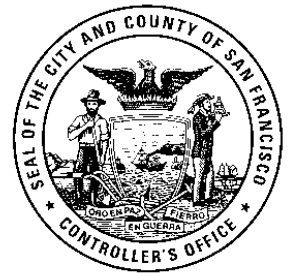
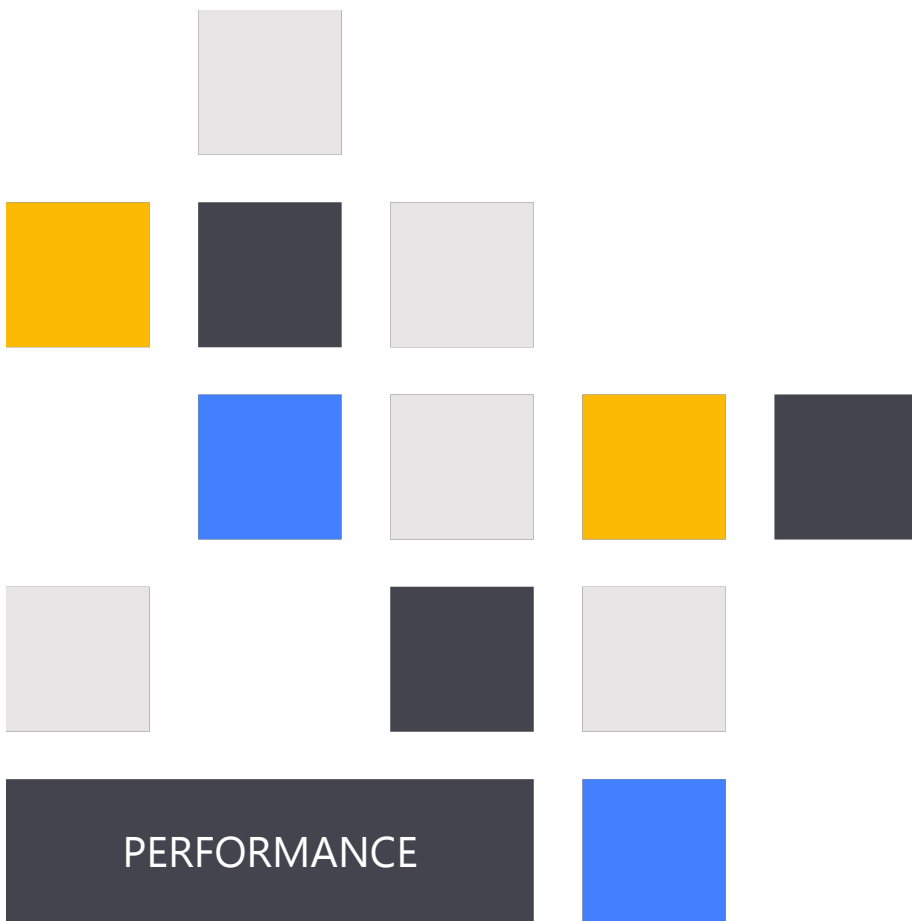


Nonprofit Wage and Equity Survey

Results and Analysis of Key Findings

This report summarizes analysis and key findings from survey data gathered from 152 nonprofits who contract with the City and County of San Francisco, including characteristics of nonprofit organizations, employee wage levels and demographic trends among nonprofit workers.



April 25, 2023

City & County Of San Francisco
Office of the Controller
City Performance

About City Performance

The City Services Auditor (CSA) was created in the Office of the Controller through an amendment to the San Francisco City Charter that was approved by voters in November 2003. Within CSA, City Performance ensures the City's financial integrity and promotes efficient, effective, and accountable government.

City Performance Goals:

- City departments make transparent, data-driven decisions in policy development and operational management.
- City departments align programming with resources for greater efficiency and impact.
- City departments have the tools they need to innovate, test, and learn.

City Performance Team:

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Executive Summary

OVERVIEW

The City and County of San Francisco (City) contracts with over 600 nonprofit organizations to deliver \$1.5 billion worth of essential services to San Francisco residents each year. Despite the magnitude of the City’s investment and the critical nature of the work, nonprofit organizations experience significant funding constraints and inflationary pressures that lead to many nonprofit workers earning very low wages. In the fall of 2022, the Controller’s Office fielded a survey to gather data on wages, demographics, and organizational characteristics from nonprofits who contract with the City to better understand the wage pressures faced by nonprofit contractors. The Controller’s Office used a two-tiered survey approach to gather data from **152 organizations**:

General Survey: 123 Respondents

- Distributed to any nonprofit currently in contract with the City
- Gathered summary data about each organization’s budget and staff wages/demographics

Cohort Survey: 29 Respondents

- Distributed to a subset of organizations spanning service areas
- Gathered General Survey summary data plus position-level data for each respondent’s workforce

SURVEY RESULTS

Nonprofit Survey Data Shows:



152

Nonprofit contractors responded to the survey



22

Departments with which survey respondents have contracts



48%

Percent of respondents with an annual budget larger than \$5M

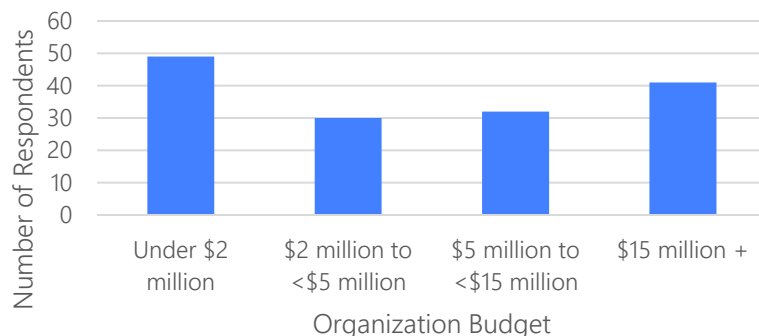


79%

Percent of nonprofits funded by more than one department

Nonprofit organizations responding to the survey represent a mix of sizes and service areas, are funded by an array of City departments, and provide services in each neighborhood in San Francisco. Nonprofits with annual budgets under \$2 million were the largest group, followed by organizations with annual budgets over \$15 million.

Annual Budget Amount for All Respondents
n=152

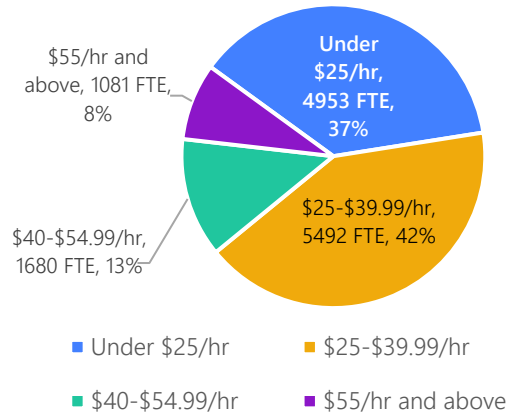


Top services areas selected by the 152 respondents include: Youth Services (16%), Homelessness and Housing (16%), Behavioral Health: (13%), and Senior Services (10%). Respondents provide services all neighborhoods in San Francisco, though the highest proportion indicated they serve the Mission, Tenderloin, South of Market, and/or Bayview-Hunters Point Neighborhoods.

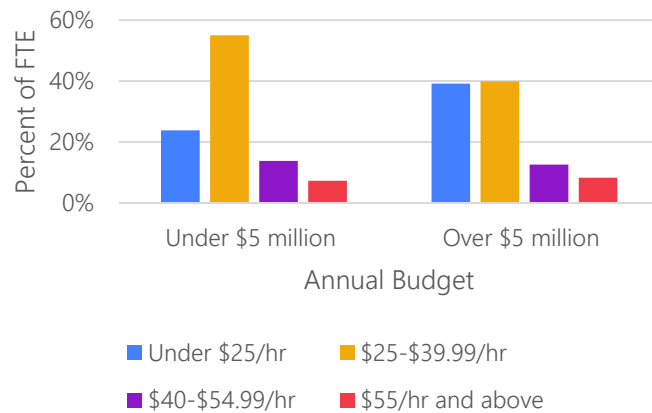
The survey gathered wage and demographic data for over 16,000 workers comprising over 13,200 FTEs. The majority of the workforce across respondent organizations earn less than \$40 per hour and almost 5,000 FTEs make less than \$25 per hour.

Examining the distribution of wage levels by service area and organization size provides additional context about where these low wage workers are concentrated. Workers making less than \$25 per hour comprise a larger proportion of the workforce in large organizations (those with an annual budget of over \$5 million). The graph below shows the service areas with the largest and smallest proportions of low wage workers. Organizations in the Workforce and Youth categories show at least 50% of their workforces earning under \$25 per hour.

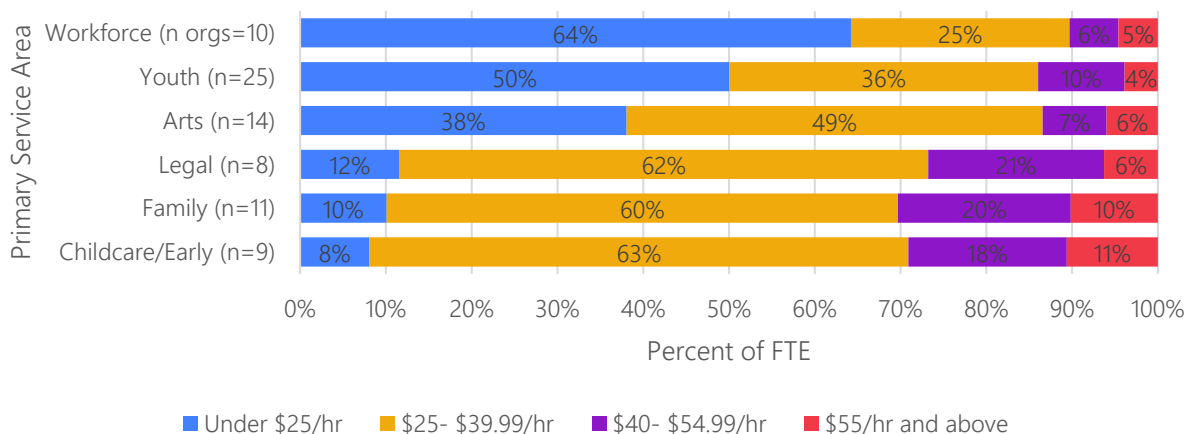
Wages of All Reported Full-time Equivalent Staff, n=13,206 FTE



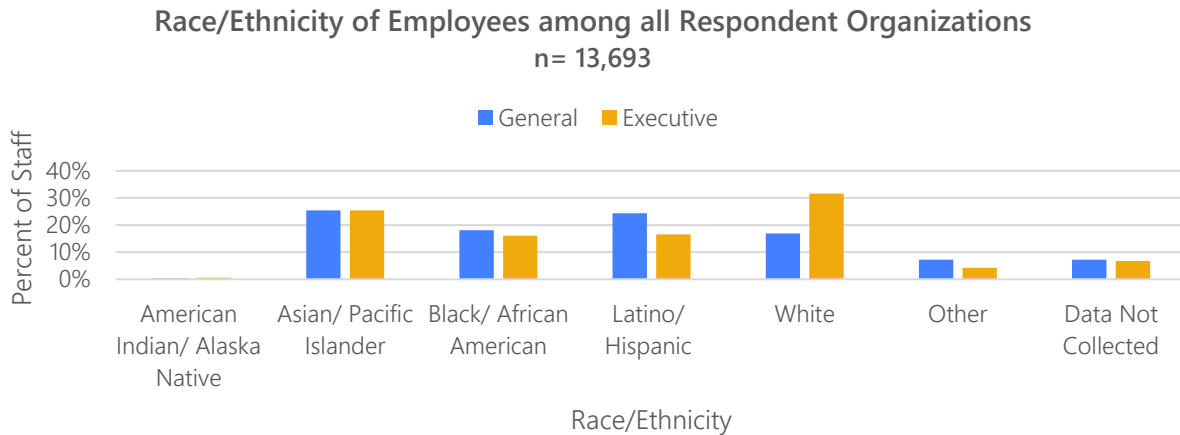
Wage Ranges by Respondent's Annual Budget, n=13,206



Wage Ranges by Respondent's Primary Service Area (excerpted) n =13,206 FTE



The data also shows that the nonprofit workforce is incredibly diverse, particularly compared to other industries in San Francisco. **Black, Indigenous and People of Color (BIPOC) workers represent over 75% of the general workforce** (meaning all staff excluding executives). The executive workforce has a greater proportion of White employees than the general workforce.



Cohort survey responses include data for 5,174 workers spanning 14 job categories. The cohort workforce is similarly diverse, although the cohort has a greater proportion of Black or African American employees compared to the overall survey. The cohort **general workforce (5,004 workers)** has a **mean wage of \$28.72 per hour** and the executive workforce (164 workers¹) has a mean wage of \$77.47 per hour.

KEY FINDINGS AND ANALYSIS

1. Low Wage Workers are Disproportionately BIPOC

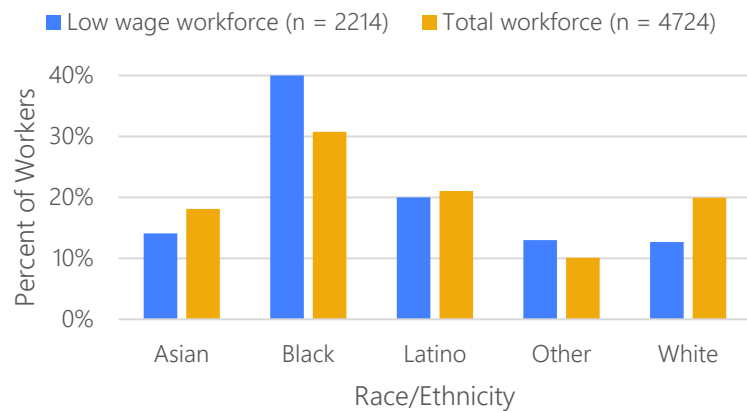
Workers making less than \$25 per hour are disproportionately Black or African American.

Four job categories have lower-than-average mean wages in the cohort survey:

- Front Desk Staff
- Janitorial or Maintenance Staff
- Children/Youth-Focused Staff
- "Other Direct Service Staff"

Each of these positions has a different demographic distribution, but within most job categories, either Asian, Black,

Racial Distribution of Workers Earning under \$25/hr Compared to Total Cohort Workforce



¹ Note that the numbers of general and executive workforces here are based on workers with an hourly wage provided. They also exclude outliers, so they do not sum to the total number of workers in the cohort.

or Latino racial groups are overrepresented compared to the total cohort demographic distribution. Gender distribution varies between job categories. Although these highlighted positions have the lowest wages in the survey, wages across positions are low. The median wage across all workers in the cohort survey is \$25.25. This means **50% of workers in the cohort make \$25.25 per hour or less.**

Job Category	Mean Hourly Wage	Number of Workers
Front Desk Staff	\$22.03	281
Janitorial or Maintenance Staff	\$24.52	269
Children/Youth-Focused Staff	\$26.18	71
Other Direct Service: Ambassadors/Practitioners	\$20.62	1,020
Other Direct Service: Food and Retail staff	\$24.14	59
Other Direct Service: Miscellaneous Counselors	\$25.28	242
Other Direct Service: all other roles	\$22.32	121

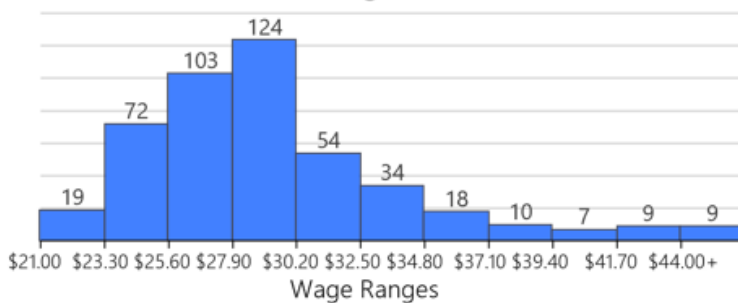
Approximately **40% of the entire cohort workforce holds a job in one of these low-paying job categories and 38% of FTEs in the overall survey population make under \$25 per hour.** This is a large proportion of the surveyed workforce, and the finding is likely applicable beyond the survey

population: a large proportion of the total City-funded nonprofit workforce likely earn very low wages. This means that Citywide investments into raising wages for low-wage workers, even if targeted at specific positions, would likely be costly. However, potential interventions could have wide-reaching positive equity impacts.

2. Case Management is a key role that spans service areas and has high vacancy rates.

Case Management is a key role across service areas, workers in this job category makes low wages for the services they perform, and data shows it may be difficult to hire and retain staff in these positions. **Case Management positions make up 29% of all the vacancies in the cohort sample (133 FTE among 457 vacant FTE positions), despite only representing 8% of the total cohort workforce.**

Number of Case Management Workers in Defined Wage Ranges



Workers in the Case Management category occupy jobs across a range of supervision levels. This translates to a range in wages from \$21.00 per hour through over \$55.00 per hour, with a mean wage of \$29.45 per hour.

In the cohort data, most Case Management positions are in organizations that identified

Homelessness and Housing as their primary service area. However, organizations with Case Management workers span an array of secondary service areas and 86% of Case Management employees in the cohort work for organizations that are funded by two or more City departments. This shows that Case Management does span programs across departments and service areas. This analysis suggests that **efforts to address operational challenges in hiring and retaining Case Management staff will likely require a Citywide approach,** rather than department-specific funding initiatives.

Investing in Case Management positions could also have positive equity impacts: workers in these roles are more likely to be Hispanic or Latino/a and female, compared to the overall cohort demographic distributions.

3. Some operational or wage-related challenges may be better suited for department-specific interventions or other targeted approaches.

Leveraging stakeholder insights from prior qualitative analysis, the Controller’s Office analyzed survey data to explore certain operational challenges, such as pay differentials for [bilingual staff](#) and whether [part-time staff without benefits](#) were being employed in order to save the cost of a full-time benefitted position. The Controller’s Office also explored issues arising in the cohort survey regarding significantly [lower mean wages for executives in small organizations](#) compared to large nonprofits, as well as the [impact of unionization](#) on worker wages. While there was insufficient evidence within survey data to suggest the need for a Citywide policy in these areas, these challenges could be appropriate for further analysis or targeted approaches within departments, service areas, or contracts.

CONCLUSIONS AND NEXT STEPS

In May 2022, the Controller’s Office released a [memo](#) exploring the wage pressures faced by nonprofit contractors providing essential services to San Francisco residents. That memo found that low wages across the sector leads to difficulty hiring and retaining staff, creating significant service impacts and gaps in the social safety net. Results from the survey may inform policy makers and stakeholders in several ways. Each issue is distinct and may require different strategies to address. The Controller’s Office plans to release a memo of recommendations related to the findings of this report in the coming months.

Equity Implications	System Implications	Sustainability Implications
The results of this survey could inform City strategies that specifically address the significantly low wages of the BIPOC workforce across the City’s nonprofit contractors.	The results of this survey could inform targeted City strategies that provide a critical lifeline for prioritized service areas, such as shelter and housing, behavioral health, or childcare.	The results of this survey could inform City strategies that consider overall nonprofit sustainability with broad and flexible approaches to funding.

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Nonprofit Wage and Equity Survey Results

OVERVIEW

The City and County of San Francisco (City) relies on nonprofit organizations to deliver essential services to San Francisco residents. In Fiscal Year 2021-2022 (FY21-22), City departments funded a total of \$1.5 billion in services delivered by over 600 nonprofit organizations across San Francisco.

The nonprofit sector serves vulnerable populations throughout the city, but these organizations experience significant funding constraints and inflationary pressures that lead to many nonprofit workers earning very low wages for essential work. In May 2022, the Controller's Office released a memo² detailing the wage pressures face by nonprofits, and how these pain points impact the services that nonprofits deliver. The memo drew primarily on qualitative data gathered through interviews and focus groups with City departments and nonprofit contractors.

To build on this previous work, the Controller's Office developed a survey to gather comprehensive quantitative data from an array of nonprofits who contract with the City. Through analysis of both organization-wide and employee-level demographic and wage data, the survey supports understanding of wage levels, variance in wages across organizations and service areas, and demographic trends in comparison to wage levels to inform policy solutions aimed at addressing inequitable or unsustainable wage levels among the City's nonprofit contractors.

Survey Approach

The Controller's Office gathered information from nonprofits through a two-tiered survey approach:

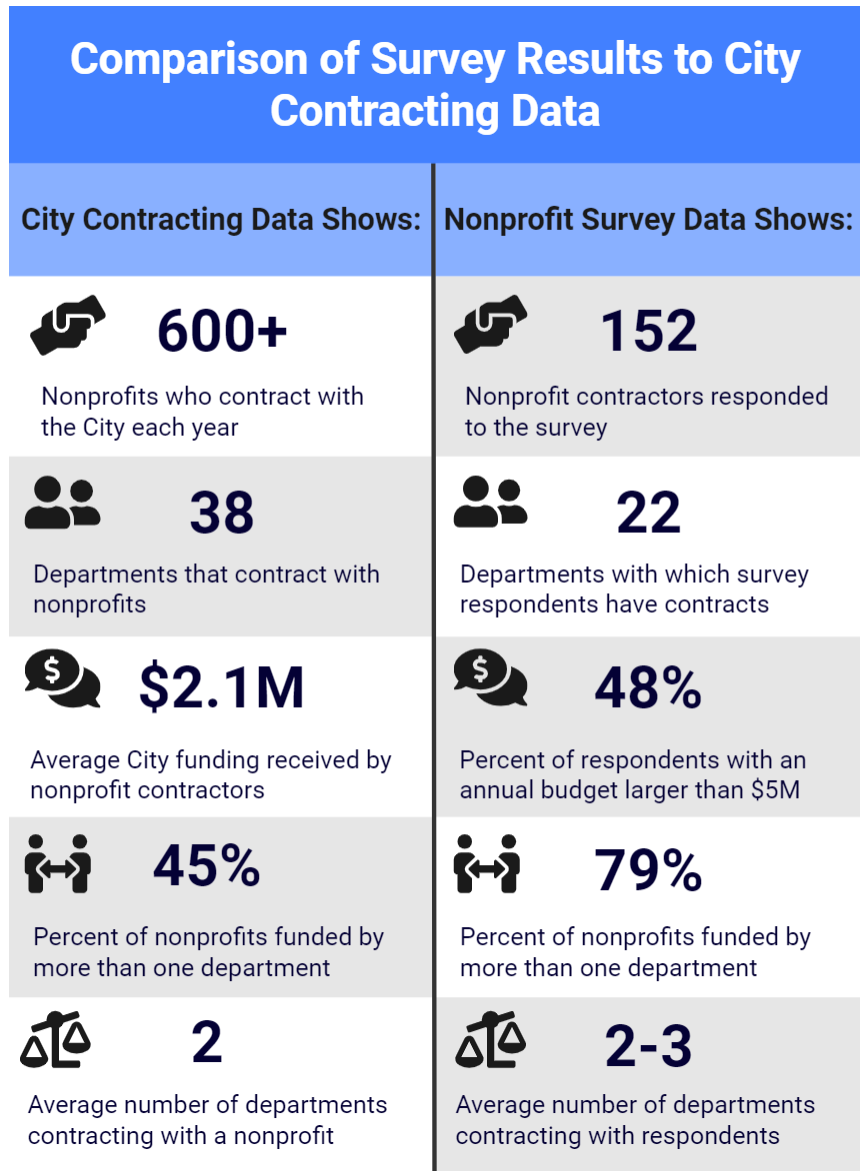
- **General Survey:** The Controller's Office distributed a general survey broadly to any nonprofit currently in contract with the City. The online survey gathered organizational data about budget levels and department funders, and gathered aggregated data about staff wage levels and demographics. A total of 123 nonprofit organizations responded to the General Survey.
- **Cohort Survey:** The Controller's Office identified and reached out to 50 organizations across a spectrum of service areas and organization size to provide worker-level data as part of a more in-depth survey. Among these, 29 provided responses, and this data is referred to as the Cohort Survey throughout this report. In addition to similar organizational data as was collected through the general survey, the online and Excel-based cohort survey gathered position-level data for the nonprofit's entire workforce, including wage levels, position titles, qualifications, and demographics of employees.

² <https://sfcontroller.org/sites/default/files/Documents/Auditing/Memo%20-%20Nonprofit%20Wage%20Analysis%20-%20FINAL%205.4.22.pdf>

The Controller’s Office administered both surveys during October and November 2022,³ and the survey data included in this analysis represents responses from **152 nonprofit organizations in contract with the City**.

The two-tiered survey approach allowed the Controller’s Office to analyze robust and detailed worker-level wage and demographic data among a subset of organizations and use the comparisons between the cohort and the general survey to determine the generalizability of the conclusions drawn based on the cohort data and the potential impact of policies targeting nonprofit staffing.

The figure provides several comparisons between the nonprofits that responded to the survey and City contracting and payment data for FY21-22, some of which were used to ensure comparability and generalizability of survey data. The Controller’s Office matched survey respondents to City payment data for FY21-22 and estimates that the 152 respondents received approximately 60% of City spending on nonprofit contracts and grants during that year.



³ During the survey period, several departments were implementing budget initiatives approved in the FY22-23 budget. These increases may or may not be reflected in the data collected, depending on the status of contract changes during the time of survey collection.

CHARACTERISTICS OF SURVEY RESPONDENTS

About the Nonprofits: Characteristics of Respondent Organizations

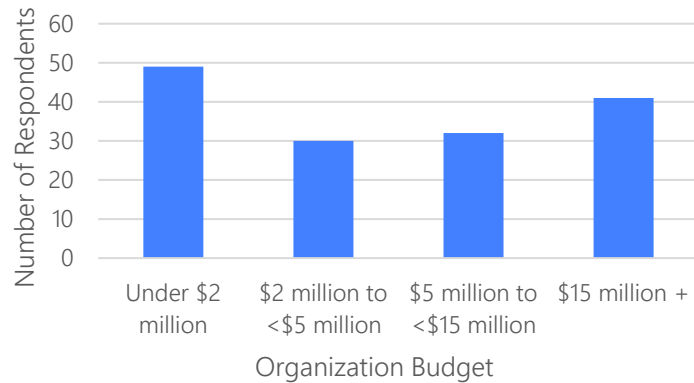
The 152 nonprofit respondents represent a broad array of service areas, department funders, organization sizes, neighborhoods served, and other characteristics. The sample of respondents is generally representative of the spread of nonprofits who contract with the City.

About half of survey respondents have an annual operating budget of under \$5 million, with the other half indicating an annual budget over \$5 million. On average, respondents receive 51% of annual revenue from City contracts, and 58% of all FTEs are funded through these contracts.

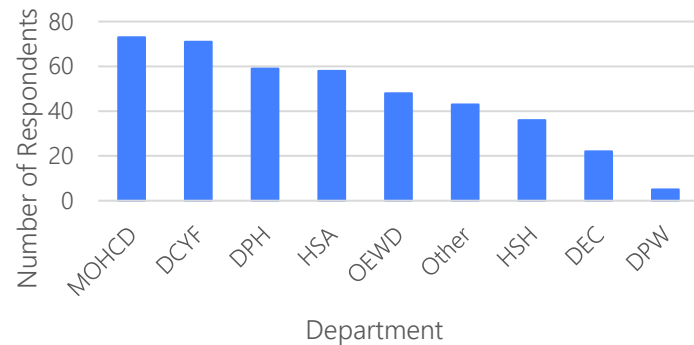
Respondents selected all departments from which they receive funding. The distribution of responses is similar to that of City spending data, suggesting that the surveyed respondents generally reflect the array of the City's contractors overall. City spending data shows that top funding departments are the Department of Homelessness and Housing Services (HSH), the Department of Public Health (DPH), Human Services Agency (HSA), the Mayor's Office of Housing and Community Development (MOHCD), and the Department of Children, Youth, and Their Families (DCYF).

Nonprofit respondents selected primary service areas to indicate types of services provided to clients and the public. The greatest percentage of respondents selected Youth Services, Homelessness and Housing Services, or Behavioral Health Services as their primary area of service.

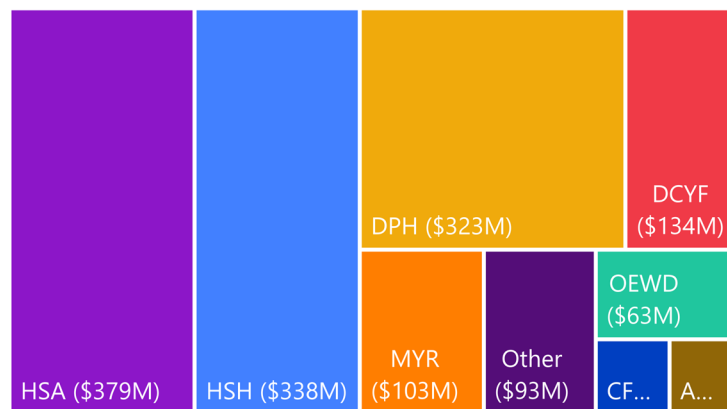
Annual Budget Amount for All Respondents
n=152

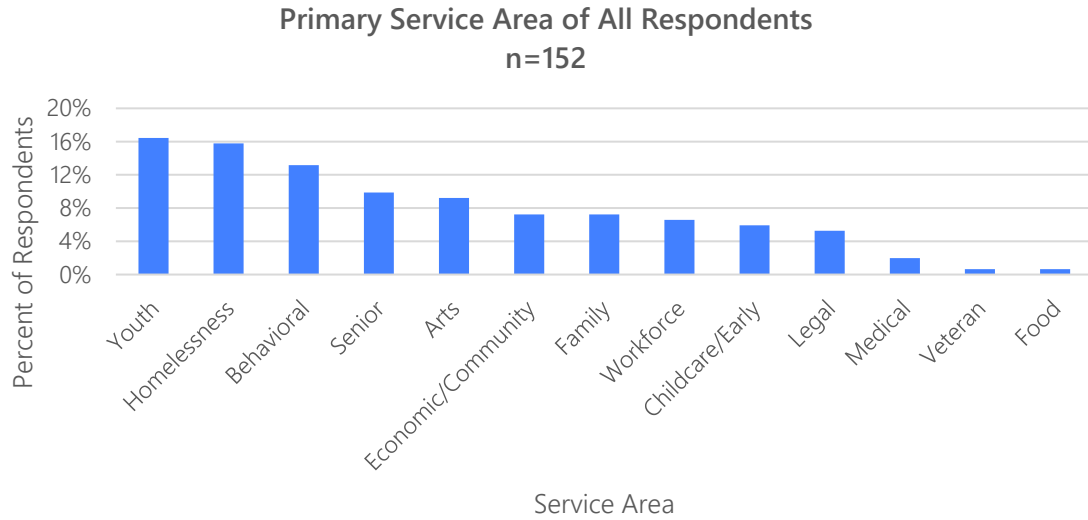


Departments Contracting with Surveyed Organizations
n=152



Total Amount Spent by Departments on Contracts with Nonprofit Organizations in FY22





To better understand communities served by sampled nonprofits, the survey asked respondents to select all neighborhoods where they deliver services. Neighborhoods historically known for having a high concentration of Black, Indigenous and People of Color (BIPOC) and/or low-income communities were highly represented in neighborhoods served by nonprofit respondents. Alternatively, few respondents indicated park neighborhoods as a service area.

The neighborhoods most commonly selected by respondents:	
Neighborhood	% of Respondents
Mission	47%
Tenderloin	43%
South of Market/Financial District/South Beach	39%
Bayview-Hunters Point	34%
Excelsior/Outer Mission	32%

The neighborhoods least commonly selected by respondents:	
Neighborhood	% of Respondents
Golden Gate Park	7%
Treasure Island	7%
Presidio	8%
Noe Valley/Twin Peaks/West of Twin Peaks	9%
Pacific Heights/Presidio Heights/Marina	10%

Of the surveyed nonprofits, 29 respondents (19%) indicated that some or all employees at the organization are represented by a union. Twelve of the 29 unionized nonprofits participated in the cohort survey, which will allow a more detailed look at how union representation may impact wage levels and other factors.

Characteristics of Respondent Nonprofit Employees

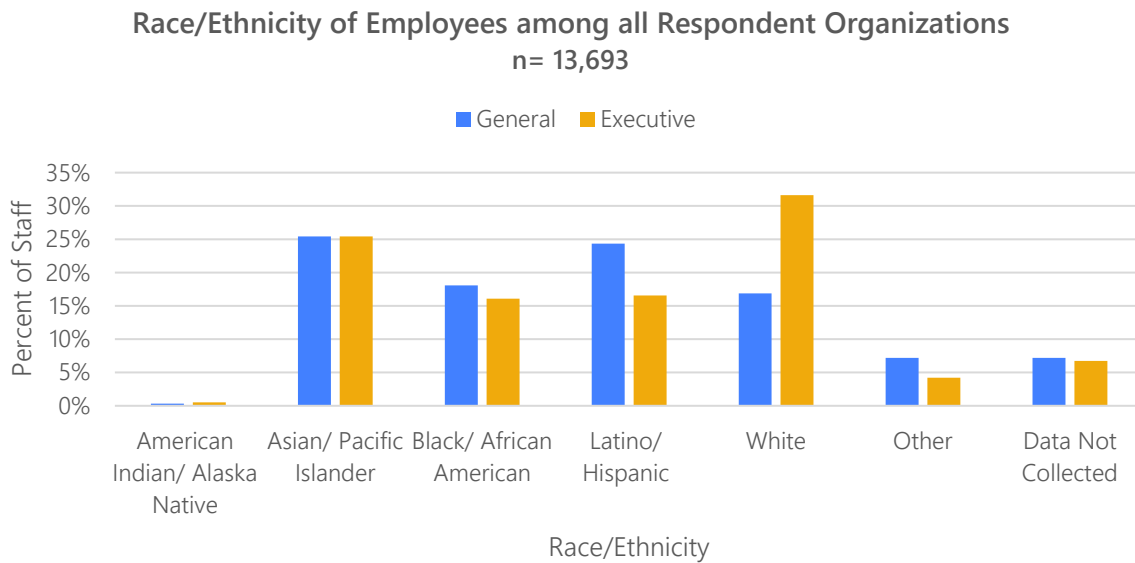
Respondents reported a **total of 16,051 employees** (“head count”) occupying a total of 13,206 full-time equivalent (FTE) positions across the 152 nonprofit organizations. This section summarizes demographic and wage level data of this staff.

Worker Demographics among Survey Respondents

Nonprofits often provide services to underserved neighborhoods in San Francisco. The survey results suggest that City-funded nonprofits most frequently serve neighborhoods with high proportions of BIPOC individuals. Hiring BIPOC employees to serve communities with higher proportions of people of color allows for cultural congruency, improving the relationships between providers and communities receiving services.

Respondents provided summary data for gender and race/ethnicity demographics in two broad job categories: **general employees** and **executive employees**. The general staff category includes direct service, back office, janitorial, middle management positions, and more. The executive category includes roles such as executive director, chief officers, and executive-level finance positions.

The sample of respondents in both general and executive job categories is diverse, although White staff are overrepresented in the executive category as compared to other racial groups.



This is still in stark contrast to other industries demographic breakdowns in San Francisco, where White employees are the dominant racial group in most key industries. According to the American Community Survey, within key industries White employees make up at least 35% of the workforce, while Black/African American employees make up less than 10% of the workforce.⁴

⁴ Steven Ruggles, Sarah Flood, Matthew Sobek, Danika Brockman, Grace Cooper, Stephanie Richards, and Megan Schouweiler. IPUMS USA: Version 13.0 [2015-2019 ACS 5 Year]. Minneapolis, MN: IPUMS, 2023. <https://doi.org/10.18128/D010.V13.0>

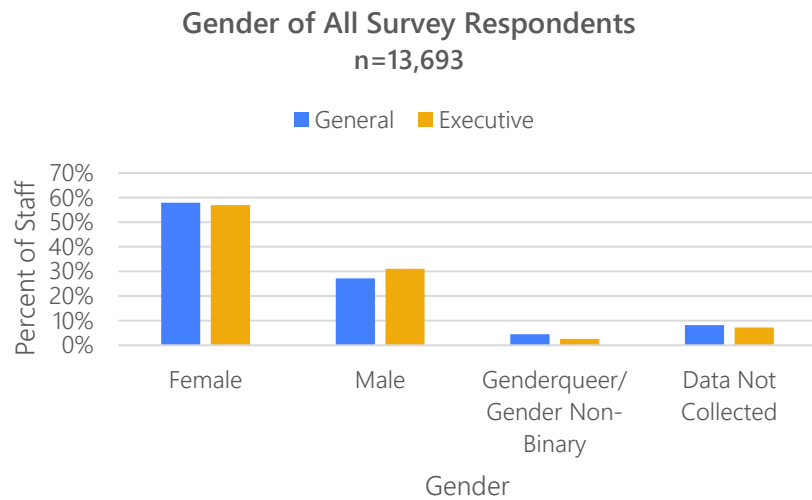
Demographics of San Francisco Workers in Key Industries

Health Care and Social Assistance: 37% of workers are White, 42% are Asian, 14% are Latino/x, and 7% are Black or African American.

Finance, Insurance and Real Estate: 55% of workers are White, 30% are Asian, 9% are Latino/x, and 5% are Black or African American.

Professional, Scientific and Technical: 60% of workers are White, 29% are Asian, 8% are Latino/x, and 3% are Black or African American.

Similarly, the gender distribution of survey respondents differs from other sampled industries in San Francisco. Apart from one industry, Health Care and Social Assistance, all other sampled industries are heavily represented by male workers.⁵ In contrast, the sample of respondents in both general and executive categories is overwhelmingly female, with male workers being slightly more represented only in the executive job category.⁶



See [Appendix B](#) for more detailed results from the American Community Survey regarding race and gender demographics of workers across key industries in San Francisco.

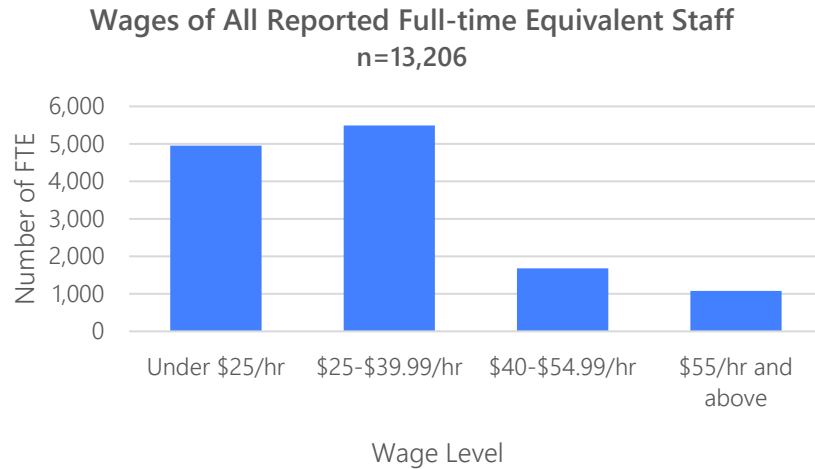
Worker Wages among Survey Respondents

The May 2022 Controller’s Office memo on nonprofit wage pressures found that nonprofit workers that earn the lowest wages often perform front-line services. The general survey asked respondents to report summary counts of FTEs within pre-defined wage levels. Summary wage data provides insight into the overall wage trends among San Francisco nonprofits.

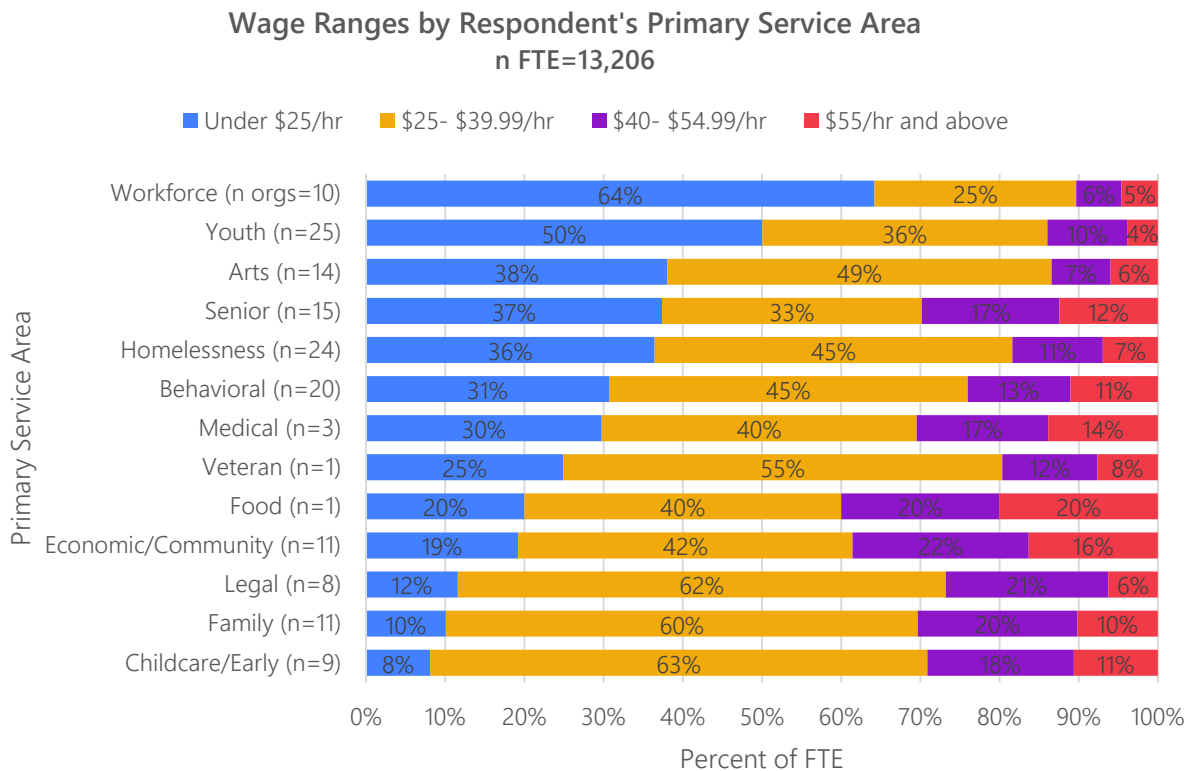
⁵ Ibid.

⁶ Some genders were too small to be able to meaningfully compare in our analysis. Trans Male and Trans Female were combined into Male and Female gender categories.

Unlike the cohort data, the general survey did not request detail on the exact wage for each employee or the types of positions that encompasses each wage level for all surveyed nonprofits. The cohort analysis that follows provides more detail on the types of positions and demographics of employees by wage level and organization size.



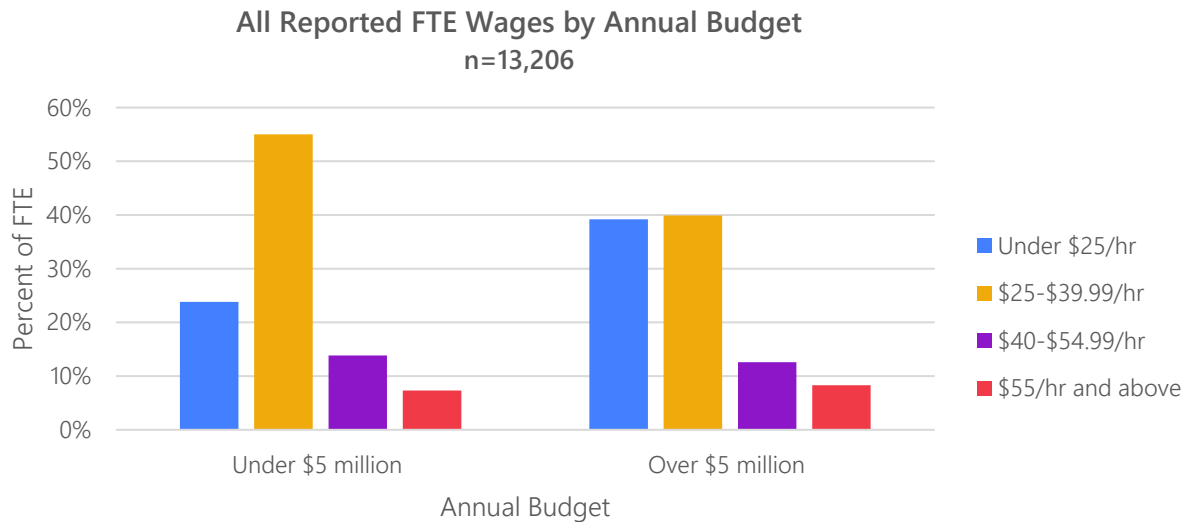
The general survey asked respondents to provide summary counts of full-time equivalent staff (FTEs) within pre-defined wage levels. **Nearly 80% of the 13,206 identified FTEs earn less than \$40 per hour.** See [Appendix B](#) for a summary table showing regional mean wages across a variety of industries.



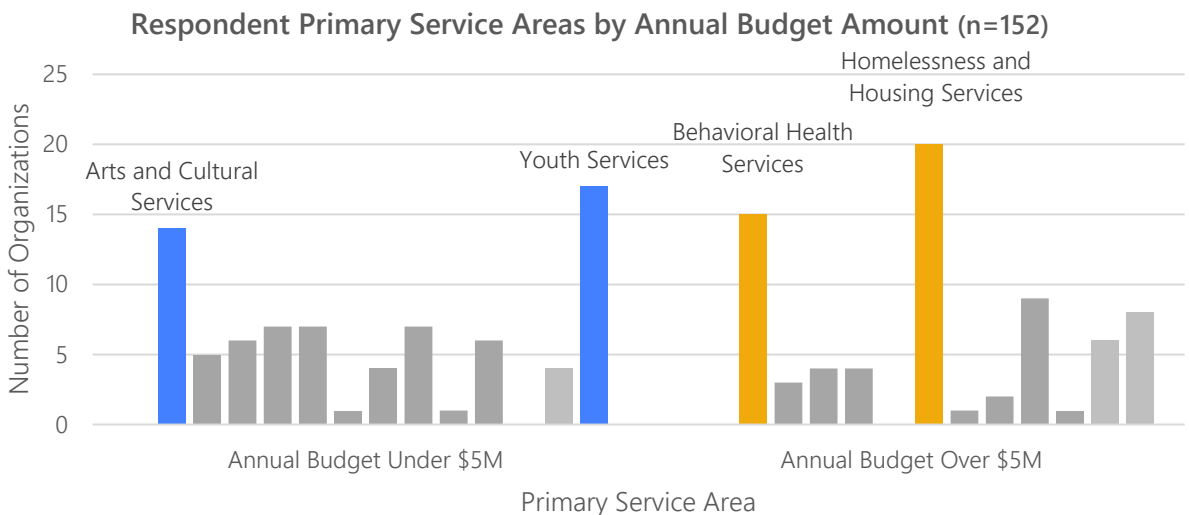
Examining the distribution of wage levels by service area and organization size provides additional context about where these low wage workers are concentrated. Looking at the proportion of staff in each wage level by primary service area shows that organizations with a primary service area of Workforce Development and Youth Services have at least 50% staff in the lowest wage level.

On the other end, organizations that primarily provide Childcare/Early Childhood Education services and Family Support services have 10% or less of staff in the lowest wage level, though organizations in these service areas have a large proportion of staff in the \$25-\$39.99 per hour wage range.

When comparing the breakdown of staff in each wage level by the organization size, survey data shows that organizations with annual budgets over \$5 million have the highest proportion of staff in the lowest wage level compared to other wage groups.



The intersection of an organization’s size and service area may have an impact on wage levels. The figure below shows which service areas are most represented among small and large organizations. Among the survey respondents, Behavioral Health and Homelessness and Housing services have the highest proportion of organizations with an annual budget over \$5 million. Alternatively, Arts and Culture and Youth Focused Services have the highest proportion of organizations with an annual budget under \$5 million. Workforce development organizations, which have the highest proportion of workers in the under \$25 per hour wage range, are split between the small (four organizations) and large (six organizations) categories below.



Putting Hourly Wages into Context

The table below shows an estimated conversation of the hourly wages discussed throughout this report into an annual salary assuming a worker is paid for 2,080 hours per year (or 40 hours per week, 52 weeks per year).

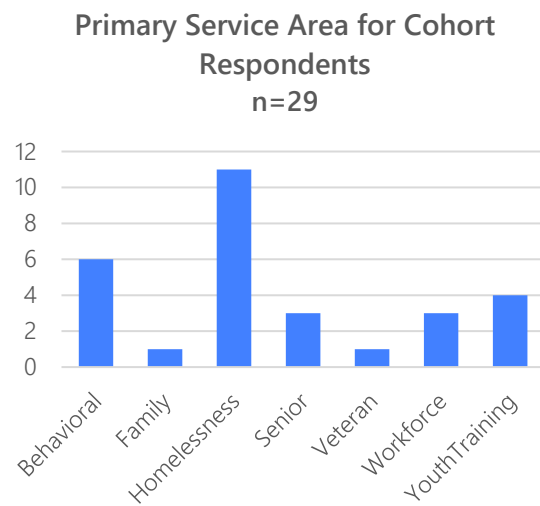
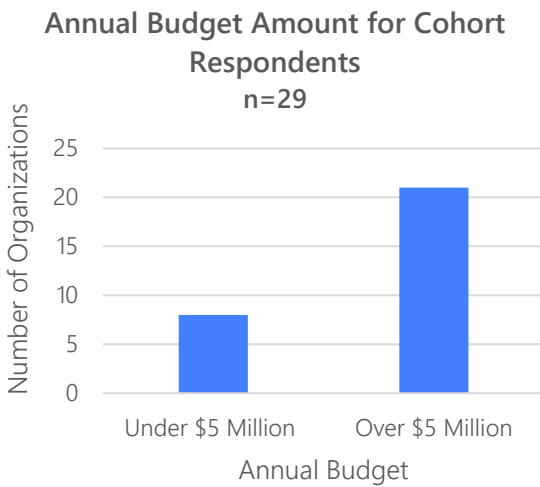
Hourly Wage Conversion	
Under \$25.00 per hour	Under \$52,000 annually
\$25.00-\$39.99 per hour	Between \$52,000 and \$83,200 annually
\$40.00-\$54.99 per hour	Between \$83,200 and \$114,400 annually
\$55.00 per hour or more	Over \$114,400 annually

To contextualize these salaries, HUD compiles Area Median Income (AMI) tables for metropolitan areas across the country.⁷ In 2022 for the metropolitan area that includes San Francisco, the AMI for a single adult is \$97,000 annually and \$138,550 annually for a family of four. HUD also defines standard income levels for San Francisco for households considered to be low income (defined as 80% AMI). In 2022, the low-income threshold for a single adult was \$77,600 per year and for a family of four was \$110,850 per year.

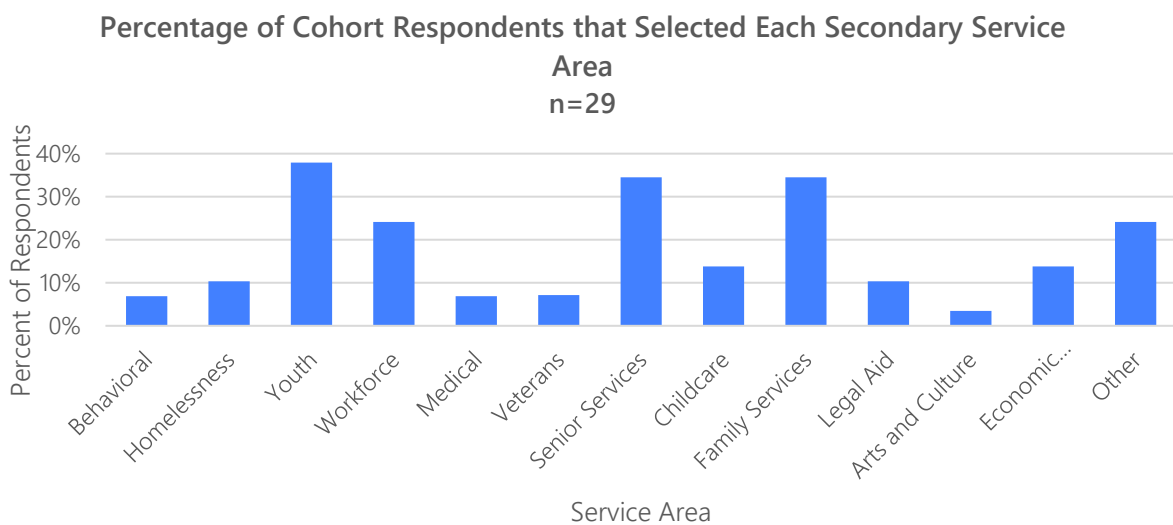
⁷ "2022 Maximum Income by Household Size" table, compiled by HUD. Accessed 4/20/2023 from <https://sf.gov/find-your-area-median-income-ami-level>

COHORT SURVEY RESPONDENT CHARACTERISTICS

The cohort survey includes detailed worker information for 29 organizations selected to gather employee-level data from a diverse set of nonprofits that receive substantial funding from the City. As a group, organizations that responded to the cohort survey **span seven service areas, receive funding from 12 departments, and receive approximately 25% of total funding the City spends on nonprofit grants and contracts annually**. The surveyed cohort organizations are primarily large organizations with an annual budget of \$5 million or more. Most organizations selected “Homelessness and Housing Services” as their primary service area.



Organizations could select multiple secondary services areas, and these selections show a more even distribution of cohort respondents, with Youth, Senior Services, Family Services, and other service areas as the top secondary service areas.



The cohort survey generated worker-level data on wages, demographics, and key position requirements. [Cohort survey responses includes data for 5,174 workers](#) spanning 14 job categories, as selected by respondents. The table below provides mean and median wages and the number of employees within each job category, sorted by the mean hourly wage.

Job Category	Mean Wage Per Hour	Median Wage Per Hour	Employees in Category
Other Direct Service Staff	\$21.69	\$21.00	1,442
Front Desk	\$22.03	\$22.00	281
Janitorial or Maintenance Staff	\$24.52	\$23.19	269
Children/ Youth Focused Educator/Worker	\$26.18	\$24.42	71
Case Management Staff	\$29.45	\$28.73	459
Physical/General Health Practitioner	\$30.20	\$19.00	364
Community Outreach Staff	\$30.40	\$28.00	184
Program Delivery Staff	\$31.04	\$28.19	825
Adult Focused Educator/Worker	\$31.20	\$32.45	32
Site Supervisor, Property Management Staff	\$31.80	\$29.96	239
Attorney or Legal Services Staff	\$38.67	\$34.94	28
Behavioral Health Practitioner	\$39.41	\$37.05	195
Administrative or Office Staff	\$40.12	\$37.12	620
Executive Leadership	\$78.37	\$72.19	165

[Across general workers, the mean wage is \\$28.72 per hour, or approximately \\$59,700 per year.](#) For executive workers, the mean wage is \$77.47 per hour, or approximately \$161,100 per year.

	Mean (per hour)	Median (per hour)
General <i>n = 5,004 workers (4,501 FTE)</i>	\$28.72	\$25.00
Executive <i>n = 164 workers (161 FTE)</i>	\$77.47	\$72.10

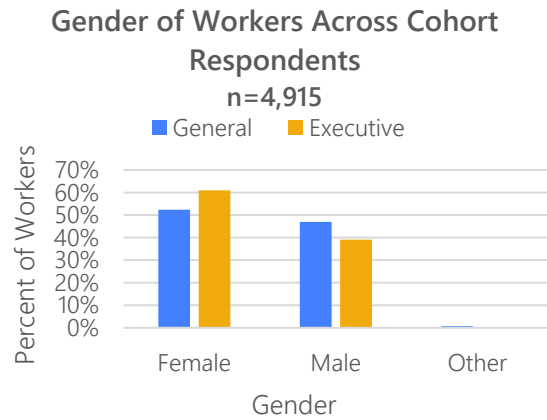
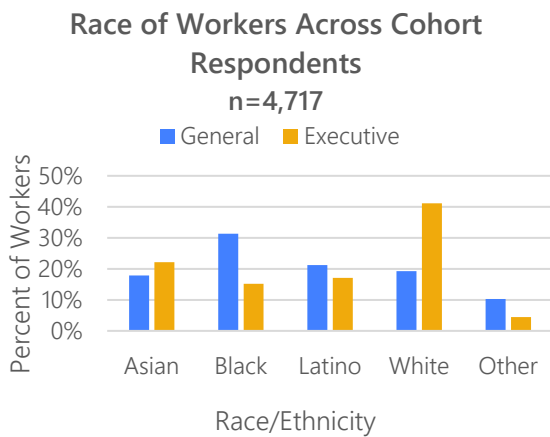
There are many more employees in large organizations in the cohort data than employees in small organizations. However, there are differences in mean wages within job categories between small and large organizations.

Among most roles, [the mean wages of workers at large organizations are higher than the mean wages of workers within the same job category at small organization.](#) The one exception is children/youth focused workers, where the mean wage is higher at small organizations. The table below excerpts the roles with the clearest differences in wages by organization size.

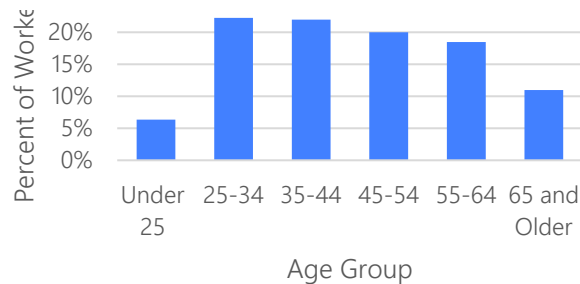
Job Category	Large Organizations		Small Organizations	
	Mean Wage Per Hour	Number of Employees	Mean Wage Per Hour	Number of Employees
Administrative Staff	\$40.18	610	\$35.93	10
Case Management Staff	\$29.53	451	\$25.05	8
Executive Leadership	\$79.30	150	\$47.22	15
Children/ Youth Focused Educator/Worker	\$25.88	53	\$27.06	18
Program Delivery Staff	\$31.36	775	\$26.13	50

Data for the workers among cohort respondents’ general workforce shows Black or African American workers are the largest group when broken out by race, followed by Hispanic or Latino and White workers. Asian workers make up 18% of the general workforce identified in the cohort survey. All other racial groups were combined into an “Other” category because the groups were otherwise too small for analysis. The racial breakdown differs among the executives, where White executives are the largest group at 41%, with Asian executives at 22%, Hispanic or Latino/a executives at 17% and Black or African American executives at 15%.

Looking at the gender distribution, there are more women than men in both the executive and general workforces. Women are more represented among executives, comprising 61% of the executive workforce and 52% of the general workforce. A small proportion of workers are non-binary or another gender identity (no workers in the cohort had gender identity information indicating that they are trans men or trans women).



The survey also collected age and sexual orientation data. Age data showed that the largest groups of workers were aged 25-34 and aged 35-44, although workers aged 45-54 and 55-64 are almost equally represented.



Few organizations reported sexual orientation, meaning that the numbers of workers with sexual orientation data is too small for analysis and therefore omitted here.

Vacant Positions

Information about vacancies helps illustrate the potential service impacts that low wages or other operational challenges may have on the City's nonprofit contractors. The survey included several questions about vacant positions. General Survey respondents provided the total number of FTEs they employ when fully staffed and the FTE sum of vacant positions. Cohort Survey respondents provided position-level vacancy data. The Controller's Office used this data to calculate approximate vacancy rates by service area and by organization annual budget.

The table below shows the number of vacancies for each service area, sorted highest to lowest number of vacant FTEs. Childcare/Early Childhood organizations have the highest calculated vacancy rate, at 17.4%, with Medical/Physical Health organizations also high, at 17.0%. Highlighted vacancy rates are above the total estimated vacancy rate. This suggests that organizations providing those services may be facing hiring challenges, and that there may be gaps in delivery of these services. **Homelessness and Housing Services and Behavioral Health Services have the highest count of vacant FTEs** (447.7 and 278.9 respectively), and both are above the total estimated vacancy rate.

Primary Service Area	Number of Organizations	Number of Vacant FTEs	Total FTEs (filled and vacant)	Calculated Vacancy Rate
Homelessness and Housing Services	24	447.7	3,823.3	11.7%
Behavioral Health Services	20	278.9	2,468.3	11.3%
Youth Services	24	233.2	2,704.1	8.6%
Senior Services	14	96.7	1,463.1	6.6%
Workforce Development	10	72.8	1,316.2	5.5%
Childcare/Early Childhood	9	70.7	407.2	17.4%
Medical/Physical Health	3	57.7	339.2	17.0%
Family Support Services	11	57.0	657.3	8.7%
Economic/Community Development	11	35.0	317.2	11.0%
Legal	8	17.5	244.5	7.2%
Veteran's Support	1	13.3	183.2	7.3%
Arts and Culture	14	12.4	146.0	8.5%
Total	149⁸	1,392.8	15,753	9.9%

Among organizations with vacancy data, the 78 organizations with budgets under \$5 million annually have an estimated vacancy rate of **11.6%** compared to a vacancy rate of **9.7%** among the 72

⁸ Two cohort organizations that did not provide vacancy data are excluded from these calculations. The only organization in the Food Security service area, with just 7.5 FTEs, was excluded from these calculations due to low numbers.

organizations with annual budgets of \$5 million and over. This suggests that small organizations may have more difficulty hiring than their larger counterparts, which may impact their ability to deliver services.

Position-level Vacancies

Of the 29 organizations that participated in the cohort survey, 27 provided data on the vacancies in their organizations. Vacancy data includes job titles, job categories, wage ranges, length of time vacant, and if the position requires bilingual skills, an advanced degree, or non-standard working hours. The vacancy data covers 457 FTEs. **On average, reported positions have been vacant for 6.9 months.** The median length of time vacant is four months. This suggests that once a position is vacant it remains vacant for several months, and a few roles have remained vacant for significantly more time.

The table below shows the number of vacant FTEs compared to the number of filled FTEs, and the resulting vacancy rate. Due to some job categories having few or no vacancies, the vacancy rate should be viewed as an estimate. The estimated vacancy rate within the cohort is 9.6%. The table is sorted by the number of vacant FTEs, and highlighted cells show the positions with the highest estimated vacancy rates. Notably, Adult Training and Case Management roles have very high vacancy rates.

Job Category	Number of Vacant FTEs	Number of Filled FTEs ⁹	Total FTEs	Calculated Vacancy Rate
Case Management	133.3	403.3	536.5	24.8%
Administrative	72.0	518.3	590.3	12.2%
Other Direct Service	60.5	1,327.6	1,388.1	4.4%
Behavioral	37.3	179.7	217.0	17.2%
Front Desk	31.5	232.9	264.4	11.9%
Janitorial	30.6	242.9	273.5	11.2%
Adult Training	22.0	31.0	53.0	41.6%
Program	19.5	663.7	683.2	2.9%
Outreach	13.0	177.7	190.7	6.8%
Site Supervisors	11.2	235.1	246.3	4.6%
Executive	10.0	146.8	156.8	6.4%
Children	8.5	49.5	58.0	14.7%
Medical	7.0	48.7	55.7	12.6%
Legal	1.0	28.0	29.0	3.5%
Total	457.3	4,285.1	4,742.5	9.6%

⁹ Vacancy rates in this table are calculated based on the 27 organizations within the Cohort Survey that provided vacancy data.

Among the vacant positions, **32% of vacancies are budgeted at under \$25 per hour** or at wage ranges that cross the \$25 per hour threshold (e.g., \$23 - \$28 per hour), similar to the 38% of the total survey population earning under \$25 per hour.

Comparing the Cohort Survey and General Survey

It is important to note that the **cohort dataset includes 1,020 Ambassadors/Practitioners** in Workforce Development organizations who are very low wage and are primarily Black or African American and male. This impacts the summary data about cohort respondents.

If the group of 1,020 Ambassador/Practitioner workers are excluded, the same summary analysis shows that mean wages are higher by about \$2.00 per hour and demographic trends across the workforce shift.

	Mean (per hour)	Median (per hour)
General (excluding Ambassadors/Practitioners) <i>N = 3,984 workers (3,504 FTE)</i>	\$30.79	\$27.21

Without Ambassadors/Practitioners, female workers comprise 61% of the general workforce (on par with the cohort executive workforce gender distribution) while male workers are 38% and non-binary workers are 1%. This is a shift from 53% female and 47% male in the cohort survey with Ambassadors/Practitioners included. Excluding this position category makes the cohort workforce more comparable to the demographics in the general survey population, which has 58% female workers and 27% male (many general survey respondents had employees with no gender data collected).

The charts about the overall cohort workforce above indicate that the largest racial group is Black or African American (31% of the workforce), but this race distribution also shifts when Ambassadors/Practitioners are excluded. Excluding the Ambassadors/Practitioners category leads to a more even division between Asian or Asian American, Black or African American, Hispanic or Latino/a, and White employees (22%-24% each with the remaining 8% in the Other racial groups category). This compares to the total survey population, which shows that Black or African American workers are 18% of the workforce and White, Asian and Latino workers each comprise 17% to 25% of the workforce.

The overrepresentation of the Ambassador/Practitioner employees may impact the demographic and wage comparisons outlined in the key insight sections below. However, while the impact of this group of workers on the summary data is considered when applying findings to the broader general survey population, these 1,020 workers are a critical part of the nonprofit workforce in San Francisco and so are an important component of understanding the findings presented here.

There are two additional ways the cohort and the general survey differ:

- The cohort includes more larger organizations than the general survey and has a greater proportion of organizations that provide Homelessness and Housing Services. That difference is taken into consideration when applying findings that are based on organization size to the larger survey population.
- There are also differences in racial composition of the executives in small organizations in the cohort and general surveys, limiting conclusions we can make about that group.

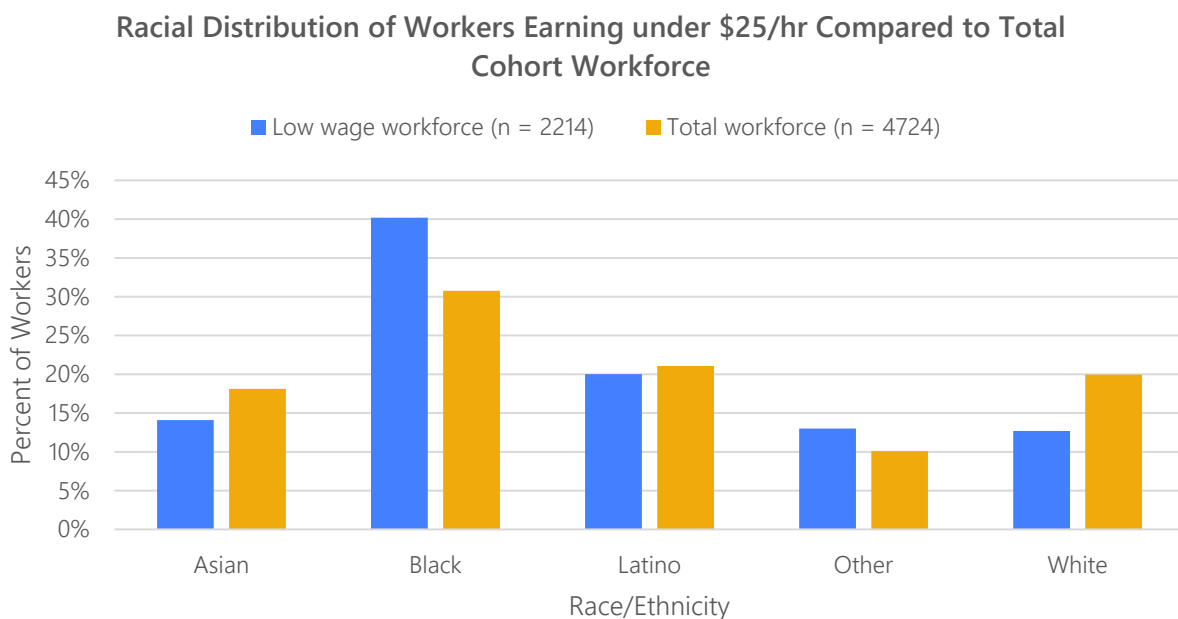
KEY FINDINGS AND POLICY INSIGHTS

The Controller’s Office analyzed worker-level wage and demographic data and organization-level data on service areas, organization budget and department funders in both the general and cohort surveys. Based on this analysis, three key findings emerged:

1. Low wage workers are disproportionately BIPOC, and this finding persists when exploring specific job categories within the cohort survey.
2. Case Management is a key role that spans service areas and has disproportionate vacancy rates compared to other positions.
3. Other operational or wage-related challenges may be better suited for department-specific or other targeted approaches.

Finding 1. Low Wage Workers are Disproportionately BIPOC

For the purposes of this analysis, we identified \$25 per hour as a threshold to signify the lowest paid workers in the sector. When comparing demographics of workers making less than \$25 per hour to demographics of the total cohort population, low wage workers are disproportionately Black or African American and small racial groups that filter into the “other” category. White and Asian staff are underrepresented in this wage group. [This suggests that policy approaches designed to support low wage workers may have positive equity impacts.](#)



In addition to identifying the demographic breakdown of low wage staff, the Controller’s Office also analyzed which jobs these low wage workers hold. Along with demographic and wage information, respondents provided a job title for each employee and classified them within one of 13 predefined job categories. The overall mean wage for all general workforce employees (meaning all employees excluding executives) in the cohort survey is **\$28.72** per hour. Comparing the mean wage in each job

category to the general workforce mean wages shows which positions workers earning low wages typically occupy. This analysis highlighted the following job categories:¹⁰

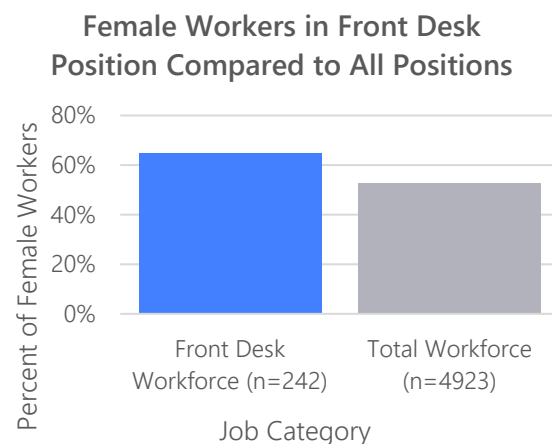
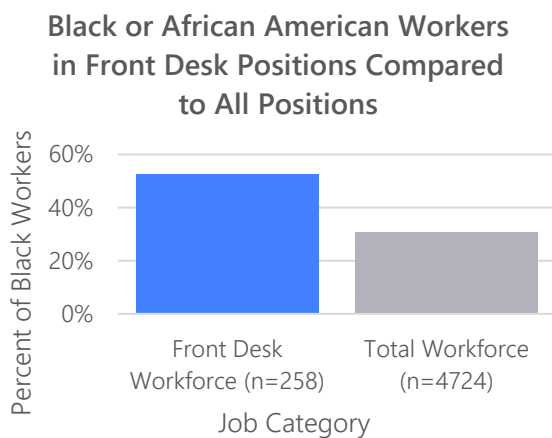
Job Category	Mean Hourly Wage	Number of Workers
Front Desk Staff	\$22.03	281
Janitorial or Maintenance Staff	\$24.52	269
Children/Youth-Focused Staff	\$26.18	71
Other Direct Service: Ambassadors/Practitioners	\$20.62	1,020
Other Direct Service: Food and Retail staff	\$24.14	59
Other Direct Service: Miscellaneous Counselors	\$25.28	242
Other Direct Service: all other roles	\$22.32	121

The following sections explore these lowest-wage job categories within the City-funded nonprofit workforce in more detail.

Front Desk Staff

Front Desk Staff serve in reception roles at administrative sites and program sites (such as at housing programs), and often provide direct service, such as deescalating crises. Front Desk Staff have a mean wage of **\$22.03** per hour: \$6.69 per hour less per hour than the general workforce mean wage.

Looking at the demographics of this group, 53% (136 people) are Black or African American, despite Black workers only representing 30% of the total workforce. Front desk staff are also primarily female, with 65% of the reported staff being female, compared to 53% of the cohort workforce. **Policies that target or support front desk staff will have disproportionate impacts on Black workers and on female workers.**



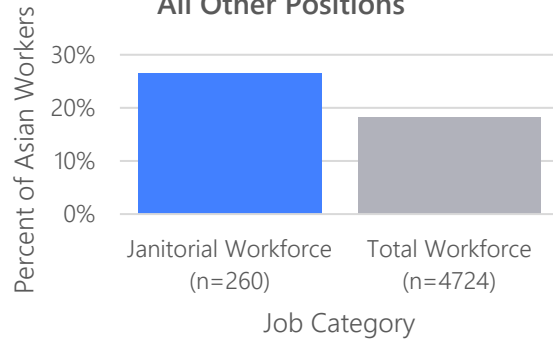
¹⁰ Cohort respondents selected “Other Direct Service” for any staff that did not fall into another pre-defined category. The Controller’s Office used analysis of specific job titles to re-group these workers. In some cases, workers were moved to a different job category more aligned with their job title.

Janitorial and Maintenance Staff

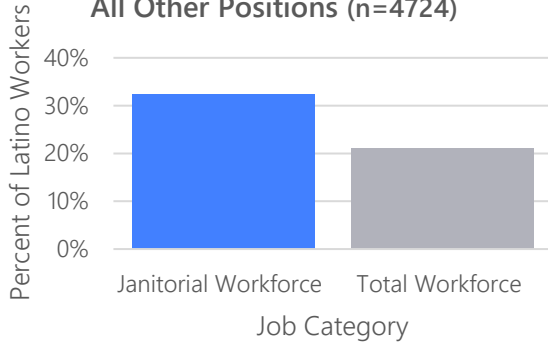
Janitorial and Maintenance Staff provide cleaning and repair services, often at places where clients use services or live. Staff in this category make a mean wage of **\$24.52** per hour, which is \$4.20 per hour less than the general workforce mean wage.

This job category is disproportionately Asian or Asian American and Hispanic or Latino/a. Asian staff represent 27% of the janitorial workforce while only making up 18% of the general cohort workforce. Similarly, Latino staff represent 32% of the janitorial workforce, compared to 21% of the general workforce. Janitorial Staff are also disproportionately male, at 78%, compared to 47% of the total cohort workforce. **Policies targeted to Janitorial Staff could impact Asian or Asian American and Hispanic or Latino workers and men.**

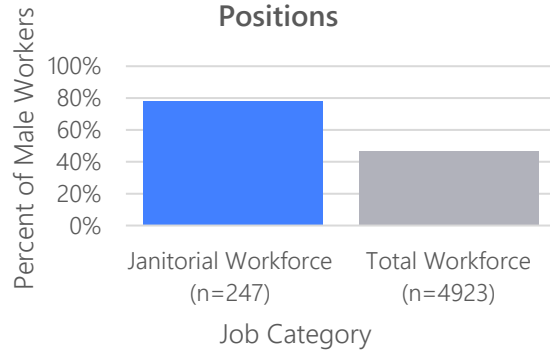
Asian or Asian American Workers in Janitorial Positions Compared to All Other Positions



Hispanic or Latino Workers in Janitorial Positions Compared to All Other Positions (n=4724)



Male Workers in Janitorial Positions Compared to All Other Positions



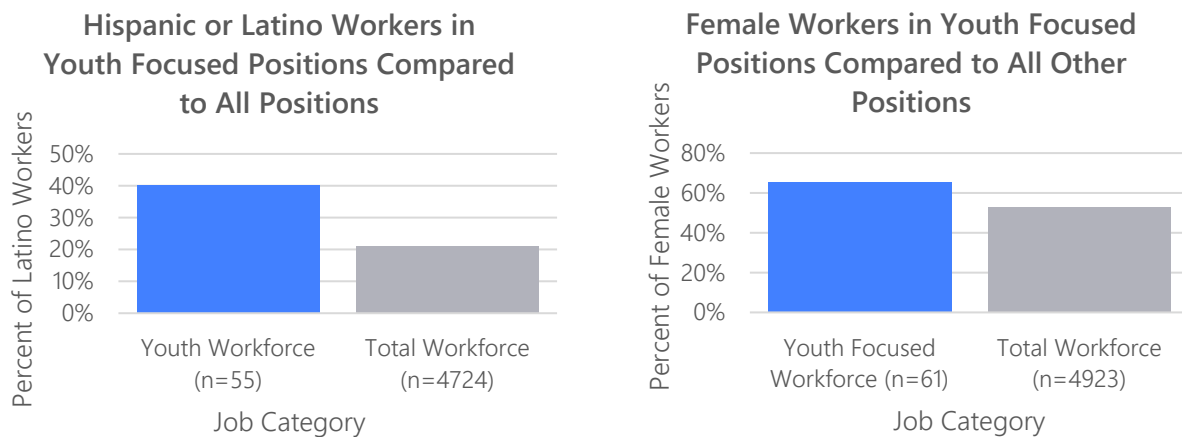
While job roles among nonprofit organizations cannot always be directly compared to City and County of San Francisco (City) positions, in some cases there are roles that are reasonably aligned. The Custodian/Porter role used by multiple City departments has a pay range of up to \$35.83 per hour.

Survey Job Category	Survey Mean Wage	Comparable City Position	City Wage Range
Janitorial/Maintenance Staff	\$24.52/hr	Custodian/Porter	\$29.50/hr - \$35.83/hr

Children/Youth-Focused Staff

The Children and Youth-Focused Staff category consists of teachers, childcare providers, mentors, education specialist working with youth, and other youth focused positions.

Children/Youth-Focused Staff positions have a mean wage of **\$26.18** per hour, a difference of \$2.54 per hour from the general workforce mean wage. The number of workers in the category in our cohort is small, however there are two key takeaways from the demographic information: 40% percent of Children/Youth-Focused Staff are Hispanic or Latino compared to 21% of the total cohort. Additionally, 65% are women, compared to 53% in the total cohort workforce. However, with such a small sample size it's not clear that this difference is statistically significant.



Across the combined survey data (general and cohort), Childcare and Early Childhood organizations showed more workers in the \$25 per hour to \$40 per hour wage category than in the under \$25 per hour category. This cohort data suggests that a large proportion of the workers in Childcare and Early Childhood organizations may be just over the \$25 per hour threshold of that wage range. **Policies that target Childcare and Early Childhood organizations or youth-focused workers could specifically impact Hispanic or Latino workers and female workers.**

Other Direct Service Staff

Respondents used the “Other Direct Service” category when a position didn’t clearly fit into any of the other job categories. Initial analysis showed that this miscellaneous job category was one of the lowest paid in the cohort dataset. To further understand this job category and better inform potential policy impacts, the Controller’s Office used the provided job titles to divide this category into subcategories.

Ambassadors/Practitioners

Ambassadors and Practitioners are employed by three large homelessness and workforce development organizations. Workers in these positions are often former clients or have lived experience of homelessness and these roles are part of workforce development programs. The mean wage for these roles is **\$20.62 per hour** and the workforce is disproportionately Black (55%) and male (81%).

Food and Retail Workers

This category includes those that work in food service, including food preparation and delivery, and retail, for organizations that have food distribution or retail programs. The mean wage for this role is **\$24.14 per hour** and the demographic breakdown is aligned with that of the total cohort workforce. In comparison, the City includes such positions as Food Service Worker, Senior Food Service Worker, Assistant Cook and Cook. The wage ranges across these junior and senior roles span from \$25.55 per hour to \$41.56 per hour.

Miscellaneous Counselors

Counselor is a role that cohort respondents categorized into a variety of job categories, including Behavioral Health, Case Management, Program, and Other Direct Service. Miscellaneous Counselors only include workers with a job title that included “counselor” that were included by the respondent within the Other Direct Service category. Many Counselor jobs in this category are peer counselors or peer counselor supervisors. Wages for this category range from \$18.00 per hour to \$42.54 per hour, with a mean of **\$25.28 per hour**. Black or African American employees are overrepresented in this job category, comprising 43% of Miscellaneous Counsellors compared to 30% of the total workforce population. The distribution of genders is aligned with that of the total workforce’s distribution.

Finding 1 Policy Considerations

Approximately **40% of the entire cohort workforce holds a job in one of these low-paying job categories** and 48% of the total cohort workforce (46% of FTEs, excluding on-call employees) make under \$25 per hour. This is a higher proportion than in the combined dataset, where 38% of FTEs make under \$25 per hour. This is likely because the 29 cohort respondents trended towards large, homelessness organizations. Both large organizations and homelessness organizations have higher proportions of workers making under \$25 per hour.

It is reasonable to assume that the survey data is applicable to the broader City-funded nonprofit workforce. With 38% of FTEs across survey respondents earning under \$25 per hour, this means that **low-wage workers make up a large portion of the workforce of all City-funded nonprofits**. Given the scale, investments into raising wages, even if targeted at specific positions, would likely be costly. This also shows that these interventions could impact a large number of people and that the positive equity impacts could also be wide-reaching.

Vacancy data can help illuminate the potential service impacts of low wages. Low wages in general and the low wages in these specific positions do not appear to have significant impacts on nonprofits’ ability to hire low wage workers. While 38% of all FTEs earn less than \$25 per hour, only 28% of the reported vacancies have a wage range under \$25 per hour (an additional 4% have a wage range that bridges the \$25 per hour threshold). Front Desk and Janitorial roles have similar vacancy rates to that of the entire dataset, while Other Direct Service jobs have lower vacancy rates.

Comparing the proportion of each service area’s workforce that makes under \$25 per hour to the proportion of the workforce that occupies one of the low wage jobs helps us understand how the City may target policy approaches such as investments in lowest-wage workers.

Primary Service Area	Proportion of workforce in the four low-wage job categories	Proportion of workforce making under \$25 per hour	Number of organizations in each service area
Behavioral Health	20%	33%	6
Family Support	37%	22%	1
Homelessness/Housing	41%	44%	11
Senior	6%	55%	3
Veteran	44%	30%	1
Workforce Development	79%	78%	3
Youth	40%	33%	4

Workforce Development respondents have the highest proportion of workers in the low wage job categories listed above (79% of their workforce falls into one) and the highest proportion of workers making under \$25 per hour. This makes sense given that hiring Ambassador/Practitioner or peer support jobs is often part of these organization’s program models. Across most service areas, the proportion of the workforce that fall into a low wage job category and the proportion that make under \$25 per hour are roughly comparable (typically less than a 15 percentage point difference). Veteran, Homelessness, Youth, and Family serving organizations all have 30%-44% of their workforces in one of the low-paying jobs identified above. Behavioral Health organizations have fewer in the low-wage job categories, at 20% of their workforce, but approximately a third of their workforce makes less than \$25 per hour.

Senior Services is the one area where there is almost a 50 percentage point difference between the proportion of the workforce that falls into one of low wage job categories and the proportion of the workforce that make under \$25 per hour. Most of their workers making under \$25 per hour are in the “Medical” and “Program” job categories. On average, these job roles are above the mean wage, and so these low wage workers in senior services are not readily apparent in the summary data of wages by job category. [This suggests that policy solutions that specifically target certain job roles may exclude low wage staff in other sectors.](#)

Finding 2. Case Management is a key role that spans service areas and has high vacancy rates

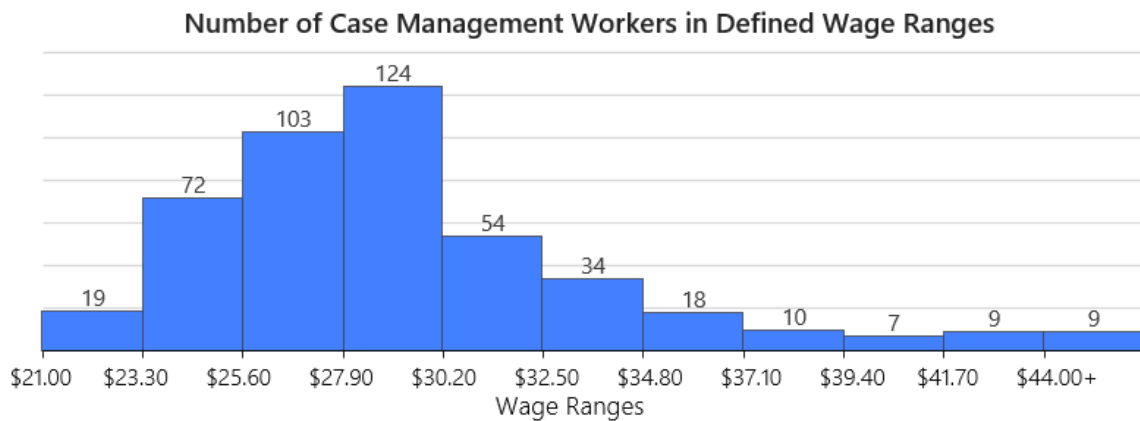
In the Controller’s Office’s May 2022 memo, stakeholders identified Case Management as a key role that spans service areas and is low wage for the services they perform. As a result, they said it is difficult to hire and retain staff in these positions which impacts service delivery.

Cohort data indicates nonprofit respondents have a high rate of vacancies in Case Management roles compared to other job categories in the cohort sample. [Case Management positions make up 29% of all the vacancies in the cohort sample \(133 FTEs among 457 FTE vacancies\), despite only representing 8% of the total cohort workforce.](#)

Assuming this trend in vacancies carries across all City-funded nonprofits with Case Management positions, policy approaches that focus on this job role could support hiring and service delivery constraints felt by nonprofit organizations.

Characteristics of Case Management Workers

The cohort survey data includes **459 workers in the Case Management job category**. Case Management workers hold many different roles spanning a range of levels, including Case Manager I – III, Specialists, Licensed Social Workers, Clinical Case Managers, etc. This translates to a large spread in wages. While case managers among cohort respondents earn more on average than the general workforce mean wage at \$29.45 per hour, pay for this group ranges from a low of \$21 per hour to a high of over \$55 per hour. **A quarter (25%) earn less than \$26.19 per hour**. The chart below illustrates this spread of wages, where most Case Management position wages cluster between \$23.30 per hour and \$32.50 per hour, with a few positions spread out across higher wage buckets.



Another impact on wages is the requirement that some Case Management employees have some type of advanced degree or licensure (such as being licensed in clinical social work - LCSW). This additional requirement translates to a small increase in pay: **for positions that require an advanced degree, there is only about a \$3.25 per hour difference in mean wages** (\$31.13 per hour compared to \$27.89 per hour). Similar to other job categories, positions requiring bilingual skills see no difference in pay as compared to those without a bilingual requirement.

Case Management roles are typically specific to social service, medical and government sectors. A few sampled comparisons of positions across these sectors highlight a variance in pay and illustrate the challenge in hiring for very low wage positions. Degree or licensure requirements impact wage ranges across industries.

Position Title or Job Category	Degree or License Required?	Industry or Source	Wage Information
Case Management Staff	No	Cohort Survey (318 workers)	\$27.89/hr Mean Wage
Health Worker I	No	City Position	\$28.63/hr - \$34.78/hr Wage Range
Social Worker I	No	City Position	\$36.10/hr - \$43.88/hr Wage Range
Case Management Staff	Yes	Cohort Survey (86 workers)	\$31.13/hr Mean Wage

Social Work Supervisor	Yes	City Position	\$46.51/hr - \$56.53/hr Wage Range
Medical Social Worker ¹¹	Yes	Integrated Healthcare Facility	\$45.8/hr - 61.83/hr Wage Range

Among positions listed above that require an advanced degree or licensure, there are significant differences in pay between the nonprofit survey respondents, the comparable City role, and the comparable healthcare role. There are few unlicensed case management roles in the private sector (e.g., at hospitals or assisted living facilities). Among City roles, entry level care coordination positions such as the Health Worker I may be comparable in pay to unlicensed nonprofit staff, though entry level Social Workers start \$8 per hour above the nonprofit mean wage.

Demographics of Case Management Workers

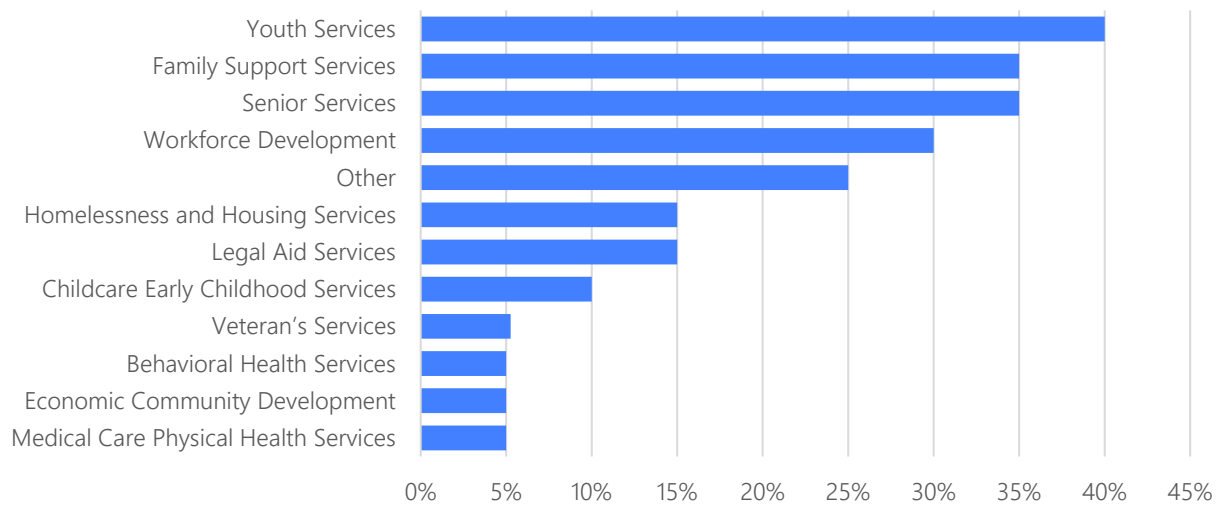
Case Management demographics tend to be similar to the total cohort survey population demographics, but there are some key differences. **Case Management staff are more likely to be Hispanic or Latino/a** (30% compared to 21%) and less likely to be Asian or Asian American (11% compared to 18%). They are also **more likely to be female** at 66% of the Case Management workforce compared to 53% female in the total cohort workforce. They are less likely to be younger (under 25) and older (55 and older). See **Appendix D** for demographic charts.

Characteristics of Organizations with Case Management Positions

The majority (77%) of Case Management positions in the cohort survey data are with organizations that list Homelessness and Housing Services as their primary service area. However, since earlier work had found that Case Management is a role that spans service areas, organizations, and departments, the Controller's Office looked at Case Management roles by secondary service areas and department funders to verify that the conclusions drawn from the sample of case management roles in the cohort survey could be reasonably applied to the broader population of Case Management roles across City-funded nonprofits.

¹¹ Wage data gathered from Sutter Health website job postings on April 5, 2023. <https://jobs.sutterhealth.org/job/san-francisco/medical-social-worker-ii/1099/45625538768>

Percent of Cohort Respondents with Case Managers for Each Secondary Service Area (n = 20 organizations)



Respondents could select multiple secondary service areas, as applicable, after selecting one single primary service area. The Case Management roles in the survey are distributed across secondary service areas. Among organizations that employ Case Management roles, 30-40% selected each youth services, workforce development, senior services, and family support services as secondary service areas. Many selected “other” as a secondary service area and wrote in their own descriptions, which include legal aid, nutrition services, early childhood services and more.

A significant number of Case Management workers documented in the cohort survey (86%) work for organizations that are funded by two or more City departments. All primary funding departments¹² fund organizations that have Case Management workers. HSH, HSA, DPH, and MOHCD each fund at least 55% of organizations in the cohort that employ Case Management workers. Although respondents didn’t indicate which departments directly funded which roles, **this suggests that Case Management roles span programs funded by all major funding departments in the City.**

Percent of cohort organizations funded by each indicated department, only looking at organizations with Case Management workers							
DPH	HSH	HSA	MOHCD	DCYF	DEC	OEWD	Other Departments
60%	70%	55%	65%	30%	15%	35%	10%

Behavioral Health Positions and Other Counselors

Behavioral Health positions and Counselor positions are similar to Case Management roles. Stakeholders have anecdotally expressed concerns about hiring and retaining staff in these roles as well.

¹² Department of Public Health (DPH), Department of Homelessness and Supportive Housing (HSH), Human Services Agency (HSA), Mayor’s Office of Housing and Community Development (MOHCD), Department of Children, Youth and Their Families (DCYF), Department of Early Childhood (DEC), Office of Economic and Workforce Development (OEWD)

Cohort respondents categorized Counselors into several different job categories, as reported above in the low-wage worker analysis.

Behavioral Health jobs tend to have higher wages than are seen in most other job categories, with a mean wage of \$39.41 per hour and a median wage of \$37.05 per hour. Similar to Case Management, Behavioral Health workers span a variety of roles and levels, which is reflected in the wage data. Among cohort respondents, Behavioral Health worker wages range from \$20.48 per hour through \$114.09 per hour.

The Controller's Office is in the process of conducting additional analysis in this area as part of a staffing analysis for Mental Health SF. Upon publication, that report will be linked here.

Finding 2 Policy Considerations

This analysis validates what was heard in qualitative reporting. Vacancy and wage data shows that although Case Management is not the category with the lowest wages, Case Management workers still receive a low wage for the complex and skilled work they do and that may contribute to the difficulty in hiring or retaining workers.

The demographic data suggests that policy approaches that target Case Management roles, that would support Hispanic or Latino/a and female workers.

Case Management roles span service areas, programs, and funders, and [efforts to address operational challenges in hiring and retaining Case Management staff likely requires a City-wide approach](#), rather than department-specific funding initiatives.

Finding 3. Some operational or wage-related challenges may be better suited for department-specific interventions or other targeted approaches

The Controller's Office analyzed the survey data to identify insights that could help inform policy approaches related to challenges identified through the May 2022 memo. For each approach, there was insufficient evidence within survey data to suggest the need for a Citywide policy. However, these challenge areas could be appropriate for further analysis, policy development within departments, or targeted initiatives to support specific contracts or nonprofits most impacted.

Bilingual Staff

In research conducted for the May 2022 memo, organizations and departments identified that having bilingual direct service workers was a key need across program and service areas. This need was mentioned specifically in relation to Case Management positions and was posited as a potential reason why hiring Case Management roles was so difficult. One potential solution raised was ensuring that workers within job categories were paid more for their bilingual skills.

The Controller's Office analyzed vacancy data and pay data to evaluate if these qualitative observations were present in the data. We looked at pay data for bilingual compared to non-bilingual staff within job categories, service areas, and organizations. Overall, it appears that no matter how the data is cross-

tabulated there is no evidence that there are differences in pay for bilingual skills, that are based on those bilingual skills, for any job category or service area.¹³

This data may suggest a need or opportunity to implement a policy related to premium pay for bilingual skills. There is some evidence that there is difficulty hiring for bilingual positions. Looking only at direct service positions in the cohort’s vacancy data, **18% of vacant positions require bilingual skills while only 10% of filled positions do**. However, when looking at specific roles, the data is less clear.

- Specifically analyzing Case Management roles, which have high rates of vacancy, bilingual requirements do not appear to have an impact on vacancy rates: 14.1% of filled positions require bilingual skills as do 14.9% of vacant positions.
- Among other positions, the job categories where a high proportion of vacancies require bilingual skills generally have few total vacancies.

This variability makes it difficult to draw conclusions about how targeting premium pay for bilingual skills could ease hiring challenges. Because the pay disparity does not result in clearly defined impacts, a City-wide approach may not be appropriate without further exploration within specific roles. Targeted analysis could help identify program-specific or department-specific needs.

Part-Time or On-Call Staff without Benefits

In the qualitative research conducted for the May 2022 memo, stakeholders raised a concern that some nonprofits may have had to employ part-time staff without benefits to make running their programs financially viable, and that it may lead to both equity concerns and operational challenges.

Analyzing the prevalence of these part time or on-call positions without benefits led to limited conclusions. First, the proportion of the total direct service workforce (all workers excluding administrative and executive staff) that fall into this category is relatively small at less than 10%. Second, **because the number of jobs in this category were relatively few**, it is difficult to subset this group to analyze by job category, service area, or organization size.

Taken together, survey data cannot help identify specific policy approaches to address this concern. However, it may be worth exploring within departments or service areas that have voiced these specific concerns.

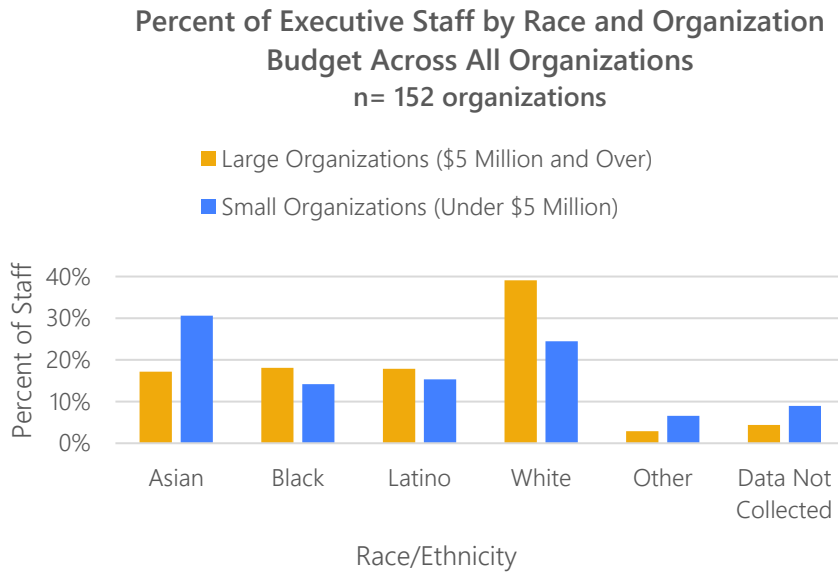
Executive Pay in Small Organizations

There is a substantial difference in the mean wages of executives in small and large organizations (those with annual budgets of under \$5 million compared to those with budgets of \$5 million and over) within the cohort respondent group.

Small Organization Mean Executive Wage	Large Organization Mean Executive Wage
\$47.22	\$80.52

¹³ Job roles categorized as Behavioral and Program seem to pay staff with bilingual skills less than their non-bilingual counterparts, but this may be due to levels within a job category. See Appendix E for more details.

Within the cohort data, White executives at large organizations make more than executives of other racial groups. There were too few executives in small organizations to make wage comparisons by race. Across all organizations, small and large organizations had somewhat different racial distributions: White executives appear to be more highly represented among large organizations, as do Black and Latino executives, while Asian executives are more highly represented in small organizations.



This differs from the cohort dataset, where there were no White executives in the small organizations that provided data. Because of this difference, survey data does not provide conclusive evidence that executive wages differ significantly by race or that supporting small organizations in increasing executive pay would have wide-reaching positive equity impacts.

Despite the differences in executive race data between the cohort and general surveys, it is clear that the difference in executive wages by organization size is large and significant.

Departments and policy makers may want to consider this factor in light of potential compaction impacts if wages within other job categories are raised or the floor for low-wage workers is raised. Targeted analysis may support departments to understand wage compaction among small nonprofits, equity impacts of compaction, and impacts on executive pay.

Impact of Unionization on Wage Structures.

Survey respondents indicated if any portion of their workforce is unionized but were not asked to indicate which employees were in unions. In the total survey population, 123 organizations do not have a union while 29 do. Most of the organizations with unions (22) have budgets of over \$5 million and 17 of the 30 provide either Behavioral Health Services or Homelessness and Housing Services.

To see if unionization is correlated with wage levels, the Controller’s Office analyzed wage data in the cohort survey, comparing wages within job categories of employees who work for an organization with a union to employees who work for an organization without a union. Because the majority of organizations with unions are large respondents, this analysis was done only on large organizations to isolate the impact of unions on wages separate from the impact organization size can have on wages.

There is some evidence that within specific job categories, workers at organizations that have unions have a slightly higher pay than those without unions. These categories are Behavioral Health workers, Front Desk Staff, and Site Supervisor related staff. The table below shows the comparison between mean wages for workers in organizations with and without unions.

Job Category	Mean Wage		Number of Large Orgs with Employees in this Category	Number of Employees in this Category
	Large Organizations without Unions	Large Organizations with Unions		
Administrative	\$42.11	\$38.38	20	610
Behavioral	\$37.07	\$40.55	10	195
Front Desk	\$20.98	\$22.86	13	279
Site Supervisor	\$29.64	\$35.09	13	238

Among Behavioral Health Workers, Front Desk workers, and Site Supervisors, workers at organizations that do have unions make between \$1.88 and \$5.45 more per hour than their counterparts at organizations without unions. Among Administrative staff, this trend is reversed, with staff at organizations without unions making more than their counterparts at organizations with unions.

However, without better understanding of which employees are covered by unions, it is not clear whether the differences in pay are due to unionization, differing job levels between organizations, or other factors not captured in this survey data. This trend also appears to be most applicable to large Behavioral and Homelessness organizations, and because organizations did not report which specific roles or employees are covered by the unions it is not clear that the job categories where these wage differences appear are specifically covered by unions.

Additionally, unions are an operational consideration unique to each organization. Before making policy recommendations related to this data, departments funding nonprofits with unionized staff may want to explore how union agreements impact wage levels and/or may constrain any proposed targeted interventions related to wages.

Conclusions and Next Steps

In May 2022, the Controller's Office released a [memo](#) exploring the wage pressures faced by nonprofit contractors providing essential services to San Francisco residents. That memo found that nonprofit workers earning the lowest wages often perform difficult front-line services necessary for program operations. It further identified that low wages in these positions leads to turnover, difficulty retaining staff in critical positions, and difficulty hiring staff in competition with the private sector and government.

Nonprofit service providers and department funders both reported that these wage-related issues result in significant service impacts, including delays in turning over housing units for new residents, higher caseloads, decreased client engagement in services, and under-delivering on units of service. **Unfilled positions leave gaps in the social safety net.**

The May 2022 memo concluded that the wage issues faced by the City's nonprofit contractors are of a magnitude that standard inflationary increases to contracts will not address and **will likely take several years of investment and multiple, complementary strategies to solve.**

This report reflects an interest in better understanding the wage-related pressures faced by the City's nonprofit contractors with an equity lens. The findings here substantiate many of the qualitative findings of the May 2022 memo, and results from the survey may inform policy makers and stakeholders in several ways. Each issue is distinct and may require different strategies to address.

Equity Implications

System Implications

Sustainability Implications

Equity Implications

- **Findings:** The nonprofit workforce is incredibly diverse. Nonprofit organizations prioritize hiring staff that align to the communities they serve, and this is apparent in the demographic trends identified through the survey. However, this workforce has low wages compared to other sectors, and some of the lowest-wage roles within the survey population are also disproportionately BIPOC.
- **Implications:** The results of this survey could inform City strategies that specifically address the significantly low wages of the BIPOC workforce across the City's nonprofit contractors.

System Implications

- **Findings:** Survey findings identified that key roles such as Case Management span department funders and service areas and have high vacancy rates. Certain functions are essential to the delivery of a service. Gaps in staffing these key roles not only impair a nonprofit from delivering that particular service but may also impact the service delivery system as a whole. If a nonprofit

that plays an essential role within a service delivery system cannot perform its part due to staffing limitations, other parts of the service delivery system suffer.

- **Implications:** The results of this survey could inform targeted City strategies that provide a critical lifeline for prioritized sectors or service areas, such as homelessness response system providers, behavioral health care providers or childcare or children’s services providers.

Nonprofit Sustainability Implications

- **Findings:** Though the findings above spotlight key roles with extremely low wages, it is important to consider that the mean wage used for comparison is a mean of wages across a sector that has had its salaries suppressed through restrictive funding models for decades. When comparing certain roles to the private sector or government positions, nonprofits are consistently below the market rate for related positions. A persistent inability to offer competitive salaries to hire and retain staff destabilizes the sector as a whole.
- **Implications:** The results of this survey could inform City strategies that consider overall nonprofit sustainability with broad and flexible approaches to funding.

Next Steps

In the coming months, the Controller’s Office plans to release a memo of recommendations related to the findings of this report. Additionally, the Controller’s Office will shortly release a complementary wage and staffing analysis of the Mental Health San Francisco program. That analysis pairs data from this survey with other data regarding civil service and nonprofit behavioral health services delivered as part of the Mental Health San Francisco initiative administered by the Department of Public Health. That report will speak more directly to the clinical, behavioral health, and medical roles not discussed in detail in this document.

Appendix A: Methodology

SURVEY DESIGN AND OUTREACH

In May 2022, the Controller's Office issued a memorandum on nonprofit wage pressures. The memo included the following recommendation:

"The City should gather robust data on wages across programs, organizations and sectors, including demographics of the current workforce and the leadership of organizations. A centralized survey of nonprofit contractors should be administered by the Controller's Office in the coming fiscal year to support enhanced analysis and planning for future wage-related initiatives."

In July 2022, the Controller's Office initiated this survey in alignment with the goals of this recommendation, with a goal to create a dataset with detailed information about City-funded nonprofits' wages, worker demographics, and overall financial information.

Survey Development and User Testing

The survey used a two-tiered approach and three survey instruments:

- General Survey: using an online survey instrument developed via Survey Monkey, the General Survey included 27 questions covering:
 - Organization service areas, neighborhoods served, and department funders
 - Organization budget range, proportion of budget covered by CCSF
 - Workforce headcount and number of FTEs; number of FTEs in each wage bucket
 - Proportion of general and executive workforce that are in gender and race/ethnicity category.

- Cohort Survey: using an online survey instrument developed via Survey Monkey with 11 questions, as well as an Excel spreadsheet, the Cohort Survey gathered the following information:
 - Survey Monkey: Organization service areas, neighborhoods served, and department funders
 - Survey Monkey: Organization budget range, proportion of budget covered by CCSF
 - Excel: Job title, job category, FTE, wage, benefits, age, race, sexual orientation, gender, and position requirements for each employee in the organization.
 - Excel: Vacancies, including FTE, job title and category, wage, and position requirements, for all vacant positions in the organization.
 - Cohort participants were given the option of submitting worker-level data on a pre-prepared excel template or on their own spreadsheet.

Nonprofit organizations provided user testing feedback throughout the survey development process, including validating the survey approach and testing the Survey Monkey tools and spreadsheet tool before issuance.

Outreach and Data Collection

Cohort Survey Outreach

The Controller's Office selected specific organizations to participate in the Cohort Survey in order to ensure a diverse sample of nonprofits spanning service areas, department funders, and annual budget sizes provided data. The Controller's Office created the Cohort Survey participant list by reviewing City financial system data, gathering recommendations from departments, including OEWD, HSH, DCYF, and DPH, and leveraging existing relationships with nonprofits.

The Controller's Office contacted 51 organizations; 34 responded with interest in participating, and 29 provided complete data by the survey deadline.

The data collection period was October 3, 2022 through November 11, 2022. During this time frame, several departments were implementing budget initiatives approved in July 2022. In particular, HSH was in process of applying planned wage increases to Front Desk workers within contracts for housing programs during the data collection period. These increases may or may not be reflected in the data collected, depending on the status of contract changes. Similarly, departments may have been in process of implementing contracted changes related to the broader Citywide cost of doing business adjustment during the survey period, and survey data may or may not include such changes.

General Survey Outreach

The goal of the general survey outreach was to gather as many responses as possible by disseminating the survey to all nonprofit organizations that contract with the City. The Controller's Office conducted outreach in three ways:

- The Controller's Office sent out the survey and reminders to a nonprofit distribution list.
- The Controller's Office distributed an outreach email to City departments that have a high volume of nonprofit contracts and requested they disseminate the survey to their portfolio of contracted nonprofits.
- The San Francisco Human Services Network (HSN), an advocacy group of nonprofit service providers, distributed the survey to its members and contacts.

The general survey data collection period was October 10, 2022 through November 11, 2022.

DATA CLEANING AND ANALYSIS

Cohort Survey Analysis

For each cohort organization, the Controller's Office combined the organization-level data from Survey Monkey with the worker-level data from the Excel spreadsheets so that each worker was also associated with all information about the organization they work for. The Controller's Office cleaned and validated the combined data for each of the 29 organizational respondents, formatted the data and uploaded

each organization's cleaned results into R statistical software to form a primary dataset used for the entirety of the cohort analysis, where each row represented one worker.

Readers should consider the following information when interpreting the analysis and findings offered in the report:

- The denominator includes all workers with demographic information provided rather than all workers. Workers without information provided in a demographic category (i.e., "data not collected") were removed from the analysis of that demographic.
- The Controller's Office calculated both mean and median wages for each job category. The analysis excluded an extreme outlier (an executive with an hourly wage over \$220 per hour) from the mean and median of the Executive job class.
- The Controller's Office used t-tests, clustered t-tests based on organization, and one-way ANOVA (analysis of variance) tests to test for significance in comparisons of wages between groups. Because the cohort is not a random sample of all nonprofit contractors, these statistical tests were used to direct the analysis and inform conclusions, but the Controller's Office did not form conclusions or insights solely based on these tests.
- We analyzed demographic distributions to determine whether workers within a job category had similar demographic representation to the total survey population, or if any race/ethnicities or genders were over or underrepresented. We compared the distributions within each job category to the total cohort survey distributions using chi-squared tests in R. Where any category is reported as under or overrepresented, the results were significant at the $<.05$ level.

Complete Survey Analysis

In order to merge the data from the Cohort Survey with the General Survey, first the Controller's Office used R to summarize the Cohort Survey data to match the format of the General Survey dataset. This included categorizing each worker into either a general or executive job category and categorizing each worker's wage into wage ranges that mirrored those ranges used within Survey Monkey for the General Survey. For each cohort organization, we then calculated:

- Total headcount and total FTEs
- Sum of FTEs in each wage range
- Proportion of general and executive workforces that fall into each gender and race/ethnicity category

The final dataset included data for each cohort and general survey respondent organization, where each row represents one organization. We exported data from R to Excel, and conducted a majority of the summary analysis included in the report using Excel.

Readers should consider the following information when interpreting the analysis and findings offered in the report:

- General Survey respondents provided a total head count and FTE sum for their entire workforce. The survey did not ask respondents to divide these figures between the executive and general workforces. Respondents provided demographic data in the form of percentages of the general and executive workforce that fall into each demographic category. Because of this, all demographic summary statistics reported in this document are averages of percentages. This means that each organization's workforce is weighted the same, regardless of how many

employees each one has. This is a limitation of the dataset, and future survey collection efforts should request the number of employees in each demographic category rather than the percentages.

Applicability of Results

The Controller’s Office selected the Cohort Survey participants to target organizations across a range of budget sizes, service areas, and department funders while ensuring sufficient representation of organizations the City invests in at the highest levels (primarily organizations with budgets over \$15 million and primarily organizations funded by the largest grant-making departments).

Because the Cohort Survey has characteristics of both a clustered sample and a convenience sample and had a 57% response rate, there is potential selection bias and non-response bias introduced that may impact the applicability of the survey results to both the total survey population and the broader nonprofit contractor population.

A clear example is that Homelessness and Housing organizations and organizations with budgets of \$15 million or more are overrepresented in the cohort sample. To account for this potential bias when drawing conclusions, we compared the key characteristics of the cohort organizations or workers to the total survey population. Where characteristics differed, we had two methods for approaching applicability to the broader survey population:

- Conducting additional analysis, such as looking at department funders and secondary service areas in addition to primary service areas.
- Creating crosstabs to compare findings across characteristics such as organization budget size or primary service areas.

Where findings from the cohort survey could not be reasonably applied to the larger survey population, that is noted explicitly in the report.

To further clarify applicability of results, the table below compares results between cohort respondents and all respondents across a variety of measures.

Comparison of Select Cohort and Total Survey Respondent Characteristics: Workers	Cohort Respondents	All Respondents
Average Headcount	178.7	107.8
Average FTEs	161	97.5
Average percent of FTEs earning:		
Less than \$25/hr	46.07%	37.51%
Between \$25/hr and \$39.99/hr	37.01%	41.00%
Between \$40/hr and \$54.99/hr	9.91%	12.72%
\$55/hr or over	7.01%	8.18%
Race: average percent of general workforce workers who are		
Asian	18.81%	25.42%
<i>Calculated % of workers who are Asian</i>	17.88%	N/A
Black or African American	21.75%	18.08%
<i>Calculated % of workers who are Black or African American</i>	31.34%	N/A

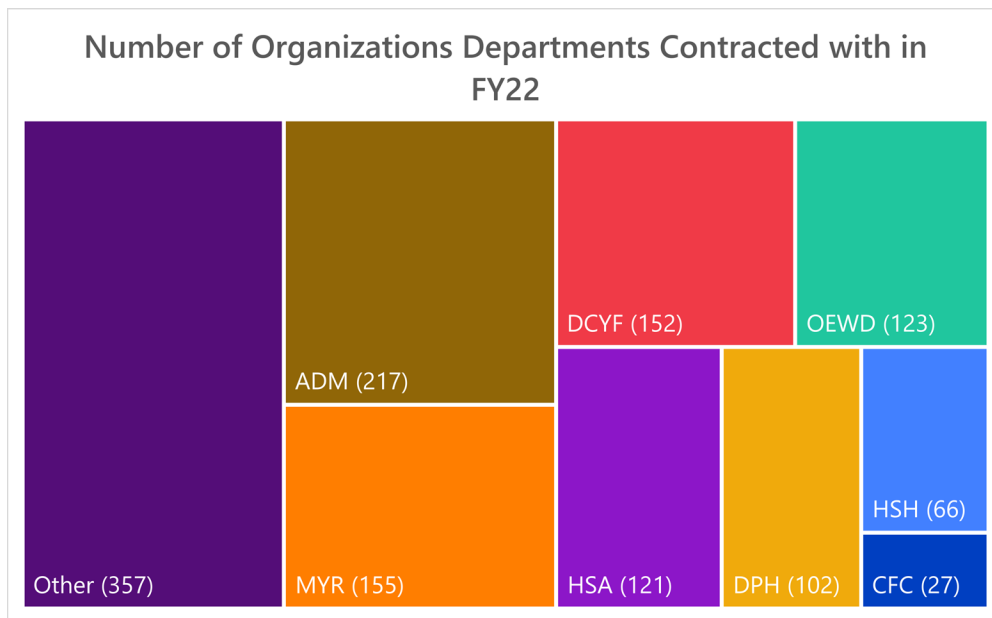
Latino/Hispanic	26.38%	24.34%
<i>Calculated % of workers who are Latino/Hispanic</i>	<i>21.21%</i>	<i>N/A</i>
White	14.90%	16.88%
<i>Calculated % of workers who are White</i>	<i>19.26%</i>	<i>N/A</i>
In a small race category or not listed ("Other")	5.92%	7.53%
<i>Calculated % of workers who are in a small race category or not listed ("Other")</i>	<i>10.3%</i>	<i>N/A</i>
Without race data	12.23%	7.20%
<i>Calculated % of workers without race data</i>	<i>N/A</i>	<i>N/A</i>
Comparison of Select Cohort and Total Survey Respondent Characteristics: Organizations	Cohort Respondents	All Respondents
Count of organizations	29	152
Proportion of respondents with budgets of \$5 million and over	72%	48%
Proportion of respondents with budgets under \$5 million	28%	52%
Proportion of respondents with a primary service area of:		
Arts and Cultural Services	0%	9%
Homelessness and Supportive Housing	38%	16%
Behavioral Health	21%	13%
Childcare/Early Childhood Services	0%	6%
Economic/Community Development Services	0%	7%
Family Services	3%	7%
Food Security Services	0%	0.7%
Legal Aid Services	0%	5%
Medical Care/Physical Health Services	0%	2%
Senior Services	10%	10%
Veteran's Services	3%	0.7%
Workforce Development	10%	7%
Youth Services	14%	17%

Appendix B: Additional Summary Data

This appendix includes additional survey results and other information to support analysis and interpretation.

Citywide Spending Data

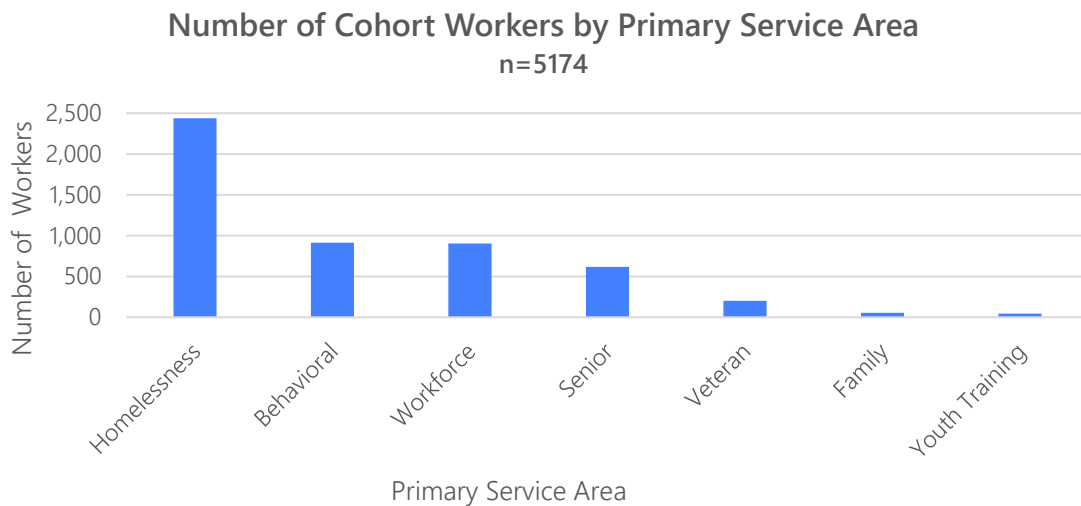
The Controller's Office used City spending data from PeopleSoft from FY21-22 (the most recent complete fiscal year) to assess the comparability of survey respondents to all City contractors.



Number of Survey Respondents by Primary Service Area

Primary Service Area	Number of Organizations n=152
Youth Services	25
Homelessness and Housing Services	24
Behavioral Health Services	20
Senior Services	15
Arts and Cultural Services	14
Economic / Community Development	11
Family Support Services	11
Workforce Development	10
Childcare/Early Childhood Services	9
Legal Aid Services	8
Medical Care/Physical Health Services	3
Veteran’s Services	1
Food Security	1

Cohort Data Analysis: Workers by Primary Service Area



Average Percent of Operating Budget Funded by the City by Primary Service Area

The table below, sorted by number of organizations in each service area, shows the total FTEs reported for that service area, and highlights the service area percentages when the average percent of the operating budget funded by the City or the average percent of City-funded FTEs are above the overall average across all service areas.

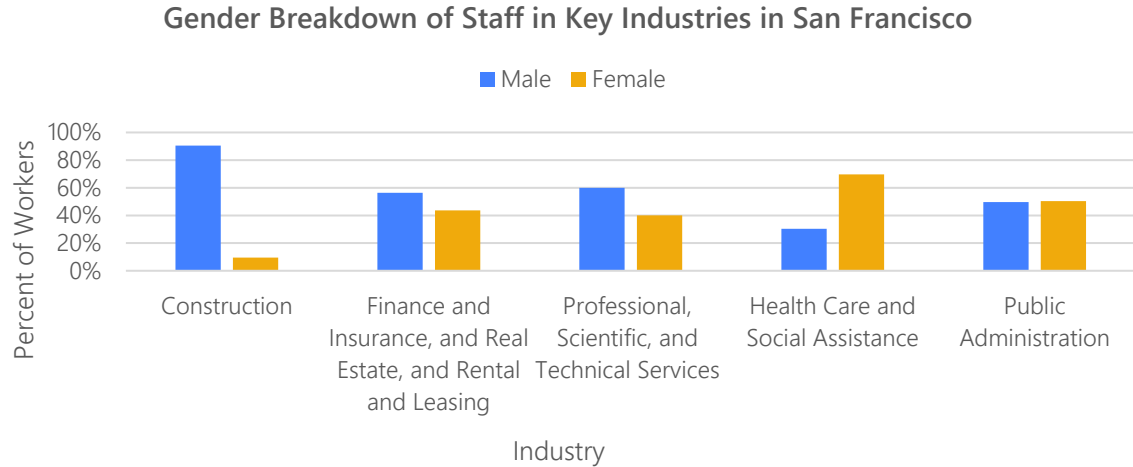
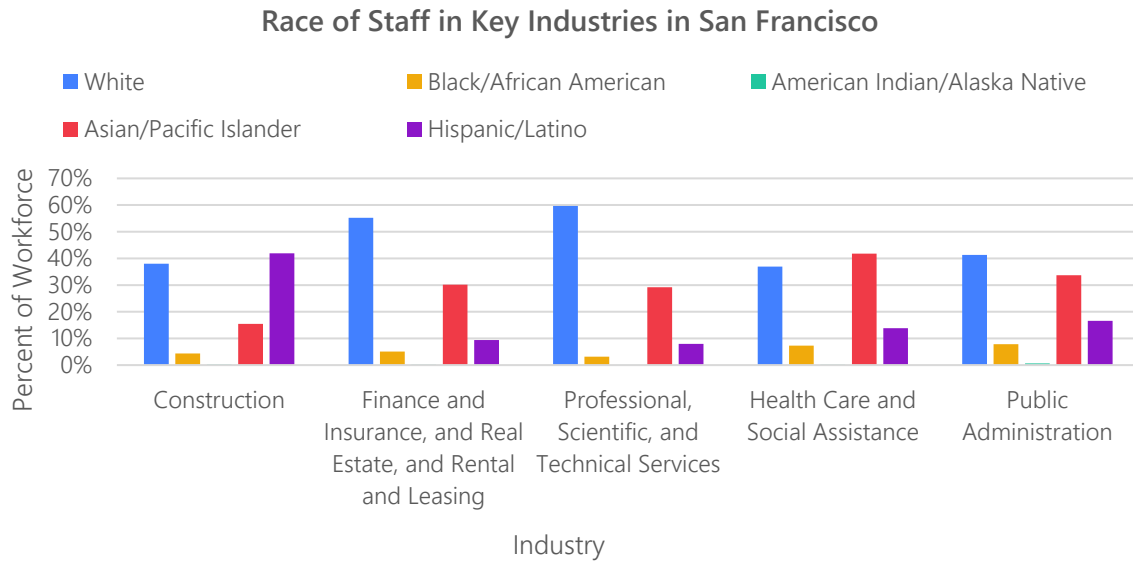
The reported FTE in the table below represents the total FTE positions an organization has when fully staffed (14,458). This total differs from the reported number of currently occupied FTE positions at surveyed organizations (13,206).

The general survey gathered information on percent of FTE funded by contracts with the City when fully staffed. The cohort survey did not gather this information in the same way, and the 29 cohort respondents are not represented in the averages shown in the table.

Primary Service Area	Number of Organizations	Total FTE	Avg. % Operating Budget Funded by City, n= 150 organizations	Avg. % FTE Funded by City, n= 121 organizations
Youth Services	25	2,710	50%	58%
Homelessness and Housing Services	24	3,823	53%	79%
Behavioral Health Services	20	2,468	71%	72%
Senior Services	15	1,838	52%	67%
Arts and Cultural Services	14	146	27%	36%
Economic / Community Development	11	657	52%	59%
Family Support Services	11	317	54%	64%
Workforce Development	10	1,316	40%	55%
Childcare/Early Childhood Services	9	407	52%	49%
Legal Aid Services	8	244	47%	48%
Medical Care/Physical Health Services	3	339	34%	22%
Veteran's Services	1	183	45%	N/A
Food Security	1	8	62%	50%
Total	152	14,458	51%	58%

Other Key Industry Demographics Using 2015-2019 ACS Data¹⁴

The Controller’s Office used American Community Survey tools to compare demographic results from the nonprofit survey to demographics of workers in other industries in San Francisco. The charts below excerpt results from several key industries.



¹⁴ Steven Ruggles, Sarah Flood, Matthew Sobek, Danika Brockman, Grace Cooper, Stephanie Richards, and Megan Schouweiler. IPUMS USA: Version 13.0 [2015-2019 ACS 5 Year]. Minneapolis, MN: IPUMS, 2023. <https://doi.org/10.18128/D010.V13.0>

Mean Wages for Key Industries in the San Francisco/Oakland/Hayward Metropolitan Statistical Area (MSA)

The Bureau of Labor Statistics (BLS) publishes the Occupational Employment and Wage Survey (OEWS), which creates estimates for a range of occupations on a national, state, or MSA level. The most recently available data for the San Francisco/Oakland/Hayward MSA are the May 2021 estimates, available here: https://www.bls.gov/oes/current/oes_41860.htm

Summary information about the MSA occupation wages:

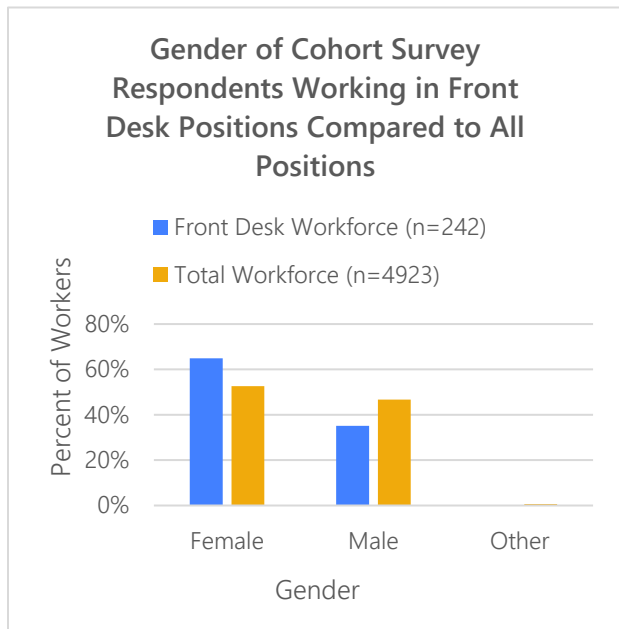
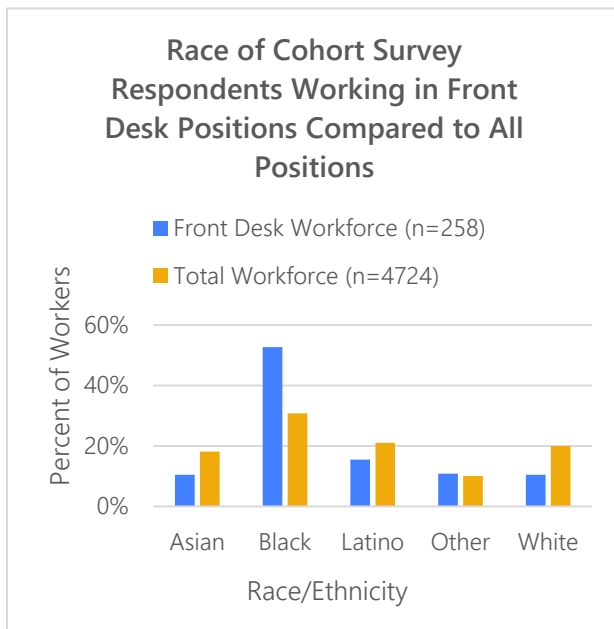
Total Employees Count	2,242,180
Average Wage	\$39.96
Average Wage w/o Management Occupations	\$38.04

Position Category	Total Employees	Mean Hourly Wage
Management Occupations	218,400	\$80.19
Legal Occupations	27,500	\$71.10
Computer and Mathematical Occupations	161,110	\$67.14
Healthcare Practitioners and Technical Occupations	114,160	\$64.85
Architecture and Engineering Occupations	52,180	\$56.13
Life, Physical, and Social Science Occupations	40,340	\$53.24
Business and Financial Operations Occupations	192,410	\$51.65
Arts, Design, Entertainment, Sports, and Media Occupations	38,990	\$42.80
Educational Instruction and Library Occupations	121,870	\$38.62
Construction and Extraction Occupations	89,440	\$37.80
Protective Service Occupations	45,170	\$35.26
Community and Social Service Occupations	37,600	\$33.84
Installation, Maintenance, and Repair Occupations	59,710	\$32.83
Sales and Related Occupations	185,620	\$30.78
Office and Administrative Support Occupations	241,860	\$27.68
Production Occupations	91,640	\$25.64
Transportation and Material Moving Occupations	156,410	\$25.33
Farming, Fishing, and Forestry Occupations	2,390	\$22.49
Building and Grounds Cleaning and Maintenance Occupations	57,240	\$21.78
Personal Care and Service Occupations	36,990	\$21.15
Healthcare Support Occupations	129,960	\$19.77
Food Preparation and Serving Related Occupations	141,190	\$19.06

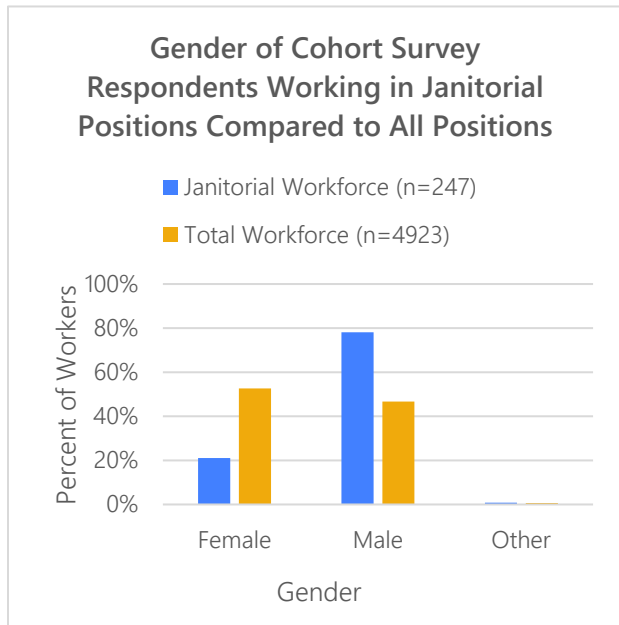
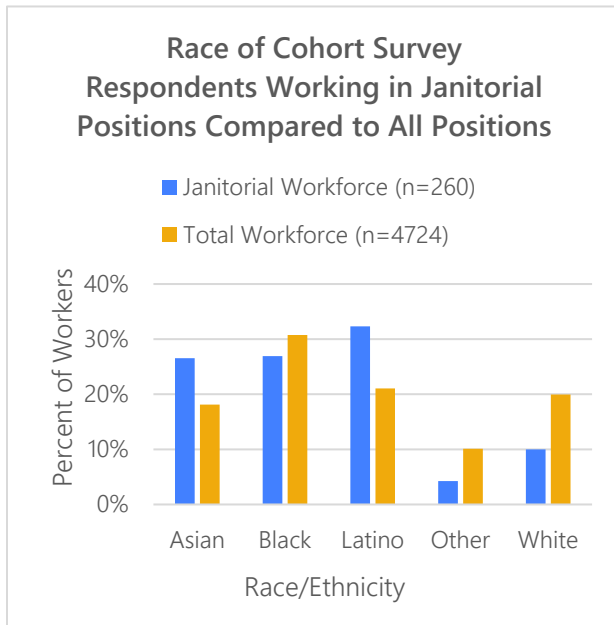
Appendix C: Low Wage Worker Additional Data

This appendix provides additional demographic details about low wage workers explored in Finding 1.

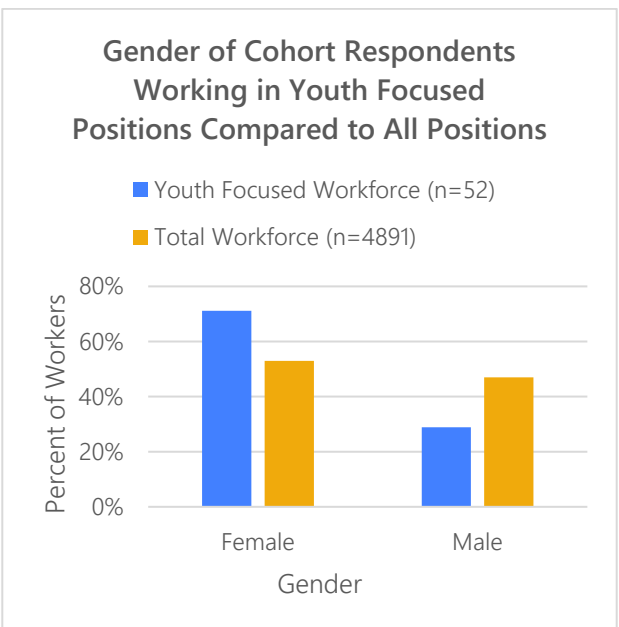
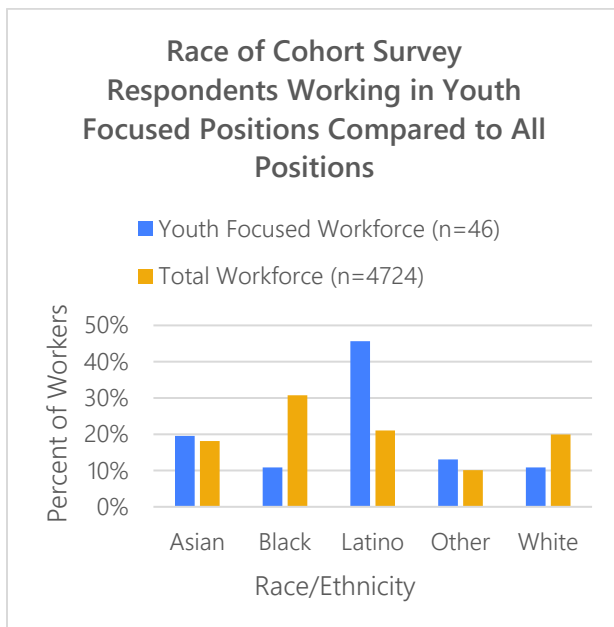
Front Desk Staff Demographics



Janitorial and Maintenance Staff Demographics

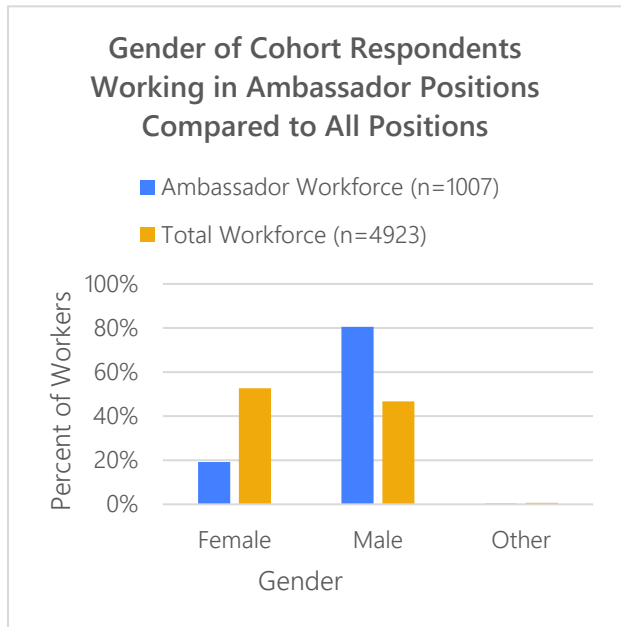
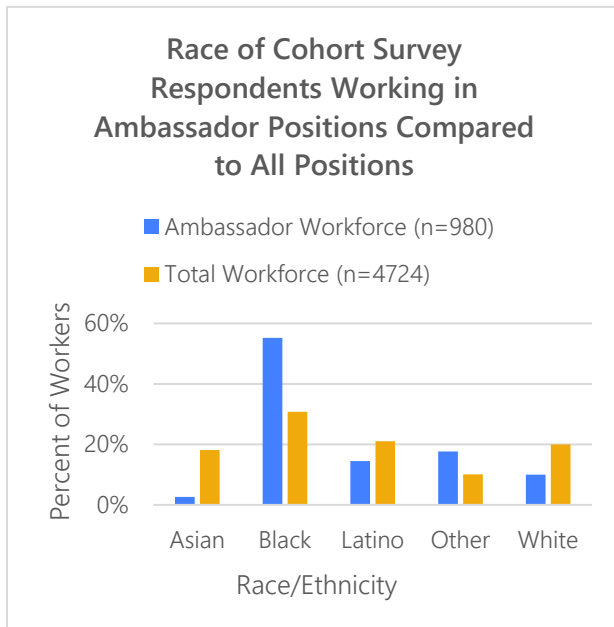


Children/Youth Focused Staff Demographics

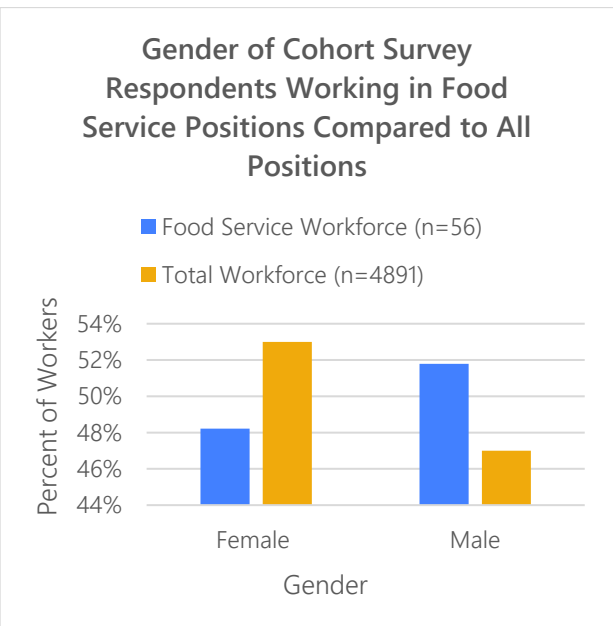
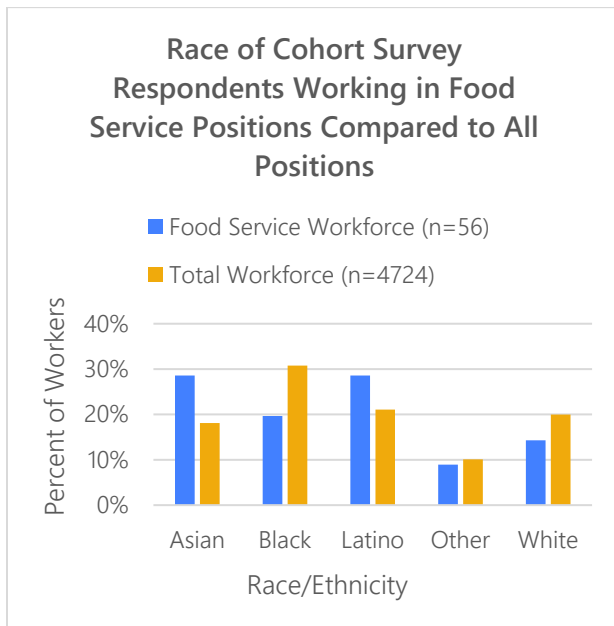


Other Direct Service Staff Demographics

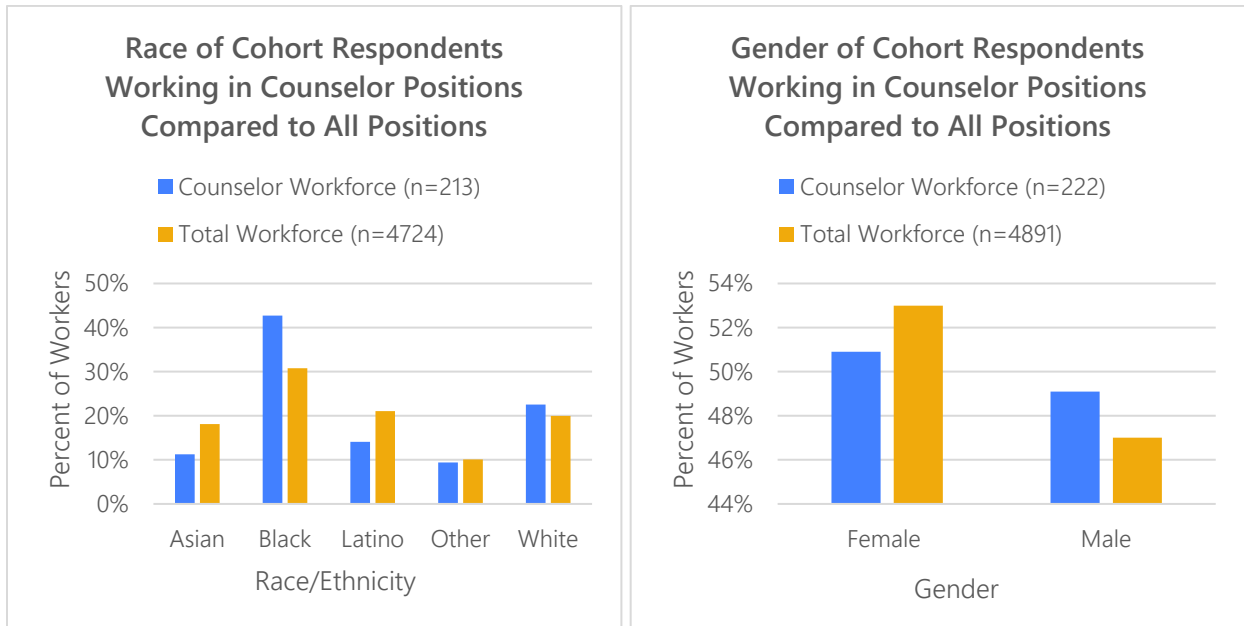
Ambassador/Practitioner



Food Service and Retail



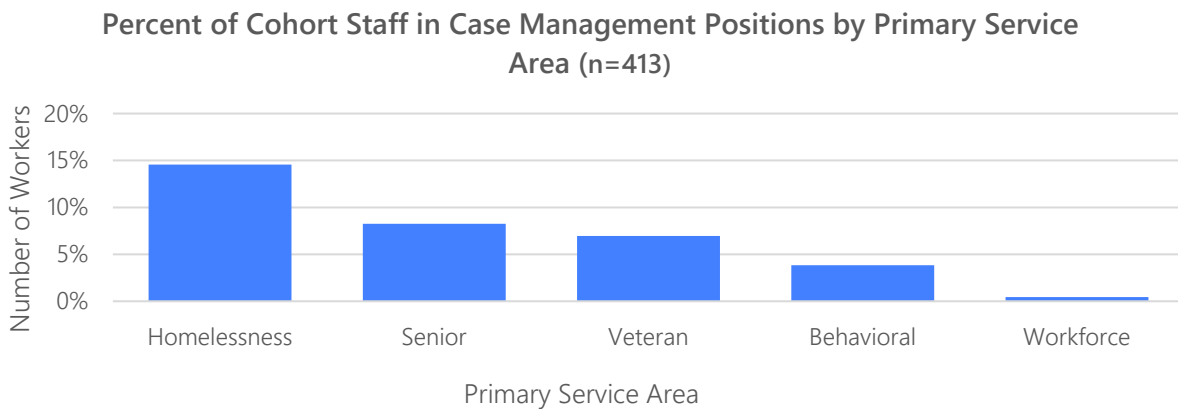
Miscellaneous Counselor



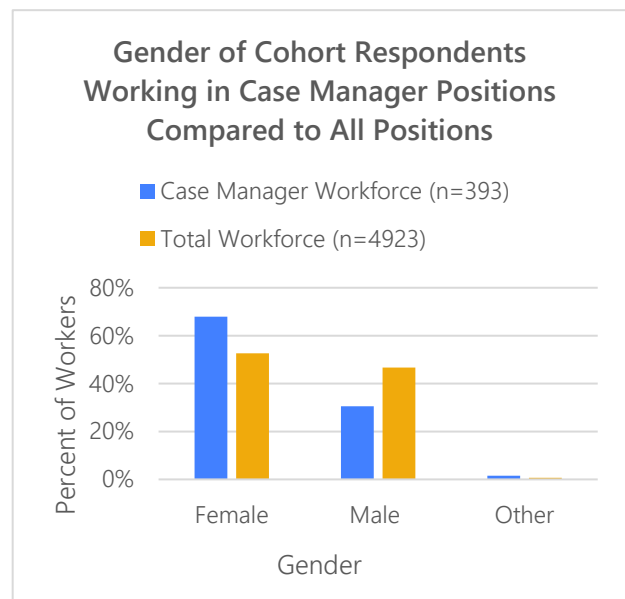
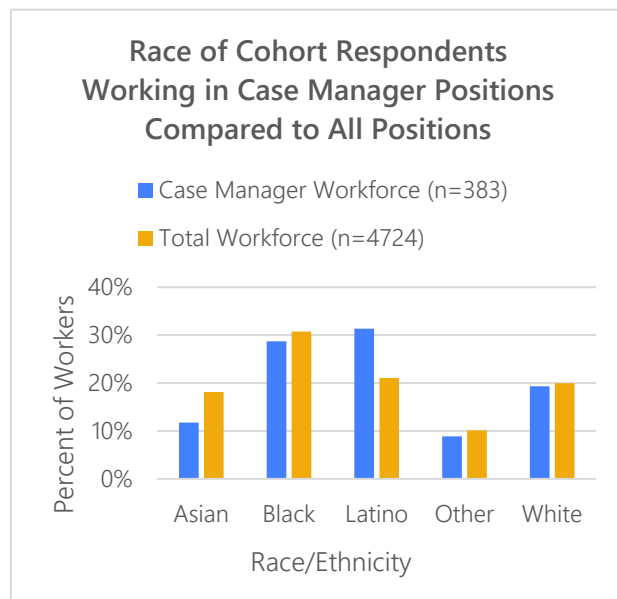
Appendix D: Case Management Additional Data

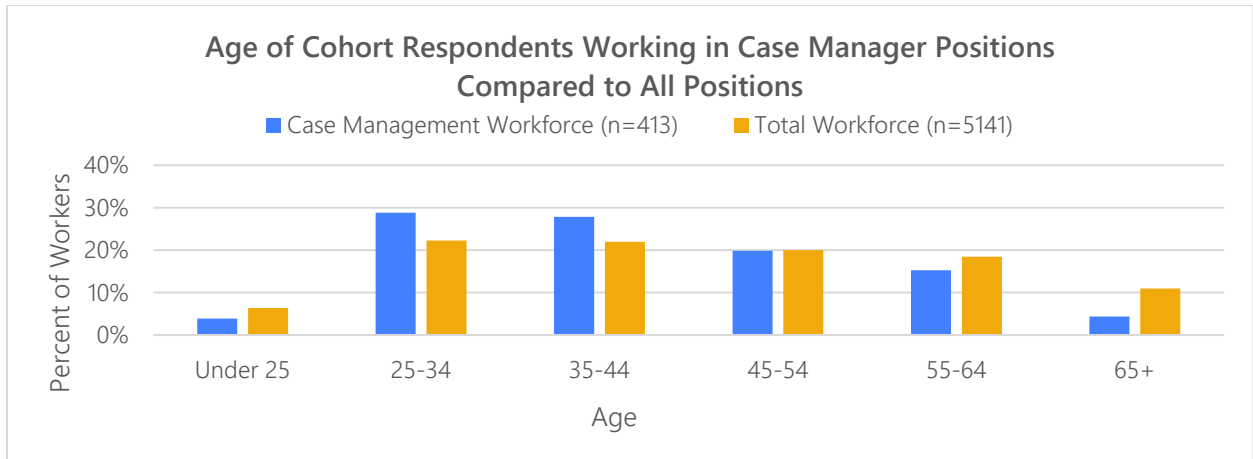
This appendix provides additional demographic details and other data about Case Management roles explored in Finding 2.

Service Areas Employing Case Managers



Demographics





Appendix E: Targeted Approaches Additional Data

This appendix provides additional data about the targeted approaches explored in Finding 3.

Wages for Bilingual and Non-Bilingual Workers by Job Category

Job Category	Bilingual Not Required		Bilingual Required	
	Mean Wage	Number of Workers	Mean Wage	Number of Workers
Administrative	\$37.78	422	\$29.79	34
Adult-Focused Training	\$31.65	25	\$29.59	7
Behavioral	\$40.07	163	\$36.02	32
Case Management	\$28.60	346	\$28.45	58
Children	\$26.64	45	\$27.88	14
Executive	\$74.28	134	\$59.17	10
Front Desk	\$22.10	263	\$23.83	9
Janitorial/Maintenance	\$24.48	250	\$23.20	5
Legal	\$40.29	21	\$33.79	7
Medical	\$48.30	85	\$34.92	2
Other Direct	\$22.69	799	\$22.73	7
Outreach	\$29.56	39	\$31.09	41
Program	\$31.89	645	\$26.61	126
Site Supervisors	\$34.97	135	\$34.27	5