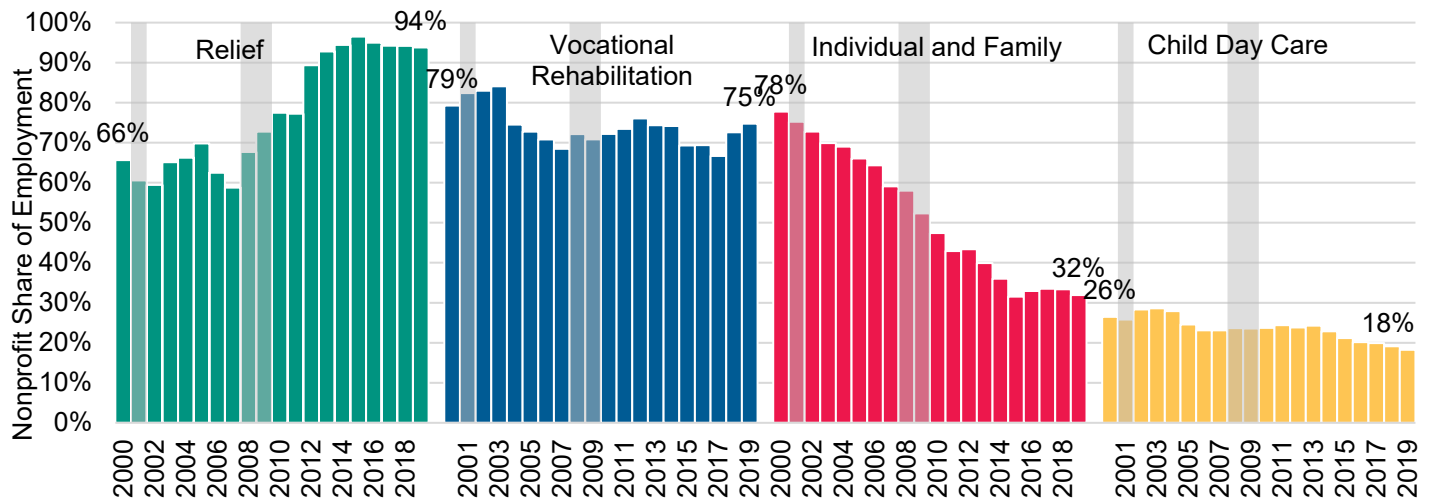


Figure C12: Percent Nonprofit Share of Total Payroll (2019\$) in EGR 5 for Social Assistance Subindustries (2000-2019)

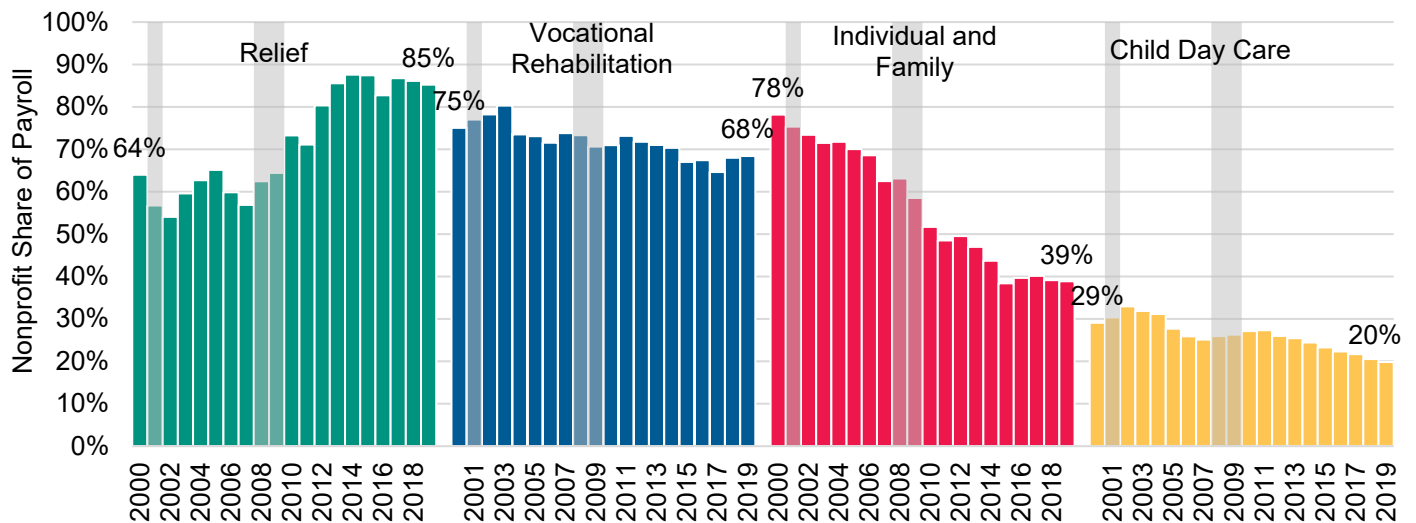


Figure C13: Percent Nonprofit Share of Total Employment in EGR 5 for Arts, Entertainment, and Recreation Subindustries (2000-2019)

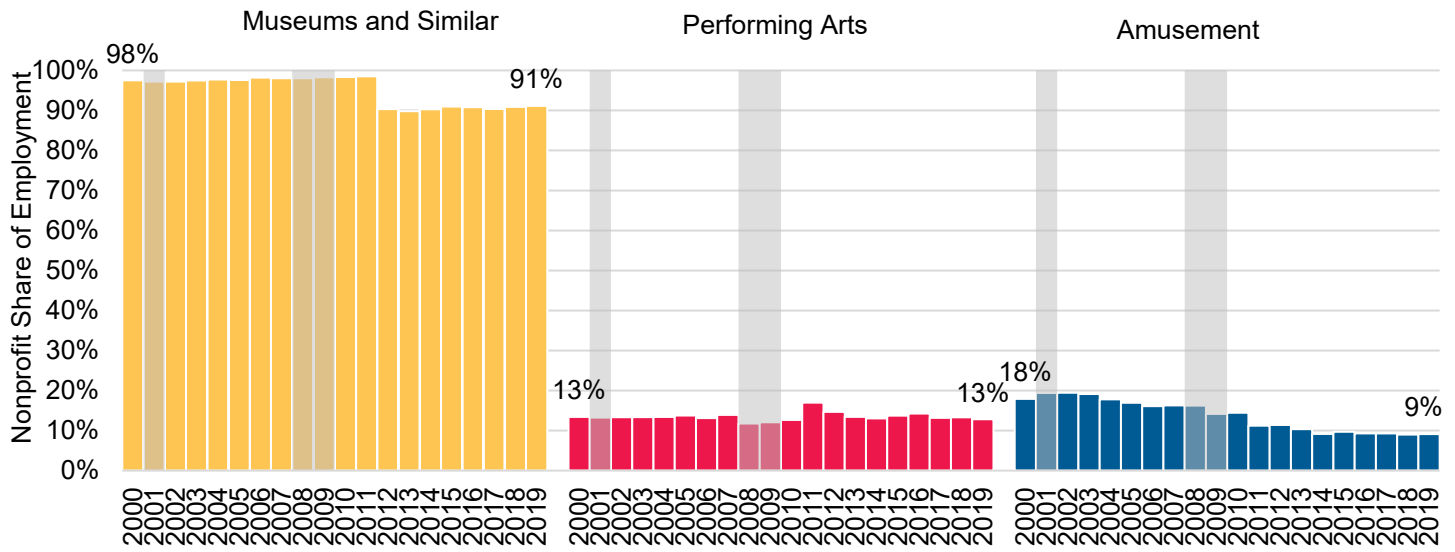
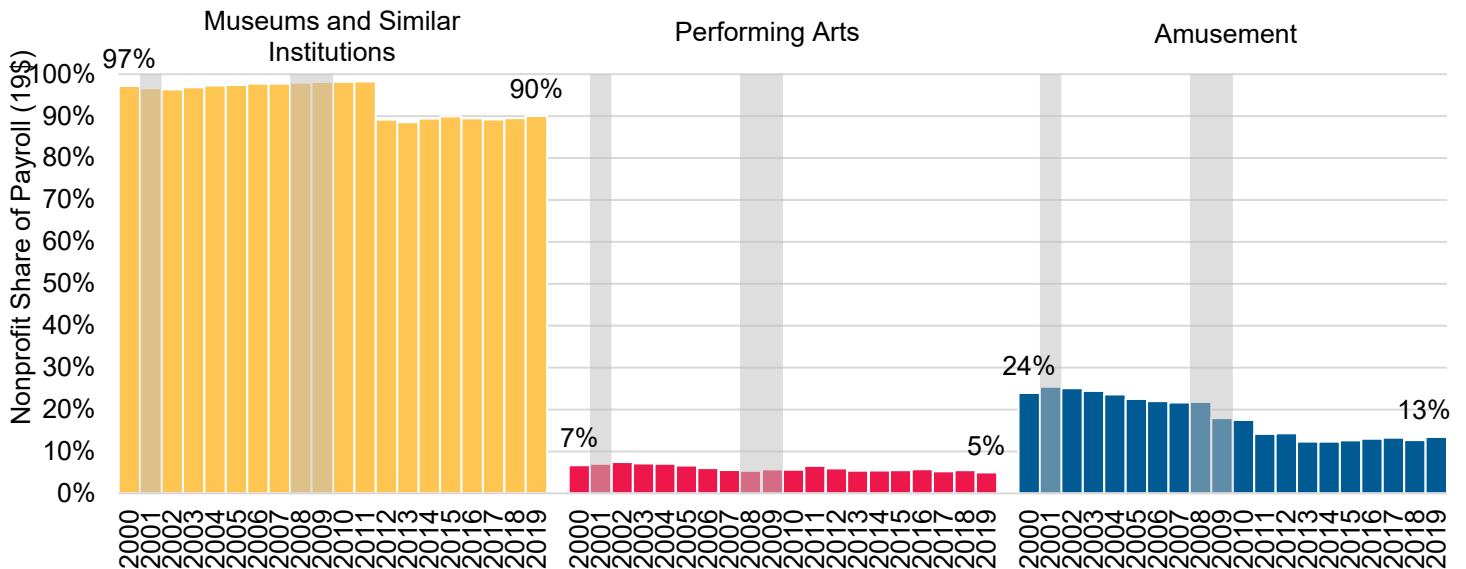


Figure C14: Percent Nonprofit Share of Total Payroll (2019\$) in EGR 5 for Arts, Entertainment, and Recreation Subindustries (2000-2019)





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