Napa's Nonprofit Landscape

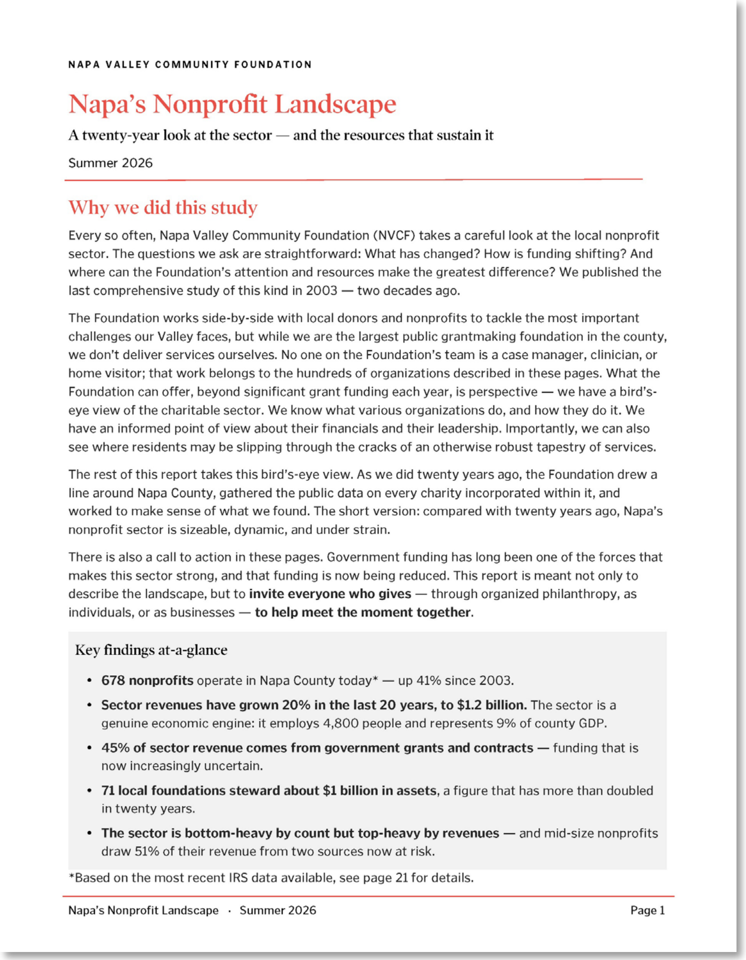
Summer 2026

Napa Valley Community FOUNDATION

Methodology:

- **Scope:** 501(c)(3) organizations incorporated in Napa County; *excludes nonprofits that serve Napa that were incorporated outside the county.*
- **Sources:**
  - **Current data:** DataLake, LLC Nonprofit Research, based on IRS exempt organization business master file, 2022-2023.
  - **Historical data:** University of San Francisco, Institute for Nonprofit Organization Management, 2003.
- *Please note: Providence Queen of the Valley Medical Center is not included in this dataset, as they no longer file a stand-alone Form 990. In 2009, prior to the Providence/St. Joseph's Health merger, the Queen had revenues of approximately $268 million.*

Download the narrative report


NAPA VALLEY COMMUNITY FOUNDATION

Napa's Nonprofit Landscape

A twenty-year look at the sector — and the resources that sustain it

Summer 2026

Why we did this study

Every so often, Napa Valley Community Foundation (NVCF) takes a careful look at the local nonprofit sector. The questions we ask are straightforward: What has changed? How is funding shifting? And where can the Foundation's attention and resources make the greatest difference? We published the last comprehensive study of this kind in 2003 — two decades ago.

The Foundation works side-by-side with local donors and nonprofits to tackle the most important challenges our Valley faces, but while we are the largest public grantmaking foundation in the county, we don't deliver services ourselves. No one on the Foundation's team is a case manager, clinician, or home visitor; that work belongs to the hundreds of organizations described in these pages. What the Foundation can offer, beyond significant grant funding each year, is perspective — we have a bird's-eye view of the charitable sector. We know what various organizations do, and how they do it. We have an informed point of view about their financials and their leadership. Importantly, we can also see where residents may be slipping through the cracks of an otherwise robust tapestry of services.

The rest of this report takes this bird's-eye view. As we did twenty years ago, the Foundation drew a line around Napa County, gathered the public data on every charity incorporated within it, and worked to make sense of what we found. The short version: compared with twenty years ago, Napa's nonprofit sector is sizeable, dynamic, and under strain.

There is also a call to action in these pages. Government funding has long been one of the forces that makes this sector strong, and that funding is now being reduced. This report is meant not only to describe the landscape, but to **invite everyone who gives** — through organized philanthropy, as individuals, or as businesses — **to help meet the moment together**.

Key findings at-a-glance

- **678 nonprofits** operate in Napa County today* — up 41% since 2003.
- **Sector revenues have grown 20% in the last 20 years, to $1.2 billion.** The sector is a genuine economic engine: it employs 4,800 people and represents 9% of county GDP.
- **45% of sector revenue comes from government grants and contracts** — funding that is now increasingly uncertain.
- **71 local foundations steward about $1 billion in assets**, a figure that has more than doubled in twenty years.
- **The sector is bottom-heavy by count but top-heavy by revenues** — and mid-size nonprofits draw 51% of their revenue from two sources now at risk.

*Based on the most recent IRS data available, see page 21 for details.

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Download the narrative companion to this powerpoint here:

napavalleycf.org/forms-pubs

Periodically, Napa Valley Community Foundation examines the local nonprofit sector to understand:

- What's changed
- How funding is shifting
- Where our attention and resources can make the greatest difference as funders

- Our last comprehensive study, published in 2003, asked:
  - How many nonprofits existed in Napa County
  - What size they were
  - Where their revenue came from

Twenty years later, comparing past to the present reveals a sector that is sizeable, dynamic, and under strain.

480 nonprofits in 2003 →

678 in 2022/23

(up 41%)

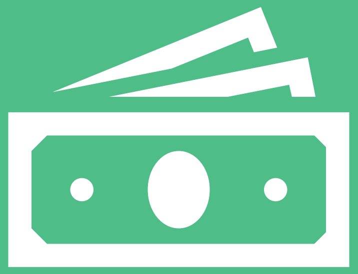
+376
new nonprofits incorporated since 2003

-178
nonprofits that ceased operations since 2003

Sector revenues have grown from

$1B to **$1.2B** since 2003

(up 20%)

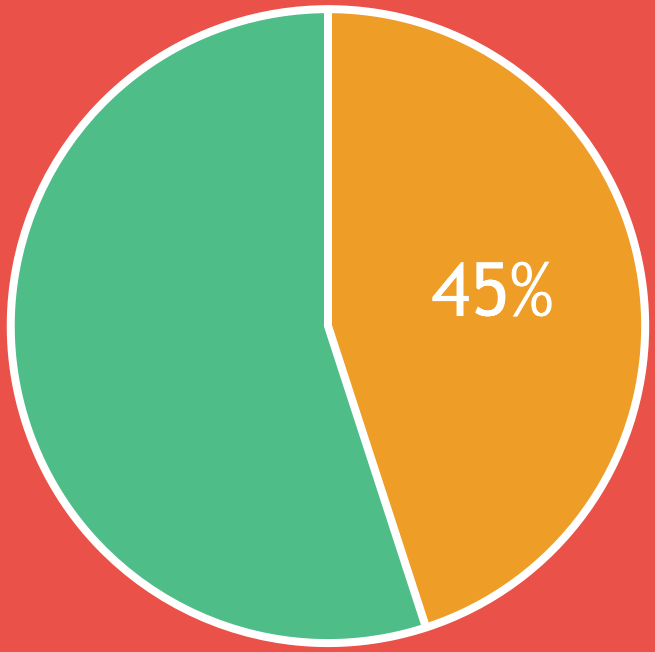


We don’t have more nonprofits per capita than other North Bay counties.

But we *do* have more small and very small nonprofits than other communities.

Government grants & contracts are

45% of sector revenues



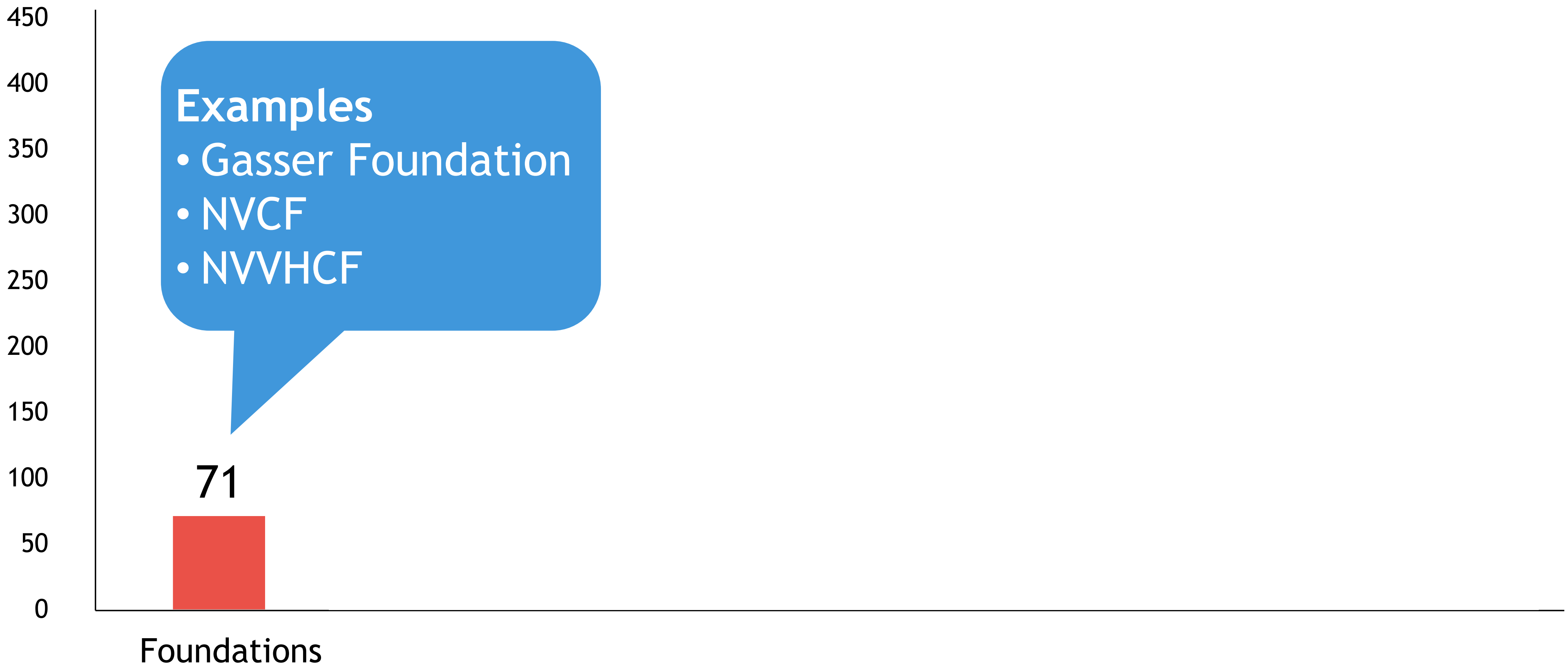
Looking ahead, government funding is increasingly uncertain

Significant state and federal funding cuts have already taken place

- HR1 (the One Big Beautiful Bill Act) will **shrink the safety net** and could reduce private giving
  - **Safety Net Cuts**
    - ↑ Increase demand for services
    - ↓ Decrease gov’t funding for services
  - **Tax changes**
    - ↓ Reduce supply of private donations

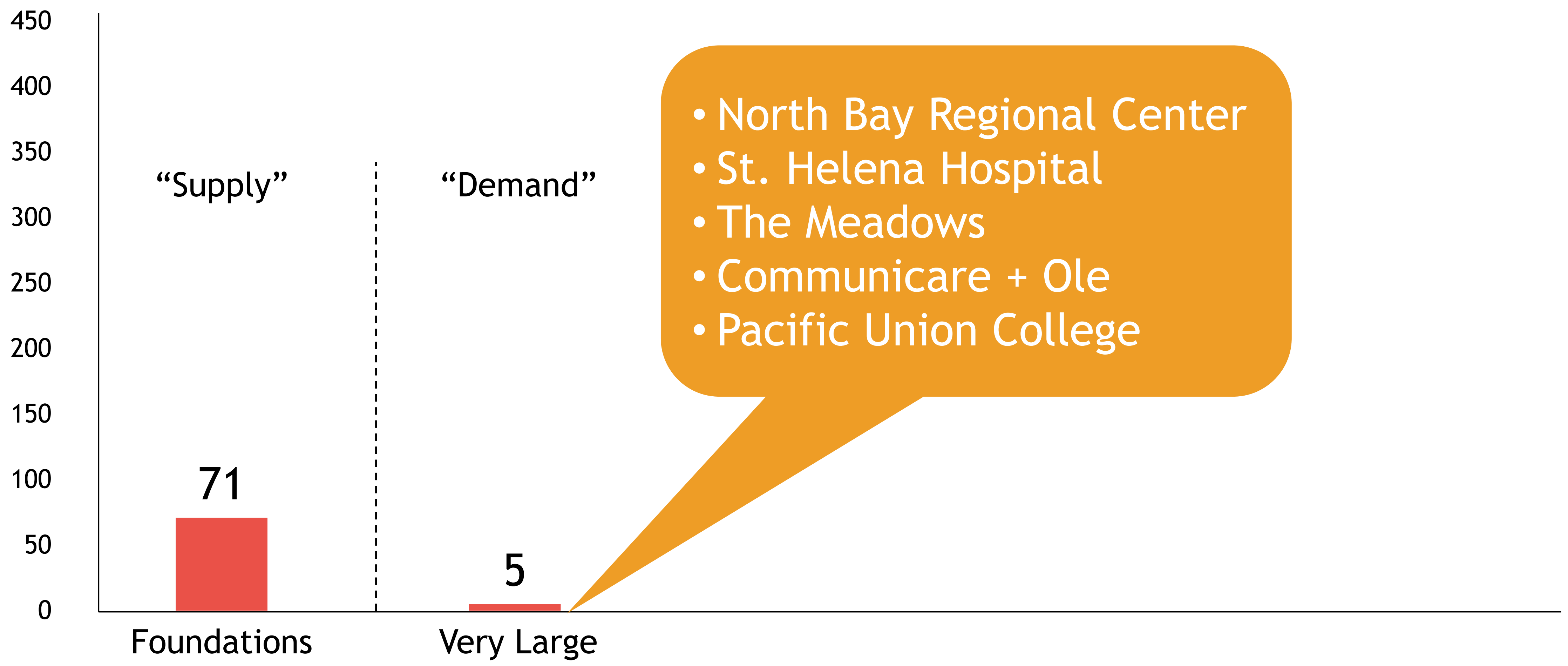
Napa’s Philanthropic Landscape

Nearly 750 nonprofit organizations are based in Napa County, including 71 grantmaking foundations…



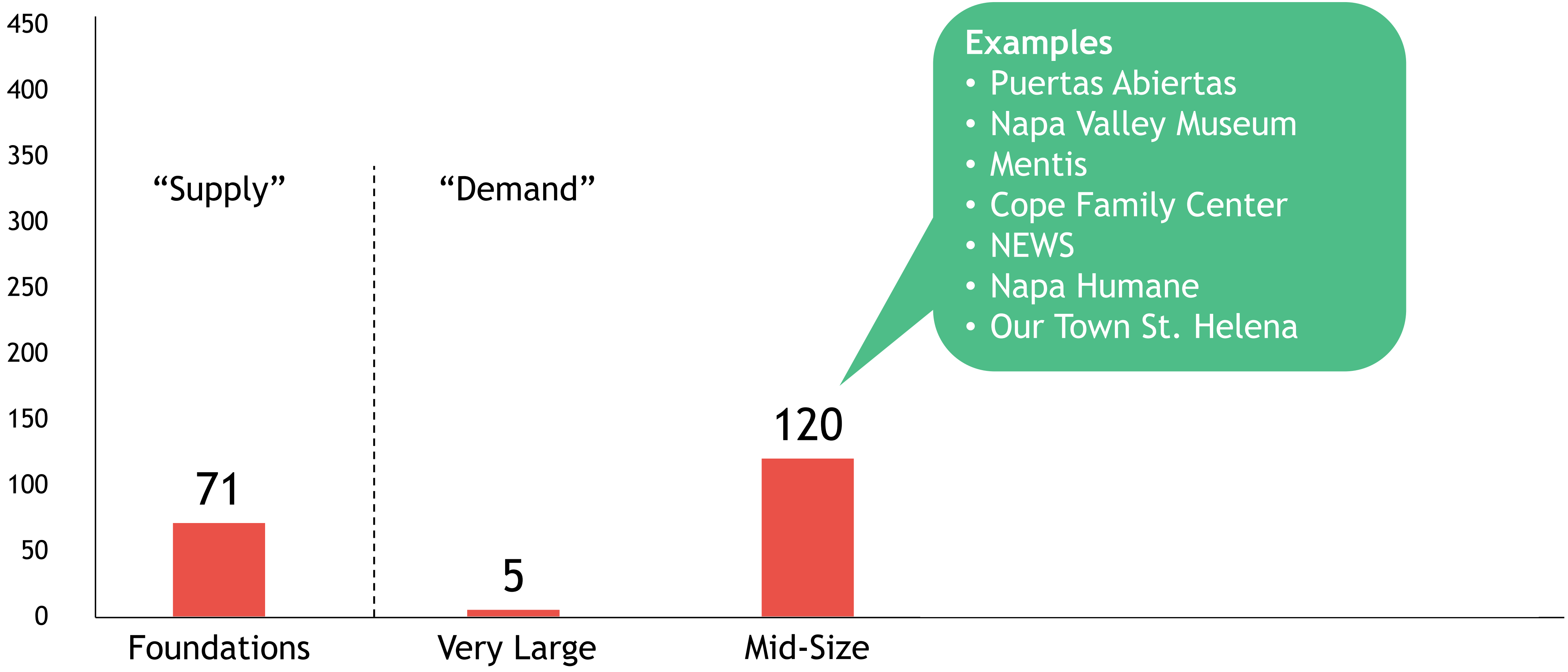
^ Source: DataLake, LLC Nonprofit Research, based on IRS exempt org business master file, 2022/2023. NVVHCF is Napa Valley Vintners Healthy Community Fund.

…and 678 direct service nonprofits that operate at vastly different scales, including 5 very large organizations (annual revenues > $20M) in the health, human services and education sectors…



^ Source: DataLake, LLC Nonprofit Research, based on IRS exempt org business master file, 2022/2023.
Please note: Providence Queen of the Valley Medical Center is not included in this dataset, as they no longer file a stand-alone Form 990. In 2009, prior to the Providence/St. Joseph's Health merger, the Queen had revenues of approximately $268 million.

…120 mid-size nonprofits ($250K < annual revenues < $20M) that typically provide a broad range of services, receive funding from multiple sources, and often rely on paid staff (rather than volunteers alone) to fulfill their missions…

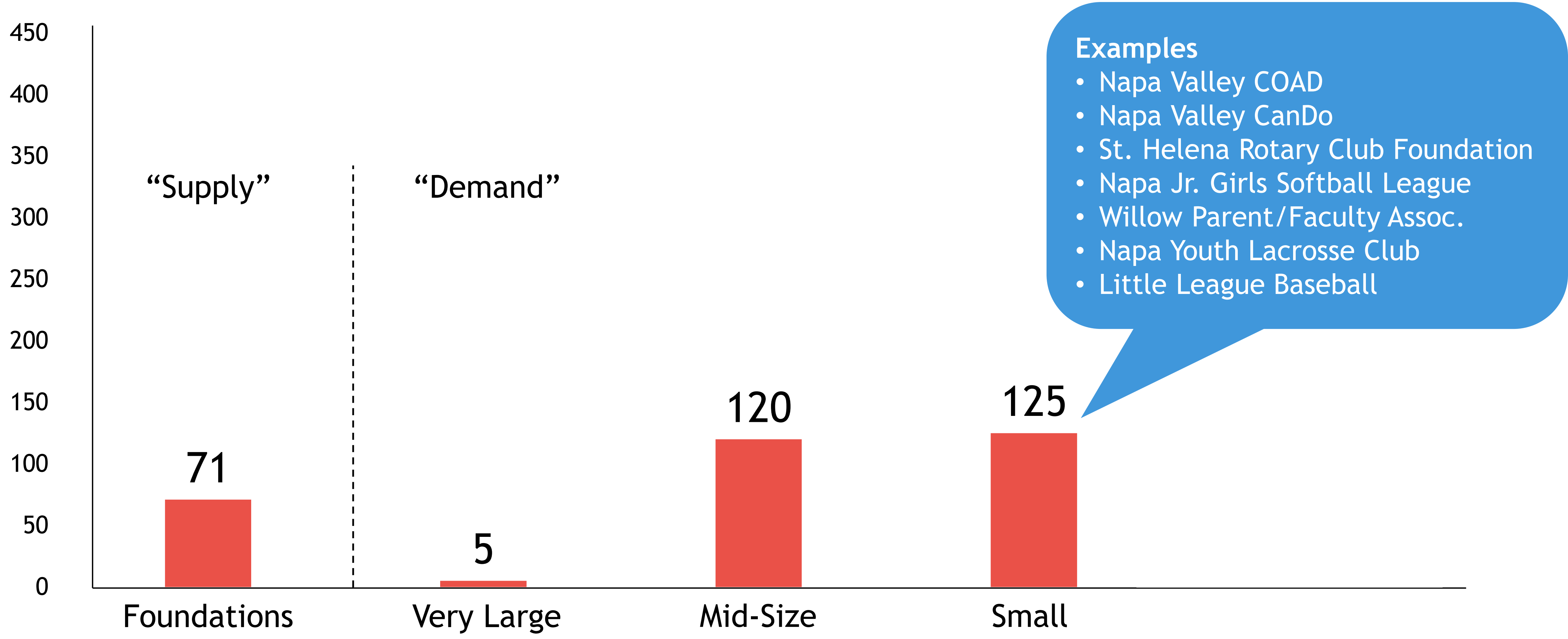


Examples

- Puertas Abiertas
- Napa Valley Museum
- Mentis
- Cope Family Center
- NEWS
- Napa Humane
- Our Town St. Helena

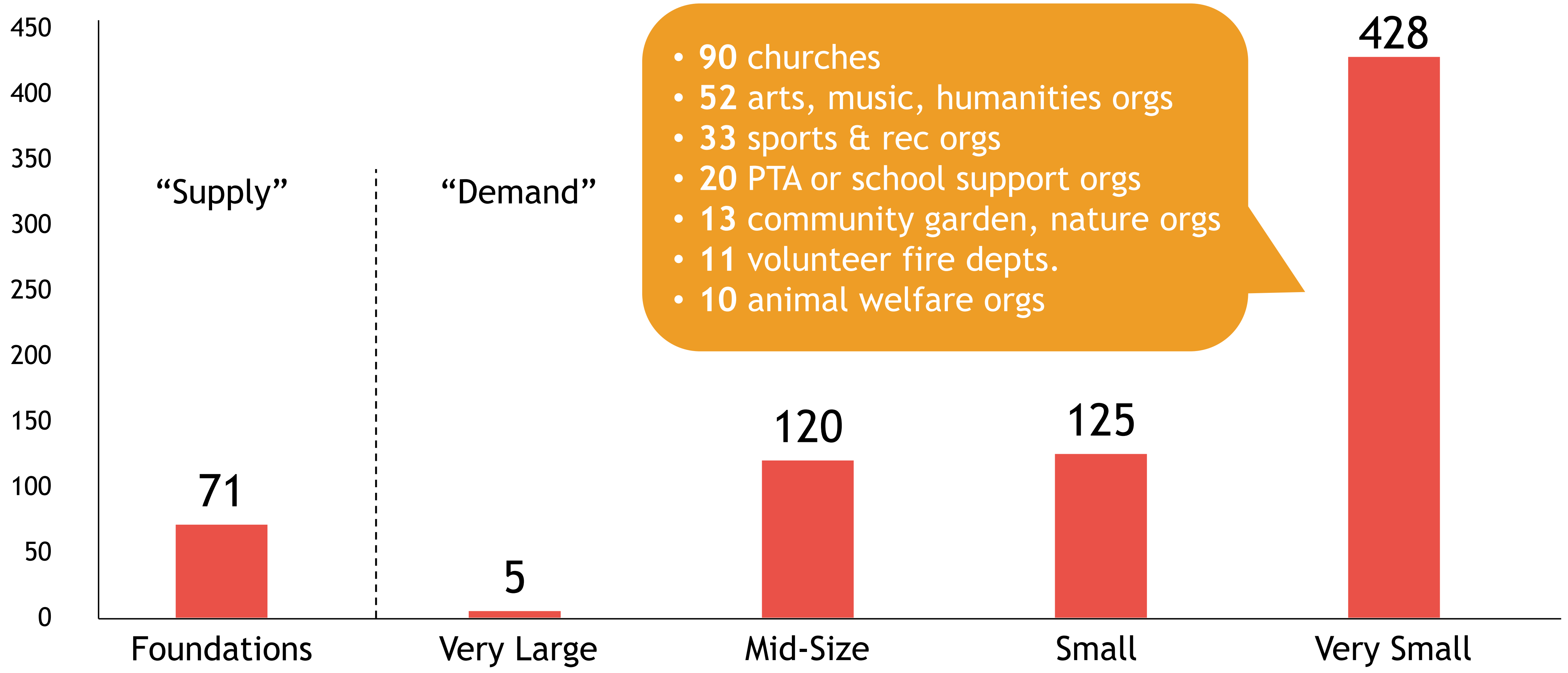
^ Source: DataLake, LLC Nonprofit Research, based on IRS exempt org business master file, 2022/2023.

…125 small nonprofits ($50K < annual revenues < $250K), some of which provide services year-round and rely on paid staff to fulfill their missions; many of which are single-purpose entities powered by volunteers…



^ Source: DataLake, LLC Nonprofit Research, based on IRS exempt org business master file, 2022/2023.

… and 428 very small nonprofits (annual revenues < $50K), most of which are volunteer-led, single-purpose entities or houses of worship.

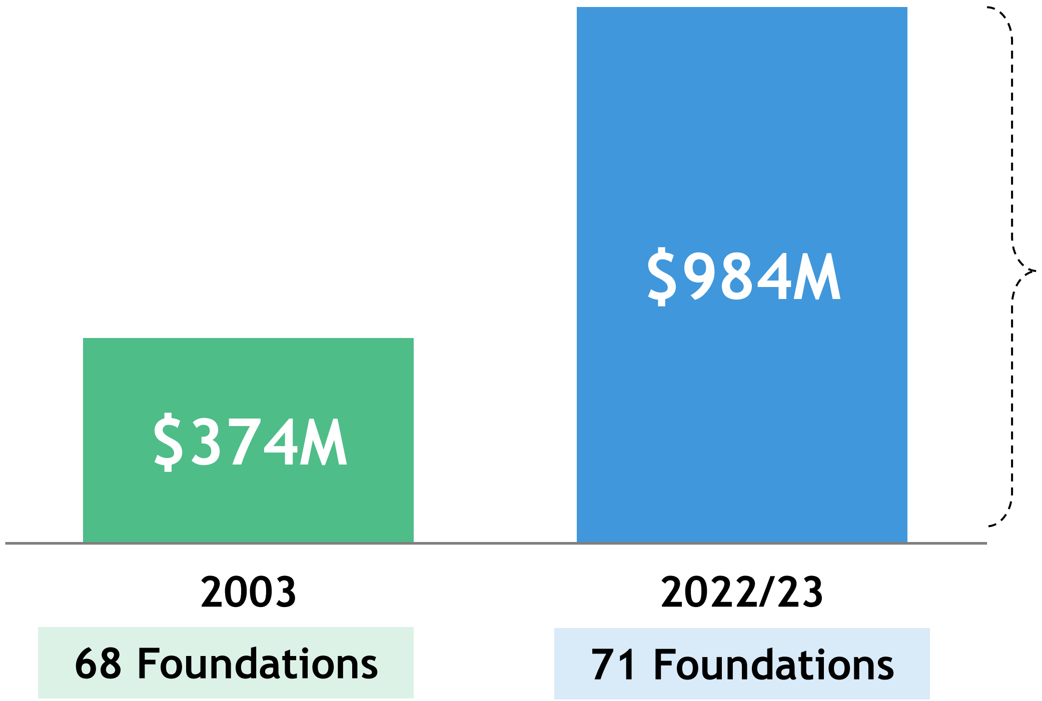


^ Source: DataLake, LLC Nonprofit Research, based on IRS exempt org business master file, 2022/2023.

Analysis
Funders

Napa-based foundation assets have more than doubled in the last 20 years.

Growth in foundation assets
(2003 to 2022/23)



Three largest foundations by asset size

- Clif Family Foundation, $551M*
- NVCF, $115M
- Gasser Foundation, $113M

* Clif Family Foundation was incorporated in Napa County, but makes grants in regions across the US, including ours.

^ Sector revenues for 2003 have been adjusted for inflation

Source: DataLake, LLC Nonprofit Research, based on IRS exempt org business master file, 2022/2023. Note: NVCF data is from 2025. 2003 data from University of San Francisco.

71 foundations established in Napa Valley steward about $1 billion in nonprofit assets.

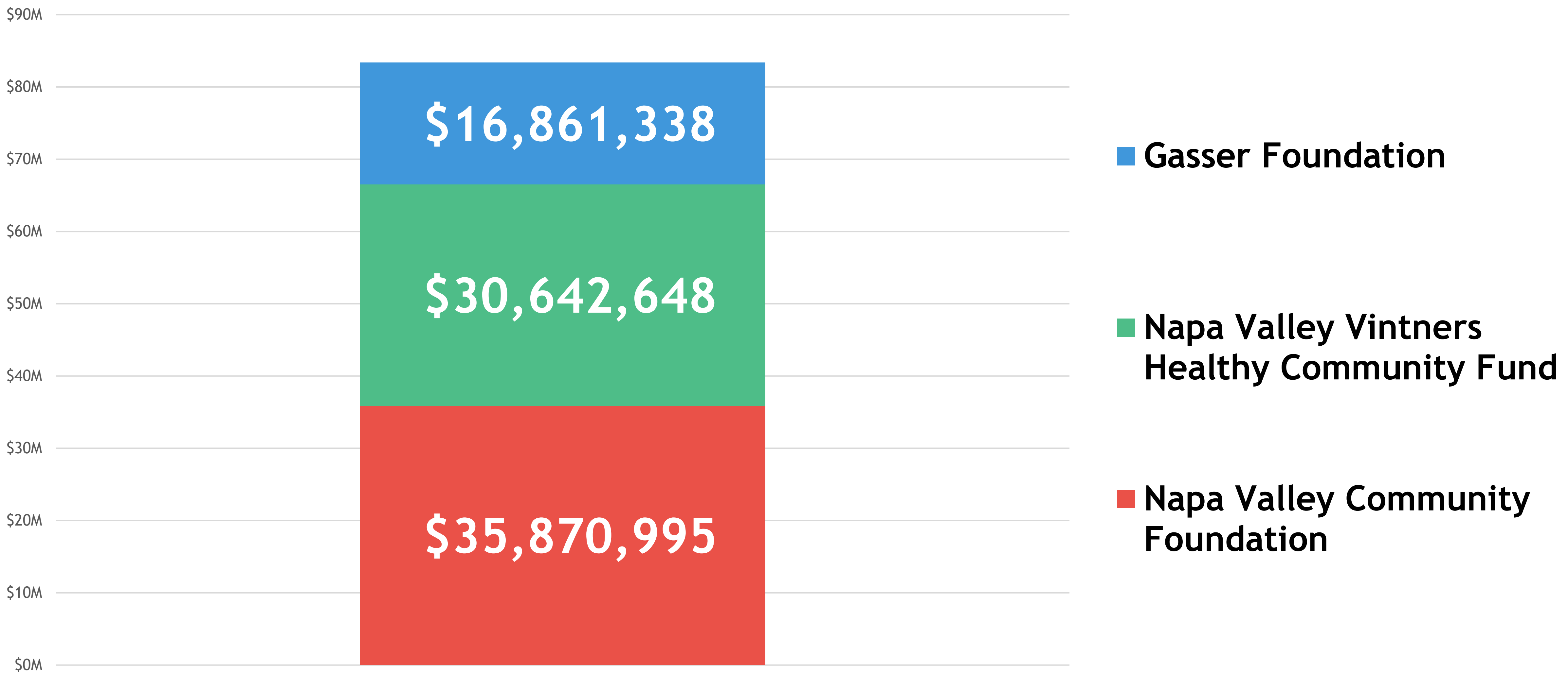
Public & Private Foundations in Napa County, 2022/2023^

- **66 private** foundations with **$884M** in assets
- **5 public** foundations with **$140M** in assets
- While these foundations were all established in Napa County, they do not necessarily grant to Napa County nonprofits exclusively

Not included: hundreds of foundations and donor advised funds established outside Napa County but associated with Valley residents.

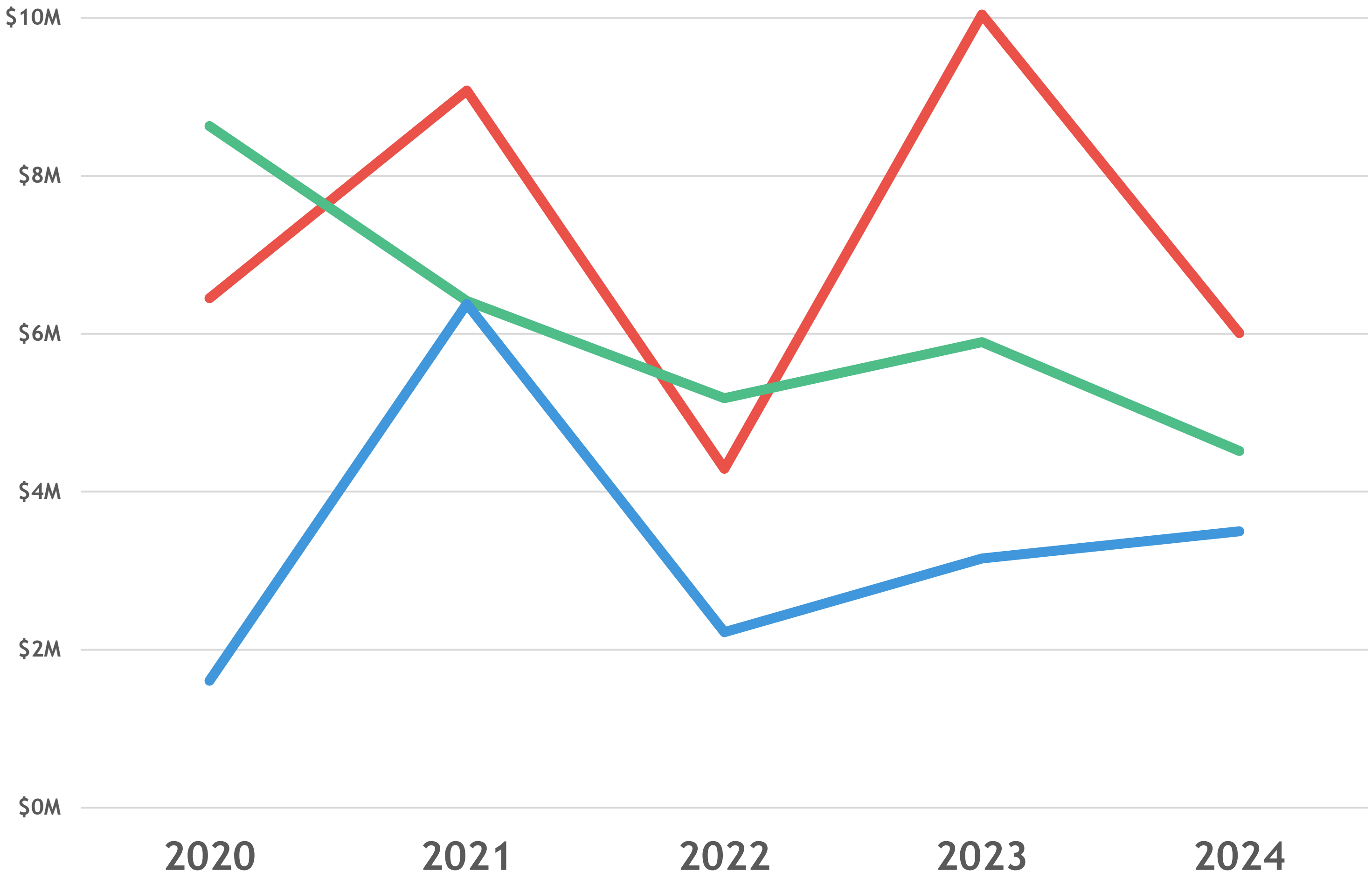
^ Source: DataLake, LLC Nonprofit Research, based on IRS exempt org business master file, 2022/2023. Note: NVCF data is from 2025.

In the last five years (2020 to 2024), three anchor funders in the Valley have distributed a total of nearly $84 million.



Source: IRS Forms 990 and 990 PF for 2020 to 2024. Please note NVVHCF is the Napa Valley Vintners Healthy Community Fund. NVCF data adjusted to reflect total grants & scholarships made in Napa County, and excludes State, National, and International grants.

The support has been significant, but also uneven in ways that reflect the particular circumstances of each funder.



NVCF TOTAL: $35.9M

upward spikes are disaster response or big years for DAF givers

NVVHCF TOTAL: $30.6M

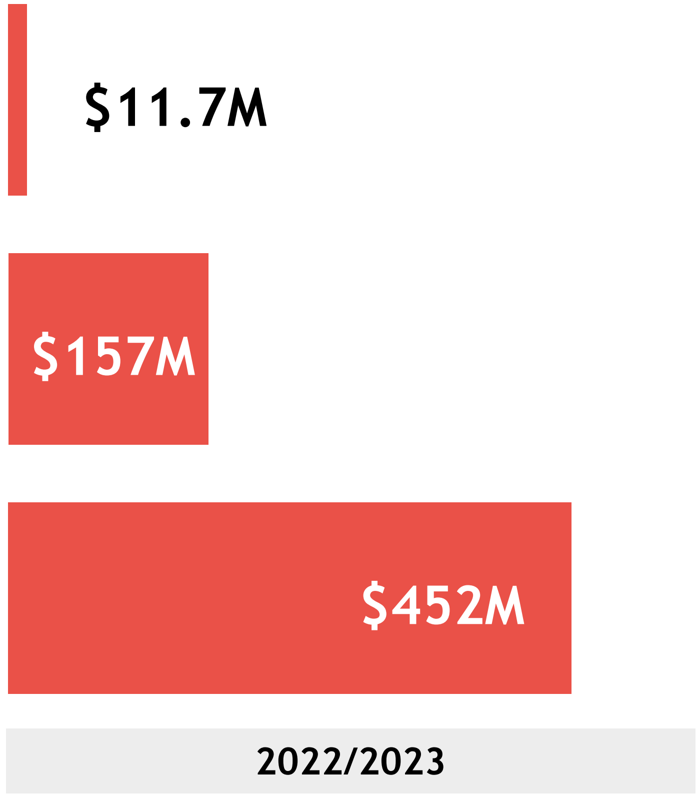
GASSER TOTAL: $16.9M

upward spikes are gifts of real property, annual cash grants average $1.5-$2M/year

Source: IRS Forms 990 and 990 PF for 2020 to 2024. Please note NVVHCF is the Napa Valley Vintners Healthy Community Fund. NVCF data adjusted to reflect total grants & scholarships made in Napa County, and excludes State, National, and International grants.

While impressive, foundation giving is just one piece of a larger puzzle.

- Total giving by NVCF, NVVHCF, Gasser = **$11.7M**
- Total giving by individuals, corporations, foundations = **$157M**
- Total government grants & contracts = **$452M**



Key Considerations Moving Forward

Looking ahead

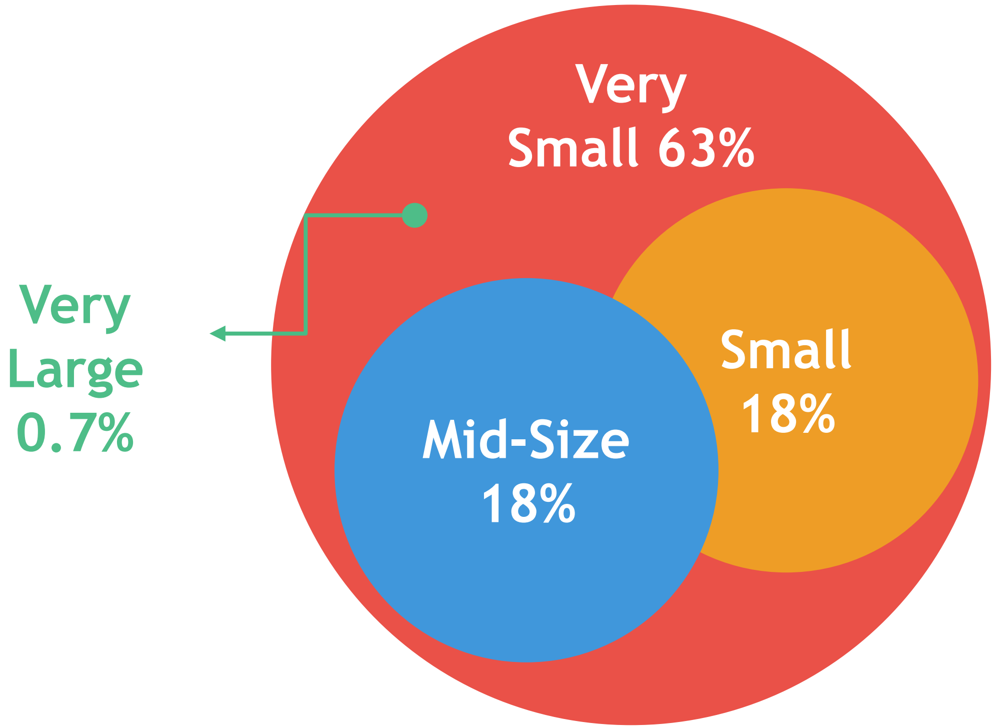
- **Government cuts are creating gaps that foundations alone cannot fill.**
  - Napa's anchor foundations play an important role, but their giving capacity is modest next to the federal and state funding now at risk.
- **Nonprofits will need to diversify funding sources, and possibly trim programs.**
  - Many donors with significant capacity live here full or part time, yet their philanthropy is often **domiciled outside the county**, a challenge for nonprofits seeking support.
  - Lately, we are hearing more frequently from nonprofits considering program cuts, other ways to reduce expenses, and potential mergers.
- **Ongoing pressures** in the **wine industry** are likely to **decrease local giving.** This could be offset by efforts to engage high-capacity givers with foundations, DAFs, and family offices located outside of Napa County.

Analysis

Nonprofits

Mapped by organization size, the nonprofit sector in Napa Valley is bottom heavy, with small and very small organizations accounting for 82% of all nonprofits incorporated in the county.

Napa County's 678 nonprofits
(share of sector headcount by org size)

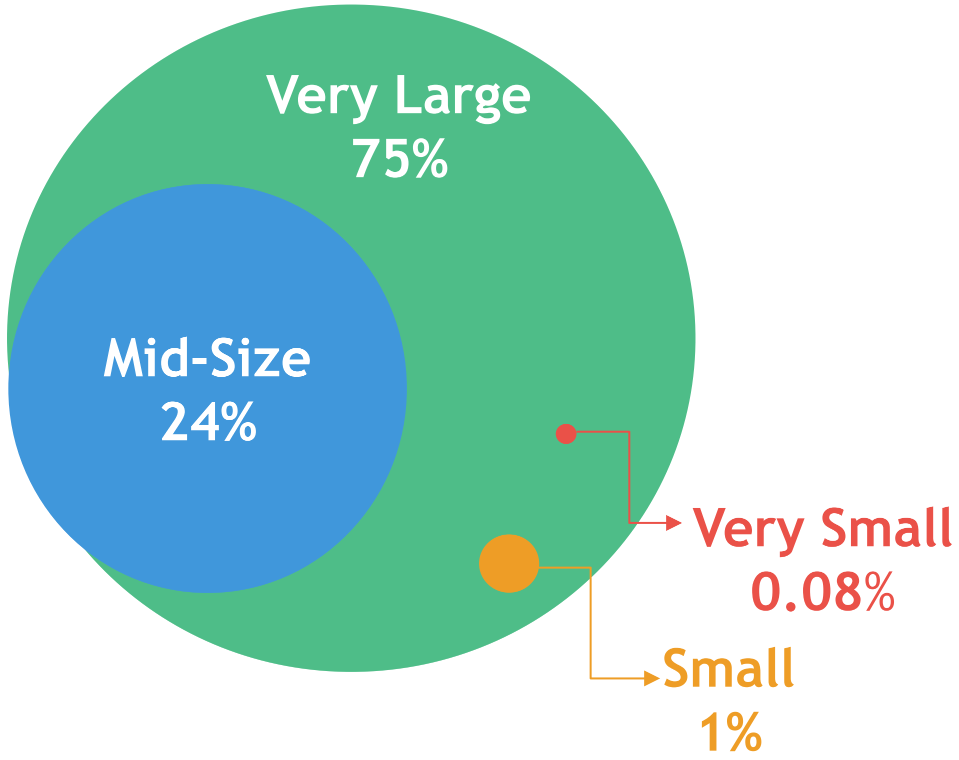


- **428 Very Small** orgs (Rev. < $50K)
- **125 Small** orgs ($50K < Rev. < $250K)
- **120 Mid-Size** orgs ($250K < Rev. < $20M)
- **5 Very Large** orgs (Rev. > $20M)

^ Source: DataLake, LLC Nonprofit Research, based on IRS exempt org business master file, 2022/2023.
Please note: Providence Queen of the Valley Medical Center is not included in this dataset, as they no longer file a stand-alone Form 990.

Mapped by annual revenues, the nonprofit sector in Napa Valley is top heavy, with very large and mid-size organizations accounting for 99% of the sector's $1.2 billion in 2022/2023 receipts.

Napa County's 678 nonprofits
(Share of sector revenues by org size)

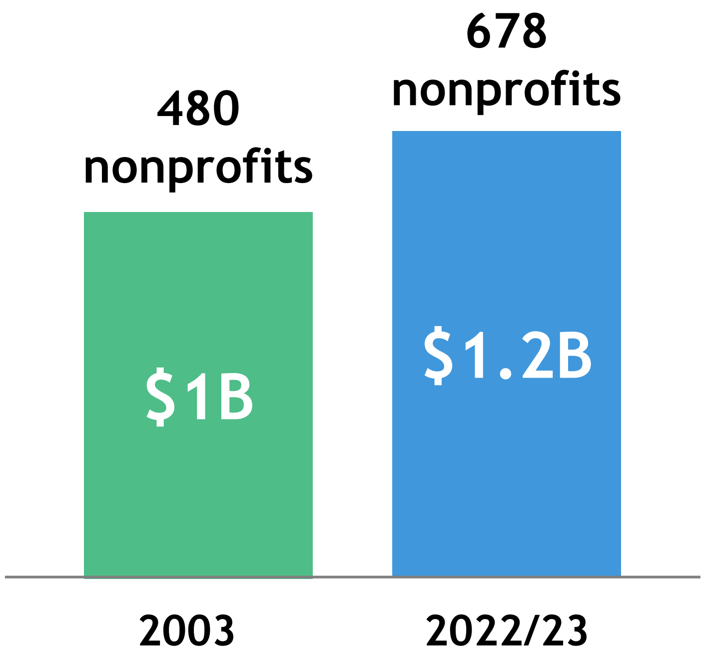


- Revenues > $20M: **5 Very Large** orgs, $882M
- $250K > Rev < $20M: **120 Mid-Size** orgs, $279M
- $50K > Rev < $250K: **125 Small** orgs, $16M
- Revenues < $50K: **428 Very Small** orgs, $1M

^ Source: DataLake, LLC Nonprofit Research, based on IRS exempt org business master file, 2022/2023.
Please note: Providence Queen of the Valley Medical Center is not included in this dataset, as they no longer file a stand-alone Form 990.

In the last 20 years, our nonprofit sector has grown both by headcount and by total revenues, with the former modestly outpacing the latter.

Growth in nonprofit sector



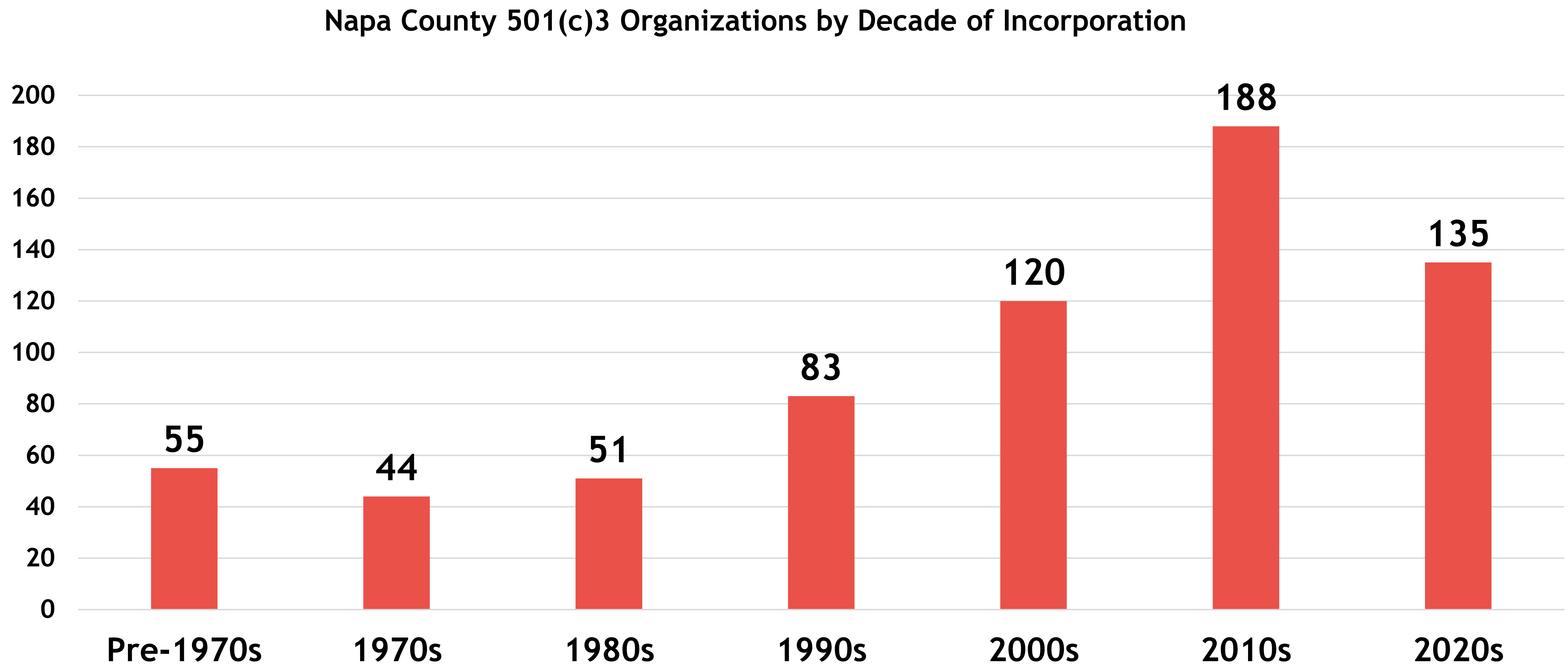
Percentage growth over period

- Number of nonprofits, **up 41%**
- Nonprofit sector revenues, **up 20%**

Sector revenues for 2003 have been adjusted for inflation

^ Source: DataLake, LLC Nonprofit Research, based on IRS exempt org business master file, 2022/2023. 2003 data from University of San Francisco.

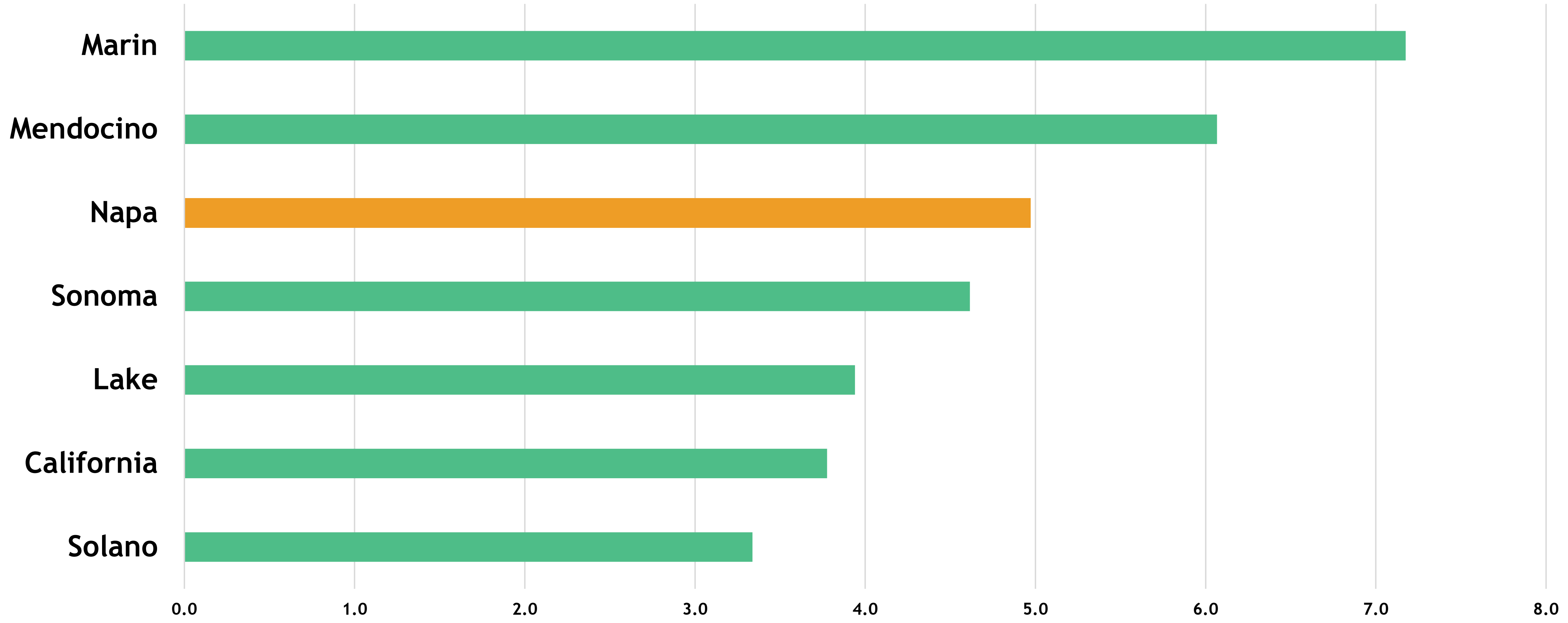
Notably, nearly half (47%) of today's nonprofits were incorporated in the 2010's and the first half of the 2020's, a period in which the county's population began to decline.



^ Source: DataLake, LLC Nonprofit Research, based on IRS exempt org business master file, 2022/2023.

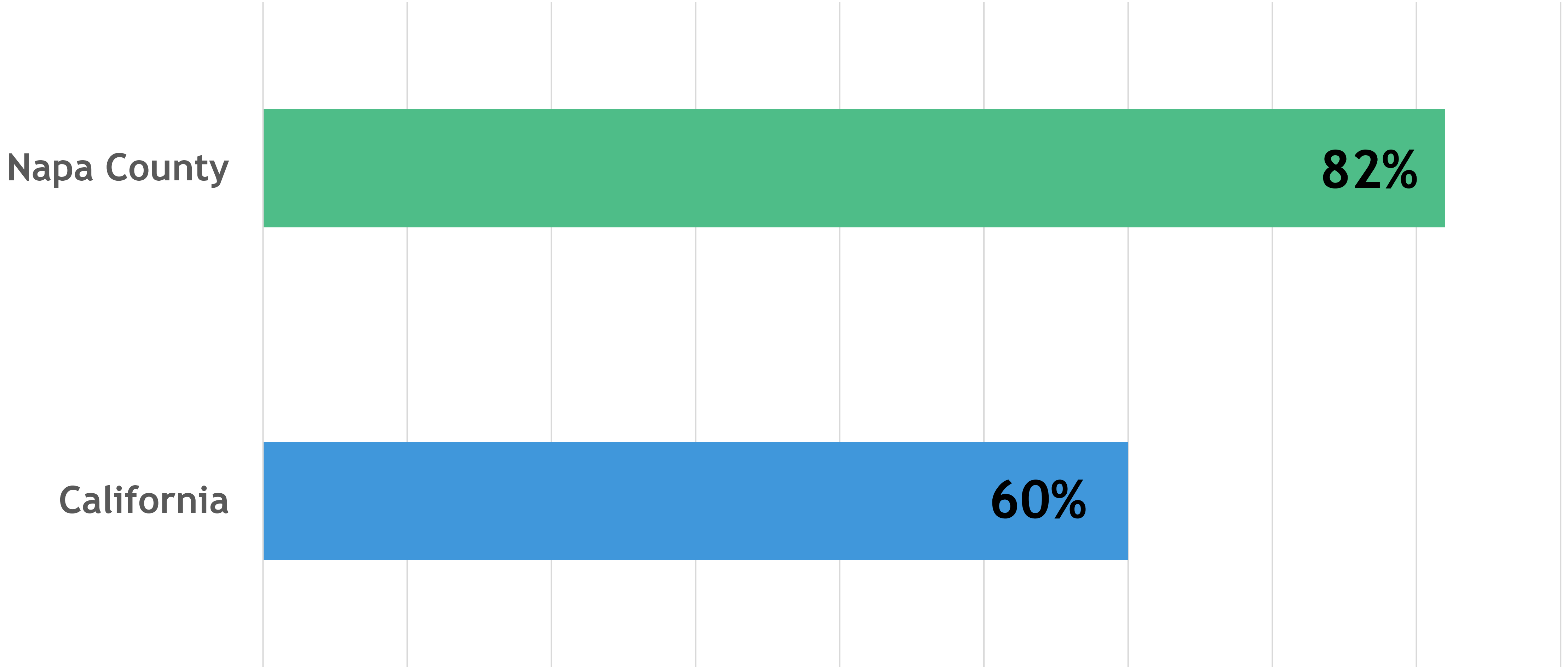
While Napa County has more nonprofits per capita than California, our numbers are similar to other North Bay counties.

Nonprofits per 1,000 residents, CA and the North Bay



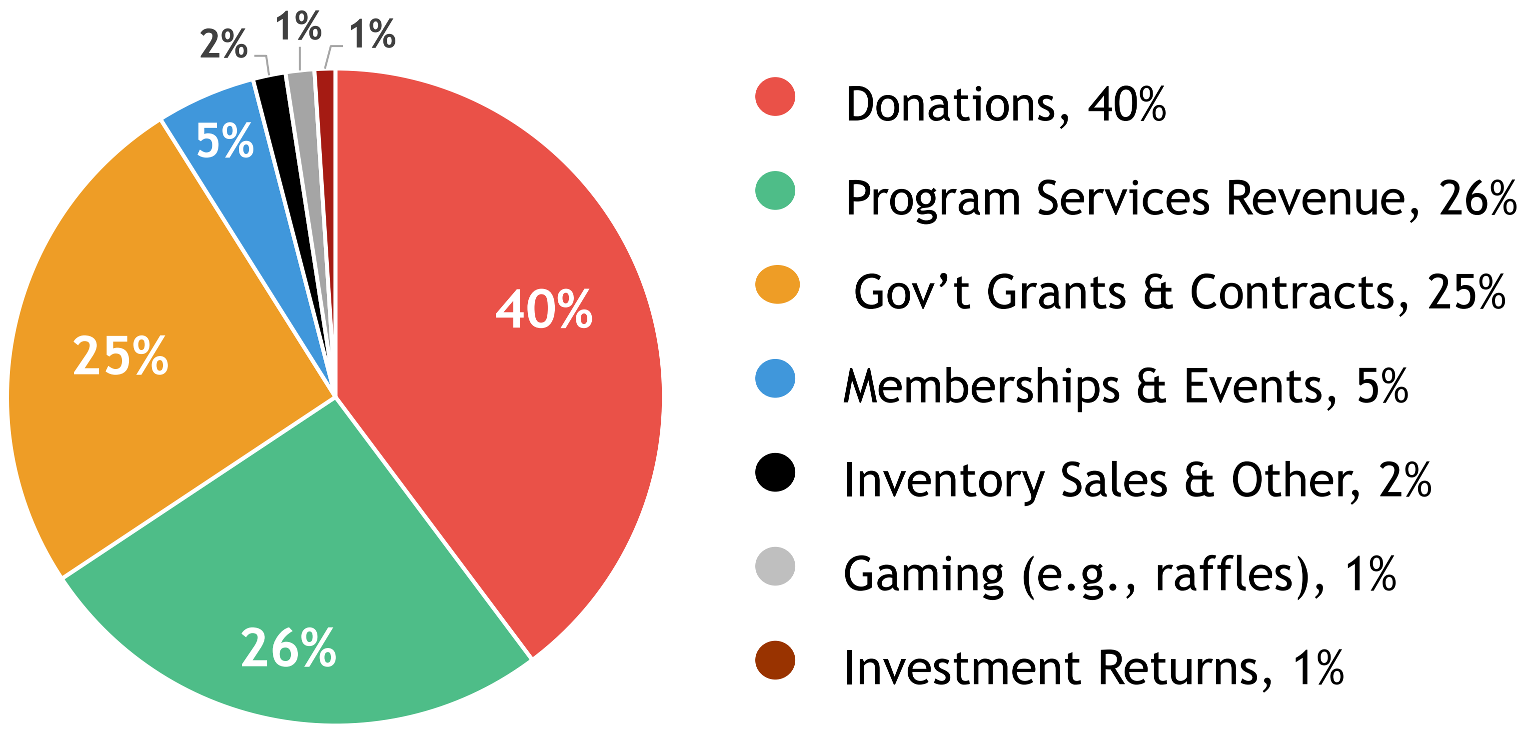
^ Source: DataLake, LLC Nonprofit Research, based on IRS exempt org business master file, 2022/2023.

Thus, while we don’t have systemic overcapacity, what we *do* have is many more small and very small nonprofits than other communities.



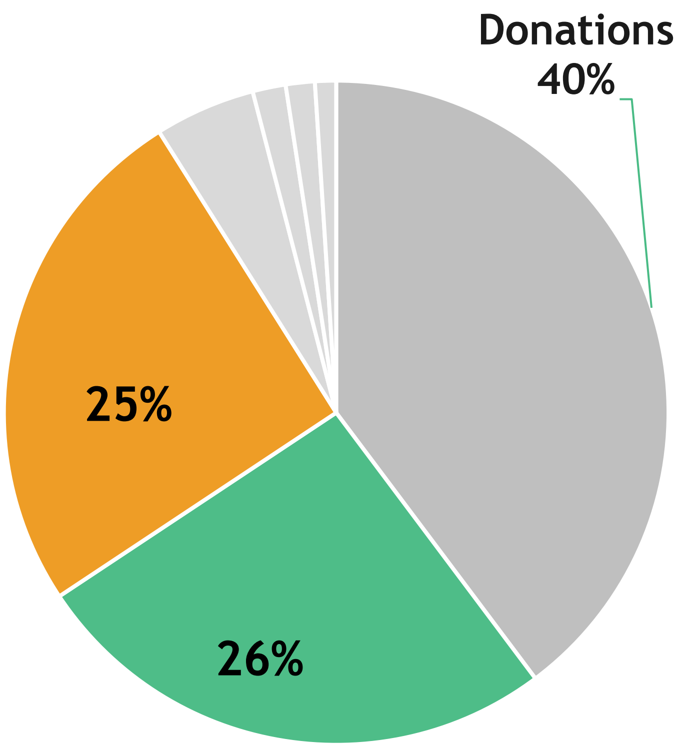
We partner most often with "Mid-Size" nonprofits, which derive ~51% of their revenues from: 1) government grants and contracts; and 2) program services revenue such as Medi-Cal payments.

- 120 organizations
- $280M in combined revenues
  - Budget range: $250K to $20M
  - Median budget: $1M
  - Avg. budget: $2.3M
- Examples
  - UpValley Family Centers
  - Puertas Abiertas CRC
  - Aldea
  - Land Trust
  - NEWS



For Mid-Size nonprofits, 51% of revenue comes from two sources at risk.

Gov't Grants & Contracts — 25%
Directly exposed to the federal and state funding cuts already underway and expected because of HR1.

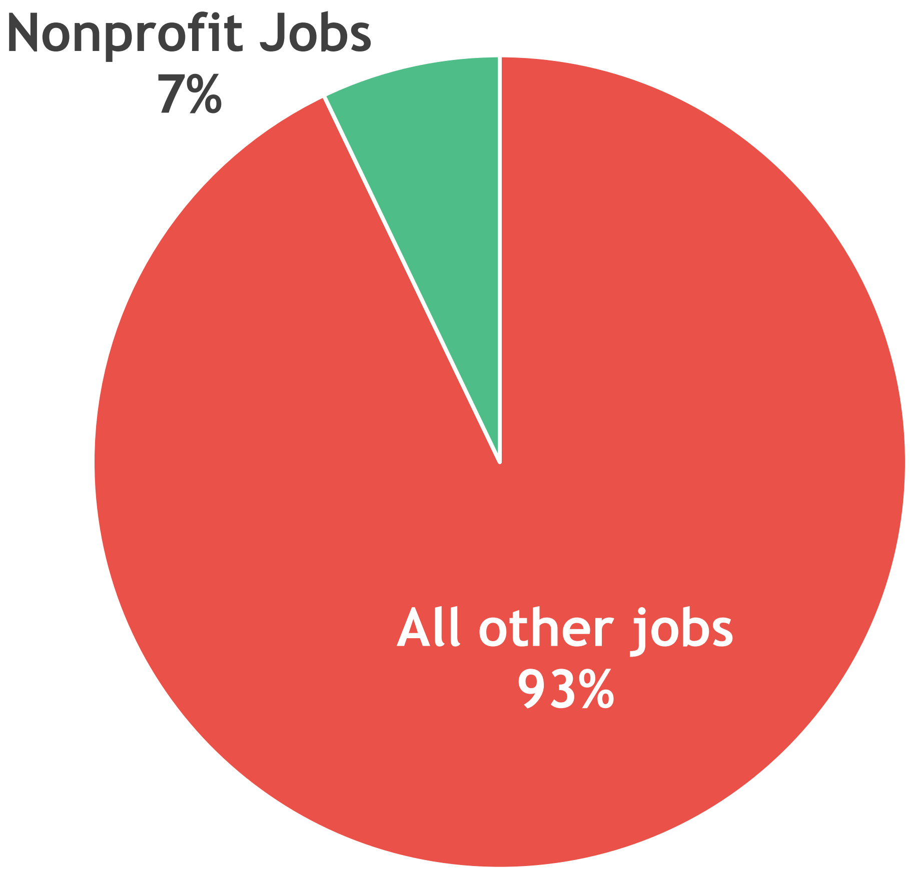


Program Services Revenue — 26%
Largely Medi-Cal and other public reimbursements, plus sliding-scale fees from low-income clients.

Reimbursement rates are often set by government contracts, not the nonprofit, and raising fees on low-income clients would make services unaffordable to the people they help.

120 Mid-Size nonprofits • $280M combined revenue • Budgets $250K–$20M (median $1M)

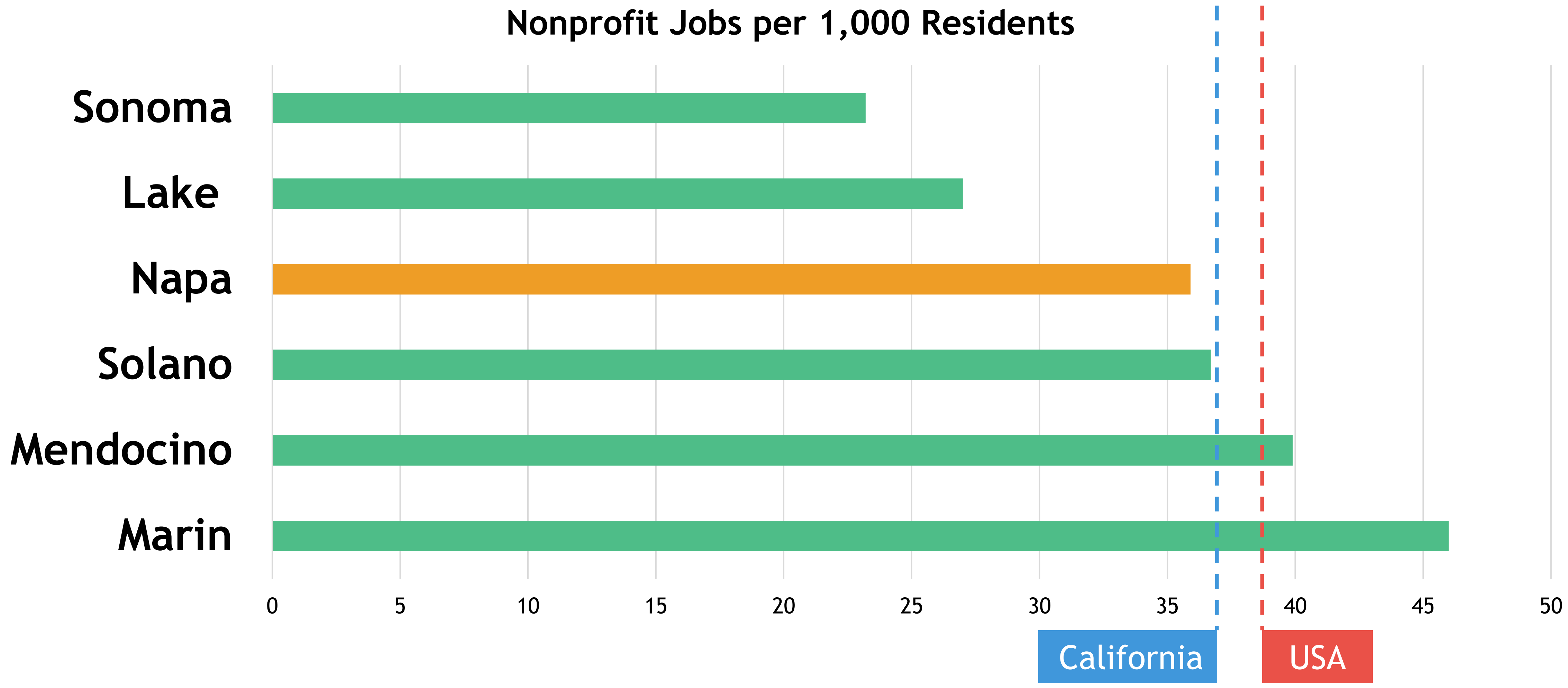
Napa's nonprofits are an economic engine for the community as a whole.



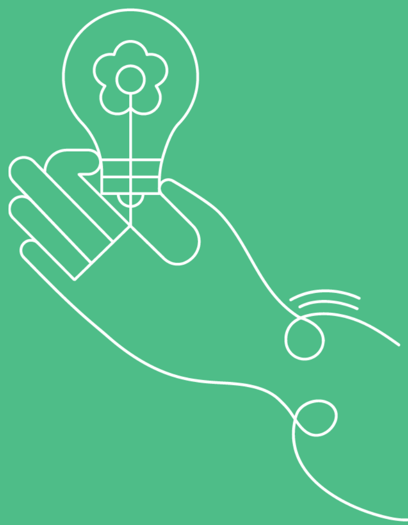
- Napa nonprofits employ **4,823 workers** — about **7% of all private-sector jobs**.
- **Local nonprofits** keep payroll dollars circulating in the community.
- The nonprofit sector accounts for **9% of county GDP** (2022).

Source: Employment and wage data for 501(c)(3) nonprofit organizations come from the U.S. Bureau of Labor Statistics' Nonprofit Sector Research Data (2022).

Napa has 36 nonprofit jobs per 1,000 residents.



Key Considerations Moving Forward



- **Sector revenues have grown from $1B to $1.2B since 2003 (up 20%)**
  - Revenue growth has lagged behind headcount growth, but this is to be expected — new nonprofits tend to be small, and it can take a decade for them to become mid-size.
- **Government grants & contracts are 45% of sector revenues, and increasingly precarious**
  - Nearly half of nonprofit income depends on policy decisions made in Sacramento and Washington.
- **Government funding cuts (including HR1) will continue to push demand for nonprofit services**
  - If and when nonprofits shrink or close, our community members will encounter hunger, illness, social isolation, and housing instability at starkly higher rates.

What are *we* doing in response?

- Sharing data and research broadly.
- Mobilizing our donors to increase giving, make multi-year grants, and prioritize unrestricted funding.
- Increasing NVCF’s Community Impact Grantmaking:
    - Continuing our Elaine Jones Safety Net grants program ($1.65M granted in year 1; year 2 launching Fall 2026).
    - Increasing our investments in advocacy, capacity building, and deepening local governmental partnerships.

Questions?

Data presented by:

Napa
Valley
Community
FOUNDATION

Contact Us:

hello@napavalleycf.org
707-254-9565