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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Part One — Twenty years of change: the sector at a glance

More organizations, coming and going

Twenty years ago, 480 nonprofits were incorporated in Napa County. Today there are 678 — an increase of 41%. That net gain of roughly 200 organizations is a byproduct of two things: market entry and market exit. Since 2003, 376 new nonprofits have been founded while 178 that existed then have closed. Organizations come and go, as they do in any community, in any economic sector.

480 nonprofits in 2003 →

678 in 2022/23

(up 41%)

+376
new nonprofits incorporated since 2003

-178
nonprofits that ceased operations since 2003

Revenues up

Nonprofit revenues grew about 20% over the same period, from $1 billion to $1.2 billion in inflation-adjusted terms. Revenue growth has lagged behind the growth in the number of organizations — which is what one would expect, since new nonprofits tend to start small and take time to grow.

Sector revenues have grown from

$1B to $1.2B since 2003

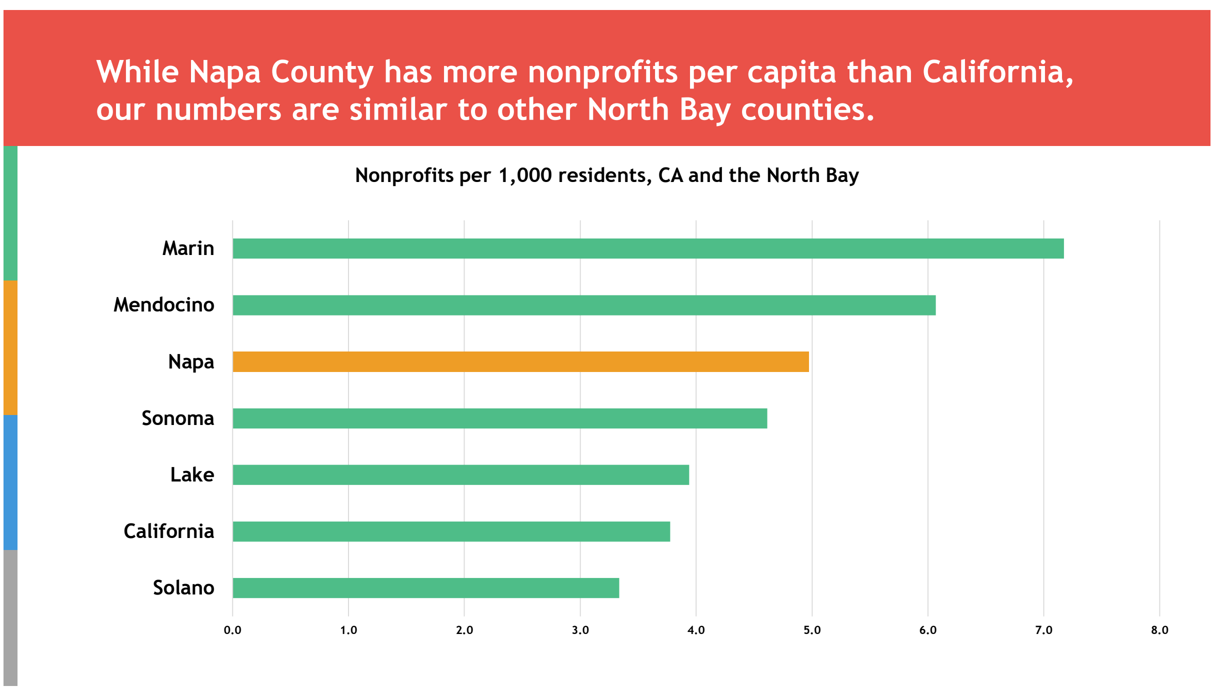
(up 20%)

An economic engine

It is easy to think of nonprofits simply as *recipients* of giving. In fact, they are key *contributors* to the local economy too. Napa's nonprofits employ roughly 4,800 people — about 7% of all private-sector jobs in the county — and keep payroll dollars circulating locally. The sector accounts for about 9% of county gross domestic product (GDP) — the total value of goods and services produced in the local economy. Napa has roughly 36 nonprofit jobs per 1,000 residents, similar to the statewide average.

Not too many nonprofits — but a lot of small ones

A common concern we hear from local donors is that Napa has too many nonprofits. The data tells us otherwise. Although Napa has more nonprofits per capita than California overall, it is in line with neighboring North Bay counties.

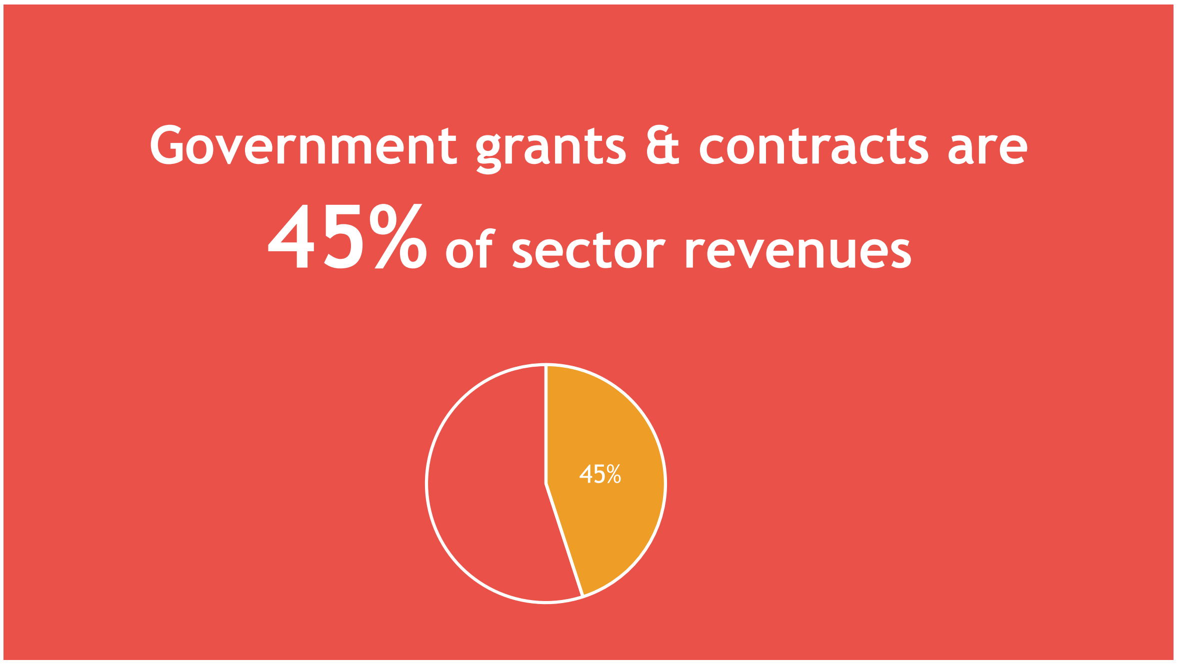


What distinguishes Napa is not the number of organizations, but their size: 82% of Napa's nonprofits are small or very small (as defined on pages 6-7), compared with about 60% statewide.

The number to remember

If there is one figure to remember from this report, it is this: **45% of all nonprofit revenues come from government grants and contracts.** Because nonprofit tax filings combine government funding into a single category, it is not possible to determine precisely how much comes from federal, state, or local sources. Historically, however, much of that funding originates with the federal government before flowing through state and county agencies to local nonprofits.

In other words, nearly half of the sector's revenues ultimately depend on public policy decisions made in Washington and Sacramento.



Why the road ahead looks harder

This dependence is the heart of the challenge. Government funding has long been a critical support to Napa's nonprofit sector. But government funding is growing less certain. Recent federal legislation — H.R. 1 (aka the One Big Beautiful Bill Act) — is expected to affect nonprofits negatively from several directions.

On the **demand** side, changes to programs such as Medi-Cal and CalFresh are likely to push more residents, no longer eligible for coverage or subsidies, toward the very services nonprofits provide.

On the **supply** side, the same legislation reduces the government dollars that fund those services.

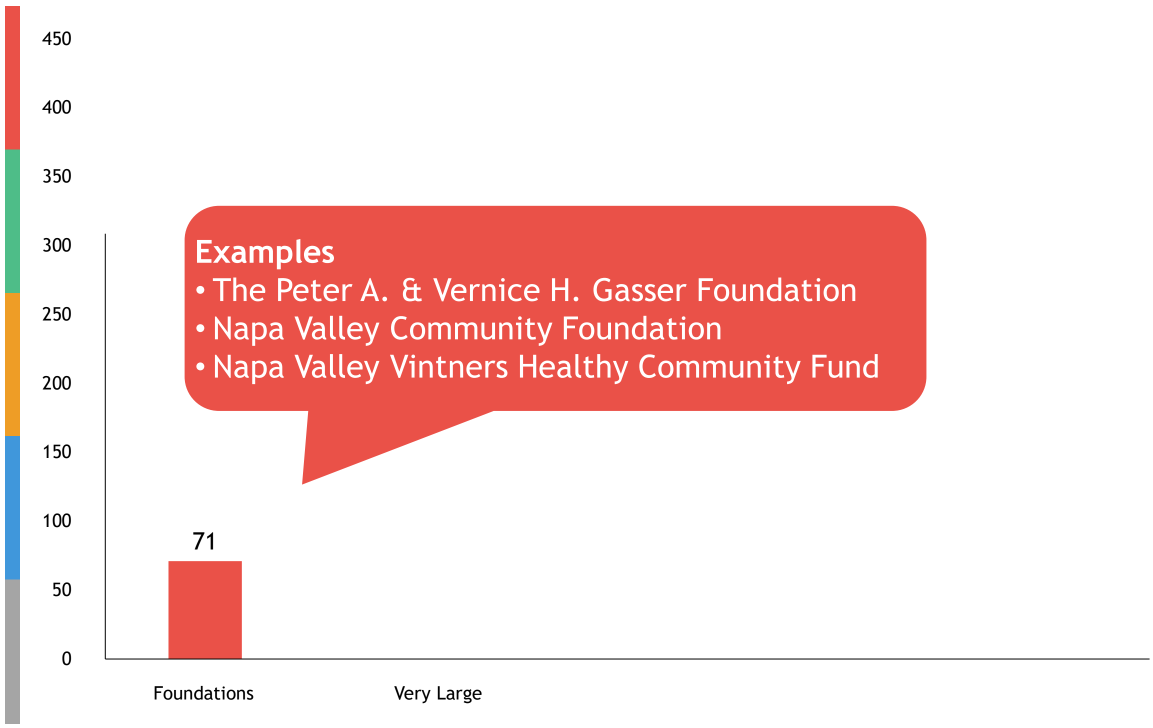
And on the **giving** side, changes to the tax code may dampen private donations: according to a recent study by the Indiana University Lilly School of Philanthropy, annual household giving is projected to decrease by $5.7 billion nationwide.

The result is greater demand for services, fewer public dollars to support them, and added pressure on the private philanthropy that might otherwise help close the gap.

Part Two — Napa's philanthropic landscape: the funders

Supply and demand

The Valley is home to **71 foundations and funding entities.** Together, they are part of the "supply" side of the charitable sector: a source of support for the **678 direct-service nonprofits** that make up the "demand" side of the equation. *(Note: the distinction between supply and demand is imperfect: NVCF, for one, both raises money and gives it away.)* Familiar names anchor the supply side, among them the Peter A. & Vernice H. Gasser Foundation (aka the Gasser Foundation), the Napa Valley Vintners Healthy Community Fund, and Napa Valley Community Foundation itself.



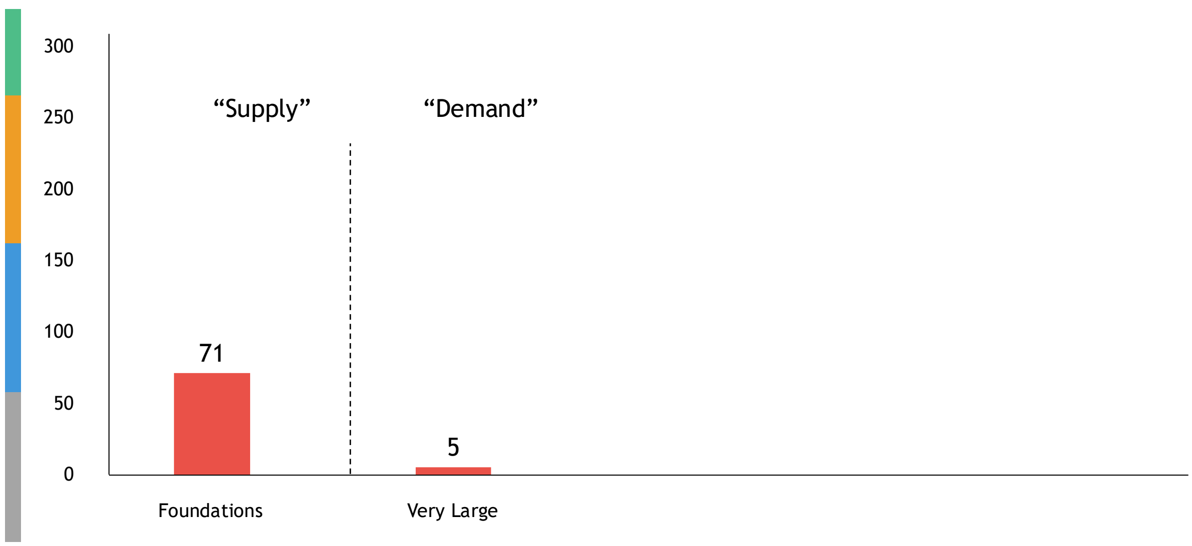
Many organizations, very different scales

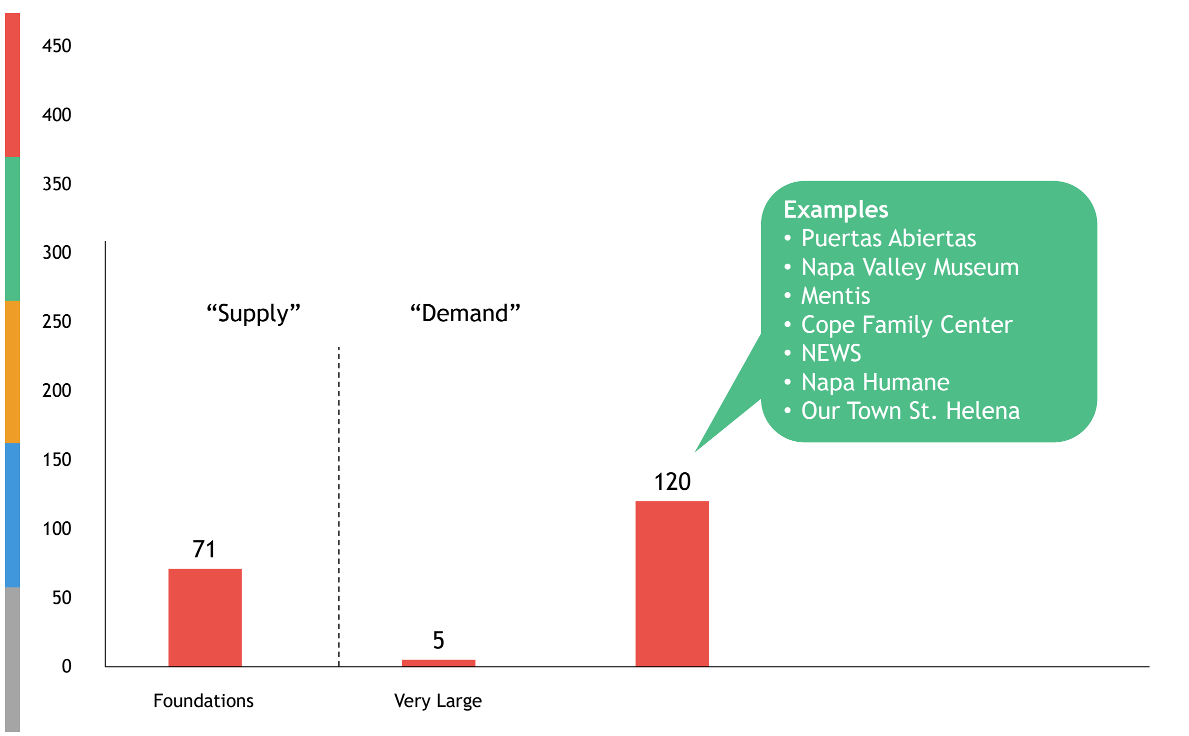
The 678 direct-service nonprofits operate at very different scales. It helps to sort them into four groups based on annual revenues.

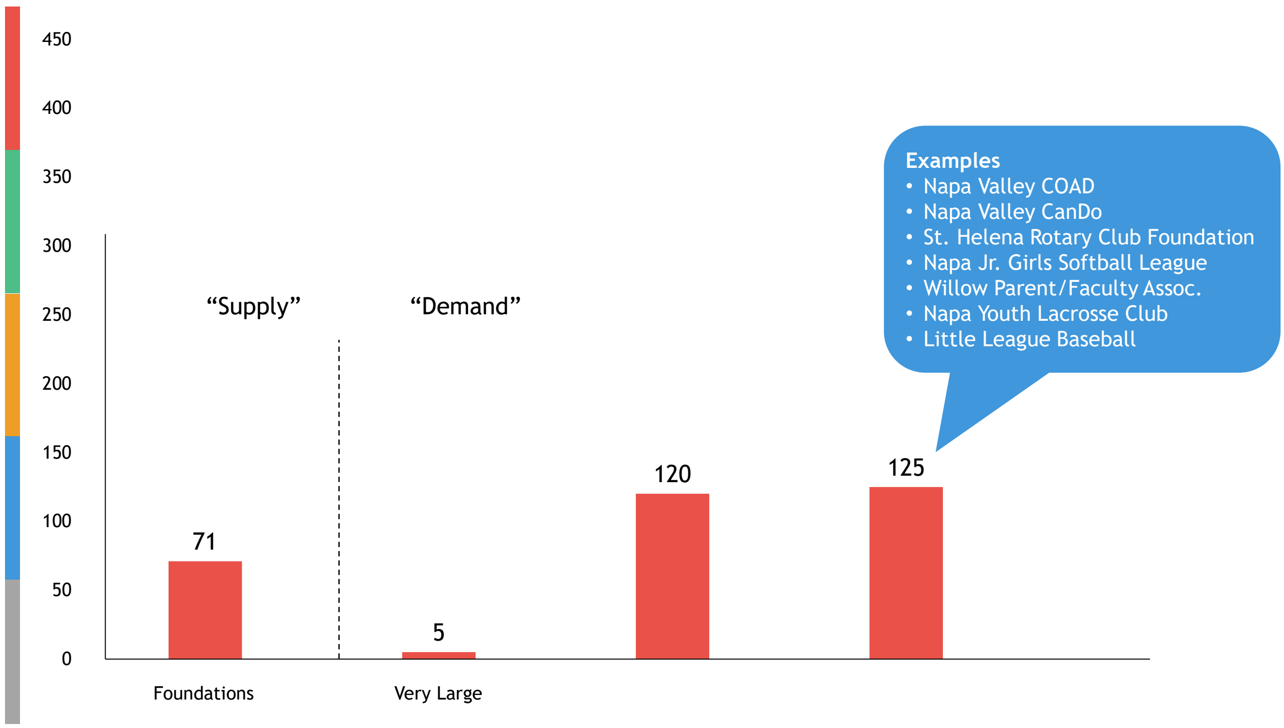
- **Five very large organizations** (annual revenues above $20 million) work in health, human services, and education — North Bay Regional Center, St. Helena Hospital, The Meadows, CommuniCare+OLE, and Pacific Union College. *(Note: The true number would be six if the Queen of the Valley Medical Center still filed its Form 990 returns independently.)*
- **120 mid-size organizations** (annual revenues of $250,000 to $20 million) provide a broad range of services, draw on multiple funding sources, and generally rely on paid staff. This is the group NVCF partners with most often, because grants of the size we are able to offer can make a measurable difference for them. Examples include Puertas Abiertas Community Resource Center, Napa Valley Museum, Mentis, Cope Family Center, NEWS, Napa Humane, and Our Town St. Helena.
- **125 small organizations** (annual revenues of $50,000 to $250,000) range from year-round operations with paid staff to single-purpose groups powered entirely by volunteers — Napa

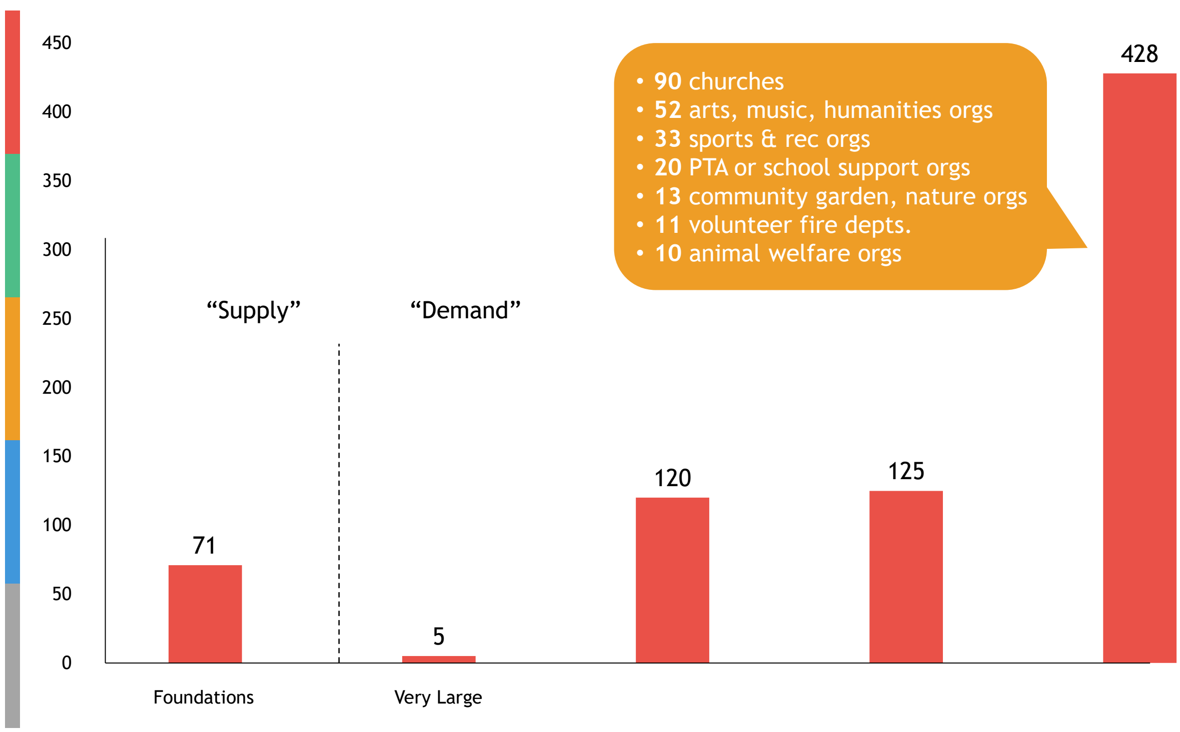
Valley COAD, Napa Valley CanDo, Rotary clubs, youth sports leagues, and school-support groups among them.

- **428 very small organizations** (annual revenues under $50,000) are mostly volunteer-led, single-purpose entities and houses of worship. The category includes about 90 churches, 52 arts and humanities groups, 33 sports and recreation organizations, 20 PTA and school-support groups, 13 garden and nature organizations, 11 volunteer fire departments, and 10 animal-welfare groups.





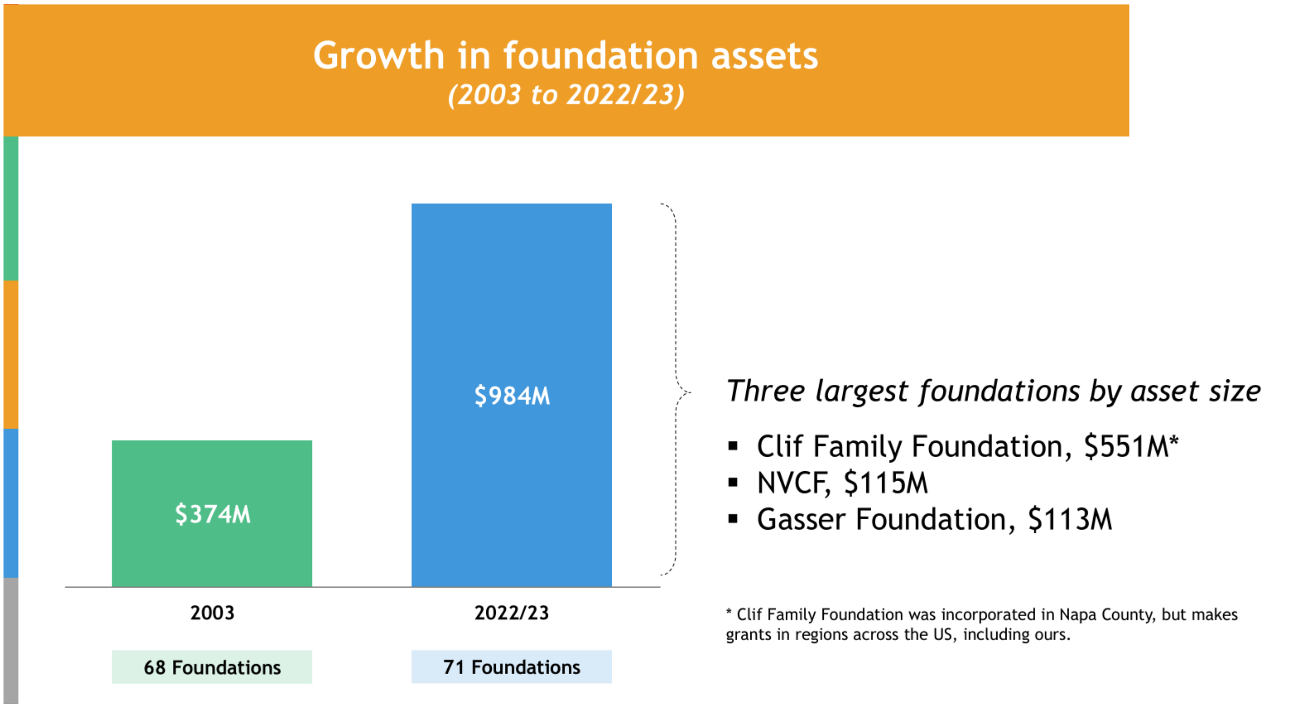




A closer look at foundations and funders

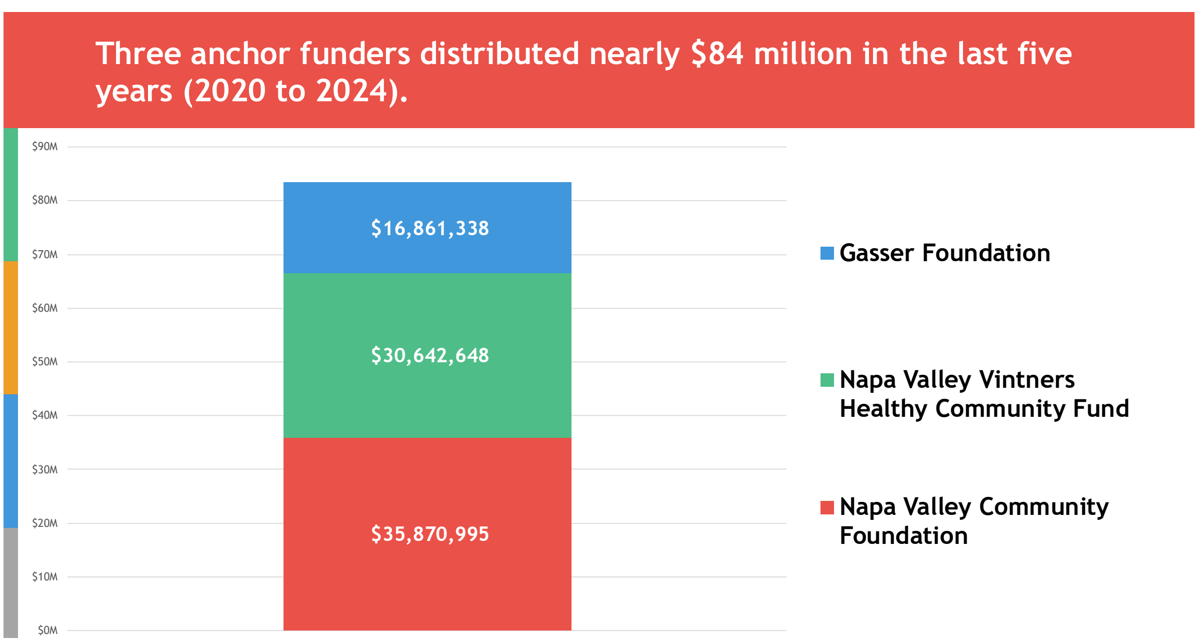
Napa County's 71 foundations and funders — 66 private and 5 public — together steward about $1 billion in assets. Two caveats are important. First, a foundation incorporated in Napa does not necessarily make grants only to Napa nonprofits. Second, this count excludes the hundreds of private foundations and donor advised funds that may be tied to Valley residents but are domiciled elsewhere — at a commercial gift fund in San Francisco, a family office in Chicago, or a private foundation in a neighboring county.

Over the past twenty years, the number of foundations has changed little — from 68 to 71 — but their combined assets have more than doubled, from $374 million to $984 million. The single biggest reason is that the Clif Family Foundation was incorporated in Napa County in 2022. With about $551 million in assets, it is the largest foundation based here, although its grantmaking extends nationwide. The next largest are Napa Valley Community Foundation ($115 million) and the Gasser Foundation ($113 million).



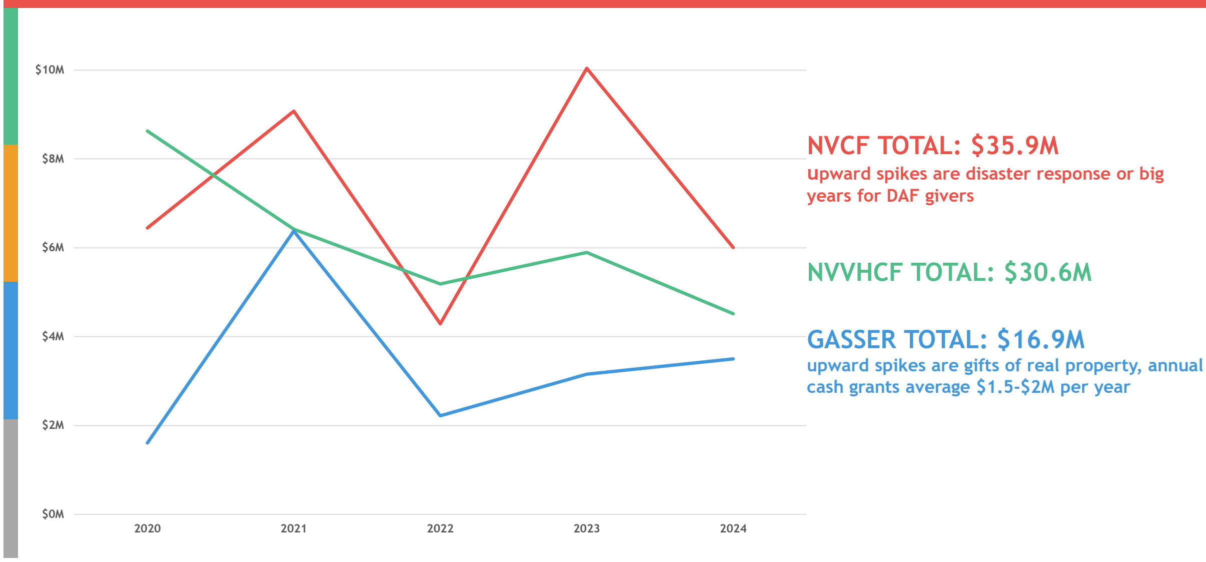
The three anchor funders

Three institutions function as the Valley's anchor funders: Napa Valley Community Foundation, the Napa Valley Vintners Healthy Community Fund, and the Gasser Foundation. Between 2020 and 2024 they distributed nearly $84 million in combined giving — about $35.9 million from NVCF, $30.6 million from the Vintners' fund, and $16.9 million from Gasser.



Yearly giving varies for reasons particular to each anchor funder. NVCF's giving spikes after disasters, because it has become the place where the community pools its dollars following a wildfire or earthquake. Gasser's giving rises in years when it makes gifts of real property, on top of a steady base of roughly $1.5 to $2 million in annual cash grants.

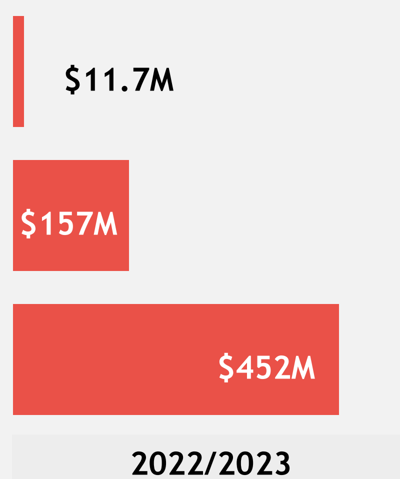
The support has been significant, but also uneven in ways that reflect the particular circumstances of each funder.



Generous — but a small piece of the puzzle

Foundation giving, impressive as it is, represents the smallest part of Napa nonprofits' funding picture. In 2022/23 the Valley's three anchor funders distributed about $11.7 million. Total giving to Napa nonprofits from all individuals, corporations, and foundations was roughly $157 million that year. By comparison, government grants and contracts totaled about $452 million. The implication is clear: local organized philanthropy plays an essential role, but it cannot alone replace the public funding now at risk.

$11.7M	Combined 2022/23 giving by three anchor funders (NVCF, NVVHCF, Gasser)
$157M	Total giving to Napa nonprofits from all individuals, corporations, and foundations
$452M	Total government grants and contracts to Napa nonprofits



What this means

Several implications follow for everyone on the giving side of the equation. The funding gaps emerging are larger than foundations alone can fill. Napa's anchor funders are critically important, but their resources are modest compared with the scale of current and potential federal and state funding cuts.

Nonprofits have no choice but to adapt. Many are already diversifying their revenue streams, strengthening fundraising, and evaluating expenses. The Foundation is hearing more organizations discuss program reductions, staffing changes, shared services, and, in some cases, mergers.

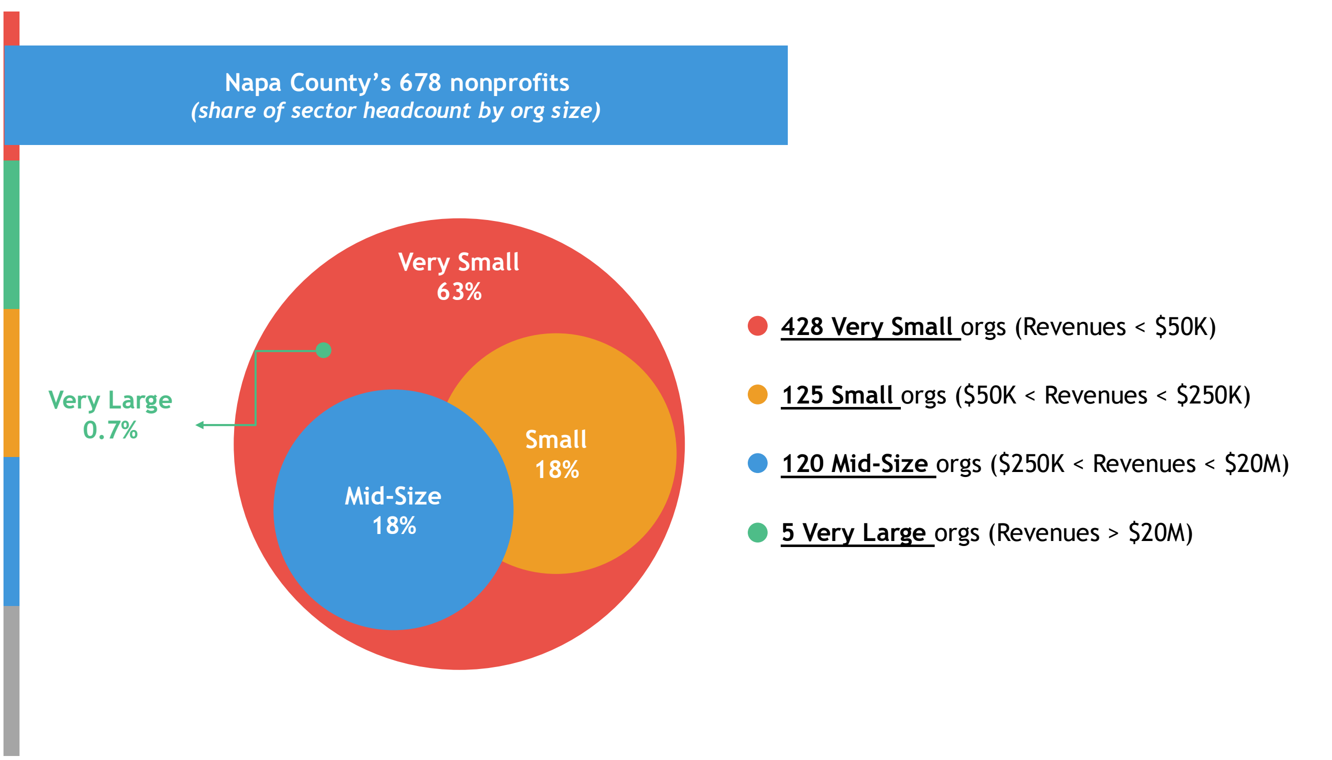
There are also opportunities ahead. Many donors with significant philanthropic capacity live in Napa full- or part-time but give through foundations, donor advised funds, or family offices based elsewhere. Those donors represent an important source of support that is often not easy for local nonprofits to reach. At a time when pressures on the wine industry may constrain local giving, engaging these donors will become even more important.

Part Three — Inside the nonprofit sector: size and scale

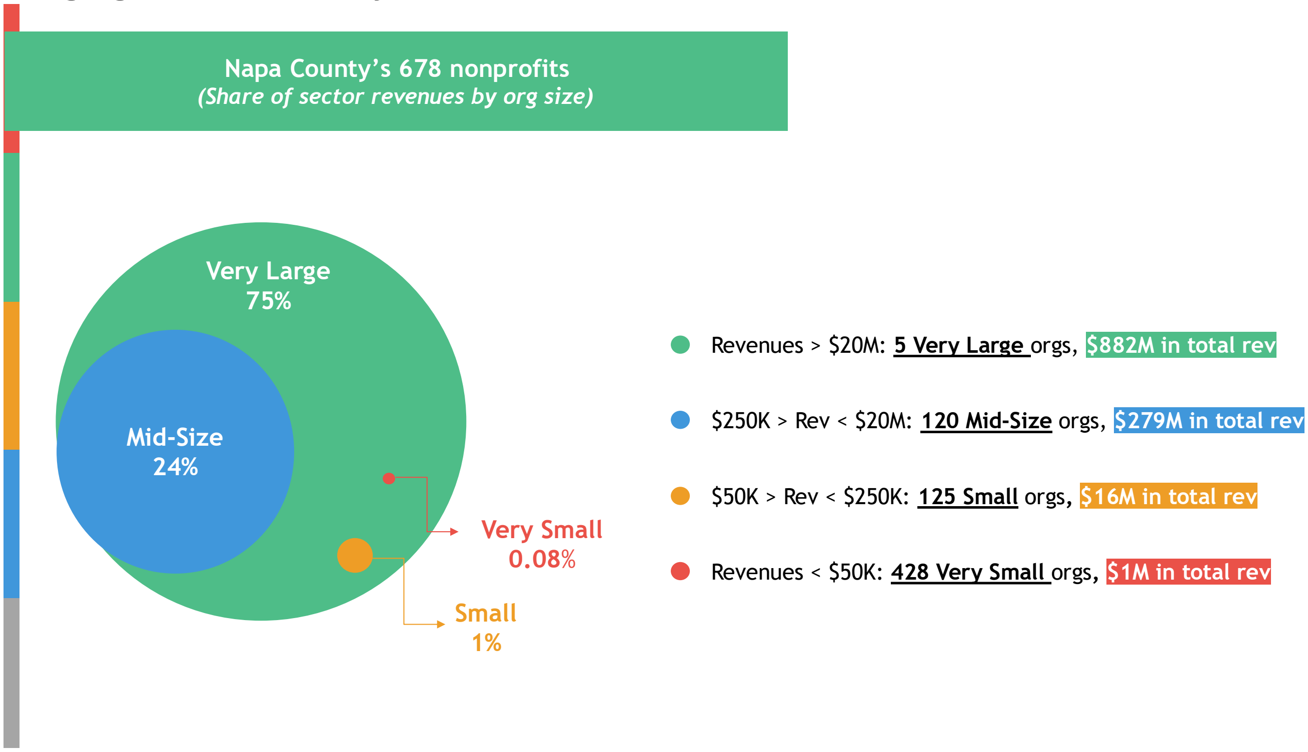
Bottom-heavy by count, top-heavy by revenues

The most important thing to understand about Napa's nonprofit sector is that it looks completely different depending on whether you count organizations or dollars.

By number, the sector is bottom-heavy, with small and very small organizations representing 82% of all nonprofits.



By revenues, the picture is almost the reverse, with very large and mid-size organizations accounting for 99% of the dollars brought in by the sector. **Put another way, most of Napa's nonprofits are doing a great deal with very little.**



Small is not the same as fragile

It might be tempting, having seen that 82% of Napa's nonprofits are small or very small, to conclude that something is amiss. The reality is more nuanced. Many of Napa's smallest organizations are intentionally small—volunteer-led, proximate to the constituents they serve, focused on a single purpose, and designed to operate with little or no paid staff or office overhead. A youth sports league, a garden club, or a congregation supported by member dues are largely insulated from federal funding cuts because they have never depended on government funding in the first place. In these cases, smallness is a strength, not a weakness.

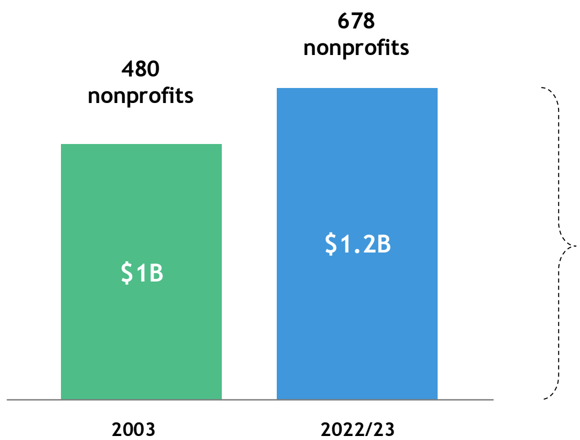
The organizations facing the greatest risk are different. They are the nonprofits that depend on government grants, contracts, and reimbursements to deliver essential services. As the next sections show, that exposure is concentrated not among the smallest organizations, but among the mid-size nonprofits that form the backbone of Napa's social safety net, and among a handful of very large organizations, as well.

A sector still maturing

Over the past twenty years Napa's nonprofit **sector grew both in number (up 41%) and revenues (up 20%)**, with the number of organizations growing roughly twice as fast as total revenue. This pattern is what we'd expect to see: new nonprofits typically start small, and many take years to grow into the mid-size range. Notably, nearly half (47%) of today's nonprofits were incorporated in the 2010s and early 2020s — a period in which Napa County's population began to decline (which might suggest the need for fewer nonprofits), but also a period in which income inequality, as measured by the U.S. Census Bureau's "GINI" index, continued to grow (which might suggest the need for more nonprofits). At the same time, 178 organizations that existed twenty years ago have since ceased operations. Like the community it serves, Napa's nonprofit sector continues to evolve.

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

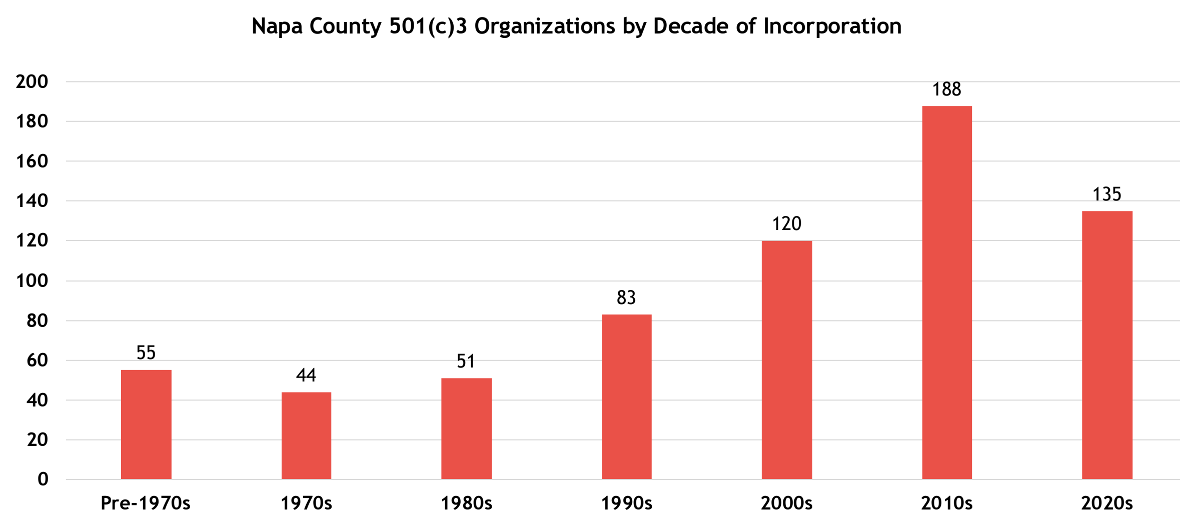
Growth in nonprofit sector
(2003 to 2022/23)



Percentage growth over period

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

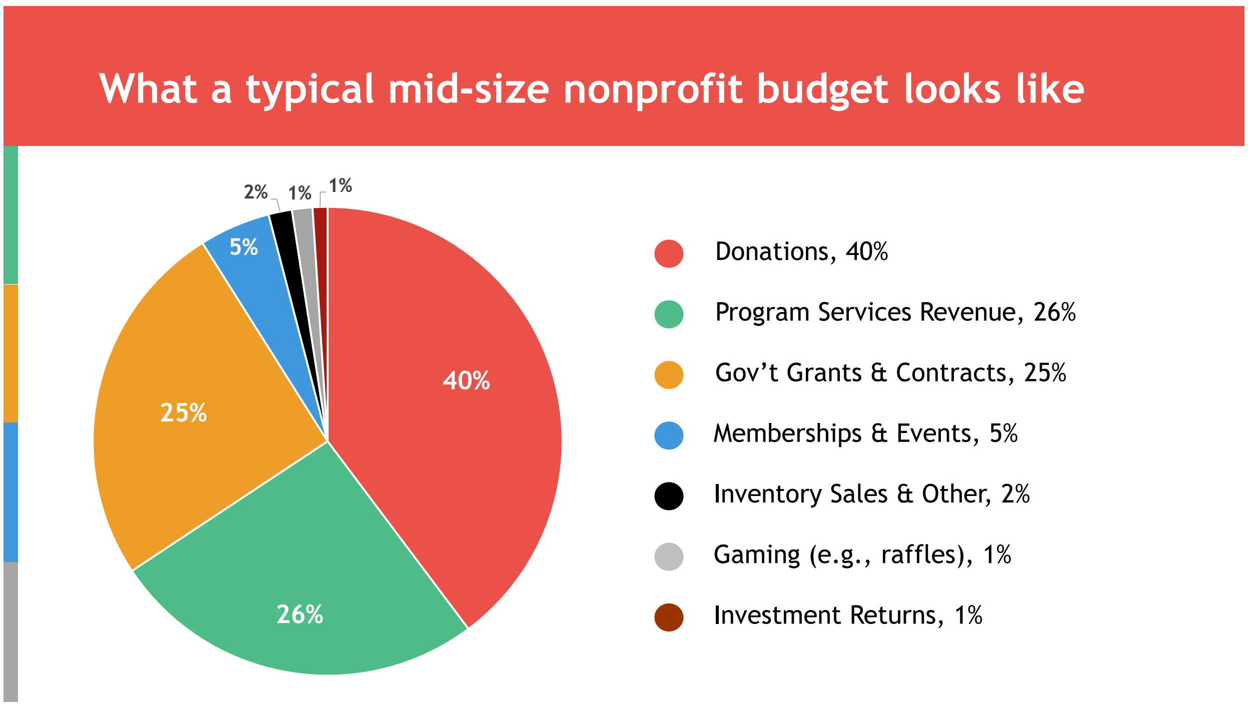
Nearly half (47%) of today's nonprofits were incorporated in the 2010's and the first half of the 2020's.



The mid-size nonprofits at the center

NVCF partners most often with the 120 mid-size organizations, which deserve a closer look because they deliver a broad range of critical services and programs that benefit thousands of our neighbors every year. Together, mid-size nonprofits bring in about $280 million annually, with budgets ranging from $250,000 to $20 million (median $1 million, average $2.3 million). Examples of mid-size organizations include UpValley Family Centers, Puertas Abiertas Community Resource Center, Aldea, Land Trust of Napa County, and NEWS.

On average, their revenues break down as follows: 40% from individual, corporate, and foundation donations; 26% from program-service revenue (mainly reimbursements from government programs like Medi-Cal for health and social services nonprofits, or things like ticket sales for arts organizations); 25% from government grants and contracts; and the remaining 9% from memberships, events, investment returns, and gaming.



The grants, contracts, and service revenues at risk

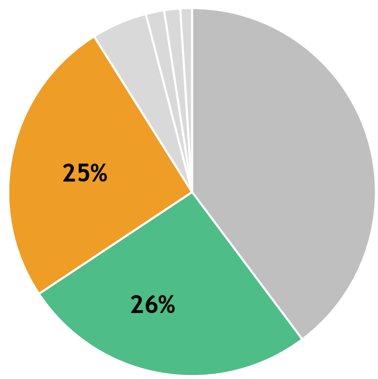
A closer look at those revenue sources reveals our nonprofit sector's greatest vulnerability. Together, **government grants and contracts (25%) and program-service revenue (26%) account for 51% of mid-size organization's revenues, on average.**

Government grants and contracts are directly exposed to the federal and state cuts already underway, as well as those expected under H.R. 1. Program-service revenue is also overwhelmingly from public funding sources, consisting largely of Medi-Cal and other government reimbursements, along with a much more modest piece from sliding-scale fees paid by low-income clients. Those reimbursement rates are set by government, not the nonprofit, and can be reduced or changed at any time. So, too, with rules about eligibility. With the number of people covered by Medi-Cal projected to decline under H.R. 1 by 2.98 million in California alone (source), raising fees for low-income clients to offset reductions in government reimbursements is generally not an option, as it can make services unaffordable for the very people nonprofit organizations exist to help.

Government funding also comes with inherent cash-flow challenges for nonprofits: many government contracts require nonprofits to deliver services first *before* they receive reimbursements. For organizations operating on thin margins, delayed reimbursement payments can create serious financial strain.

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 H.R. 1.



Program-Service 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)

Which organizations are most exposed

Risk is not spread evenly. Drawing on where the money comes from, the organizations facing the greatest exposure are those that rely heavily on government grants, contracts, and reimbursements to deliver essential safety net services. Those nonprofits generally makeup what we think of as the social safety net: direct-service nonprofit organizations that respond to the ongoing and essential needs of children, working families, and seniors in Napa County and provide programs — often under contract with a government entity — that positively impact the health of our community overall.

This list includes, but is not limited to, nonprofits that provide direct services in the areas of: physical, mental and behavioral health; disability assistance; food security; childcare; legal support; housing; and more.

Because nonprofit organizations exist, in part, to lessen the burdens of government, these organizations are expected to step up when the government is providing less assistance to residents. When the organizations that are relied on most by residents in difficult times face financial strain themselves, the consequences extend beyond individual nonprofit organizations and affect the entire community.

What this study cannot tell us yet

Understanding these findings also means recognizing the limits of the available data. Because nonprofit tax filings aggregate several funding sources, important questions remain beyond what the data alone can answer:

- **How much of the 45% comes from federal, state, or local government?** IRS filings combine these sources into a single category, making it difficult to determine precise exposure to any one level of government.
- **Which grants and contracts will ultimately be affected?** Changes in federal policy are implemented over time, and funding often flows through multiple levels of government before reaching local nonprofits.
- **How much private philanthropy could realistically offset funding reductions?** Donor advised funds and private foundations connected to Napa but based elsewhere are largely invisible in the available data.
- **How many organizations are already planning program reductions, layoffs, mergers, or closure?** NVCF is hearing these ideas considered more frequently, but no comprehensive data exist yet.

None of these questions change the overall direction of the findings. They do, however, underscore the need for continued listening, monitoring, and analysis as conditions evolve.

A collective call to action

Several themes are consistent in this report.

Government funding reductions are creating gaps that current philanthropic giving patterns alone cannot fill. With nearly half of the sector's revenues tied to public funding decisions, changes in government policy have direct consequences for Napa residents. When nonprofits reduce services or close programs, the effects are felt in increased hunger, poorer health, greater social isolation, and more housing instability.

Nonprofits, for their part, will need to **diversify their revenues** and strengthen the **administrative capacity** that competing for (and retaining) public funds increasingly requires. In addition, they will need to take a clear-eyed **look at efficiencies**, which could include **trimming programs, reducing staff, consolidating back-office functions across multiple organizations, and potential mergers.**

Donors and funders have a role that only grows more important. Multi-year, unrestricted support provides nonprofits with the stability they need to plan, adapt, and continue serving the community through uncertain times, and this kind of support is what we are urging local donors to consider providing, if they are able to do so.

Napa has built nearly 680 nonprofit organizations to care for its residents. That reflects a community with deep generosity and a commitment to neighbors helping neighbors.

The invitation of this report, to nonprofits, donors, businesses, government, and residents, is simple: Let’s **meet the moment together** to ensure that Napa’s nonprofit sector remains strong for the people in our community who depend upon it.

What NVCF is doing: the Elaine Jones Safety Net Fund

NVCF's most direct, but not only, response is the **Elaine Jones Safety Net Fund**. Last year, the Fund launched and made its first-ever investment of $1.65 million in 15 nonprofits, including $1.2 million in unrestricted, general operating support grants and $450,000 in capacity building grants.

The Fund has been designed to be both a lifeline and a compass for Napa County nonprofit organizations as they navigate this time of increased need for services coupled with a decrease in funding to provide services.

The unrestricted, general operating support is intended to keep essential services available in the short term, while organizations adjust to decreased revenues and increased demand.

Capacity building grants provide funding to pay for professional technical assistance that helps nonprofits strengthen business operations, diversify revenues, and seek efficiencies. This type of funding is generally scarce and difficult for nonprofits to access, especially when community need calls for them to spend more on service delivery.

Fundraising continues and the Fund will launch its second year of investments in fall, 2026.

How the Elaine Jones Safety Net grants program works:

General operating support helps nonprofits sustain essential services in the face of government funding cuts, sized to each organization's budget and demonstrated funding gap.

Capacity building grants help organizations strengthen their systems and long-term sustainability — building new revenue sources, for example, or exploring mergers with other nonprofits.

Bridge loans, offered at 0% interest, help nonprofits manage short-term cash-flow gaps caused by delayed — but not reduced — government funding.

An illustration

When the first Safety Net Fund grants went out, Puertas Abiertas — a family resource center serving Napa's Latino community — was managing a leadership transition and a move into a new building just as demand surged, with the number of people it served jumping roughly 30% in a single year, from about 3,500 to 4,600, handled by a staff of seven. A $100,000 unrestricted operating grant let it keep programs running even where dedicated funding had vanished, including La Cultura Cura, a cultural-wellness workshop series for older adults whose grant support had been cut entirely.

A separate $50,000 capacity building grant did the longer-term work: half ($25k) funded grant-writing support that went on to secure roughly $260,000 for the new building, and the balance ($25k) backed a board governance project that moved the board from day-to-day operations toward strategic leadership. The flexibility was the point — it let the organization direct each dollar to where the need was sharpest while it found its footing for the years ahead.

Alongside the Fund, the Foundation is deepening its investments in advocacy, capacity building, and partnerships with local government. We believe the best path forward through these pressures is for funders, nonprofits, and government to **work together**.

About this study: methodology, scope, and sources

This study counts 501(c)(3) public-benefit organizations incorporated in Napa County. That boundary misses organizations incorporated elsewhere that nonetheless provide important services here, and counts revenues from Napa-based nonprofits that also provide services in neighboring counties. Similarly, it undercounts hundreds of donor advised funds (DAFs) and family foundations that are associated with local givers but domiciled beyond our borders. Thus, the figures in this report are best read as a reliable picture of the sector's shape and scale, not a precise census.

Current data comes from DataLake, LLC, an independent research firm working from the IRS exempt-organization business master files for 2022–2023. Historical 2003 figures come from the University of San Francisco's Institute for Nonprofit Organization Management, and all dollar comparisons are adjusted for inflation.

Importantly, Providence Queen of the Valley Medical Center did not file a standalone Form 990 in 2022-2023, so it does not appear in this dataset. That is a significant gap: before its merger into Providence, the Queen reported revenues of roughly $268 million.

Get in touch

Napa Valley Community FOUNDATION

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About Napa Valley Community Foundation

Napa Valley Community Foundation works side-by-side with local donors and nonprofits to tackle the most important challenges the Valley faces. Now celebrating nearly 32 years of service to the community, the Foundation has distributed more than $120 million in grants to improve the quality of life for residents of the region and currently serves as the philanthropic partner to thousands of individuals, families, nonprofit agencies and corporations in Napa Valley and beyond. To learn more, visit napavalleycf.org.