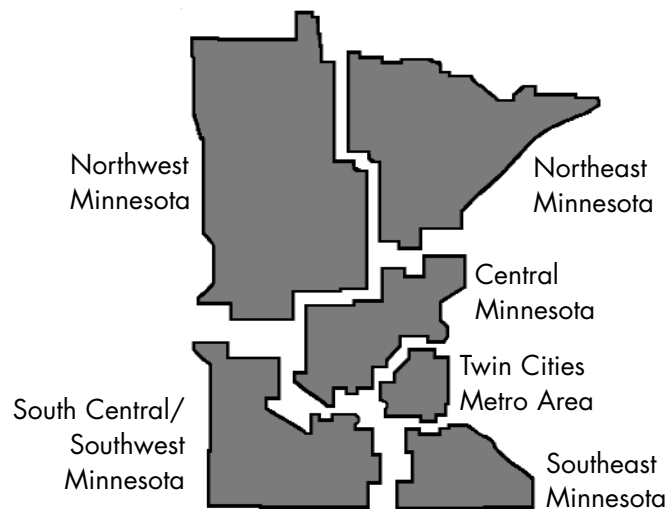


Minnesota Nonprofit Economy Report

A Statewide and Regional Analysis



2008



An annual study that describes the role of nonprofit organizations in Minnesota's economy.

Using this Report

Like every other industry in the United States, the nonprofit sector benefits from having timely information on economic performance. The Minnesota Council of Nonprofits' *Minnesota Nonprofit Economy Report*, published annually for the last twelve years, provides the most current and comprehensive nonprofit economic information available in the nation. Minnesota ranks at or near the top in virtually every measure of nonprofit and philanthropic activity. This success is due to substantial donations of time and financial resources by the people of Minnesota, generous support from Minnesota's business community and strong partnerships with state and local governments.

The *Minnesota Nonprofit Economy Report* – when used together with the *Minnesota Salary and Benefits Survey* and other publications from the Minnesota Council of Nonprofits – has important uses for five distinct audiences:

- **Managers of nonprofit organizations:** planning budgets, evaluating revenue streams and identifying potential partnerships
- **Nonprofit boards of directors:** developing strategic plans, informing board trainings and evaluating staffing and compensation plans
- **Government officials:** understanding nonprofit funding streams and identifying partnership opportunities
- **Donors to nonprofits:** understanding the sources of support and nature of expenditures of nonprofit organizations
- **Economic and community development planners:** incorporating nonprofit employment trends into economic development plans and understanding regional differences and local economies

The Authors

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The Minnesota Council of Nonprofits (MCN) is the statewide association of more than 1,900 Minnesota nonprofit organizations. Through its Web site, publications, workshops and events, cost-saving programs and advocacy, MCN works to inform, promote, connect and strengthen individual nonprofits and the nonprofit sector.

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2008 Minnesota Nonprofit Economy Report

Executive Summary

Nonprofit organizations play a vital – and often unrecognized – role in Minnesota’s economy. To provide a sense of the scope of the nonprofit economy in the state, consider these facts: In 2007, there were more than 3,500 nonprofits in Minnesota with at least one paid employee. These nonprofits employed one out of every 10 workers in the state and paid nearly \$12 billion in wages. There were at least another 3,600 nonprofits operating without any paid employees. Altogether, in 2007 the nonprofit sector reported about \$29 billion in expenditures and held more than \$56 billion in assets.

Nonprofits are essential to the Minnesota economy. The *Minnesota Nonprofit Economy Report* is an annual study by the Minnesota Council of Nonprofits that analyzes public data on nonprofit employers, employment, wages and finances to describe the role nonprofit organizations play in the state’s economy. This year’s report uses data from 2007, the most current information available.

Economic downturn touches nonprofit sector

The first evidence that Minnesota’s nonprofit sector is feeling the effects of the recent economic downturn may be found in this year’s report. In 2007, the sector experienced a decline in both the total number of nonprofit employers and the number of nonprofit employment locations (one nonprofit employer may have more than one location within the state).

The decline in employers and locations may indicate that nonprofits are closing branch offices, merging with other organizations or shutting their doors altogether. Of the major nonprofit industries, only ambulatory health care experienced an appreciable increase in employment locations in 2007. Every other industry examined experienced flat, or even negative, growth in employment locations.

It is important to note, however, that this downward trend began before the official start of the recession (which was December 2007). Minnesota’s nonprofit sector did not experience a similar net loss in employers or employment locations during the 2001 recession.

Nonprofit workforce continues strong growth

The state’s nonprofit workforce did not yet show any signs of the weakening economy in 2007. The number of nonprofit jobs in

Table of Contents

- 2 Statewide Analysis
- 6 Twin Cities Metro Area Analysis
- 9 Northeast Minnesota Analysis
- 12 Northwest Minnesota Analysis
- 15 Central Minnesota Analysis
- 18 Southeast Minnesota Analysis
- 21 South Central/Southwest Minnesota Analysis
- 24 Appendix

Minnesota increased by nearly 4% in 2007, the strongest annual growth the sector has seen since the late 1990s. Moreover, this growth significantly outpaced growth in the government and for-profit sectors, where employment numbers remained virtually flat in 2007.

The growth in employment occurred in nearly every nonprofit industry examined. Health care saw the biggest gains in employment in 2007, while social advocacy organizations and community relief services (such as food shelves and emergency shelters) were among the few nonprofit industries to experience a net decline in employment.

An uncertain future for nonprofit finances

The continued ability of the nonprofit sector to generate new jobs for Minnesota’s economy depends on the financial health of organizations. The national recession, however, is likely to destabilize key nonprofit revenue sources such as government grants and contracts and charitable contributions.

This report examines the finances of more than 7,100 nonprofits in Minnesota – most of the 501(c)(3) and 501(c)(4) organizations that were required to file a return with the IRS. (This number far exceeds the number of nonprofit employers because a majority of nonprofit organizations operate without any paid staff.)

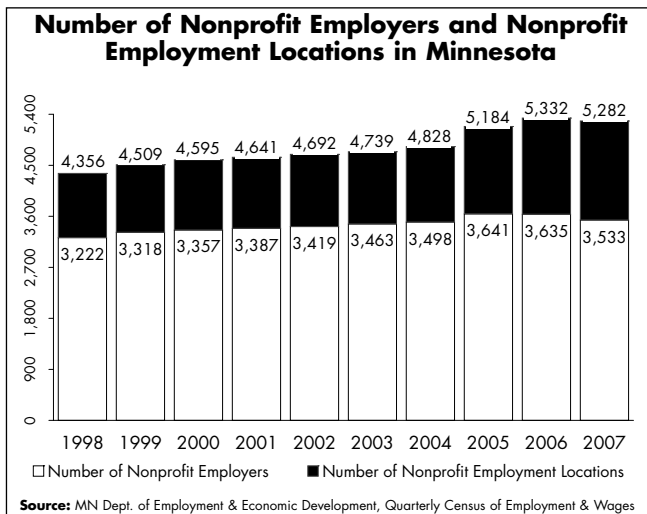
The analysis reveals several vulnerabilities in the sector. In 2007, nonprofits in Minnesota raised more than \$33 billion in revenues, but how an organization raises those funds can vary greatly. The largest organizations in the state rely mostly on program service revenue, which usually includes government fees and contracts. Smaller nonprofits rely heavily on charitable contributions (which includes foundation grants) and government grants to fund their services.

Recent trends in these revenue sources raise concerns for the future. A study of Minnesota’s nonprofit sector conducted by the Minnesota Council of Nonprofits and the Humphrey Institute of Public Affairs in early 2007 found that two-thirds of the nonprofits surveyed reported flat or declining revenues from government and foundation sources over the past two years. Individual donations fared slightly better – but more than half of the organizations had not seen any increase in total donations over the last two years. ❖



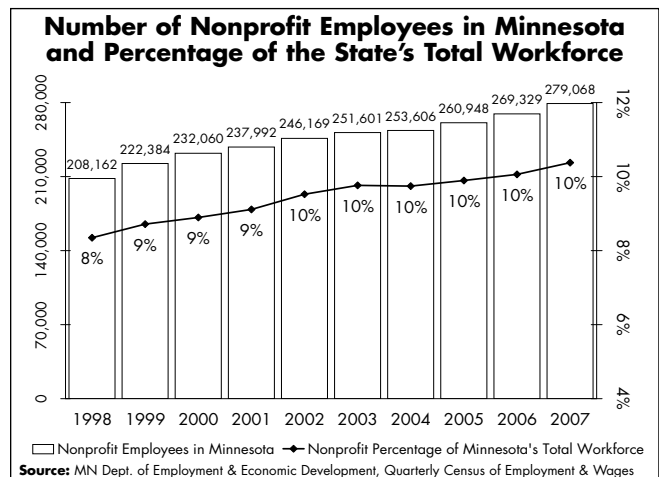
Statewide Nonprofit Employment

Statewide Overview: The nonprofit sector plays an important role in Minnesota's economy, employing one out of every 10 workers in the state and paying close to \$12 billion in wages in 2007. The number of nonprofit jobs in Minnesota continued to expand in 2007, even as the number of nonprofit employers and employment locations declined. Health care is the largest nonprofit industry in the state, employing two-thirds of the nonprofit workforce. In 2007, health care was the only industry to see an increase in nonprofit employment locations, although nearly every industry examined experienced an increase in nonprofit jobs.



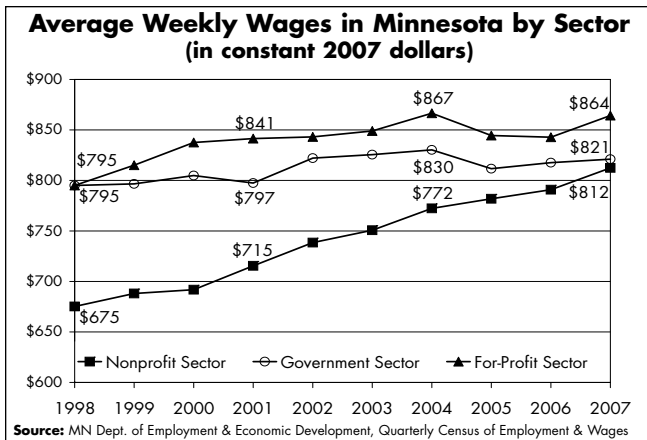
- In 2007, there were over 3,500 nonprofit employers in Minnesota, a decline of about 100 employers from the previous year. This is the second consecutive year there has been a decline in the number of nonprofit employers in the state.
- A single nonprofit employer may have more than one location in the state. In 2007, the 3,533 nonprofit employers in the state operated close to 5,300 employment locations in Minnesota. This represented a slight decline from the previous year – the first decline in nonprofit employment locations since the 1980s.
- Just over half, or 52%, of Minnesota nonprofit employment locations were located in the seven-county Twin Cities metro area in 2007. Of the remaining nonprofit employment locations, 13% were in Northwest Minnesota, 9% were in Southeast Minnesota, 9% were in South Central/Southwest Minnesota, 8% were in Central Minnesota and 7% were in the Northeast.

- In 2007, only two regions did not experience a decline in the number of nonprofit employment locations – Northwest and Southeast Minnesota – although the growth in these two regions was minimal.
- The nonprofit sector provided nearly 280,000 jobs in Minnesota in 2007, employing one out of every 10 workers in the state. Every region in the state experienced an increase in the number of nonprofit jobs. Over the last decade, nonprofit employment in Minnesota has increased an average of 3% each year, while government and for-profit employment have each increased an average of only 1% per year.
- More than half of all nonprofit jobs were located in the Twin Cities metro area in 2007 (53%), another 17% were in Southeast Minnesota, 9% were in Northwest Minnesota, 8% in Central Minnesota, 7% in Northeast Minnesota and 6% in South Central/Southwest Minnesota.



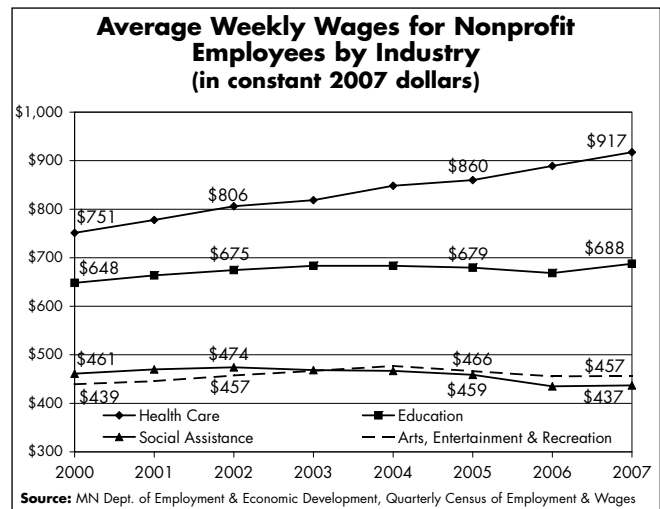


Statewide Nonprofit Wages



- Health care – which includes ambulatory health care services, hospitals, and nursing and residential care facilities – makes up the largest segment of Minnesota’s nonprofit economy. In 2007, these health care industries accounted for more than one out of every four nonprofit employment locations in the state, employed two out of every three nonprofit workers, and paid three out of every four dollars in nonprofit wages.
- The nonprofit sector is also widely associated with providing social assistance, such as delivering individual and family services; food, housing, emergency and other relief services; vocational rehabilitation services; and child day care services. In 2007, 22% of nonprofit employment locations and 10% of nonprofit jobs were involved in delivering social assistance services in Minnesota.
- Other industries with a large share of the nonprofit economy in 2007 included educational services (with 9% of nonprofit employment locations and 9% of the nonprofit workforce) and arts, entertainment and recreation (with 7% of nonprofit employment locations and 2% of the nonprofit workforce).
- In 2007, nonprofit employers paid \$11.8 billion in wages, or 10% of all wages paid in the state. After adjusting for inflation, this represented a 6% increase in the total nonprofit payroll from 2006 – twice the rate of increase in the for-profit sector.

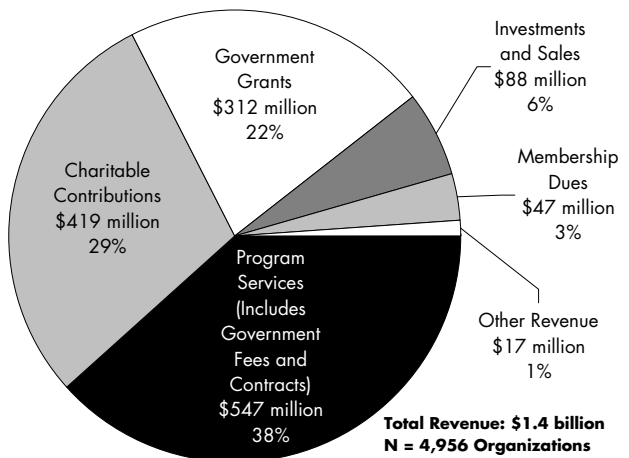
- Average weekly wages in the nonprofit sector have been steadily increasing, closing the gap with the government and for-profit sectors. Over the last decade, the nonprofit average weekly wage has increased an average of 2% per year, which was at least twice as fast as the growth in the average weekly wage of the for-profit and government sectors.
- The growth in nonprofit wages has been driven largely by increases in the health care sector. After adjusting for inflation, the average weekly wage in the nonprofit health care industry has increased 22% since 2000. During the same period of time, the average weekly wage in the nonprofit education industry grew just 6% and arts, entertainment and recreation increased by only 4%. In social assistance, the inflation-adjusted average weekly wage has actually declined by 5% since 2000.
- Although wages between nonprofit industries can vary substantially, the median hourly wage for full-time employees in the nonprofit sector is usually competitive within that industry, often exceeding the median hourly wage for a full-time government or for-profit employee working in the same industry. In most cases, the median hourly wage for a nonprofit employee is also sufficient to support the basic needs of a family of four in the region where the job is located (with two adults working full-time).





Statewide Nonprofit Finances

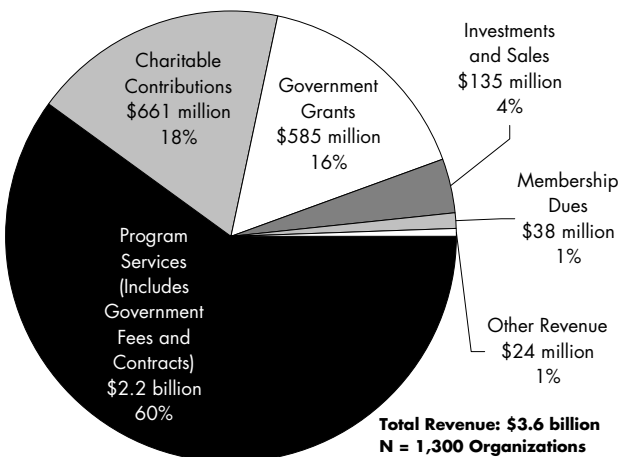
**Revenue Sources for Small Nonprofits
(with assets under \$1 million)**



Source: MCN's analysis of data from the Minnesota Attorney General's Office, Charities Division

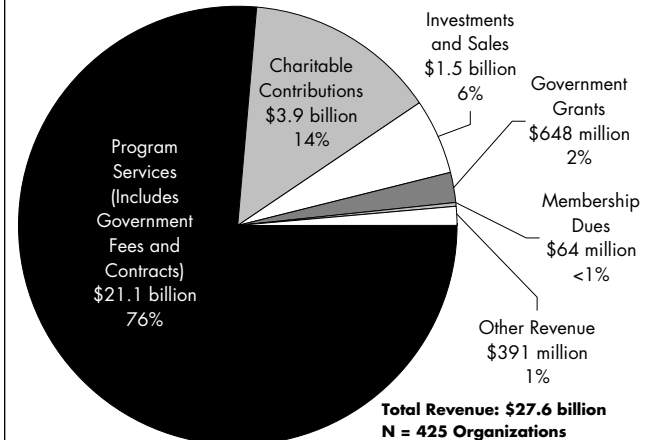
- There are a substantial number of nonprofits in Minnesota that operate without any paid employees. Looking at nonprofit finances — revenues, expenditures and assets — captures the economic activity of nonprofits with and without paid staff. This report analyzes the most recent financial return (from 2006 or 2007) for more than 7,100 charitable organizations in the state. The analysis includes most of the 501(c)(3) and 501(c)(4) organizations that were required to file returns with the IRS, but notably excludes private foundations and thousands of small nonprofits with minimal financial activity.
- Nonprofit organizations in Minnesota receive their revenues from four main sources: program services (which includes revenue from government contracts), charitable contributions (which includes corporate and foundation grants), government grants, and returns from investments, sales and special events. The mix of revenues, however, varies based on the organization's size, with small organizations raising more from charitable contributions and government grants and larger organizations earning a higher percentage from program service revenue (which includes government fees and contracts). The mix of revenues also varies depending on the organization's activity area.

**Revenue Sources for Medium-Sized Nonprofits
(with assets between \$1 and \$10 million)**



Source: MCN's analysis of data from the Minnesota Attorney General's Office, Charities Division

**Revenue Sources for Large Nonprofits
(with assets over \$10 million)**



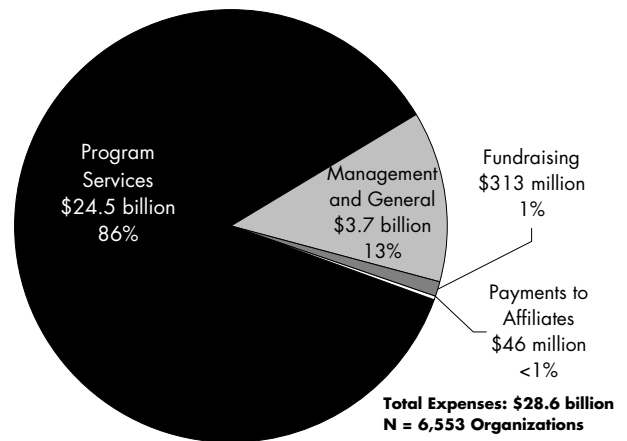
Source: MCN's analysis of data from the Minnesota Attorney General's Office, Charities Division



Statewide Nonprofit Finances

- The Charities Review Council of Minnesota recommends that nonprofits spend at least 70% of their total annual expenses on program services and no more than 30% on management and fundraising. In 2007, nonprofits in Minnesota spent on average 86% of their revenues on program services and 13% on management and fundraising. These percentages did not vary significantly by the size of the organization.
- Nonprofit organizations in Minnesota reported \$56.0 billion in assets, with health organizations (including hospitals and HMOs) holding 50% of these assets and educational organizations (including colleges and universities) holding another 25%.
- Health organizations in Minnesota reported \$21.7 billion in revenues for their most recent fiscal year (90% from program services, 4% from charitable contributions, 3% from investments and sales, and 2% from government grants) and \$20.6 billion in expenses (86% for program services, 14% for management and less than 1% for fundraising).
- Human service organizations reported \$3.8 billion in revenues (56% from program services, 19% from charitable contributions, 16% from government grants and 5% from investments and sales) and \$3.7 billion in expenses (87% for program services, 11% for management and 2% for fundraising).
- Educational organizations reported \$3.2 billion in revenues (58% from program services, 18% from charitable contributions, 12% from investments and sales, and 10% from government grants) and \$2.7 billion in expenses (87% for program services, 10% for management and 2% for fundraising).
- Arts, culture and humanities organizations reported \$705 million in revenues (40% from charitable contributions, 28% from program services, 15% from investments and sales, and 14% from government grants) and \$625 million in expenses (80% for program services, 14% for management and 6% for fundraising).
- Environmental and animal-related organizations reported \$156 million in revenues (41% from charitable contributions, 28% from program services, 15% from investments and sales, and 11% from government grants) and \$145 million in expenses (82% for program services, 11% for management and 7% for fundraising).

Expenditures by Nonprofit Organizations Located in Minnesota

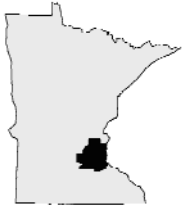


Source: MCN's analysis of data from the Minnesota Attorney General's Office, Charities Division

Classifying Nonprofits by Industry or Activity Area

This report uses two methods of classifying nonprofit organizations. Nonprofit employers, employees and wages are classified using the North American Industry Classification System (NAICS), which is described in detail in Appendix A. Nonprofit financial information is classified using the National Taxonomy of Exempt Entities (NTEE) classification system. The five main activity areas of the NTEE system used in this report are described below.

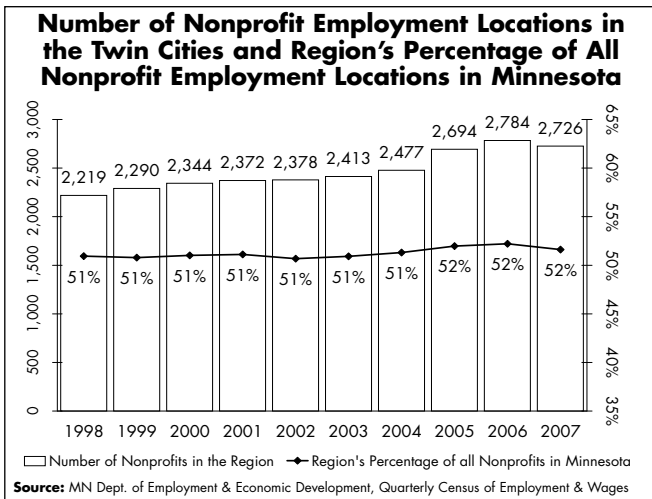
- **Health:** activities include, but are not limited to, hospitals, ambulatory health care, rehabilitative care, public health, nursing care, mental health treatment, substance abuse treatment, HMOs and medical research.
- **Human Services:** activities include, but are not limited to, crime prevention and rehabilitation, abuse prevention, legal services, vocational counseling and rehabilitation, food programs, housing and shelter, disaster preparedness and relief, recreation and sports, youth development, child and youth services, emergency assistance and centers for specific populations.
- **Education:** activities include, but are not limited to, nonprofit elementary and secondary schools, vocational and technical schools, higher education, adult education, libraries, educational services and student services.
- **Arts, Culture and Humanities:** activities include, but are not limited to, arts education, media and communications, visual arts, museums, performing arts and historical preservation.
- **Environmental and Animal-Related:** activities include, but are not limited to, natural resources conservation and protection, pollution abatement and control, horticulture, animal protection and welfare, wildlife preservation, veterinary services, and zoos and aquariums.



Twin Cities Metro Area Nonprofit Employment

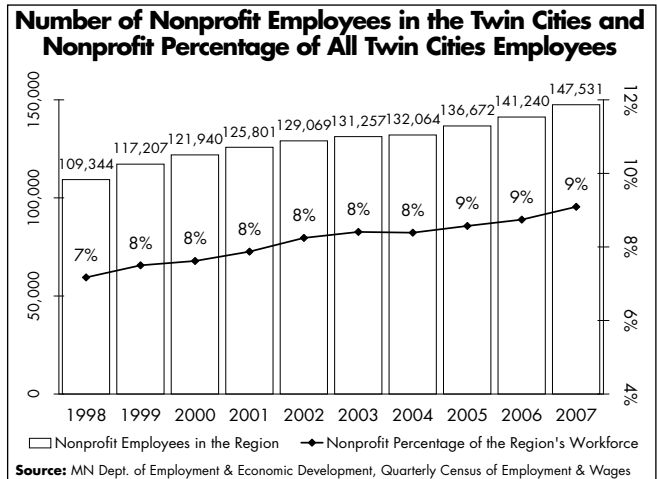
Counties: Anoka, Carver, Dakota, Hennepin, Ramsey, Scott, Washington

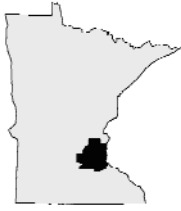
Regional Overview: With more than 2,700 nonprofit employment locations and over 147,500 nonprofit jobs, the seven-county Twin Cities metro area was home to over half of the state's nonprofit sector in 2007. Hennepin and Ramsey counties alone accounted for 41% of nonprofit employment locations and 45% of nonprofit jobs in the state. Although the nonprofit sector experienced strong growth in 2007, with 4% growth in employment and a 6% increase in inflation-adjusted payroll, there are signs of a slowing economy. After eight consecutive years of growth, there was a decline in the number of nonprofit employment locations in the region in 2007.



- A majority of the state's nonprofit employment locations – 52% – were located in the Twin Cities metro area in 2007.
- After eight consecutive years of growth, the seven-county Twin Cities metro area experienced the first decrease in the number of nonprofit employment locations. There were 2,726 employment locations in the region in 2007, 2% less than in 2006. However, the total number of for-profit employment locations in the region also declined (by 3%).
- With over 147,500 employees, nonprofits in the Twin Cities employed 53% of the state's total nonprofit workforce in 2007.
- Although the nonprofit sector accounted for just 3% of all employment locations in the region, the nonprofit share of the Twin Cities workforce continues to edge higher, surpassing 9% in 2007.

- Nonprofit employment in the Twin Cities has been growing faster than employment in the government and for-profit sectors. The nonprofit workforce experienced a 4% increase in 2007 and has increased an average of 3% per year over the last ten years. Employment growth in the government and for-profit sectors has averaged around 1% per year over the last ten years.
- In 2007, half of all nonprofit employment locations in the Twin Cities region were in Hennepin County, with another 30% in Ramsey County. Nonprofit jobs were similarly distributed, with 54% of the region's nonprofit jobs in Hennepin County and 30% in Ramsey County. Together these two counties accounted for 41% of the nonprofit employment locations in the state and 45% of the state's nonprofit jobs.
- Every county in the Twin Cities region experienced an increase in nonprofit employment in 2007, with the strongest growth in Hennepin (6% increase) and Washington (4% increase) counties.





Twin Cities Metro Area Nonprofit Wages

Counties: Anoka, Carver, Dakota, Hennepin, Ramsey, Scott, Washington

Median Hourly Wages for Full-Time Employees in the Twin Cities Metro Area

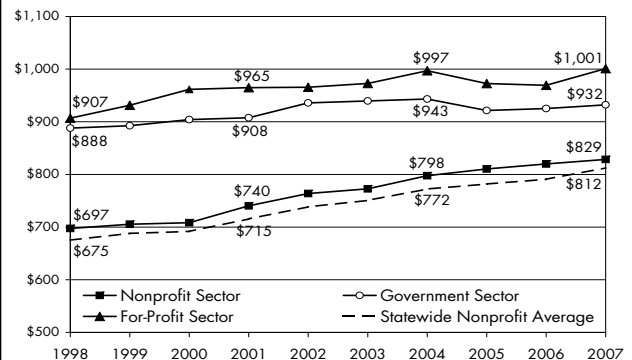
Industry	Full-Time Median Hourly Wage by Sector (% of the sector's total employment in the region)		
	Nonprofit	For-Profit	Government
Arts, Entertainment & Recreation	\$16.75 (3%)	\$13.47 (2%)	\$16.67 (1%)
Educational Services	\$20.53 (11%)	\$20.19 (1%)	\$23.84 (47%)
Health Care			
Ambulatory Health Care Services	\$23.45 (11%)	\$20.20 (4%)	\$24.75 (<1%)
Hospitals	\$29.25 (36%)	\$21.83 (<1%)	\$21.90 (2%)
Nursing & Residential Care Facilities	\$15.08 (12%)	\$13.42 (2%)	\$18.97 (1%)
Social Assistance			
Individual & Family Services	\$15.67 (6%)	\$11.18 (1%)	NA
Community Food, Housing, Emergency & Other Relief Services	\$16.03 (1%)	\$15.90 (<1%)	NA
Vocational Rehabilitation Services	\$13.93 (3%)	\$16.47 (<1%)	\$25.00 (<1%)
Child Day Care Services	\$12.47 (1%)	\$11.60 (<1%)	\$16.18 (<1%)
Other Services			
Religious Organizations	\$18.01 (1%)	\$11.00 (<1%)	NA
Grantmaking & Giving Services	\$24.20 (1%)	\$25.04 (<1%)	NA
Social Advocacy Organizations	\$16.16 (2%)	\$17.48 (<1%)	\$29.49 (<1%)
Civic & Social Organizations	\$12.50 (3%)	\$11.04 (<1%)	NA

Source: MN Dept. of Employment & Economic Development, Enhanced Wage Records, 4th Quarter 2007
Notes: "NA" indicates either that the sector did not have any employees in that industry or that the information for that category was suppressed for reasons of privacy. The selected industries represented 91% of nonprofit employment, 10% of for-profit employment and 51% of government employment in the region in 2007. More extensive descriptions of these industries are available in Appendix A.

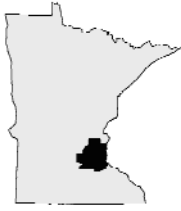
- The nonprofit health care industry is not as dominant in the Twin Cities as it is in other regions. Nevertheless, in 2007, health care accounted for 23% of the nonprofit employment locations and 59% of the nonprofit workforce in the region.

- Within the health care sector, however, there have been some interesting trends. Nonprofit employment in Twin Cities hospitals increased by 5,200 employees (or 11%) between 2006 and 2007. Nonprofit employment in nursing home facilities in the Twin Cities, however, has been slowly declining since 2003.
- Nonprofit organizations in the Twin Cities metro area paid \$6.4 billion in wages in 2007, or nearly 8% of all wages in the region. After adjusting for inflation, the total nonprofit payroll increased by 6% from 2006, while total for-profit payroll increased by 4% and government payroll declined by 1%.
- Despite steady increases, nonprofit average weekly wages in the Twin Cities continue to lag behind average weekly wages in the government and for-profit sectors. On average, in 2007 nonprofit employees were paid \$104 per week less than government employees and \$173 less than for-profit employees.
- Although there may be a wage gap between the nonprofit, government and for-profit sectors, in all but two of the industries examined, the median hourly wage for a full-time nonprofit employee exceeded the minimum amount necessary to support the basic needs of a family of four (two adults working full-time, two children). According to the JOBS NOW Coalition, in 2006, each adult needed to earn \$13.19 an hour to meet these costs in the Twin Cities metro area.

**Average Weekly Wages in the Twin Cities by Sector
(in constant 2007 dollars)**



Source: MN Dept. of Employment & Economic Development, Quarterly Census of Employment & Wages

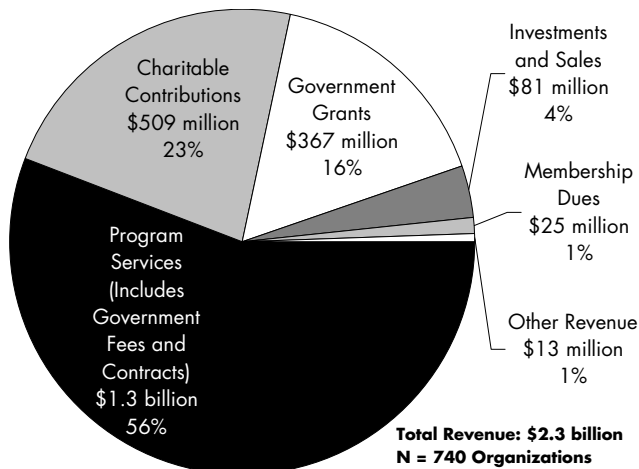


Twin Cities Metro Area Nonprofit Finances

Counties: Anoka, Carver, Dakota, Hennepin, Ramsey, Scott, Washington

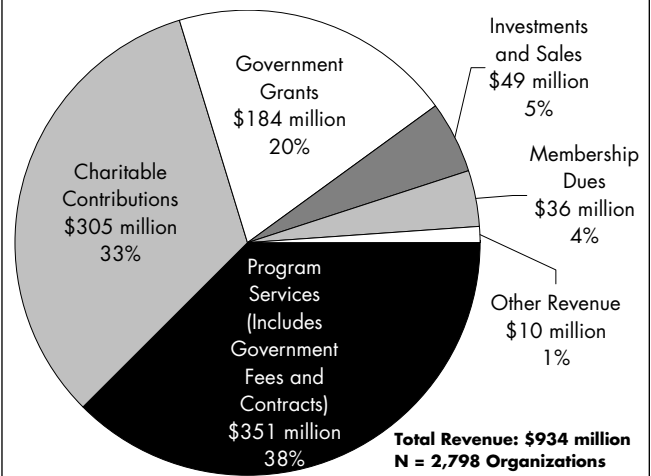
- Nonprofits in the Twin Cities metro area reported \$20.9 billion in revenues, \$17.9 billion in expenditures and \$35.7 billion in assets for the most current fiscal year.
- The five activity areas detailed below accounted for 86% of nonprofit revenues in the region, 96% of expenses and 87% of assets. Health organizations alone accounted for 59% of nonprofit revenues in the region, 67% of expenses and 36% of assets.
- Health organizations in the Twin Cities reported \$12.4 billion in revenues (90% from program services, 4% from charitable contributions, 2% from investments and sales, and 1% from government grants) and \$11.9 billion in expenses (85% for program services, 14% for management and less than 1% for fundraising).
- Human service organizations reported \$2.8 billion in revenues (56% from program services, 22% from charitable contributions, 13% from government grants and 5% from investments and sales) and \$2.7 billion in expenses (86% for program services, 11% for management and 2% for fundraising).

Revenue Sources for Medium-Sized Nonprofit Organizations Located in the Twin Cities (with assets between \$1 and \$10 million)



Source: MCN's analysis of data from the Minnesota Attorney General's Office, Charities Division

Revenue Sources for Small Nonprofit Organizations Located in the Twin Cities (with assets under \$1 million)



Source: MCN's analysis of data from the Minnesota Attorney General's Office, Charities Division

- Educational organizations reported \$2.1 billion in revenues (60% from program services, 16% from charitable contributions, 11% from government grants and 11% from investments and sales) and \$1.8 billion in expenses (87% for program services, 11% for management and 2% for fundraising).
- Arts, culture and humanities organizations reported \$632 million in revenues (39% from charitable contributions, 29% from program services, 15% from investments and sales, and 13% from government grants) and \$574 million in expenses (80% for program services, 13% for management and 6% for fundraising).
- Environmental and animal-related organizations reported \$124 million in revenues (42% from charitable contributions, 26% from program services, 17% from investments and sales, and 11% from government grants) and \$114 million in expenses (84% for program services, 8% for management and 8% for fundraising).

Note: This analysis includes 4,013 501(c)(3) and (4) organizations that filed a 990 or 990EZ financial return from an address located in the Twin Cities region. These figures may also include financial information for some organizations operating in other regions of the state, but with headquarters in the Twin Cities. This financial information excludes all other types of 501(c) organizations, private foundations that filed form 990PF and some charitable trusts.

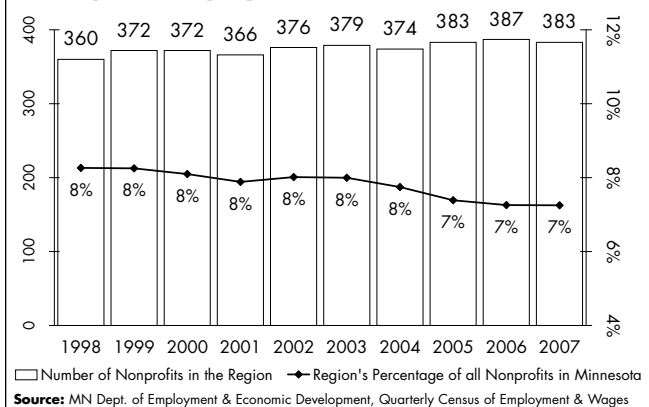


Northeast Minnesota Nonprofit Employment

Counties: Aitkin, Carlton, Cook, Itasca, Koochiching, Lake, St. Louis

Regional Overview: The nonprofit sector in the seven-county Northeast region is defined by two characteristics: it is concentrated in one county and it is dominated by one industry. Although the Northeast is the second-largest region in Minnesota in terms of square miles, in 2007, 80% of nonprofit jobs in the region were located in St. Louis County (home to the city of Duluth). And while health care plays an important role in the nonprofit sector in every region, it is particularly strong in Northeast Minnesota. In 2007, health care accounted for 78% of all nonprofit employees and 87% of all nonprofit wages in the region.

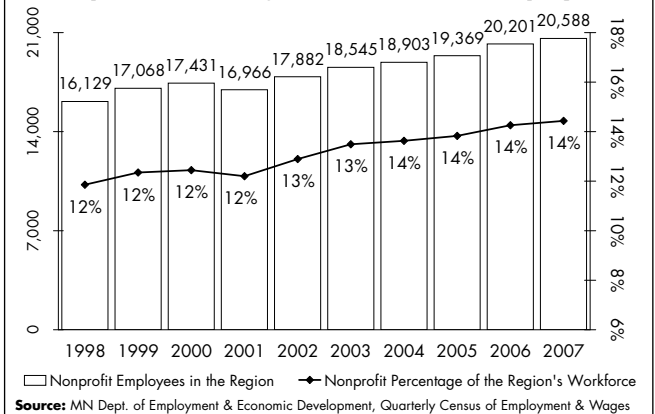
Number of Nonprofit Employment Locations in the Northeast and Region's Percentage of All Nonprofit Employment Locations in Minnesota



- With just 383 nonprofit employment locations in 2007, the Northeast region of Minnesota has the fewest nonprofit employment locations in the state.
- The number of nonprofit employment locations in Northeast Minnesota has changed little over the last decade, while the total number of nonprofit employment locations in Minnesota has increased by 21% during that time. As a result, the Northeast region's share of the state's nonprofit employment locations has been declining.
- As in other regions of the state, growth in nonprofit employment in Northeast Minnesota is outpacing increases in the government and for-profit sectors. Over the last ten years, nonprofit employment in the Northeast has increased an average of 3% per year, while total employment in the region has increased an average of just 1% per year.

- Consistent growth in employment has contributed to a strong nonprofit sector in Northeast Minnesota. In 2007, 14% of the region's workforce was employed by the nonprofit sector, surpassing the statewide average of 10%.
- The majority of nonprofit activity in the Northeast is located in St. Louis County, the largest county in the region and home to the city of Duluth. In 2007, St. Louis County accounted for 58% of the region's nonprofit employment locations and 80% of the region's nonprofit workforce. Within St. Louis County, the nonprofit sector employed more workers in 2007 than the entire government sector.
- Itasca County – with the regional center of Grand Rapids – is a distant second in nonprofit activity in Northeast Minnesota. In 2007, this county was home to 14% of the region's nonprofit employment locations and 8% of the region's nonprofit workforce.

Number of Nonprofit Employees in the Northeast and Nonprofit Percentage of All Northeast Employees





Northeast Minnesota Nonprofit Wages

Counties: Aitkin, Carlton, Cook, Itasca, Koochiching, Lake, St. Louis

Median Hourly Wages for Full-Time Employees in Northeast Minnesota

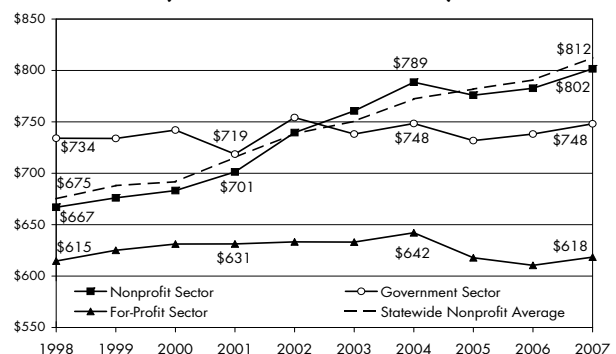
Industry	Full-Time Median Hourly Wage by Sector (% of the sector's total employment in the region)		
	Nonprofit	For-Profit	Government
Arts, Entertainment & Recreation	\$17.62 (1%)	\$10.00 (2%)	\$12.06 (7%)
Educational Services	\$19.33 (6%)	\$15.97 (<1%)	\$20.19 (36%)
Health Care			
Ambulatory Health Care Services	\$18.53 (18%)	\$16.73 (3%)	NA
Hospitals	\$19.53 (42%)	NA	\$17.53 (7%)
Nursing & Residential Care Facilities	\$12.00 (17%)	\$10.51 (5%)	\$14.91 (3%)
Social Assistance			
Individual & Family Services	\$12.78 (3%)	\$10.23 (1%)	\$22.16 (<1%)
Community Food, Housing, Emergency & Other Relief Services	\$14.33 (1%)	\$15.21 (<1%)	NA
Vocational Rehabilitation Services	\$10.10 (2%)	\$12.73 (<1%)	\$22.59 (<1%)
Child Day Care Services	\$11.72 (1%)	\$8.63 (<1%)	NA
Other Services			
Religious Organizations	\$11.02 (<1%)	NA	NA
Grantmaking & Giving Services	\$21.08 (<1%)	NA	NA
Social Advocacy Organizations	\$16.35 (1%)	\$10.99 (<1%)	NA
Civic & Social Organizations	\$8.03 (3%)	\$8.76 (1%)	NA

Source: MN Dept. of Employment & Economic Development, Enhanced Wage Records, 4th Quarter 2007
Notes: "NA" indicates either that the sector did not have any employees in that industry or that the information for that category was suppressed for reasons of privacy. The selected industries represented 98% of nonprofit employment, 13% of for-profit employment and 52% of government employment in the region in 2007. More extensive descriptions of these industries are available in Appendix A.

- In 2007, 78% of the nonprofit workforce in the Northeast was employed in the health care industry. Only Southeast Minnesota, with the city of Rochester and the Mayo Clinic, had a higher percentage of its nonprofit workforce in health care.

- Educational services was the second largest nonprofit employer in the Northeast, responsible for 6% of nonprofit jobs in 2007. The arts, entertainment and recreation industry employed just over 1% of the nonprofit workforce, but accounted for 11% of the nonprofit employment locations in the region – the highest percentage outside of health care.
- In 2007, nonprofits in the Northeast paid \$858 million in wages, or 17% of all wages in the region. After adjusting for inflation, this represented a 4% increase from 2006.
- In the Northeast, the average weekly wage in the nonprofit sector far exceeded the weekly wage in both the government and for-profit sectors. However, after removing the nonprofit health care industry from the calculation, the average weekly nonprofit wage falls from \$802 to \$471, which is significantly below the government and for-profit sectors in the region.
- With two exceptions – vocational rehabilitation services and civic and social organizations – the median hourly wage for a full-time nonprofit employee in the industries examined exceeded the minimum amount necessary to support the basic needs of a family of four (two adults working full-time, two children). According to the JOBS NOW Coalition, in 2006, each adult needed to earn \$10.21 an hour to meet these costs in Northeast Minnesota.

**Average Weekly Wages in the Northeast by Sector
(in constant 2007 dollars)**



Source: MN Dept. of Employment & Economic Development, Quarterly Census of Employment & Wages

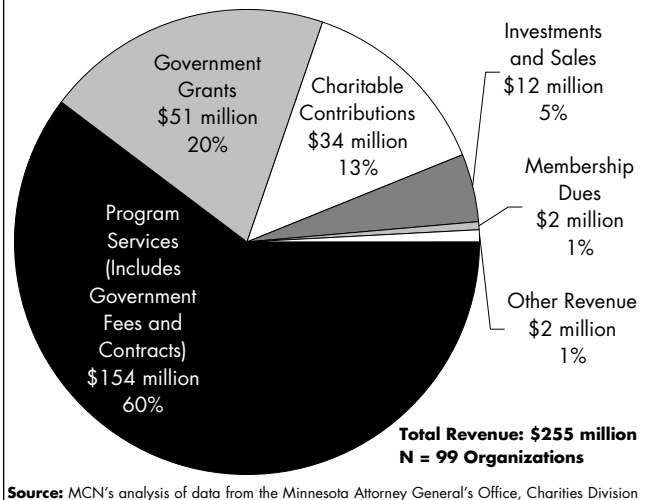


Northeast Minnesota Nonprofit Finances

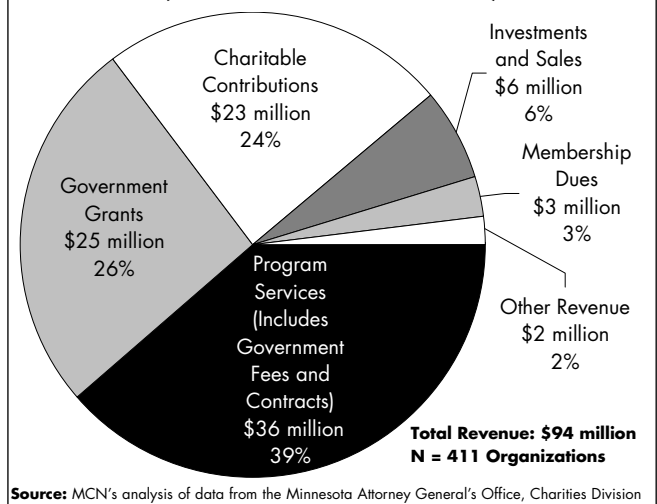
Counties: Aitkin, Carlton, Cook, Itasca, Koochiching, Lake, St. Louis

- Nonprofits in Northeast Minnesota reported \$2.0 billion in revenues, \$1.9 billion in expenses and \$4.6 billion in assets for the most current fiscal year.
- The five activity areas detailed below accounted for 98% of nonprofit revenues in the region, 99% of expenses and 96% of assets. Health organizations alone accounted for 82% of nonprofit revenues in the region, 83% of expenses and 87% of assets.
- Health organizations in the Northeast reported \$1.7 billion in revenues (95% from program services, 2% from investments and sales, 1% from charitable contributions and 1% from government grants) and \$1.6 billion in expenses (86% for program services, 13% for management and less than 1% for fundraising).
- Human service organizations reported \$193 million in revenues (43% from program services, 35% from government grants, 14% from charitable contributions and 5% from investments and sales) and \$187 million in expenses (87% for program services, 12% for management and 1% for fundraising).

Revenue Sources for Medium-Sized Nonprofit Organizations Located in Northeast Minnesota (with assets between \$1 and \$10 million)



Revenue Sources for Small Nonprofit Organizations Located in Northeast Minnesota (with assets under \$1 million)



- Educational organizations reported \$107 million in revenues (71% from program services, 21% from government grants, 4% from charitable contributions and 3% from investments and sales) and \$100 million in expenses (87% for program services, 11% for management and 2% for fundraising).
- Arts, culture and humanities organizations reported \$32 million in revenues (58% from charitable contributions, 17% from program services, 12% from government grants and 10% from investments and sales) and \$16 million in expenses (77% for program services, 17% for management and 6% for fundraising).
- Environmental and animal-related organizations reported \$9 million in revenues (49% from program services, 31% from charitable contributions, 9% from investments and sales, and 3% from government grants) and \$8 million in expenses (69% for program services, 28% for management and 3% for fundraising).

Note: This analysis includes 574 501(c)(3) and (4) organizations that filed a 990 or 990EZ financial return from an address located in Northeast Minnesota, but excludes all other types of 501(c) organizations, private foundations that filed form 990PF, some charitable trusts, and some organizations operating in the Northeast with headquarters in another region or outside of the state.

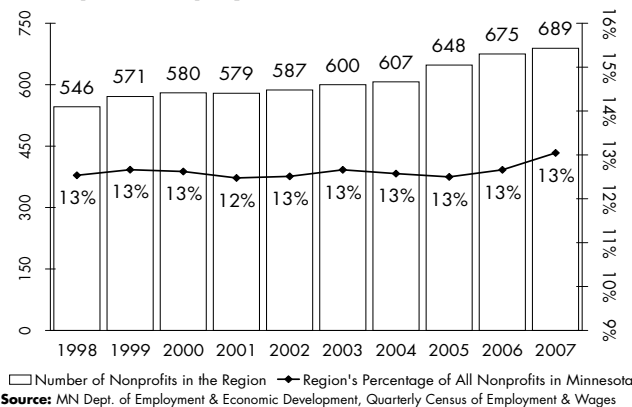


Northwest Minnesota Nonprofit Employment

Counties: Becker, Beltrami, Cass, Clay, Clearwater, Crow Wing, Douglas, Grant, Hubbard, Kittson, Lake of the Woods, Mahnomon, Marshall, Morrison, Norman, Otter Tail, Pennington, Polk, Pope, Red Lake, Roseau, Stevens, Todd, Traverse, Wadena, Wilkin

Regional Overview: If Northeast Minnesota can be characterized by a concentration of nonprofit activity, then the 26-county Northwest region should be noted for its widely dispersed nonprofit sector. At least five counties – Beltrami, Clay, Crow Wing, Otter Tail and Polk – can claim a large share of the region’s nonprofit employment locations and nonprofit workforce. Contrary to the mostly negative trends in the for-profit and government sectors in the region, in 2007 the nonprofit sector in Northwest Minnesota experienced 2% growth in employment and employment locations, as well as a 7% increase in total wages paid.

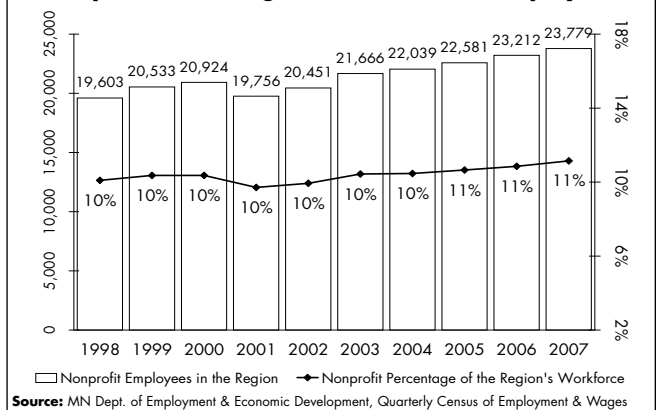
Number of Nonprofit Employment Locations in the Northwest and Region’s Percentage of All Nonprofit Employment Locations in Minnesota



- In 2007, the number of nonprofit employment locations in the Northwest increased by 2% to 689 locations, even while the total number of employment locations in the region declined slightly. With 13% of the state’s nonprofit employment locations, the Northwest region has the largest concentration of nonprofit employment locations outside of the Twin Cities.
- The nonprofit sector in the Northwest employs 11% of the region’s total workforce, which is just slightly higher than the statewide average of 10%.
- Even though the Northwest region has a large percentage of the state’s nonprofit employment locations, its share of the nonprofit workforce is closer to average. As a result, nonprofits in the region tend to be much smaller than nonprofits in other regions, averaging just 35 jobs for each nonprofit employment location, compared to 54 jobs per location in the Twin Cities.

- In 2007, the number of nonprofit jobs in Northwest Minnesota increased by 2%, while employment in the government and for-profit sectors declined. Over the last decade, nonprofit employment in the region increased an average of 2% per year, only slightly stronger than the for-profit and government sectors (1%).
- Nonprofit activity is widely dispersed in the Northwest, reflecting that the region has more, but smaller, population centers than other regions. In 2007, 10% of nonprofit employment locations were in Crow Wing County (where Brainerd is located), 10% in Clay County (Moorhead), 10% in Otter Tail County (Fergus Falls), 9% in Beltrami County (Bemidji) and 7% in Polk County (Crookston and East Grand Forks).
- The nonprofit workforce in the region followed a slightly different pattern, with 15% of the region’s nonprofit jobs in Clay County, 10% in Otter Tail, 9% in Crow Wing, 9% in Beltrami and 8% in Polk County.

Number of Nonprofit Employees in the Northwest and Nonprofit Percentage of All Northwest Employees





Northwest Minnesota Nonprofit Wages

Counties: Becker, Beltrami, Cass, Clay, Clearwater, Crow Wing, Douglas, Grant, Hubbard, Kittson, Lake of the Woods, Mahnomon, Marshall, Morrison, Norman, Otter Tail, Pennington, Polk, Pope, Red Lake, Roseau, Stevens, Todd, Traverse, Wadena, Wilkin

Median Hourly Wages for Full-Time Employees in Northwest Minnesota

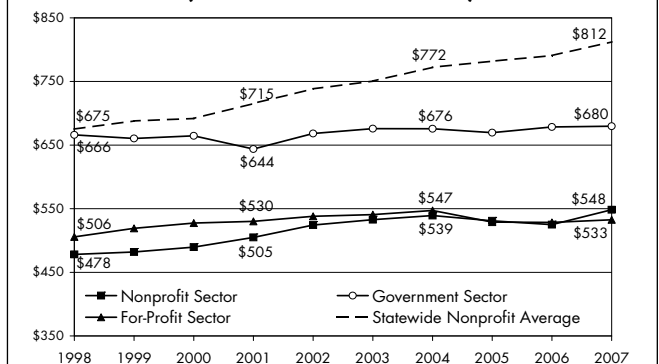
Industry	Full-Time Median Hourly Wage by Sector (% of the sector's total employment in the region)		
	Nonprofit	For-Profit	Government
Arts, Entertainment & Recreation	\$10.00 (1%)	\$10.03 (1%)	\$10.39 (6%)
Educational Services	\$15.93 (7%)	\$13.68 ($<1\%$)	\$20.25 (43%)
Health Care			
Ambulatory Health Care Services	\$16.73 (8%)	\$15.85 (4%)	\$21.97 (1%)
Hospitals	\$16.90 (31%)	NA	\$18.11 (6%)
Nursing & Residential Care Facilities	\$11.36 (30%)	\$10.09 (3%)	\$13.15 (2%)
Social Assistance			
Individual & Family Services	\$11.74 (7%)	\$10.25 (1%)	\$16.45 ($<1\%$)
Community Food, Housing, Emergency & Other Relief Services	\$11.20 ($<1\%$)	\$8.05 ($<1\%$)	NA
Vocational Rehabilitation Services	\$11.29 (4%)	\$10.20 ($<1\%$)	NA
Child Day Care Services	\$9.73 (1%)	\$9.44 ($<1\%$)	\$16.91 ($<1\%$)
Other Services			
Religious Organizations	\$12.04 (1%)	NA	NA
Grantmaking & Giving Services	\$17.31 ($<1\%$)	\$20.26 ($<1\%$)	NA
Social Advocacy Organizations	\$14.09 (2%)	\$12.36 ($<1\%$)	NA
Civic & Social Organizations	\$10.00 (1%)	\$9.10 (1%)	NA

Source: MN Dept. of Employment & Economic Development, Enhanced Wage Records, 4th Quarter 2007
Notes: "NA" indicates either that the sector did not have any employees in that industry or that the information for that category was suppressed for reasons of privacy. The selected industries represented 93% of nonprofit employment, 11% of for-profit employment and 59% of government employment in the region in 2007. More extensive descriptions of these industries are available in Appendix A.

- In 2007, the largest nonprofit industry in Northwest Minnesota was nursing and residential care facilities, accounting for 18% of all nonprofit employment locations and 30% of all nonprofit jobs in the region.

- Hospitals were another major industry in the Northwest in 2007, employing 31% of the region's nonprofit workforce, but only making up 4% of the region's nonprofit employment locations.
- Outside of health care, the largest industries in the Northwest were individual and family services (13% of nonprofit employment locations and 7% of nonprofit jobs); arts, entertainment and recreation (9% of nonprofit employment locations and 1% of nonprofit jobs); and educational services (4% of nonprofit employment locations and 7% of nonprofit jobs).
- Nonprofits in the Northwest paid \$678 million in wages in 2007, or 11% of all wages in the region. After adjusting for inflation, total nonprofit payroll increased by 7% while growth in total payroll in the government and for-profit sectors was flat.
- After a couple years of decline, nonprofit average weekly wages in the Northwest rebounded in 2007, increasing by 4% and surpassing the average weekly wage for the for-profit sector.
- In all but three of the industries examined, the median hourly wage for a full-time nonprofit employee exceeded the minimum amount necessary to support the basic needs of a family of four (two adults working full-time, two children). According to the JOBS NOW Coalition, in 2006, each adult needed to earn \$10.27 an hour to meet these costs in Northwest Minnesota.

Average Weekly Wages in the Northwest by Sector (in constant 2007 dollars)



Source: MN Dept. of Employment & Economic Development, Quarterly Census of Employment & Wages

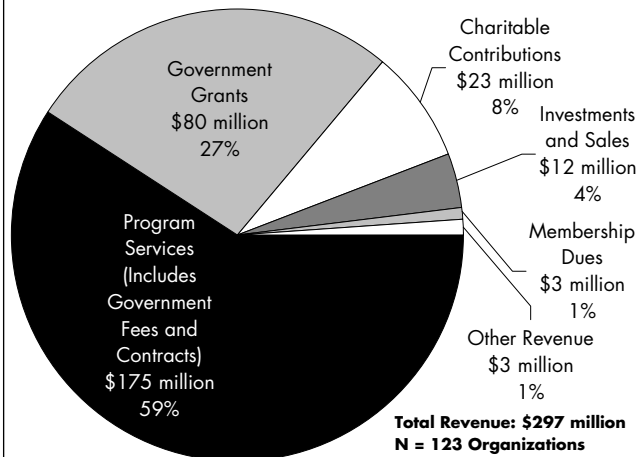


Northwest Minnesota Nonprofit Finances

Counties: Becker, Beltrami, Cass, Clay, Clearwater, Crow Wing, Douglas, Grant, Hubbard, Kittson, Lake of the Woods, Mahnomon, Marshall, Morrison, Norman, Otter Tail, Pennington, Polk, Pope, Red Lake, Roseau, Stevens, Todd, Traverse, Wadena, Wilkin

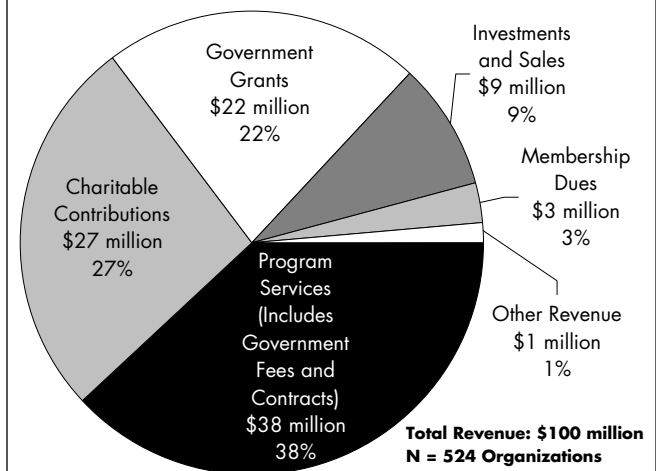
- Nonprofits in Northwest Minnesota reported \$1.2 billion in revenues, \$1.1 billion in expenses and \$1.8 billion in assets for the most current fiscal year.
- The five activity areas detailed below accounted for 96% of nonprofit revenues in the region, 97% of expenses and 86% of assets. Health organizations alone accounted for 73% of nonprofit revenues in the region, 74% of expenses and 64% of assets.
- Health organizations in Northwest Minnesota reported \$887 million in revenues (93% from program services, 3% from investments and sales, 2% from charitable contributions and 1% from government grants) and \$826 million in expenses (87% for program services, 13% for management and less than 1% for fundraising).
- Human service organizations reported \$220 million in revenues (48% from program services, 34% from government grants, 11% from charitable contributions and 5% from investments and sales) and \$217 million in expenses (88% for program services, 11% for management and 1% for fundraising).

Revenue Sources for Medium-Sized Nonprofit Organizations Located in Northwest Minnesota (with assets between \$1 and \$10 million)



Source: MCN's analysis of data from the Minnesota Attorney General's Office, Charities Division

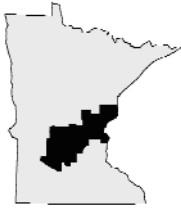
Revenue Sources for Small Nonprofit Organizations Located in Northwest Minnesota (with assets under \$1 million)



Source: MCN's analysis of data from the Minnesota Attorney General's Office, Charities Division

- Educational organizations reported \$31 million in revenues (42% from government grants, 26% from charitable contributions, 16% from investments and sales, and 11% from program services) and \$24 million in expenses (79% for program services, 19% for management expenses and 2% for fundraising).
- Arts, culture and humanities organizations reported \$10 million in revenues (46% from charitable contributions, 22% from program services, 13% from government grants and 12% from investments and sales) and \$8 million in expenses (76% for program services, 18% for management and 6% for fundraising).
- Environmental and animal-related organizations reported \$7 million in revenues (44% from charitable contributions, 27% from program services, 13% from investments and sales, and 12% from government grants) and \$7 million in expenses (81% for program services, 17% for management and 2% for fundraising).

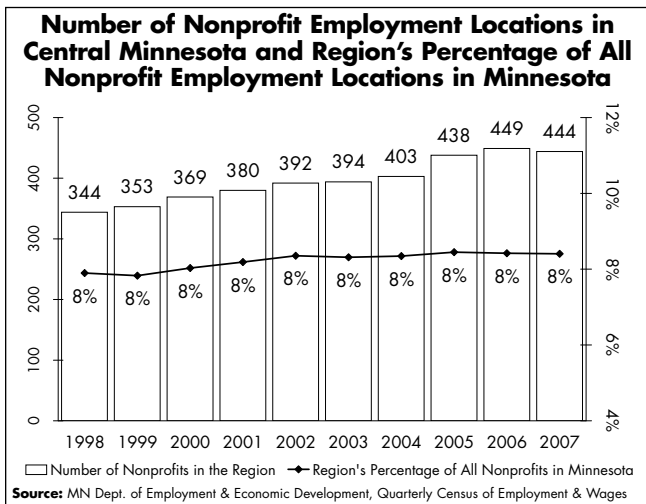
Note: This analysis includes 736 501(c)(3) and (4) organizations that filed a 990 or 990EZ financial return from an address located in Northwest Minnesota, but excludes all other types of 501(c) organizations, private foundations that filed form 990PF, some charitable trusts and some organizations operating in the Northwest with headquarters in another region or outside of the state.



Central Minnesota Nonprofit Employment

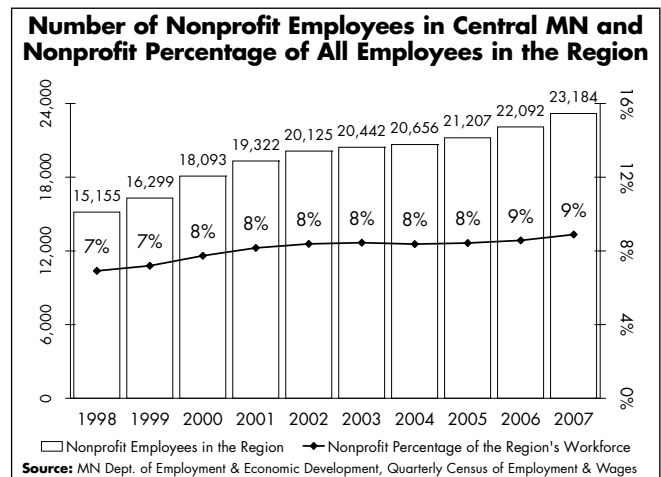
Counties: Benton, Chisago, Isanti, Kanabec, Kandiyohi, McLeod, Meeker, Mille Lacs, Pine, Renville, Sherburne, Stearns, Wright

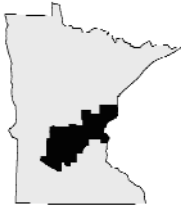
Regional Overview: The 13-county region of Central Minnesota may be home to just 8% of the state's nonprofit employment locations, but over the last decade it has experienced the strongest growth in nonprofit employment in the state. Since 1998, the nonprofit workforce in Central Minnesota has increased an average of 5% per year, while the statewide average increase was 3% per year. Although most nonprofit activity is in Stearns County, where most of the city of St. Cloud is located, the strongest growth in nonprofit employment has come in the area north of the Twin Cities metro area (which includes Chisago, Isanti, Kanabec, Mille Lacs and Pine counties).



- In 2007, there were 444 nonprofit employment locations in Central Minnesota, a slight decline from 2006. The region's for-profit sector, however, also experienced a decline in the number of employment locations.
- The number of nonprofit employment locations in Central Minnesota may have decreased, but size of the nonprofit workforce increased by 5%, the largest percentage increase since 2001. Both the government and for-profit sectors in the region experienced a minimal increase in employment in 2007 – just 1% each. The nonprofit sector now accounts for 9% of all jobs in the region.
- Growth in the nonprofit workforce is not a new phenomenon in Central Minnesota; over the last decade nonprofit employment in the region has grown an average of 5% per year, faster than any other region in the state.

- The largest center of nonprofit activity in the region is Stearns County, where most of the city of St. Cloud is located. In 2007, 26% of the region's nonprofit employment locations and 39% of the region's nonprofit jobs were located here. Stearns County alone accounts for almost one-half of the net increase in nonprofit jobs in the region in 2007.
- Wright and Sherburne counties, which lie between St. Cloud and the Twin Cities metro area, are also regional centers of nonprofit activity. Together these two counties accounted for 21% of nonprofit employment locations and 24% of nonprofit jobs.
- Outside of Stearns County, the strongest growth in nonprofit employment has come in the area north of the Twin Cities metro area (Chisago, Isanti, Kanabec, Mille Lacs and Pine counties). While this area only accounted for one-fourth of the region's nonprofit workforce, in 2007 it was responsible for more than one-third of the increase in the region's nonprofit jobs.





Central Minnesota Nonprofit Wages

Counties: Benton, Chisago, Isanti, Kanabec, Kandiyohi, McLeod, Meeker, Mille Lacs, Pine, Renville, Sherburne, Stearns, Wright

Median Hourly Wages for Full-Time Employees in Central Minnesota

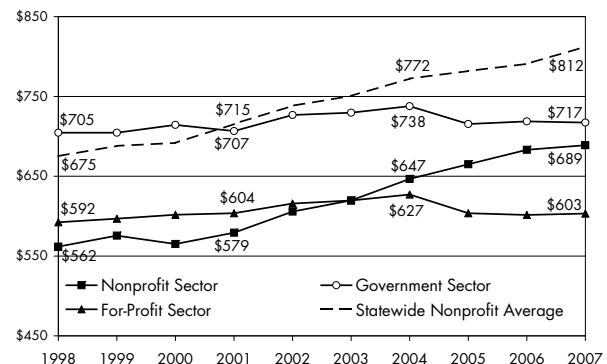
Industry	Full-Time Median Hourly Wage by Sector (% of the sector's total employment in the region)		
	Nonprofit	For-Profit	Government
Arts, Entertainment & Recreation	\$13.29 (1%)	\$9.00 (2%)	\$11.82 (7%)
Educational Services	\$18.27 (7%)	\$13.71 (<1%)	\$20.46 (45%)
Health Care			
Ambulatory Health Care Services	\$19.21 (9%)	\$18.11 (4%)	NA
Hospitals	\$21.00 (35%)	\$15.35 (<1%)	\$18.51 (10%)
Nursing & Residential Care Facilities	\$12.59 (26%)	\$10.90 (3%)	\$19.67 (1%)
Social Assistance			
Individual & Family Services	\$12.06 (6%)	\$10.11 (1%)	\$19.39 (<1%)
Community Food, Housing, Emergency & Other Relief Services	\$13.20 (1%)	\$12.55 (<1%)	NA
Vocational Rehabilitation Services	\$11.08 (6%)	\$12.10 (<1%)	NA
Child Day Care Services	\$10.95 (2%)	\$9.25 (1%)	NA
Other Services			
Religious Organizations	\$12.94 (<1%)	NA	NA
Grantmaking & Giving Services	\$14.67 (<1%)	NA	NA
Social Advocacy Organizations	\$13.42 (2%)	\$13.00 (<1%)	NA
Civic & Social Organizations	\$8.41 (1%)	\$9.06 (1%)	NA

Source: MN Dept. of Employment & Economic Development, Enhanced Wage Records, 4th Quarter 2007
Notes: "NA" indicates either that the sector did not have any employees in that industry or that the information for that category was suppressed for reasons of privacy. The selected industries represented 96% of nonprofit employment, 12% of for-profit employment and 64% of government employment in the region in 2007. More extensive descriptions of these industries are available in Appendix A.

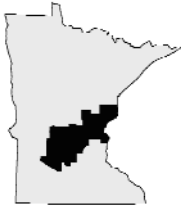
- In 2007, 70% of nonprofit employees and 31% of nonprofit employment locations in Central Minnesota were in the health care industry, which includes ambulatory health care services, hospitals, and nursing and residential care facilities.

- Nonprofits in Central Minnesota paid \$831 million in wages in 2007, or 10% of all wages paid in the region. After adjusting for inflation, the total nonprofit payroll increased by 6% from the previous year, significantly more than the 1% increase in the government and for-profit sectors.
- Nonprofit wages have been rising rapidly in the region. Over the last decade, the nonprofit average weekly wage in Central Minnesota has increased by 23%, after adjusting for inflation. Over the same period of time, the average weekly wage in the for-profit and government sectors increased by only 2%.
- In previous years, growth in the nonprofit average weekly wage has been driven by wage increases in health care. In 2007, however, the average weekly wage for the nonprofit health care industry increased by just 1%, while the average weekly wage for the rest of the nonprofit sector in the region increased by 4%.
- In most of the industries examined the median hourly wage for a full-time nonprofit employee in the region exceeded the minimum necessary to support the basic needs of a family of four (two adults working full-time, two children). According to the JOBS NOW Coalition, in 2006, each adult needed to earn \$12.00 an hour to meet these costs in Central Minnesota. The exceptions were vocational rehabilitation services, child day care services, and civic and social organizations.

Average Weekly Wages in Central MN by Sector (in constant 2007 dollars)



Source: MN Dept. of Employment & Economic Development, Quarterly Census of Employment & Wages

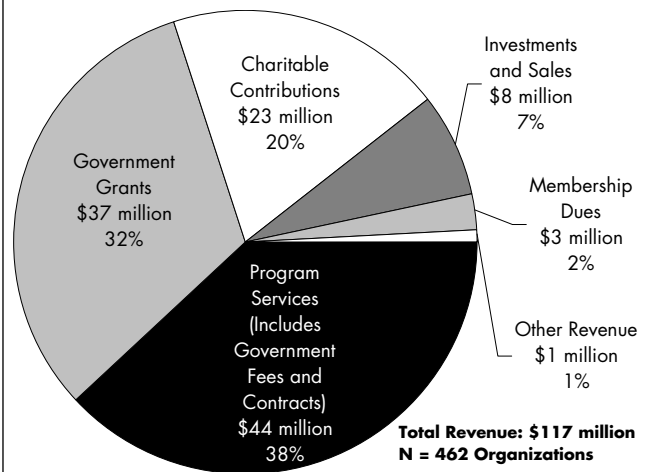


Central Minnesota Nonprofit Finances

Counties: Benton, Chisago, Isanti, Kanabec, Kandiyohi, McLeod, Meeker, Mille Lacs, Pine, Renville, Sherburne, Stearns, Wright

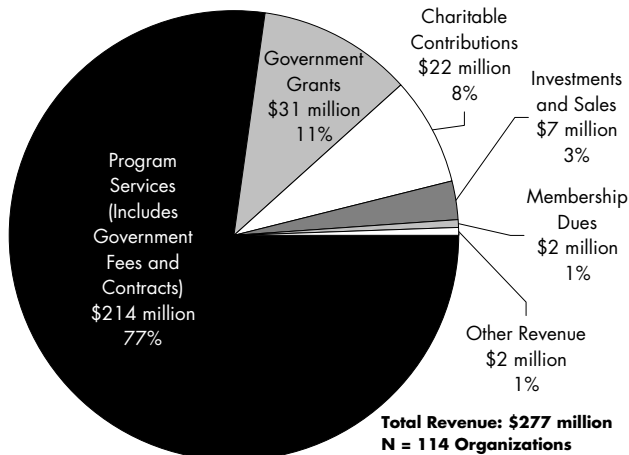
- Nonprofits in Central Minnesota reported \$1.7 billion in revenues, \$1.5 billion in expenses and \$2.3 billion in assets for the most current fiscal year.
- The five activity areas detailed below accounted for 97% of nonprofit revenues in Central Minnesota, 98% of expenses and 92% of assets. Health organizations alone accounted for 77% of nonprofit revenues in the region, 78% of expenses and 68% of assets.
- Health organizations in Central Minnesota reported \$1.3 billion in revenues (92% from program services, 5% from investments and sales, 2% from charitable contributions and 1% from government grants) and \$1.2 billion in expenses (87% for program services, 13% for management and less than 1% for fundraising).
- Human service organizations reported \$194 million in revenues (57% from program services, 23% from government grants, 13% from charitable contributions and 4% from investments and sales) and \$185 million in expenses (87% for program services, 11% for management and 1% for fundraising).

Revenue Sources for Small Nonprofit Organizations Located in Central Minnesota (with assets under \$1 million)



Source: MCN's analysis of data from the Minnesota Attorney General's Office, Charities Division

Revenue Sources for Medium-Sized Nonprofit Organizations Located in Central Minnesota (with assets between \$1 and \$10 million)



Source: MCN's analysis of data from the Minnesota Attorney General's Office, Charities Division

- Educational organizations reported \$125 million in revenues (66% from program services, 19% from charitable contributions, 10% from government grants and 6% from investments and sales) and \$108 million in expenses (87% for program services, 10% for management and 3% for fundraising).
- Arts, culture and humanities organizations reported \$7 million in revenues (34% from program services, 30% from charitable contributions, 20% from government grants and 10% from investments and sales) and \$7 million in expenses (79% for program services, 15% for management and 4% for fundraising).
- Environmental and animal-related organizations reported \$5 million in revenues (53% from charitable contributions, 27% from program services, 14% from investments and sales, and 2% from government grants) and \$5 million in expenses (79% for program services, 17% for management and 4% for fundraising).

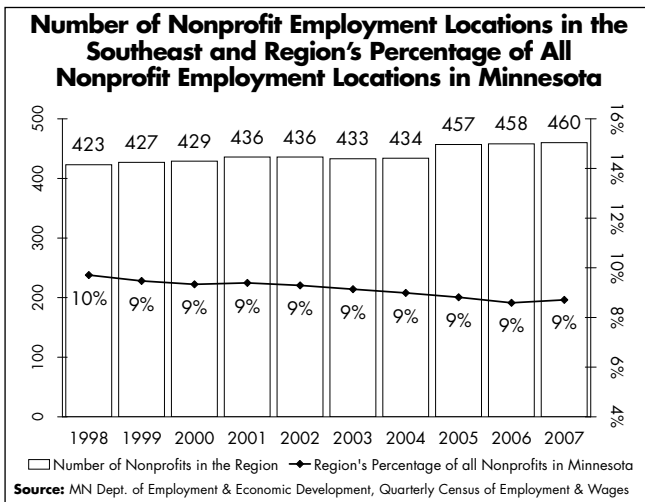
Note: This analysis includes 657 501(c)(3) and (4) organizations that filed a 990 or 990EZ financial return from an address located in Central Minnesota, but excludes all other types of 501(c) organizations, private foundations that filed form 990PF, some charitable trusts and some organizations operating in Central Minnesota with headquarters in another region or outside of the state.



Southeast Minnesota Nonprofit Employment

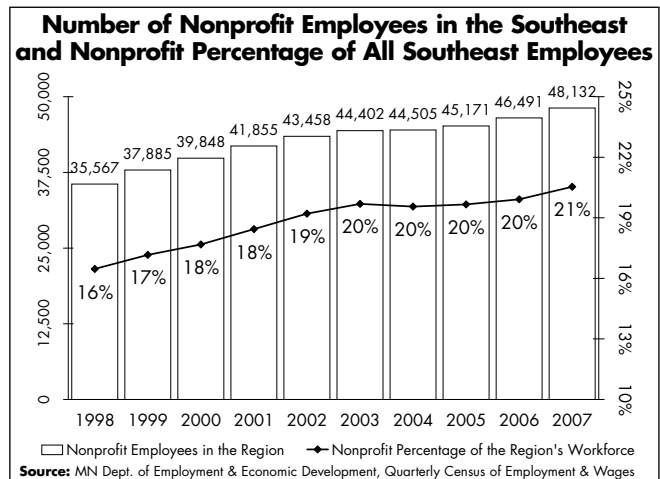
Counties: Dodge, Fillmore, Freeborn, Goodhue, Houston, Mower, Olmsted, Rice, Steele, Wabasha, Winona

Regional Overview: The 11-county region of Southeast Minnesota contains some interesting extremes. Olmsted County, home to the city of Rochester and the internationally-renown Mayo Clinic, is also home to 12% of all nonprofit jobs in Minnesota. This represents the third-largest concentration of nonprofit employment in the state – behind only Hennepin and Ramsey counties. Nonprofits employ 36% of the total workforce in Olmsted County. The Southeast region, however, also includes the county with the smallest concentration of nonprofit employment in the state. In 2007, there were fewer than 40 nonprofit jobs in Dodge County. Nonprofits employed only 1% of the total workforce in Dodge County.



- In 2007, there were 460 nonprofit employment locations in Southeast Minnesota. There has been virtually no change in the number of nonprofit employment locations in the region over the last two years.
- While the number of nonprofit employment locations has remained stable, the number of nonprofit jobs in the Southeast has been growing. The nonprofit workforce in the region has increased an average of 3% per year over the last ten years. During the same period of time, total employment in the region increased an average of just 1% per year.
- With more than 48,000 employees, the Southeast region has the largest nonprofit workforce outside of the Twin Cities, accounting for 17% of all nonprofit jobs in the state. In the Southeast, the nonprofit sector now employs 21% of the total workforce, or about one in every five employees in the region.

- Olmsted County is home to the city of Rochester and the internationally-renown Mayo Clinic. As a result of the large role the health care industry plays in Olmsted County, 69% of the region's nonprofit jobs are located in this one county. In 2007, the 33,000 nonprofit jobs in Olmsted County also accounted for 12% of all the nonprofit jobs the state. This represents the third-largest concentration of nonprofit jobs in Minnesota, behind only Hennepin and Ramsey counties.
- Outside of Olmsted County, the three counties with the most nonprofit activity in 2007 included Winona (11% of the region's nonprofit employment locations and 7% of nonprofit jobs), Rice (11% of nonprofit employment locations and 6% of nonprofit jobs) and Goodhue (10% of nonprofit employment locations and 4% of nonprofit jobs).
- Dodge County has the smallest level of nonprofit activity in the state with fewer than 40 nonprofit employees.





Southeast Minnesota Nonprofit Wages

Counties: Dodge, Fillmore, Freeborn, Goodhue, Houston, Mower, Olmsted, Rice, Steele, Wabasha, Winona

Median Hourly Wages for Full-Time Employees in Southeast Minnesota

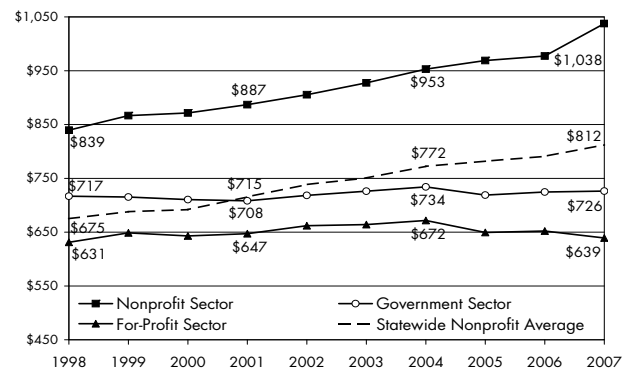
Industry	Full-Time Median Hourly Wage by Sector (% of the sector's total employment in the region)		
	Nonprofit	For-Profit	Government
Arts, Entertainment & Recreation	\$13.56 (<1%)	\$10.00 (2%)	NA
Educational Services	\$21.43 (8%)	\$13.59 (<1%)	\$21.24 (47%)
Health Care			
Ambulatory Health Care Services	\$21.33 (45%)	\$18.04 (3%)	\$13.42 (<1%)
Hospitals	\$18.64 (26%)	NA	\$21.24 (3%)
Nursing & Residential Care Facilities	\$12.12 (12%)	\$11.23 (3%)	\$13.21 (3%)
Social Assistance			
Individual & Family Services	\$11.38 (3%)	\$10.05 (1%)	NA
Community Food, Housing, Emergency & Other Relief Services	\$13.61 (<1%)	\$17.09 (<1%)	NA
Vocational Rehabilitation Services	\$11.70 (1%)	\$11.03 (<1%)	NA
Child Day Care Services	\$9.81 (1%)	\$10.00 (<1%)	NA
Other Services			
Religious Organizations	\$11.12 (<1%)	\$20.19 (<1%)	NA
Grantmaking & Giving Services	\$19.17 (<1%)	NA	NA
Social Advocacy Organizations	\$12.59 (1%)	\$10.36 (<1%)	NA
Civic & Social Organizations	\$9.07 (1%)	\$9.50 (1%)	NA

Source: MN Dept. of Employment & Economic Development, Enhanced Wage Records, 4th Quarter 2007
Notes: "NA" indicates either that the sector did not have any employees in that industry or that the information for that category was suppressed for reasons of privacy. The selected industries represented 99% of nonprofit employment, 9% of for-profit employment and 53% of government employment in the region in 2007. More extensive descriptions of these industries are available in Appendix A.

- Health care is the dominant industry in Southeast Minnesota. In 2007, the major health care industries – ambulatory health care, hospitals, and nursing and residential care facilities – accounted for 32% of nonprofit employment locations, 84% of nonprofit jobs and 91% of all nonprofit wages in the region.

- Educational services is the next largest industry in the Southeast, although a distant second to health care. In 2007, education accounted for 11% of nonprofit employment locations and 8% of all nonprofit jobs in the region.
- Nonprofit employers in the Southeast paid \$2.6 billion in wages in 2007, or 29% of all wages in the region. In Olmsted County alone, nonprofit employers paid \$2.1 billion in wages, which accounted for nearly half of all wages in the county.
- The average weekly wage for nonprofit employees in the Southeast was \$1,038 in 2007, which was well above the average weekly wages for both government (\$726) and for-profit employees (\$639). If the health care industries are removed from the calculation, however, the average weekly wage for the nonprofit sector drops to just \$544, well below both the government and for-profit average weekly wage.
- In all but two of the industries examined, the median hourly wage for a full-time nonprofit employee in the region exceeded the minimum necessary to support the basic needs of a family of four (two adults working full-time, two children). According to the JOBS NOW Coalition, in 2006, each adult needed to earn \$11.06 an hour to meet these costs in Southeast Minnesota. The two exceptions were nonprofit child day care services and civic and social organizations.

Average Weekly Wages in the Southeast by Sector (in constant 2007 dollars)



Source: MN Dept. of Employment & Economic Development, Quarterly Census of Employment & Wages

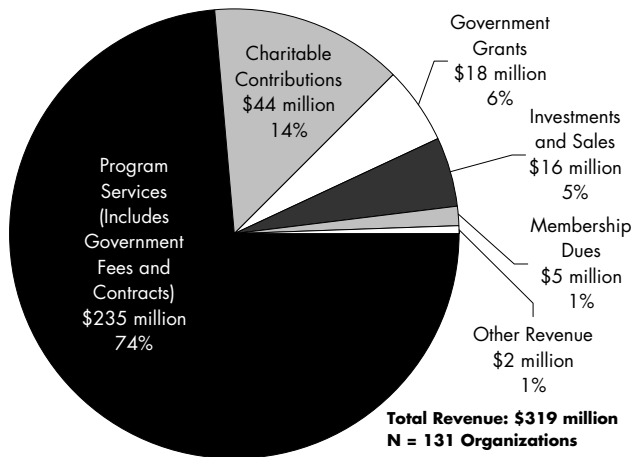


Southeast Minnesota Nonprofit Finances

Counties: Dodge, Fillmore, Freeborn, Goodhue, Houston, Mower, Olmsted, Rice, Steele, Wabasha, Winona

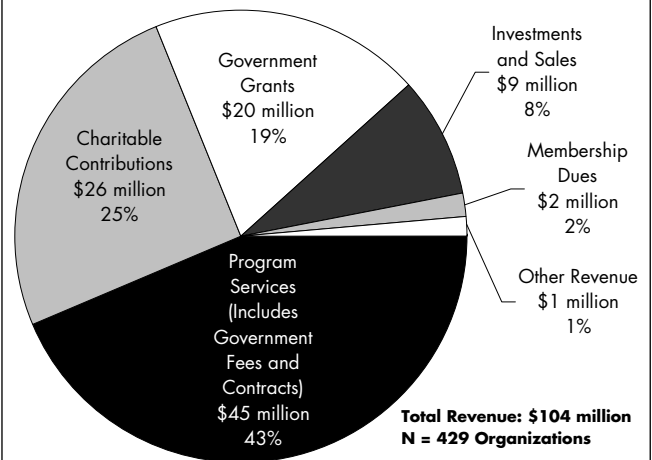
- Nonprofits in Southeast Minnesota reported \$5.8 billion in revenues, \$5.2 billion in expenses and \$10.1 billion in assets for the most current fiscal year.
- The five activity areas detailed below accounted for 99% of nonprofit revenues in the region, 99% of expenses and 98% of assets. Health organizations alone accounted for 86% of nonprofit revenues in the region, 88% of expenses and 76% of assets.
- Health organizations in the Southeast reported \$5.0 billion in revenues (84% from program services, 6% from investments and sales, 5% from charitable contributions and 4% from government grants) and \$4.6 billion in expenses (86% for program services, 13% for management and 1% for fundraising).
- Human service organizations reported \$238 million in revenues (71% from program services, 13% from charitable contributions, 8% from government grants and 5% from investments and sales) and \$227 million in expenses (90% for program services, 9% for management and 1% for fundraising).

Revenue Sources for Medium-Sized Nonprofit Organizations Located in Southeast Minnesota (with assets between \$1 and \$10 million)



Source: MCN's analysis of data from the Minnesota Attorney General's Office, Charities Division

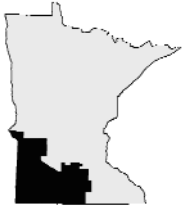
Revenue Sources for Small Nonprofit Organizations Located in Southeast Minnesota (with assets under \$1 million)



Source: MCN's analysis of data from the Minnesota Attorney General's Office, Charities Division

- Educational organizations reported \$496 million in revenues (57% from program services, 20% from investments and sales, 15% from charitable contributions and 4% from government grants) and \$369 million in expenses (87% for program services, 10% for management and 3% for fundraising).
- Arts, culture and humanities organizations reported \$18 million in revenues (53% from charitable contributions, 16% from government grants, 16% from program services and 10% from investments and sales) and \$13 million in expenses (77% for program services, 18% for management and 5% for fundraising).
- Environmental and animal-related organizations reported \$6 million in revenues (40% from charitable contributions, 38% from program services, 14% from investments and sales, and 2% from government grants) and \$5 million in expenses (80% for program services, 14% for management and 6% for fundraising).

Note: This analysis includes 652 501(c)(3) and (4) organizations that filed a 990 or 990EZ financial return from an address located in Southeast Minnesota, but excludes all other types of 501(c) organizations, private foundations that filed form 990PF, some charitable trusts and some organizations operating in the Southeast with headquarters in another region or outside of the state.

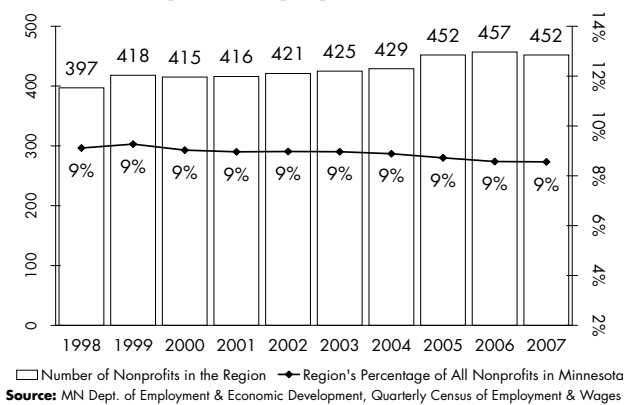


South Central/Southwest Minnesota Nonprofit Employment

Counties: Big Stone, Blue Earth, Brown, Chippewa, Cottonwood, Faribault, Jackson, Lac Qui Parle, Le Sueur, Lincoln, Lyon, Martin, Murray, Nicollet, Nobles, Pipestone, Redwood, Rock, Sibley, Swift, Waseca, Watonwan, Yellow Medicine

Regional Overview: The nonprofit economy in the 23-county South Central/Southwest region of Minnesota has been slowing in recent years. Between 1996 and 2005, the number of nonprofit employment locations and nonprofit jobs in the region increased an average of 4% per year. Since 2005, however, the nonprofit workforce has increased by less than 1% per year and the number of employment locations has remained virtually stable. The rest of South Central/Southwest Minnesota has been following a similar trend, with both government and for-profit employment actually declining slightly in 2007.

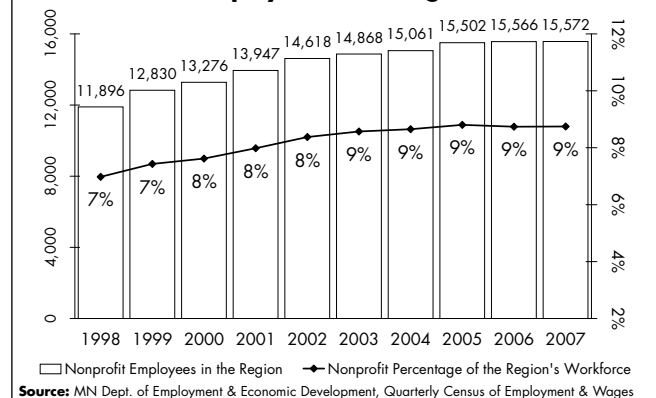
Number of Nonprofit Employment Locations in the South Central/Southwest and Region's Percentage of All Nonprofit Employment Locations in MN

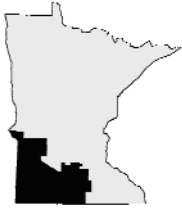


- In 2007, there were 452 nonprofit employment locations in South Central/Southwest Minnesota, a slight decline from the previous year. The region as a whole, however, also experienced a decline in the total number of employment locations between 2006 and 2007.
- Over the last decade, the number of nonprofit employment locations in South Central/Southwest Minnesota has increased by 14%. Nevertheless, the region's share of the state's nonprofit employment locations has been holding steady at 9%.
- In 2007, 9% of the workforce in South Central/Southwest Minnesota was employed by the nonprofit sector, just slightly below the statewide average of 10%. For the second year in a row, nonprofit employment in the region experienced virtually no increase from the previous year. The government and for-profit sectors actually experienced a decline in employment in 2007.

- The current slowdown in the nonprofit sector in South Central/Southwest Minnesota comes after a decade of steady growth, particularly in the nonprofit workforce. Between 1996 and 2005, the number of nonprofit jobs in the region increased by 44%.
- The largest center of nonprofit activity in South Central/Southwest Minnesota is Blue Earth County (where the city of Mankato is largely located), with 12% of the region's nonprofit employment locations and 29% of nonprofit jobs in 2007.
- Other counties in South Central/Southwest Minnesota with a large nonprofit presence in 2007 included Brown County (8% of nonprofit employment locations and 10% of nonprofit jobs), Lyon County (9% of nonprofit employment locations and 4% of nonprofit jobs), Martin County (5% of nonprofit employment locations and 7% of nonprofit jobs) and Nicollet County (6% of nonprofit employment locations and 8% of nonprofit jobs).

Number of Nonprofit Employees in the South Central/Southwest and Nonprofit Percentage of All Employees in the Region





South Central/Southwest Minnesota Nonprofit Wages

Counties: Big Stone, Blue Earth, Brown, Chippewa, Cottonwood, Faribault, Jackson, Lac Qui Parle, Le Sueur, Lincoln, Lyon, Martin, Murray, Nicollet, Nobles, Pipestone, Redwood, Rock, Sibley, Swift, Waseca, Watonwan, Yellow Medicine

Median Hourly Wages for Full-Time Employees in Southwest Minnesota

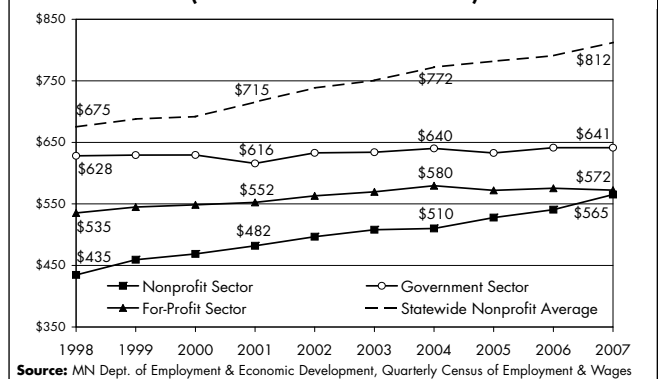
Industry	Full-Time Median Hourly Wage by Sector (% of the sector's total employment in the region)		
	Nonprofit	For-Profit	Government
Arts, Entertainment & Recreation	\$10.00 (1%)	\$9.00 (1%)	NA
Educational Services	\$19.77 (7%)	\$15.63 ($<1\%$)	\$19.78 (43%)
Health Care			
Ambulatory Health Care Services	\$15.65 (6%)	\$15.06 (3%)	\$17.09 ($<1\%$)
Hospitals	\$17.76 (31%)	\$18.93 ($<1\%$)	\$18.25 (12%)
Nursing & Residential Care Facilities	\$11.54 (31%)	\$10.87 (3%)	\$12.09 (3%)
Social Assistance			
Individual & Family Services	\$12.58 (2%)	\$10.25 (1%)	\$17.88 ($<1\%$)
Community Food, Housing, Emergency & Other Relief Services	\$9.00 (1%)	NA	NA
Vocational Rehabilitation Services	\$12.73 (11%)	\$12.72 ($<1\%$)	NA
Child Day Care Services	\$8.53 (1%)	\$8.51 ($<1\%$)	NA
Other Services			
Religious Organizations	\$12.54 (1%)	NA	NA
Grantmaking & Giving Services	\$15.72 (1%)	NA	NA
Social Advocacy Organizations	\$13.13 (3%)	\$20.00 ($<1\%$)	NA
Civic & Social Organizations	\$8.08 (2%)	\$8.33 (1%)	NA

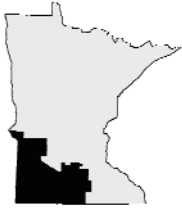
Source: MN Dept. of Employment & Economic Development, Enhanced Wage Records, 4th Quarter 2007
Notes: "NA" indicates either that the sector did not have any employees in that industry or that the information for that category was suppressed for reasons of privacy. The selected industries represented 98% of nonprofit employment, 11% of for-profit employment and 59% of government employment in the region in 2007. More extensive descriptions of these industries are available in Appendix A.

- In 2007, health care was the predominant nonprofit industry in the South Central/Southwest region, accounting for one-third of nonprofit employment locations and more than two-thirds of the nonprofit workforce.

- Outside of health care, in 2007 the industries in the region with the largest number of nonprofit employment locations were individual and family services, and arts, entertainment and recreation, each with 10% of nonprofit employment locations. Other than health care, the industries with the most nonprofit employees were vocational rehabilitation services (11% of nonprofit jobs) and educational services (7% of nonprofit jobs).
- In 2007, nonprofit organizations in South Central/Southwest Minnesota paid \$458 million in wages, or 8% of all wages in the region. After adjusting for inflation, total nonprofit payroll in the region increased by 5% from 2006, while total payroll for the government sector was stagnant and total payroll for the for-profit sector declined slightly.
- The inflation-adjusted average weekly wage for the nonprofit sector in the region increased by 5% in 2007, nearly matching the average weekly wage in the for-profit sector for the first time.
- In all but three of the industries examined, the median hourly wage for a full-time nonprofit employee exceeded the minimum wage necessary to support the basic needs of a family of four (two adults working full-time, two children). According to the JOBS NOW Coalition, in 2006, each adult needed to earn \$9.72 an hour to meet these costs in the South Central/Southwest region.

Average Weekly Wages in the Southwest by Sector (in constant 2007 dollars)



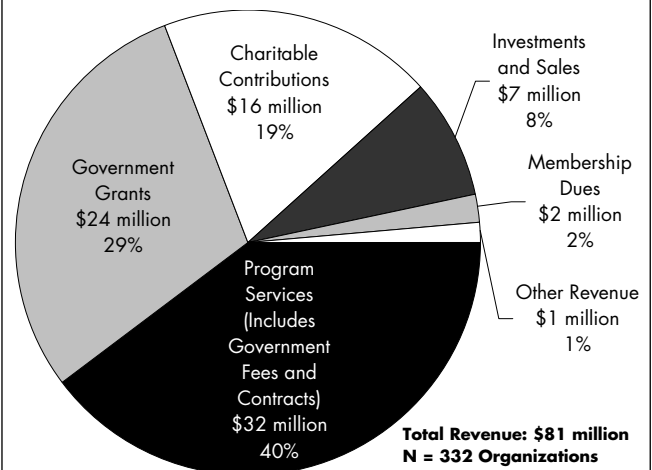


South Central/Southwest Minnesota Nonprofit Finances

Counties: Big Stone, Blue Earth, Brown, Chippewa, Cottonwood, Faribault, Jackson, Lac Qui Parle, Le Sueur, Lincoln, Lyon, Martin, Murray, Nicollet, Nobles, Pipestone, Redwood, Rock, Sibley, Swift, Waseca, Watonwan, Yellow Medicine

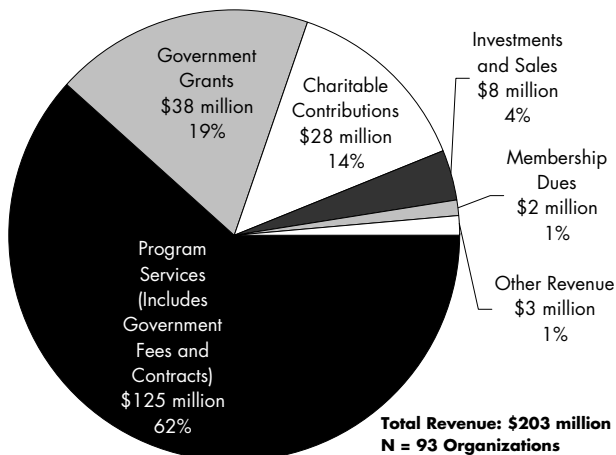
- Nonprofits in South Central/Southwest Minnesota reported \$1.0 billion in revenues, \$973 million in expenses and \$1.5 billion in assets for the most current fiscal year.
- The five activity areas detailed below accounted for 99% of nonprofit revenues in South Central/Southwest Minnesota, 99% of expenses and 98% of assets. Health organizations alone accounted for 50% of nonprofit revenues in the region, 51% of expenses and 36% of assets.
- Health organizations in the region reported \$524 million in revenues (94% from program services, 2% from charitable contributions, 2% from investments and sales, and 1% from government grants) and \$493 million in expenses (88% for program services, 12% for management and less than 1% for fundraising).
- Human service organizations reported \$172 million in revenues (52% from program services, 30% from government grants, 11% from charitable contributions and 3% from investments and sales) and \$165 million in expenses (88% for program services, 11% for management and 1% for fundraising).

Revenue Sources for Small Nonprofits Located in South Central/Southwest Minnesota (with assets under \$1 million)



Source: MCN's analysis of data from the Minnesota Attorney General's Office, Charities Division

Revenue Sources for Medium-Sized Nonprofits Located in South Central/Southwest Minnesota (with assets between \$1 and \$10 million)



Source: MCN's analysis of data from the Minnesota Attorney General's Office, Charities Division

- Educational organizations reported \$321 million in revenues (47% from program services, 41% from charitable contributions, 9% from investments and sales, and 3% from government grants) and \$291 million in expenses (94% for program services, 4% for management and 2% for fundraising).
- Arts, culture and humanities organizations reported \$7 million in revenues (46% from charitable contributions, 18% from program services, 17% from government grants and 12% from investments and sales) and \$6 million in expenses (68% for program services, 27% for management and 5% for fundraising).
- Environmental and animal-related organizations reported over \$5 million in revenues (52% from government grants, 21% from charitable contributions, 20% from program services and 6% from investments and sales) and \$5 million in expenses (80% for program services, 18% for management and 2% for fundraising).

Note: This analysis includes 495 501(c)(3) and (4) organizations that filed a 990 or 990EZ financial return from an address located in South Central/Southwest MN, but excludes all other types of 501(c) organizations, private foundations that filed form 990PF, some charitable trusts and some nonprofits operating in the South Central/Southwest with headquarters in another region or outside of the state.

Appendix A

Major Nonprofit Industries in the North American Industry Classification System (NAICS)

Ambulatory Health Care Services (NAICS 621) – Industries in this subsector provide health care services to ambulatory patients, and include physicians' offices, mental health practitioners, dentists, optometrists, physical, occupational and speech therapists, family planning centers, outpatient mental health and substance abuse centers, medical and diagnostic laboratories and home health care services. In 2007, this industry accounted for 10% of nonprofit employment locations and 17% of nonprofit jobs statewide.

Arts, Entertainment & Recreation (NAICS 71) – This sector includes establishments that are involved in producing, promoting or participating in live performances, events or exhibits intended for public viewing; establishments that preserve and exhibit objects and sites of historical, cultural or educational interest; and establishments that operate facilities or provide services that enable patrons to participate in recreational activities or pursue amusement, hobby and leisure-time interests. In 2007, this industry accounted for 7% of nonprofit employment locations and 2% of nonprofit jobs statewide.

Child Day Care Services (NAICS 6244) – This industry comprises establishments primarily engaged in providing day care of infants or children. In 2007, this industry accounted for 3% of nonprofit employment locations and 1% of nonprofit jobs statewide.

Civic & Social Organizations (NAICS 8134) – This industry comprises establishments engaged in promoting the civic and social interests of their members, including alumni associations, ethnic associations, scouting organizations, student clubs and social senior citizens' associations. In 2007, this industry accounted for 4% of nonprofit employment locations and 2% of nonprofit jobs statewide.

Community Food, Housing, Emergency & Other Relief Services (NAICS 6242) – Community food service establishments primarily collect, prepare and deliver food for the needy. Community housing service establishments provide short-term emergency shelter, transitional housing for low-income people, volunteer construction or repair of low-cost housing, or repair of homes for elderly or disabled homeowners. Emergency and other relief service establishments primarily provide food, shelter, clothing, medical relief, resettlement and counseling to victims of domestic or international disasters or conflicts. In 2007, this industry accounted for 3% of nonprofit employment locations and 1% of nonprofit jobs statewide.

Educational Services (NAICS 611) – This industry comprises establishments that provide instruction and training through specialized establishments, such as schools, colleges, universities and training centers. In 2007, this industry accounted for 9% of nonprofit employment locations and 9% of nonprofit jobs statewide.

Grantmaking & Giving Services (NAICS 8132) – This industry comprises grantmaking foundations and charitable trusts, as well as establishments primarily engaged in raising funds for a range of social welfare activities. In 2007, this industry accounted for 3% of nonprofit employment locations and 1% of nonprofit jobs statewide.

Hospitals (NAICS 622) – Industries in this subsector provide medical, diagnostic and treatment services that include physician, nursing and other health services to inpatients. Hospitals may also provide outpatient services as a secondary activity. In 2007, this industry accounted for 2% of nonprofit employment locations and 34% of nonprofit jobs statewide.

Individual & Family Services (NAICS 6241) – This industry comprises establishments primarily engaged in providing nonresidential social assistance services for children and youth, such as adoption and foster care, drug prevention, life skills training and positive social development. In 2007, this industry accounted for 12% of nonprofit employment locations and 5% of nonprofit jobs statewide.

Nursing & Residential Care Facilities (NAICS 623) – Industries in this subsector provide residential care combined with either nursing, supervisory or other types of care as required by the residents. Examples include nursing care facilities, residential mental health facilities and community care facilities for the elderly. In 2007, this industry accounted for 14% of nonprofit employment locations and 16% of nonprofit jobs statewide.

Religious Organizations (NAICS 8131) – This industry comprises churches, religious temples, monasteries and establishments primarily engaged in administering an organized religion or promoting religious activities. In 2007, this industry accounted for 3% of nonprofit employment locations and 1% of nonprofit jobs statewide.

Social Advocacy Organizations (NAICS 8133) – This industry comprises establishments primarily engaged in promoting a particular cause or working for the realization of a specific social or political goal to benefit a broad or specific constituency. These organizations may solicit contributions or offer memberships to support these goals. In 2007, this industry accounted for 6% of nonprofit employment locations and 2% of nonprofit jobs statewide.

Vocational Rehabilitation Services (NAICS 6243) – This industry comprises establishments engaged in providing services such as job counseling, job training and work experience to unemployed and underemployed persons, persons with disabilities and persons who have a job market disadvantage because of lack of education, job skills or experience. In 2007, this industry accounted for 4% of nonprofit employment locations and 4% of nonprofit jobs statewide.

Appendix B

Data Sources

Quarterly Census of Employment and Wages

The Quarterly Census of Employment and Wages (QCEW), a cooperative endeavor between the U.S. Department of Labor's Bureau of Labor Statistics (BLS) and the Minnesota Department of Employment and Economic Development (DEED), is a virtual census of Minnesota employers, covering 97% of nonagricultural employment and wage data in Minnesota. Covered employment includes private sector employees, as well as state, county and municipal government employees insured under the Unemployment Insurance (UI) Act and federal employees who are insured under separate laws. Religious congregations, proprietors, the self-employed, railroad workers, family farm workers, full-time students working for their school, elected government officials and those working on a commission-only basis are excluded. Total wages include gross wages and salaries, pay for vacation and other paid leave, tips and other gratuities that are reported to the employer, bonuses (including severance pay), stock options, some sickness and disability payments, and the cash value of meals and lodging. For more information about the QCEW, visit www.deed.state.mn.us/lmi/tools/qcew/about.htm.

This report uses QCEW data to analyze 501(c)(3) nonprofit employers, employment locations, employees and wages. Each year, DEED provides new data for the most current year and revised data for the previous year. Therefore, data for 2006 may differ slightly from what was reported in the *2007 Minnesota Nonprofit Economy Report*. Information on the number of nonprofit employers is only available at the state level, so regional analysis focuses on the number of nonprofit employment locations. This report uses the Consumer Price Index (CPI-U) to adjust total payroll and average weekly wages for inflation.

Enhanced Wage Records

The median wage data used in this report is from the Minnesota Department of Employment and Economic Development (DEED). DEED merges data from the QCEW program (described above) from the 4th quarter of 2007 with Unemployment Insurance (UI) Wage Records for the same quarter. UI records contain individual-level employment and wage data on all employees and employers covered under the UI program. Merging these data sets enables DEED to determine an individual employee's wages as paid by a unique employer during that quarter. In order to be included in the analysis, each employee needed to have earnings in the 3rd and the following 1st quarter with the same employer as in the 4th quarter. This report uses the data to examine median hourly wages, or the mid-point in the range of wages, by region for full-time employees in selected industries. Full-time is defined as working 35 hours or more per week, or over 454 hours during the quarter.

Attorney General's Office, Charities Division

The Minnesota Attorney General's (AG) office has the primary responsibility for regulating, enforcing and supervising charitable organizations and charitable trusts. This report uses data provided by the AG's office on charitable organizations exempted under IRS subsection 501(c)(3) and (c)(4) that filed a Form 990 or 990EZ. Nonprofit organizations exempted under IRS subsection 501(c)(5) through (c)(19), private foundations filing form 990PF, and certain charitable trusts are excluded from analysis in this report. Some organizations with physical operations in Minnesota, but with headquarters outside of the state, may not be captured in this analysis. Certain other organizations that are exempt from filing with the Attorney General's Office are also not reflected in the data, including organizations that do not employ paid staff and have less than \$25,000 in gross receipts, and churches and other religious organizations that are not required to file a Form 990 federal return.

This report analyzes the financial data for 7,127 organizations filing from an address located in Minnesota. Of these organizations, 92% were 501(c)(3)s and 8% were 501(c)(4)s. This report attempts to use financial information reported for the fiscal year that closed in 2007. However, for 34% of the organizations, fiscal year 2006 was the most current financial information available. When possible, missing or incomplete financial information has been supplemented with data obtained from the Internal Revenue Service (IRS), the Economic Research Institute (www.eri-nonprofit-salaries.com) or Guidestar (www.guidestar.org).

JOBS NOW Coalition, *The Cost of Living in Minnesota*

In *The Cost of Living in Minnesota*, the JOBS NOW Coalition calculates the wage necessary for a family to cover its basic needs, looking at a variety of family compositions as well as geographic differences. The "basic needs budget" constructs a realistic budget by measuring the actual costs of meeting basic needs for food, housing, health care, child care, clothing and transportation in 2006. The budget does not include any money for entertainment, vacation, eating out, emergencies, retirement or education. *The Cost of Living in Minnesota* uses the state's thirteen economic development regions to examine geographic differences, while this report uses the state's six planning regions. Therefore, to determine the appropriate wage for the Northwest, Southwest and Central planning regions, the unweighted budgets of the economic development regions within these planning regions were averaged together. *The Cost of Living in Minnesota* report and budget calculator are available online at www.jobsnowcoalition.org.



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