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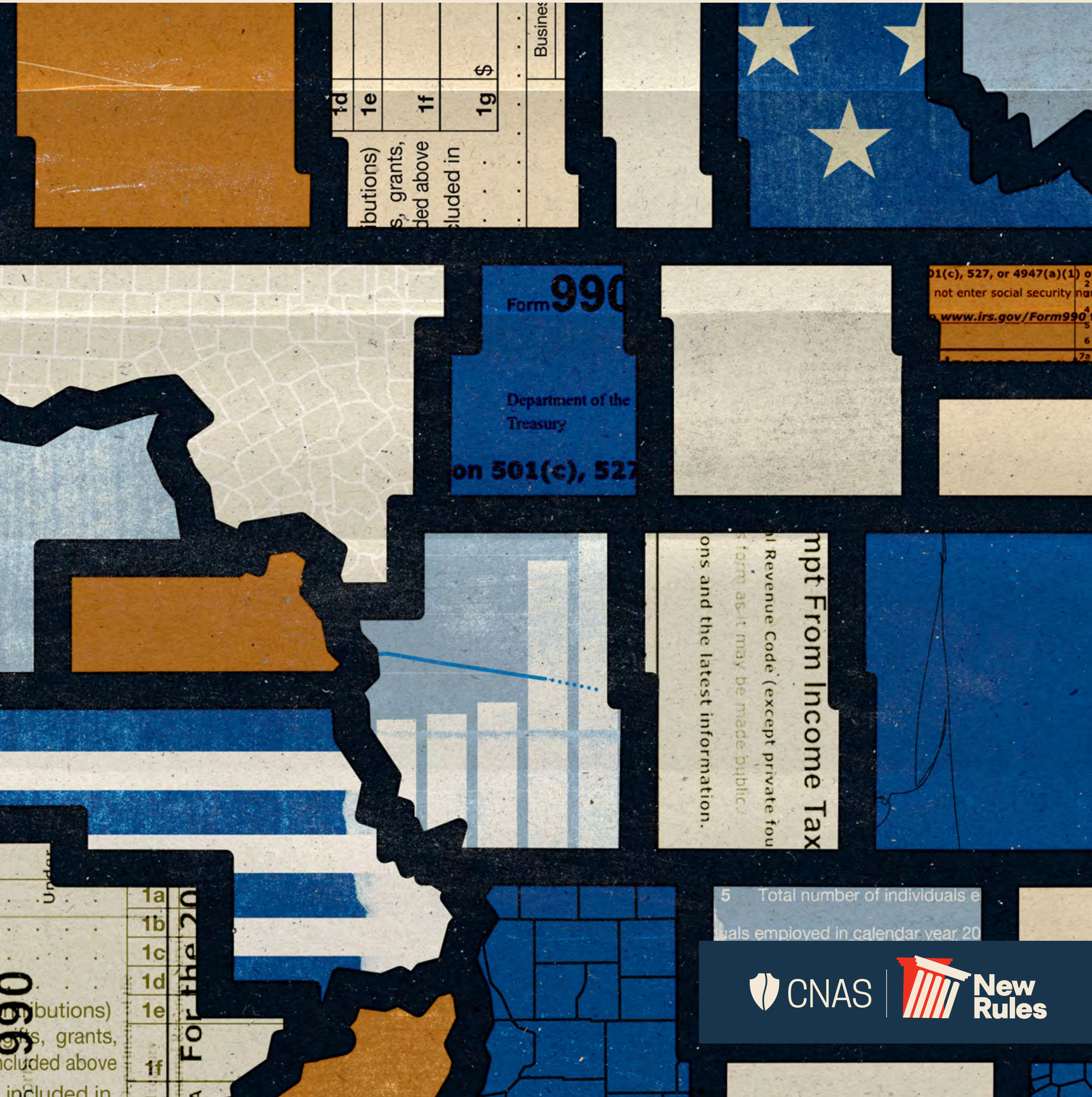
Redrawing the Map

Assessing the Military- and Veteran-Serving Nonprofit Sector

Katherine L. Kuzminski



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About the Author

Katherine L. Kuzminski is the director of studies at the Center for a New American Security (CNAS), where she is responsible for managing the Center's research agenda, publications, and research staff. In addition to her senior management role, Kuzminski leads the Center's work on national security human capital. Her research specializations include military recruitment, retention, and talent management; mobilization; Department of Defense institutional and organizational design and management; civil–military relations; and veteran and military family issues.

Kuzminski returned to CNAS from the RAND Corporation, where she was a political scientist researching military personnel policy. During her time at RAND, she led research teams examining officer personnel management, senior officer selection and development, ground force capability development, military organizational culture, and reserve component utilization.

From 2013 to 2017, Kuzminski served as a research associate, Bacevich fellow, and fellow for the CNAS Military, Veterans, and Society Program. During this time, she led the Rebuilding the Bipartisan Defense Consensus Project and developed the Veterans Data Project.

Kuzminski has testified before the congressionally mandated National Commission on Military, National, and Public Service. Her research and analysis have been featured in *The New York Times, The Washington Post, The Wall Street Journal, The Economist, The Guardian*, NPR, BBC, the NBC Nightly News, CNN, and the CBS Evening News. She is completing a certificate in management excellence at Harvard Business School and earned a BS in military history and MA in security studies from Kansas State University.

About the National Security Human Capital Program

The success of U.S. national security is driven by the uniformed warfighters and civilian professionals who develop, execute, and assess U.S. national security strategy, contingency plans, operational concepts, rules of engagement, doctrine, and policy. The U.S. warfighting edge therefore relies on recruiting, retaining, and leveraging top talent from across the nation with the knowledge, skills, abilities, and other attributes necessary to deter and, should deterrence fail, defeat adversaries. Central to the program's mission is the recognition that issues facing veterans and military families are inseparable from national security.

The CNAS National Security Human Capital Program provides timely, data-driven, actionable research and policy recommendations to ensure that the U.S. military, the Department of Defense, the military services, and the broader national security apparatus have access to and effectively leverage the nation's top talent. The program engages policymakers, industry leaders, Congress, scholars, the media, and the public regarding the critical role of human capital for national security.

Acknowledgments

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Executive Summary

THE UNITED STATES IS HOME TO 17.3 MILLION VETERANS in 2026—a population that has declined from 21.0 million in 2015, as older, conscription-era veterans have passed away.[1] Serving that population is both the federal government, primarily through the Department of Veterans Affairs (VA), and a vast ecosystem of military- and veteran-serving nonprofit organizations, including service providers, advocacy organizations, and local posts comprised of veteran members.[2] More than a decade after the Center for a New American Security published *Charting the Sea of Goodwill*, examining trends and dynamics within the military- and veteran-serving landscape, the need to identify trends in this community continues to be relevant.[3] This report takes a new approach to analyzing the structural conditions shaping the organizations serving the military and veteran community, focusing on the subset of organizations that provide day-to-day support.

Dynamics in the military- and veteran-serving community are worth reexamining as the veteran population itself evolves. The decline in the overall veteran population comes with a broader shift in its composition. In 2026, 26 percent of veterans served in the post-9/11 period, compared to 13 percent in 2015, and the median veteran age has fallen from 65 to 62.[4] The proportion of female veterans has increased from 9 percent in 2015 to 12 percent in 2025.[5]

Dynamics in the military- and veteran-serving community are worth reexamining as the veteran population itself evolves.

Geographically, the veteran population is unevenly distributed. Large absolute veteran populations cluster around major population centers and military installations. Veteran concentration rates per county tell a different story, as some rural counties have veteran populations representing much higher proportions of their residents, creating concentrated demand for services that federal resources and nonprofit capacity do not always reach.

Despite the declining veteran population, federal expenditures on veterans have grown substantially in constant dollars over the past decade, driven by legislation including the PACT Act, the Forever GI Bill, and the VA MISSION Act—each of which expanded eligibility for benefits and care.[6] The VA's reduction of 30,000 staff in fiscal year 2025, combined with an expanding reliance on community care models, represents a significant shift in federal service delivery whose full implications for veterans—particularly those in communities with limited nonprofit capacity—have yet to fully be assessed.[7]

These demographic and policy shifts provide the backdrop against which this report characterizes the landscape of organizations and services currently meeting veterans' needs. The study builds a new dataset from the ground up rather than relying on the Internal Revenue Service's (IRS) classification of military- and veteran-serving organizations (via the National Taxonomy of Exempt Organizations [NTEE] code). The NTEE classification code is assigned by the IRS at the time an organization files for tax-exempt status and may not reflect the filing organization's intent. An organization's mission or program focus can also evolve over time without a change to the NTEE code reflecting the shift in services. Moreover, the NTEE code may capture the specific substantive area of the services provided—such as human services or medical care—while missing the specific subpopulation they target. The traditional code does not capture organizations whose veteran- and military-serving work falls under other major IRS categories, such as health care or social services.

Beginning with the IRS's full registry of nonprofit organizations, this study narrows analysis to 501(c)(3) organizations filing an IRS Form 990 or 990-EZ, identifying organizations with relevant missions, and narrows the scope even further to organizations with at least one full-time employee. This approach yields 849 stand-alone organizations whose primary mission is dedicated to serving veterans, service members, and their families, alongside 150 organizations in which military- and veteran-specific support, programming, or a nested organization is embedded within a broader institutional mission.

Among the 849 stand-alone organizations, the plurality of organizations in the sector are small, young, and unevenly concentrated. Of these, 65 percent of organizations operate with fewer than 10 employees, 80 percent were founded in 2002 or later, and just five of 18 mission categories account for 64 percent of all organizations. Revenue growth has been broad-based, with median annual growth of 15 percent over the last four years of recorded tax data—though a minority of organizations (many concentrated on emergency relief) saw meaningful decline. Government funding remains concentrated in housing and homelessness services, tied to identifiable federal programs like Housing and Urban Development-VA Supportive Housing (HUD-VASH) and Supportive Services for Veteran Families. Geographic concentration of military- and veteran-serving organizations reflects both veteran population size and proximity to federal policymaking in Washington, D.C.

The 150 embedded services, programs, and organizations tell a different story: Rather than existing to serve veterans, they serve veterans as one population within a broader mission. Most often, these embedded services include housing, family services, food assistance, disability services, and legal aid. These programs and organizations cluster around general nonprofit infrastructure in states such as Texas, New York, and Illinois.

The findings lead to distinct responsibilities for key players in each part of the military- and veteran-serving ecosystem.

The executive branch should consider how veteran concentration rates per county should factor into resourcing decisions—not just the absolute number of veterans in an area—to ensure that rural and geographically isolated areas have equal access to veteran services and resources. Federal grant compliance frameworks should be tiered by organizational size and resourcing to reduce the disproportionate burden on smaller grantees.

> Despite the declining veteran population, federal expenditures on veterans have grown substantially in constant dollars over the past decade, driven by legislation including the PACT Act, the Forever GI Bill, and the VA MISSION Act—each of which expanded eligibility for benefits and care.

Congress should exercise robust oversight of the VA staffing reductions and the expansion of community care, convening regular hearings to assess whether alternative service delivery mechanisms are maintaining or elevating the quality and continuity of care that veterans have earned.

The philanthropic community should examine its current portfolio of grantees and identify whether it is reaching organizations best positioned to support underserved veterans. Capacity-building grants for overhead, staffing, and operational infrastructure should be considered as programmatic investments. Investments in shared technological infrastructure could meaningfully reduce the burden on small organizations currently operating without adequate tools or sufficient staffing levels. Funders should also consider the value of investing in specific positions focused on the military and veteran community within existing organizations and institutions, including universities, hospital systems, state and local government offices, or large organizations with aligned missions such as housing, employment, and mental health.

Introduction

THE U.S. VETERAN POPULATION REACHED 17.3 MILLION in 2026.[8] Serving that population are both the federal government (primarily through the Department of Veterans Affairs [VA]) and a robust community of military- and veteran-serving organizations. As of April 2026, the VA requested a $488.2 billion budget for fiscal year (FY) 2027, representing a 7.7 percent increase from the FY 2026 budget.[9] The largest categories in the budget are primarily divided between mandatory spending on veterans' benefits, including disability compensation, pensions, and educational benefits (69.2 percent), and discretionary spending on medical care delivered through VA hospitals and clinics, information technology, electronic health record modernization, and construction, with mandatory benefits programs (30.8 percent).[10] The growth in the federal budget dedicated to serving veterans reflects legislated eligibility expansion through the PACT Act, the MISSION Act, and the Forever GI Bill (explored in more detail later).[11]

Over the last decade, the strategic and national landscapes have undergone significant change. The pace of military deployments has also changed over the past decade. U.S. troops in Afghanistan, numbering more than 100,000 service members in mid-2011, were formally withdrawn on August 30, 2021.[12] The difficult withdrawal raised questions about the justification of U.S. involvement in Afghanistan and was reflected in lower rates of trust in the military.[13] In the days immediately following the withdrawal, the VA and veteran-serving nonprofits reported significant increases in service members seeking mental health counseling.[14]

The past decade has been defined by structural and institutional changes affecting the military and veteran community.

In the same time frame, the veteran population decreased from nearly 21.0 million veterans in 2015 to 17.3 million veterans in 2026, largely the result of older, conscription-era veterans passing away.[15] The veteran population is not only smaller, but its makeup also represents shifting demographic trends, as 26 percent of veterans in 2026 served in the post-9/11 period (compared to 13 percent in 2015), and women comprise 12 percent of the veteran population (compared to 9 percent in 2015).[16] The population's changing composition may present new needs for both the VA and the nonprofit organizations that serve it.

The past decade has been defined by structural and institutional changes affecting the military and veteran community. In 2019, the United States also created a sixth military branch, the United States Space Force—the first new military service created since the advent of the United States Air Force in 1947.[17] Between FYs 2021 and 2023, the military services faced the most challenging recruiting environment in the 50-year history of the all-volunteer force, with the Army, Navy, and Air Force failing to meet their recruitment goals in FY 2023.[18] The VA reduced its workforce by 30,000 staff in FY 2025, aiming to cut bureaucracy while maintaining or improving veteran services.[19] The changing composition of the veteran population and the evolving strategic and institutional backdrop present an opportunity to reexamine the landscape of organizations actively meeting the needs of service members, veterans, and their families.

This growing federal financial investment in the veteran community exists alongside a complementary support system: the parallel nonprofit ecosystem serving service members, veterans, and their families. These nonprofit services operate in ways that federal programs alone cannot. The network of nonprofit organizations serving the community can reach populations that the VA does not (including family members or veterans not eligible for federal benefits) and has the potential to respond more nimbly to emerging needs within the veteran and military family community.

In 2015, the Center for a New American Security (CNAS) published *Charting the Sea of Goodwill*.[20] The study conducted a comprehensive landscape analysis of the funding flows to the "sea of goodwill," or the community of military- and veteran-serving organizations. More recent studies exploring the nonprofit sector serving this community include RAND's *The Role, Effectiveness, and Sustainability of Nonprofit Organizations that Provide Employment Support for Veterans* (2024), the Milken Institute's *Thriving Beyond Service: Strategic Philanthropy for the Military-to-Civilian Transition* (2025), and the Lilly Family School of Philanthropy's *Military & Veterans Community Index 2025*.[21]

Each of these studies takes a different approach to defining the community of military- and veteran-serving organizations. The 2015 CNAS and 2024 RAND studies relied on a conventional approach of focusing on organizations classified by the Internal Revenue Service (IRS) as military- or veteran-serving through the National Taxonomy of Exempt Entities' (NTEE) code W30, an approach that had also been used by the Urban Institute and the D'Aniello Institute for Veterans and Military Families and cited by reporting from the George W. Bush Institute.[22] Common references to approximately 42,000–45,000 veteran-serving organizations trace back to the list of organizations coded under NTEE's W30.[23] This methodology has an advantage in that it produces a closed, consistently referenced list over time. However, an understanding of the veteran- and military-serving

Figure 1 | Military- and Veteran-Serving 501(c) Statuses[24]

501(c) Type	Type of Organization
501(c)(3)	Tax-exempt social welfare organizations restricted from engaging in lobbying activities.
501(c)(4)	Social welfare organizations, allowed to engage in lobbying activities.
501(c)(19)	Tax-exempt veterans' member organizations (75 percent of members must be past or present members of the military).
501(c)(23)	Tax-exempt veterans' member organizations established prior to 1880 (75 percent or more of members must be past or present members of the military).

Military- and veteran-serving nonprofits can be organized under several 501(c) tax-exempt statuses, ranging from general social welfare designations (501(c)(3) and (4)) to ones specifically for veterans' membership organizations (501(c)(19) and (23)).

landscape based solely on this set of organizations has limitations. The classification code is assigned by the IRS and may not reflect the filing organization's intent. An organization's mission or program focus can also evolve over time without a change to the NTEE code to reflect a shift in services. Moreover, the NTEE code may capture the specific substantive area of the services provided—such as human services or medical care—while missing the specific subpopulation they target.

Recognizing these limitations, the Milken Institute and the Lilly School of Philanthropy each developed their own screening criteria to build datasets of military- and veteran-serving nonprofit organizations tailored to their respective research study questions. This study offers another set of screening criteria to identify the core list of organizations serving the military and veteran community. Rather than relying on IRS classifications to define the field, this study builds a new dataset from the ground up, drawing directly from IRS tax filings to identify organizations whose missions, programs, staffing, and activities serve veterans, service members, and their families independent of how the IRS classified them at the time of filing. This study further includes both organizations whose primary mission is dedicated to the military and veteran community and organizations that embed military- and veteran-specific programming within a broader institutional mission, including programs and organizations overlooked in more recent studies.

The dataset developed for this study is also narrower than prior approaches in specific ways. It excludes 501(c)(4) organizations that are permitted to engage in advocacy and lobbying activities, as well as 501(c)(19) and 501(c)(23) organizations—membership-based veteran and military organizations, such as posts of the Veterans of Foreign Wars of the U.S. (VFW) and the American Legion, that operate under a distinct tax designation. While these organizations play an important role in the broader veteran ecosystem, that role is distinct from, and broader than, the day-to-day direct-service focus of this study.

What resulted is a list of 849 organizations under 501(c)(3) specifically focused on meeting the needs of veterans and military families, along with 150 embedded organizations or specific lines of effort operating within other organizations that have a broader overall mission.

Most existing studies do not account for the fact that many nonprofit organizations serving military and veteran populations operate with no full-time staff. While meaningful service to the veteran and military community is undertaken daily by volunteer-led, volunteer-staffed organizations, the threshold of whether an organization has at least one full-time employee serves as a proxy for capacity to deliver on an organization's mission. Though volunteer-led, volunteer-staffed organizations are not included in this analysis, an additional goal for philanthropy should be to identify prospective military- and veteran-serving organizations currently meeting the needs of their target community in a fully voluntary capacity. The dataset developed for this study further requires that each organization report at least one full-time employee, a threshold used as a credible proxy for institutional capacity. The ability to sustain operations, maintain institutional knowledge, and deliver services with a measure of consistency requires a degree of workforce capacity distinct from that of organizations run entirely by volunteers.

To meaningfully contribute to the evolving discourse, this study characterizes the current landscape of organizations serving these populations. This study further examines how mission, organizational capacity, and reliance on government funding shape organizations' ability to meet community needs.

To trace philanthropic investment in military- and veteran-serving organizations, the study draws on IRS Form 990 and 990-N filings derived from complementary datasets: the IRS Exempt Organizations Business Master File Extract and explorable forms 990 and 990-EZ through ProPublica, Candid (formerly GuideStar), and CauseIQ. Referencing across these independent datasets and platforms allowed the research team to validate findings, investigate discrepancies, and exercise informed judgment about which organizations to include or exclude from the analysis.

This study sought to provide additional context to IRS data through semi-structured qualitative interviews with nonprofit leaders in the field. Interviews were conducted across two distinct categories: leaders of large national-level organizations and leaders of locally focused organizations. The dual track was designed to identify the distinct similarities, differences, strengths, challenges, and opportunities facing each, while also recognizing the characteristics and practices that leaders of more established organizations attribute to their sustained impact. Interviews also captured the experience and perceptions of both stand-alone organizations and those nested within larger institutions, including within university campuses or services provided in partnership with state and local government offices.

The report is structured to provide both breadth and depth across several interrelated dimensions of the military- and veteran-serving landscape.

It bears noting that this study does not claim to evaluate the programmatic effectiveness or mission impact of the organizations examined; the analytic focus is the flow of resources and funding to the field rather than outcomes produced by the organizations being funded. That said, many of the organizations participating in qualitative interviews currently receive support from prominent philanthropic funders recognized for rigorous grant-making standards and robust outcome-tracking requirements. This suggests that, while organizational effectiveness falls outside the scope of this study, the interviewed sample is in large part held accountable to external funders for their results, lending a degree of confidence in the quality and intentionality of the organizations whose perspectives inform this report.

To ensure the study's findings reflect the full community of military- and veteran-serving organizations, a targeted number of interviews were also conducted with organizations that have not yet secured significant philanthropic investment. This deliberate inclusion serves two purposes: first, to illuminate the distinct challenges facing yet-to-be resourced organizations; and second, to draw meaningful connections between the attributes and practices of well-resourced organizations and those still seeking sustainable funding—therefore, ultimately informing recommendations for both emerging organizations navigating the path toward organizational maturity and philanthropic funders as they consider their portfolio of investment. Leaders of emerging organizations were identified through their participation in nonprofit leadership training networks.

The report is structured to provide both breadth and depth across several interrelated dimensions of the military- and veteran-serving landscape. It opens with a county-level overview of the veteran population, examining both absolute and veteran concentration rate data to situate the analysis geographically. This is followed by a county-level assessment of federal resource flows through the VA (as measured by the Geographic Distribution of Expenditures [GDX] dataset), offering a granular picture of where federal investment currently flows.[25]

The report then turns to the organizations actively serving service members, veterans, and their families. It first examines the 849 stand-alone organizations whose primary mission is dedicated to serving the community, walking through their distribution across mission areas, organizational size and staffing patterns, the age of the organizations (and what it reveals about the sector's post-9/11 growth), four-year revenue trends, reliance on government funding, grant-making activity, and geographic distribution. It then provides insights into the 150 identified embedded programs, services, and organizations through which veteran-specific programming operates within a broader institutional mission. Because revenue and staffing cannot be cleanly attributed to veteran-specific activities and cases for this cohort, the focus is on how their missions, organizational ages, reliance on government funding, and geographic footprints compare to stand-alone veteran-serving organizations. Together, these sections offer a full picture of the network of services available to the military and veteran community.

The report closes with observations and recommendations for distinct areas of practice: the federal government, philanthropic community, and military- and veteran-serving organizations.

Background

BEFORE EXAMINING THE NONPROFIT ORGANIZATIONS serving veterans, it is necessary to understand the population they serve and the VA resources directed toward the community. This section establishes that baseline in two parts: first, by characterizing the makeup of the current veteran population, including the size, age, and geographic distribution of the veteran population; and second, by examining the distribution of federal spending on veterans and the concentration of VA expenditures geographically. Together, this background sets the context for the organizational analysis that follows, identifying both the population that veteran-serving organizations exist to reach and the areas where federal resources may not fully meet localized need.

The Veteran Population

In the last decade, the overall veteran population has declined from 21.0 million to 17.3 million. This decline reflects the passing of older, conscription-era veterans—those who served when the military was significantly larger and the U.S. draft was still in effect. When the draft ended in 1973, the number of U.S. active-duty service members totaled more than 2.1 million; in 2026, this figure was roughly 1.3 million.[26] The end of the draft means that the youngest person drafted into the U.S. military would be 71 years old today. The youngest veterans of World War II are 99 years old, and the youngest conscripts from the Korean War are 91. As these generations pass, they are not being replaced in equal numbers—the smaller, all-volunteer force therefore produces fewer veterans. As a result, the median veteran age fell from 65 in 2015 to 62 in 2026. While this may seem like a subtle shift, it represents an increasing share of younger veterans who may experience a different set of needs (such as employment, access to education, and family stability) than their older counterparts.

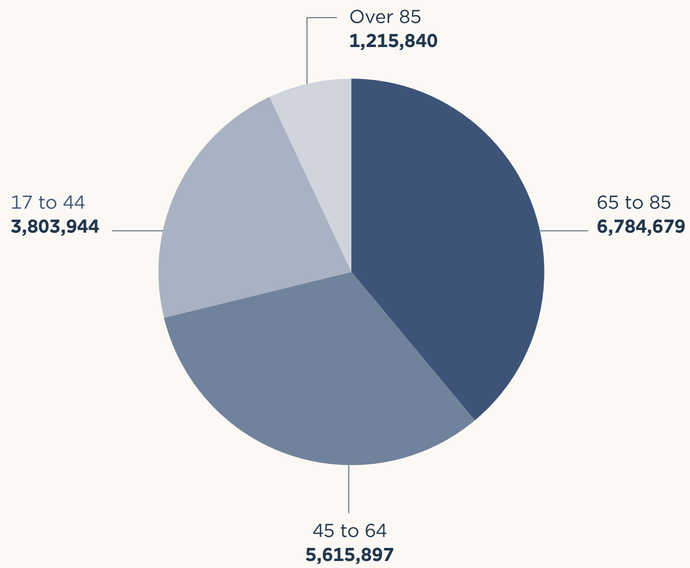
The end of the draft means that the youngest person drafted into the U.S. military would be 71 years old today.

With this decline comes a shift in the gender composition of the veteran population. As the U.S. veteran population skews younger, perhaps the largest shift is in its gendered makeup. The female proportion of veterans grew from 9 percent in 2015 to 12 percent in 2025. This transition has specific implications for both policymakers and those who serve the veteran community, as female veterans have distinct health-care needs and may present other gender-specific requirements related to their service.

Geographically, the absolute number of veterans correlates with U.S. population centers. Large numbers of veterans live in the areas around Phoenix, San Diego, Chicago, Seattle, and the Washington, D.C., metro area. Large veteran populations also settle around major military installations, including Cumberland County, North Carolina (near Fort Bragg), and Honolulu (near Joint Base Pearl Harbor-Hickam, Schofield Barracks, Marine Corps Base Hawaii, and Fort Shafter).

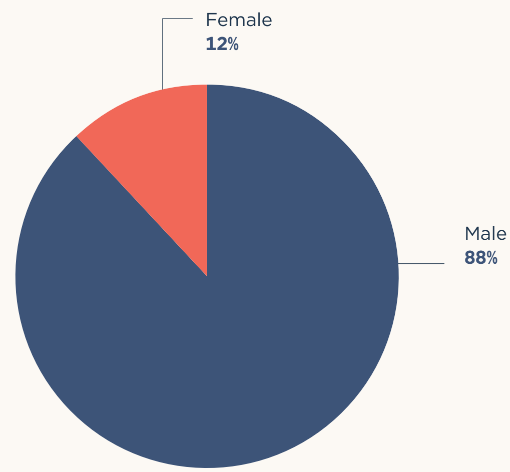
While it is important to identify counties with large veteran populations when considering the availability of services and resources, it is equally important to assess veteran concentration rates at the county level. Counties where veterans represent a disproportionately large share of the overall population may confront a distinct set of resource pressures, bearing concentrated demand for services that may not be matched by commensurate federal resource allocations or philanthropic investment. Small counties with fewer than 10,000 residents may have veteran concentration rates as high as 46 percent (as is the case in Chattahoochee, Georgia).

Figure 2 | Veterans by Age Category, 2025 Projection[27]



In 2025, nearly 40% of U.S. veterans (about 6.8 million) will be between the ages of 65 and 84. Though older veterans make up the largest percentage of this population, that dominance is fading as the conscription-era generation passes away and the smaller, all-volunteer force yields proportionally more younger veterans in the coming years.

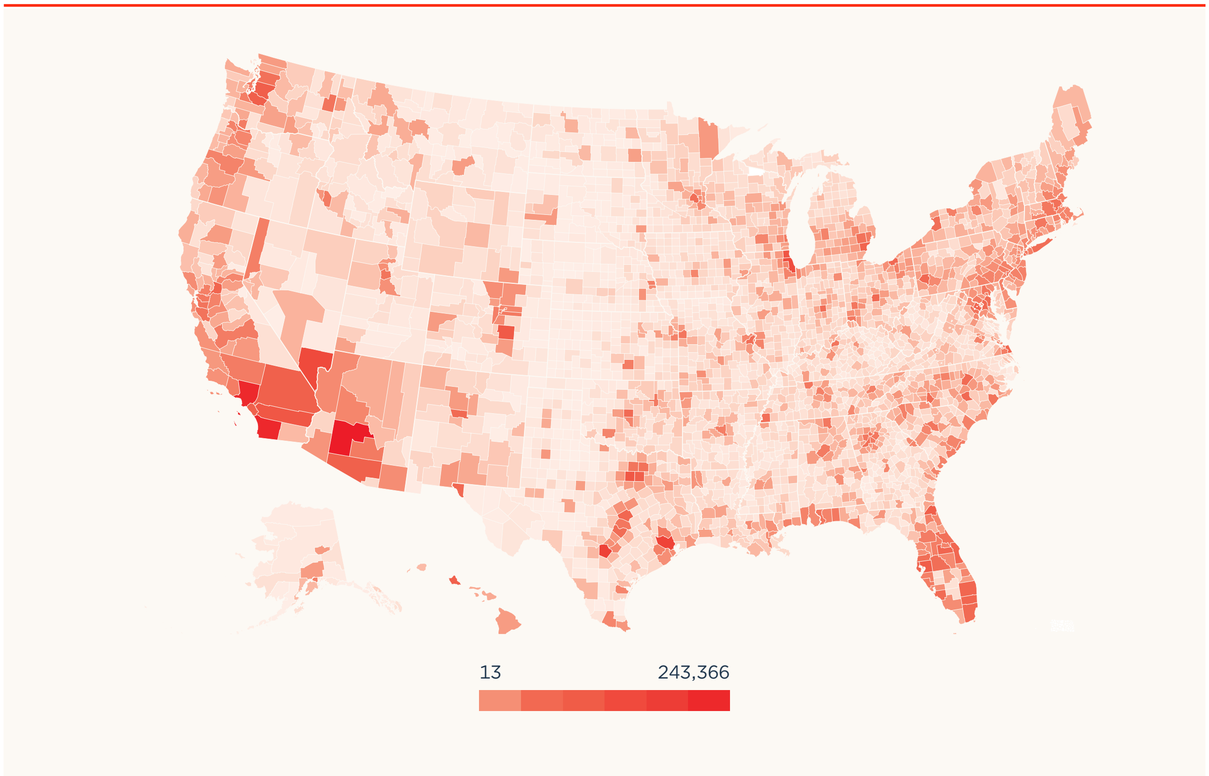
Figure 3 | Veteran Percentage by Gender, 2025 Projection[28]



As the veteran population skews younger, women made up 12 percent of veterans in 2025, up from 9 percent in 2015. This change carries distinct implications for health-care and other service-connected needs.

The absolute number of veterans by county largely mirrors overall U.S. population density, concentrating in major metropolitan areas and counties surrounding major military installations.

Figure 4 | Projected Veterans per County (Absolute), 2025[29]



Phoenix, San Diego, Los Angeles, San Antonio, and Dallas had the largest veteran populations in 2025, while rural counties had the smallest.

Figure 5 | Counties with the Largest and Smallest Projected Veteran Populations, 2025[30]

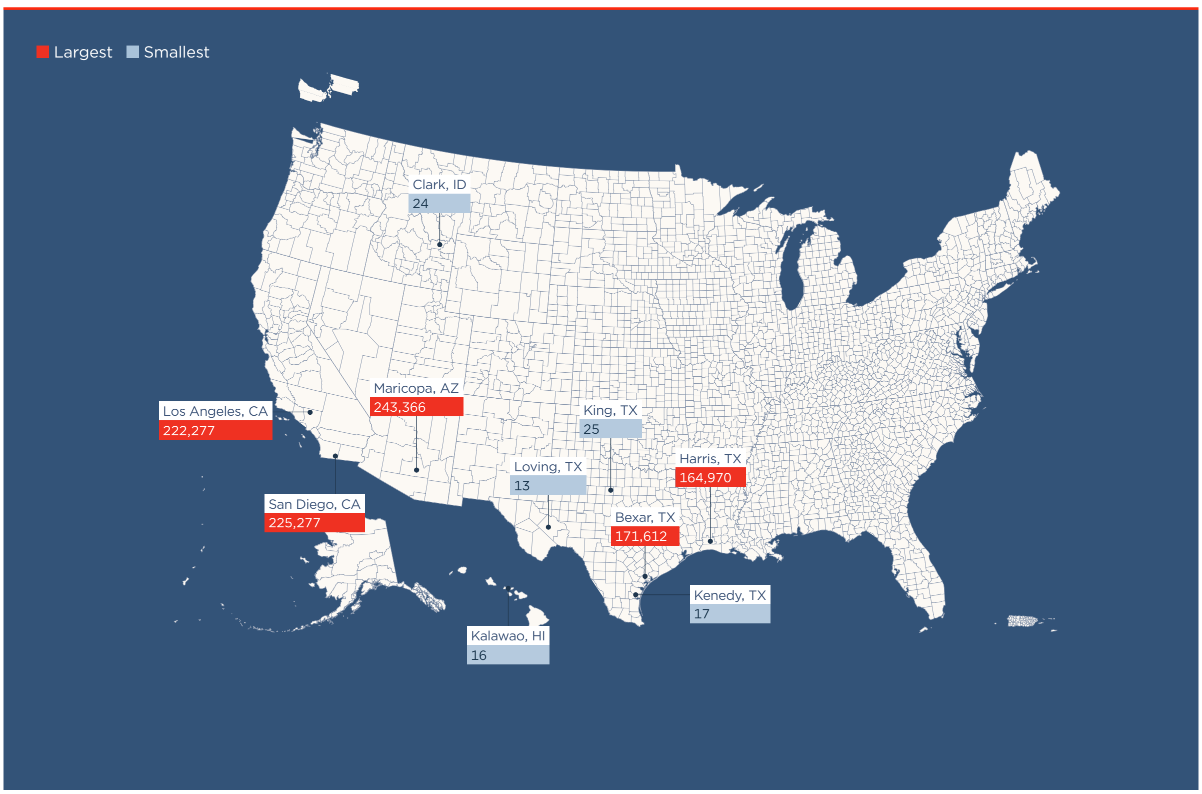


Figure 6 | Projected Veteran Concentration Rates per County, 2025[31]

Veterans make up a larger percentage of the population in more rural areas.

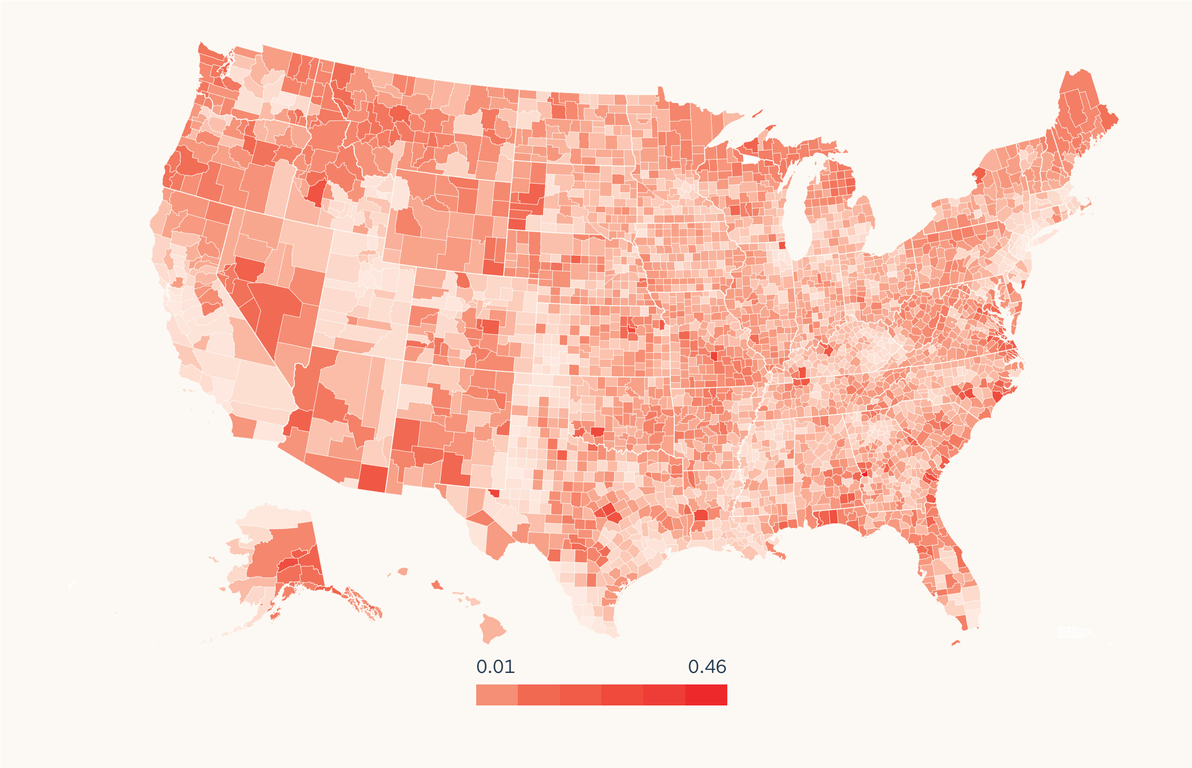
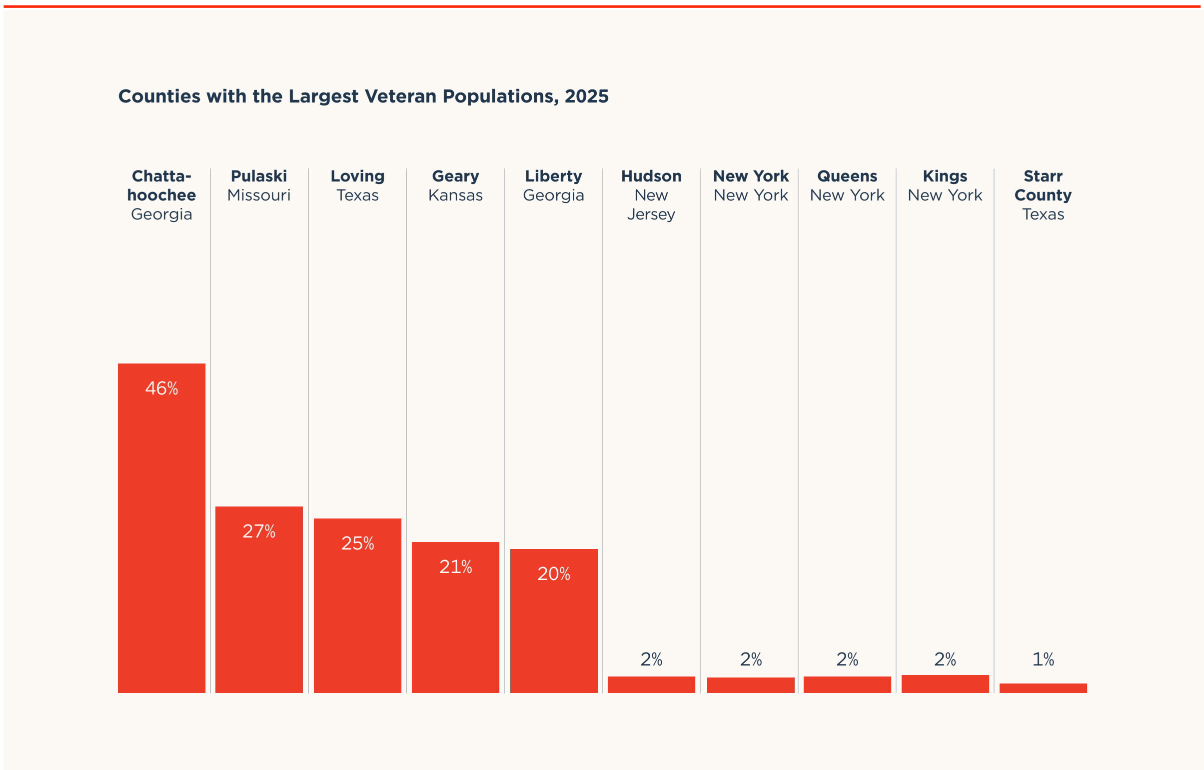


Figure 7 | Projected Veteran Concentration Rates by County: Highest and Lowest, 2025[32]

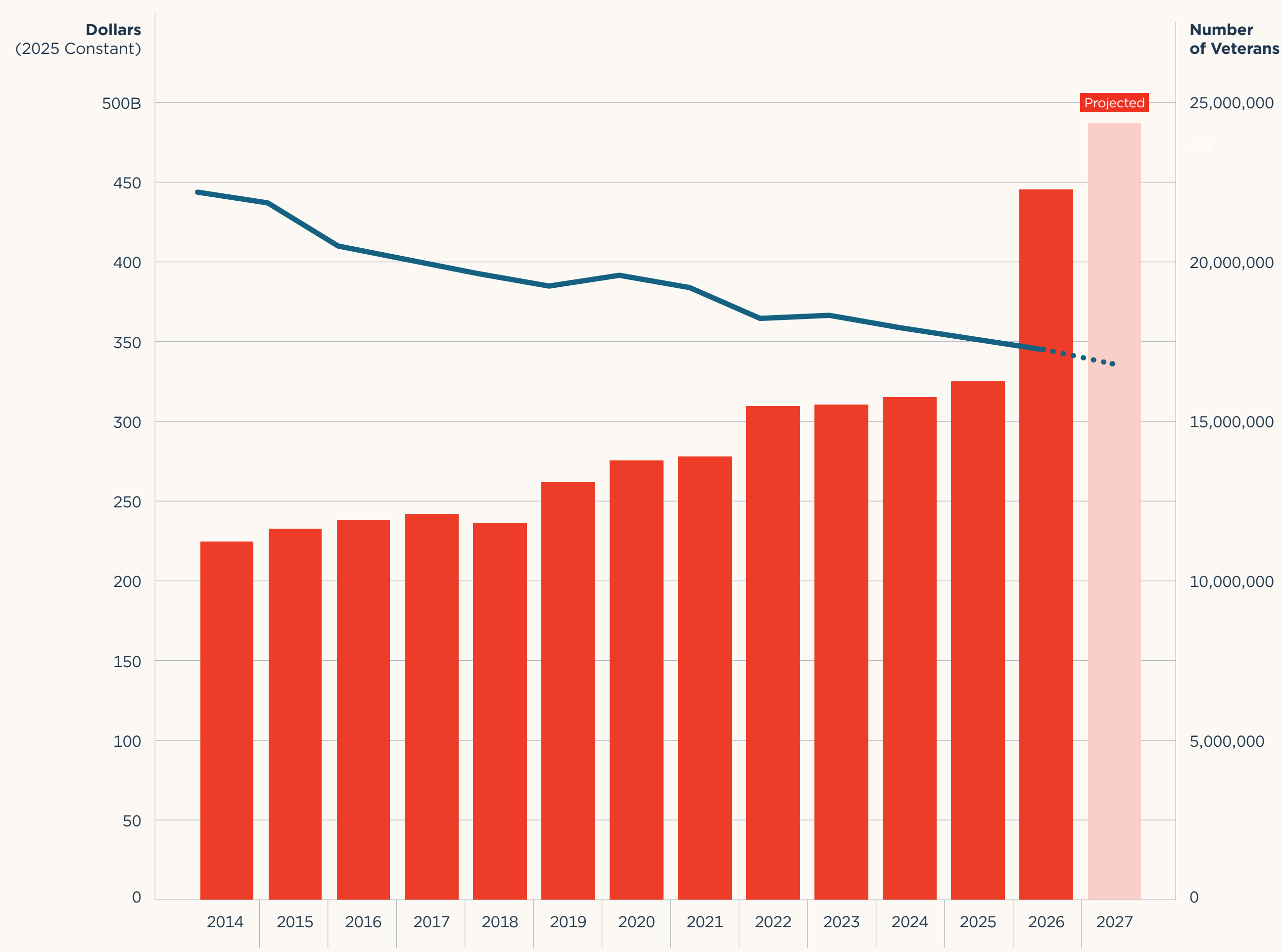


It is vital that the federal and state governments, military- and veteran-serving organizations, and the philanthropic community maintain a clear understanding of the geographic distribution of the veteran population, both in absolute and relative terms. Veteran population raw numbers provide important information regarding the scale of resources required to serve it. Large metro areas with high veteran populations can attract more resources than areas where the absolute number of veterans is widely distributed. However, counties with high veteran concentrations may face unmet localized service demands. Organizations planning where to open offices, provide services, or target their outreach need to consider both data points in their strategic planning. For policymakers, decisions regarding the distribution of VA hospitals and clinics, benefits offices, or other resources need to factor in small, high-density counties, such as rural communities in the South or Midwest, to ensure that veterans are not over-looked or underserved based purely on their location. Veteran concentration rates by county can better inform state and local legislators regarding how real costs such as health care, housing, and social services for veterans may specifically impact their communities.

Government Spending on Veterans

Despite a decline in the veteran population, federal expenditures have continued to grow in constant dollars—meaning that per veteran spending has risen substantially over the decade.

Figure 8 | Veteran Population vs. VA Expenditures, 2014–2027 (Projected)[33]



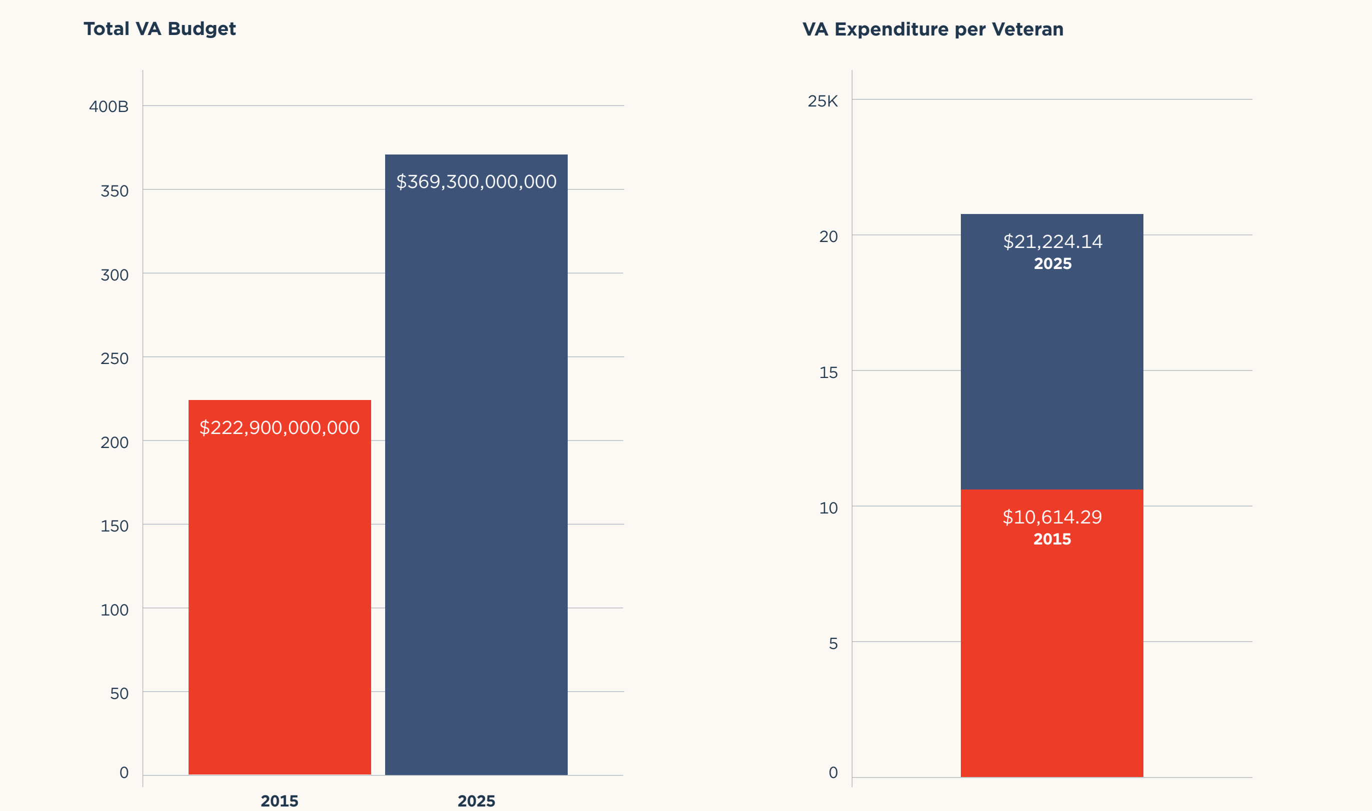
Even as the veteran population has steadily declined, inflation-adjusted VA expenditure continues to increase over time.

The growth in federal expenditures reflects the impact of legislative and policy decisions over the 2015–2026 period, focused on expanding access to care, recognizing the impacts of toxic-substance exposure among veterans, expanding access to GI Bill benefits for education, and extending benefits and support to caregivers of veterans. The 2017 Forever GI Bill extended veterans' earned GI Bill benefits from the previous 15-year time limit to span a veteran's lifetime, with an anticipated cost of $70 million.[34] The VA MISSION Act provided $5.2 billion to expand veteran access to community care, whereby veterans could more easily access private health-care providers outside the VA system.[35] The PACT Act, passed in 2022, expanded benefits for veterans and survivors, granting permanent eligibility for VA health care to 3.5 million post-9/11 veterans and expanding the legal presumptions of service connection based on toxic exposure during military service.[36] The Senator Elizabeth Dole 21st Century Veterans Healthcare and Benefits Improvement Act expands access to community care, strengthens caregiver support, and increases the VA's reimbursement rates for in-home and noninstitutional care for veterans from 65 percent to 100 percent.[37] Each piece of legislation is intended to improve the quality of life for veterans through federal benefits and contributed to the growth in the VA budget.

The geographic distribution of VA expenditures across the country at the county level ranges from $1,871 in Kalawao County, Hawaii, to $2.55 billion in Bexar County, Texas. Kalawao County is the smallest U.S. county by geographic size and the second smallest by veteran population. Bexar County—home to San Antonio, known as "Military City USA"—hosts the Department of Defense's sole Level 1 Trauma Center (capable of the highest level of trauma care, burn care, and wound care) at Brooke Army Medical Center, the Audie L. Murphy Memorial Veterans' Hospital, and more than 10 VA clinics. The city's proximity to several installations across the military services and the concentration of military medicine serve as a draw for separating service members and federal resources.[39]

At the national level, VA expenditures amount an average of $8,817 per veteran. Yet just as the veteran population should be examined in both absolute and relative terms, it is equally important to examine both the total VA expenditures at the county level and the per veteran rate of VA investment at the county level. In FY 2024, the VA expenditure per veteran at the reported county level ranged from $117 in Kalawao County, Hawaii, to $28,301 in Jones County, North Carolina.

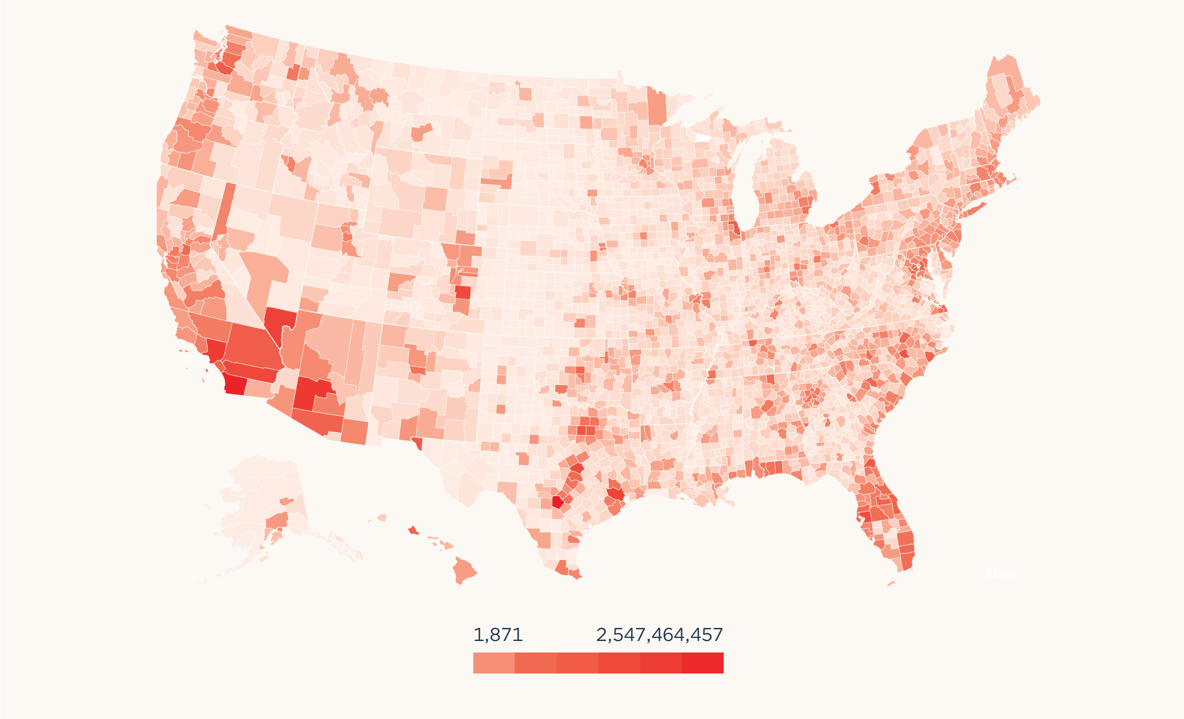
Figure 9 | VA Budget per Veteran Comparisons, 2015–2025[38]



VA expenditures per veteran in constant dollars doubled between 2015 and 2025.

VA expenditures by county largely mirror the geographic distribution of veteran populations, with spending concentrated in the metropolitan areas that hold the largest veteran populations.

Figure 10 | VA Expenditures per County, 2024[40]



VA expenditures are lowest in Kalawao County, Hawaii, and highest in Bexar County, Texas.

Figure 11 | Counties with the Highest and Lowest VA Expenditures, 2024[41]

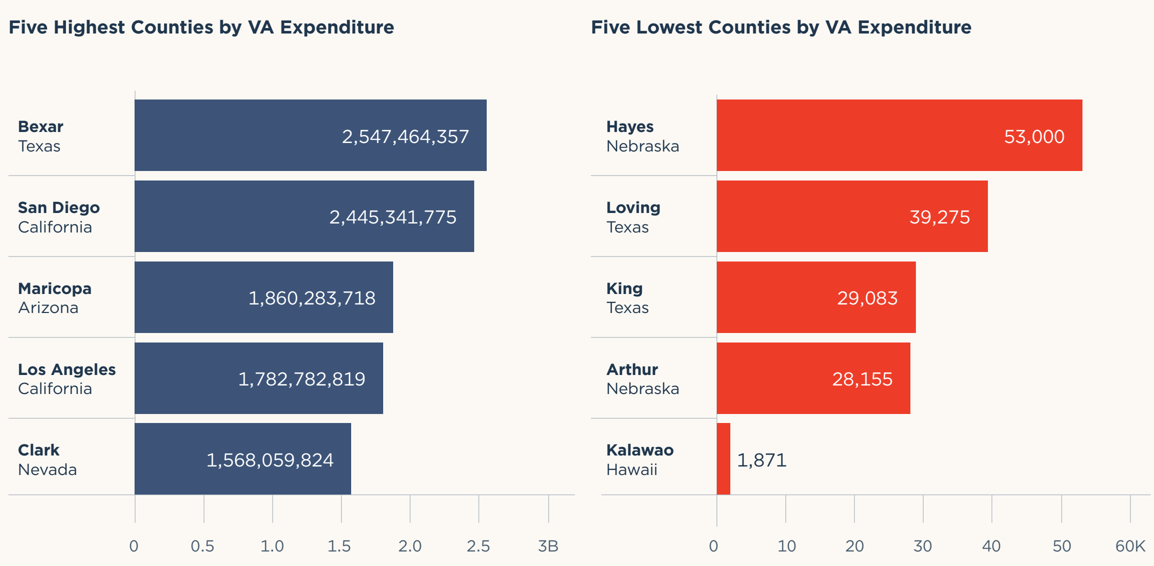
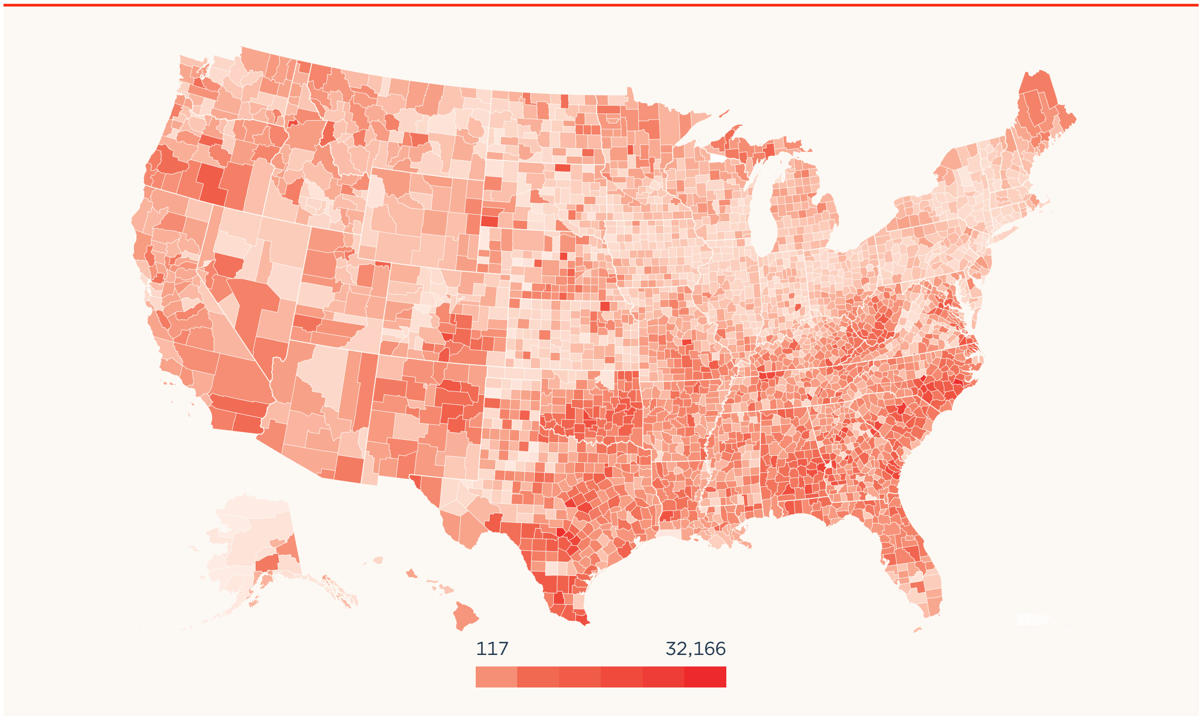
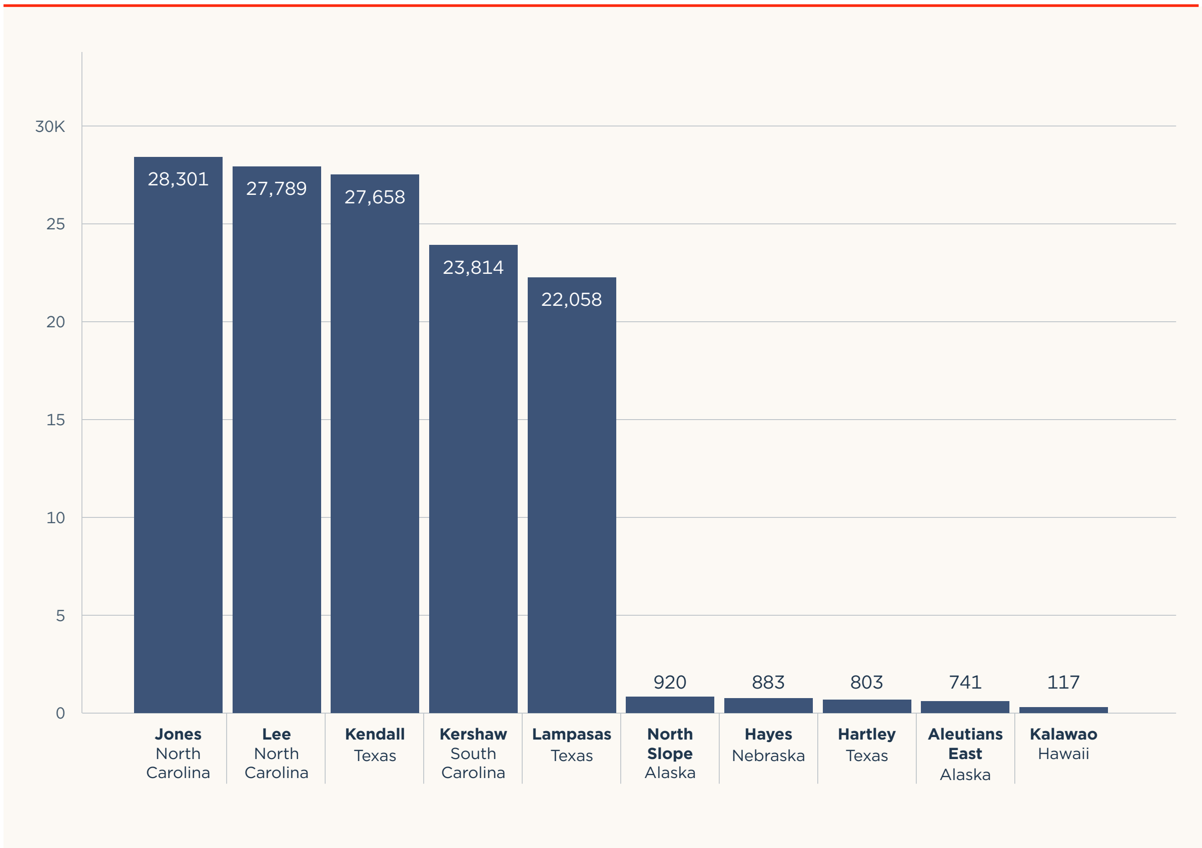


Figure 12 | VA Expenditures per Veteran per County, 2024[42]



When adjusted for veteran density rather than absolute totals, VA expenditures reveal a different pattern, suggesting that resource allocation does not scale up with population size but varies widely by county-level factors.

Figure 13 | Five Highest and Lowest VA Geographic Expenditures per Veteran[43]



There is a large disparity in VA expenditures per veteran, ranging from a low of $117 in Kalawao, Hawaii, to a high of $28,301 in Jones County, North Carolina.

Implications for Policymakers and the Philanthropic Community from the Background Data

The core tension revealed by the data is that government spending on veterans is increasing while the veteran population is shrinking. This trend should imply that individual veterans have higher access to resources than in the past. However, the geographic distribution of expenditures is uneven and may not reflect the concentration of need or the range of services required by veterans and their families. Per capita VA expenditure rates at the county level may indicate large capital investments (e.g., VA facilities) serving the veteran population for an entire region beyond the county and thus may not accurately reflect the resources available to veterans in the specific county. While VA expenditure data provides a useful measure of federal infrastructure in a community, it does not necessarily provide a proxy for veteran wellbeing. Military- and veteran-serving organizations—and the philanthropic community that supports them—can be more responsive to acute needs at the local level. The following section explores the landscape of organizations currently meeting the needs of the community.

Mapping the Landscape of Military- and Veteran-Serving Organizations

UNDERSTANDING HOW SERVICE MEMBERS, veterans, and their families are served today requires an understanding of the nonprofit ecosystem that works alongside the federal government to deliver services and resources to the community. This section first lays out the methodology used to construct a new, focused dataset of these organizations, addressing the limitations of prior approaches that relied on IRS classification codes alone. It then presents the trends and structural patterns emerging from the study dataset, including how these organizations are distributed by mission, size, age, revenue, government funding, and location, examined individually for the 849 organizations whose primary mission is dedicated to veterans. It further explores insights from the 150 organizations in which veteran-specific programming is embedded within a broader institutional mission.

Methodology

Arriving at a comprehensive, commonly understood list of veteran- and military-serving organizations is less straightforward than a cursory review would indicate. Historically, a few different approaches have been used to compile a comprehensive list.

One common approach bases analysis on the National Center for Charitable Statistics (NCCS) National Taxonomy of Exempt Entities (NTEE) codes, a classification system adopted by the Internal Revenue Service (IRS) in 1995. Under this coding system, military- and veteran-serving organizations fall under a subsection of "Public, Society Benefit—Multipurpose and Other" organizations, filed under the code W30. Studies relying on this methodology include the 2015 Center for a New American Security study *Charting the Sea of Goodwill*, the Syracuse University D'Aniello Institute for Veterans and Military Families working paper "Mapping Collaboration in Veterans and Military Family Services," and the 2024 RAND study *The Role, Effectiveness, and Sustainability of Nonprofit Organizations that Provide Employment Support for Veterans.*[44] As of April 2026, the web-based nonprofit data and intelligence platform built on IRS data identified 43,155 veteran-serving organizations in the United States identified under the NTEE code W30.[45] This NTEE-coded data has since been cited as a secondary resource in numerous studies, articles, and service provider platforms.[46]

While informed by an organization's stated intent, NTEE codes are assigned by the IRS rather than declared by the nonprofit itself. As a result, the classification may be imprecise, capturing only a single facet of an organization's work rather than its most defining activity, population served, or method of service delivery. NTEE codes also may not account for an organization's evolution over time. The NTEE classification system relies on the organization's IRS Form 1023 (for organizations seeking 501(c)(3) tax-exempt status) or IRS Form 1024 (for organizations filing for other 501(c)-type tax-exempt status) to make the determination at the time the organization initially applied for tax-exempt status.[47]

To address the NTEE's limitations, public-good research institutions focused on categorizing the nonprofit sector have developed alternative classification systems aimed at capturing more nuance to better synthesize and analyze similar organizations. In 2001, the NCCS released the Nonprofit Program Classification (NPC) system to add a further layer of detail on top of the NTEE system. While the NTEE system classifies the organization type, the NPC enables researchers, foundations, and practitioners to search by the subject focus of an organization's programs, the types of activities involved (to include advocacy, fundraising, or research), and the population the program is intended to serve.[48] The NPC is derived entirely from Part III of an organization's Form 990 and is designed to be used together with the NTEE.

A separate system, the Philanthropy Classification System (PCS), was developed by Candid (an organization formed by the merger of two previous platforms, the Foundation Center and GuideStar) to meet a different set of needs. Unlike the NPC system, which relies on Form 990 data alone, the PCS draws on a wider range of sources including organization websites, news coverage, press releases, and IRS bulletins, allowing for a fuller and potentially more accurate characterization of an organization's mission and activities than the NTEE alone provides.[49] The PCS is revised roughly every three to four years, based on community feedback and additional analysis, with the most recent update released in November 2024.[50] The broader sourcing and adaptability of the PCS enables more precise characterization of organizations. However, because it is adaptable and can evolve over time, there is a tradeoff: Research and analysis built on top of PCS codes at one point in time can shift, requiring researchers to cross-check historical data to ensure accuracy. The static IRS Form 990-based NPC system, while less adapted, does not carry the same need to cross-check historical data. Beyond the standardized systems outlined (NTEE, NPC, PCS), individual researchers and teams have also built custom datasets tailored to their specific questions, using their own inclusion rules layered on top of the underlying tax-filing data. Two recent study examples include the Lilly School of Philanthropy's *The Military and Veteran Community Index 2025* and the Milken Institute's dataset supporting *Thriving Beyond Service*. The Lilly School research team relied on IRS Form 990 and 990-EZ data and applied its own inclusion criteria to an initial list of 2,040,184 domestic charitable organizations in the IRS data between January 2010 and September 2025. To be included, the nonprofit must direct at least 80 percent of program expenses toward serving the military and veteran community. The Lilly School of Philanthropy dataset also "universally included" all 501(c)(19) and 501(c)(23) membership organizations. The total number of organizations included in its analysis is 39,375.[51]

The Milken Institute's *Thriving Beyond Service* study takes a similar but independently constructed approach. It draws on tax-filing data from 2011 to 2021 for all e-filers of forms 990, 990-EZ, and 990-PF, aggregated from NCCS and IRS sources. Organizations were included based on relevant NTEE codes and keywords tied to veterans and the military, and the final dataset was supplemented with interviewed organizations that do not appear in the IRS filings (such as the D'Aniello Institute for Veterans and Military Families, embedded in Syracuse University). The Milken team excluded organizations focused primarily on public awareness. The dataset "presumptively included" all NTEE-coded W30 organizations, which were not manually reviewed, but also applied exclusion rules to its initial dataset to remove "those related to public monuments, memorials, and museums; historical societies dedicated to the preservation of military history; and organizations focused on public awareness or education but not provision of services to veterans."[52] The final list analyzed by the Milken Institute resulted in a sample of 17,239 organizations and included a subset of 501(c)(19) veteran service organizations, including tax filings from individual posts.

Having reviewed the existing literature, methodologies, and datasets, this study takes a different approach to developing a relevant dataset. The underlying question of this study is: What does the current landscape of organizations actively serving veterans, service members, and their families look like within communities across the country and at the national level? Prior studies tend to encompass a broad set of organizations that are not necessarily focused on direct-service provision. These broader datasets include 501(c)(4) organizations (which engage in advocacy and lobbying) and 501(c)(19) membership organizations (a special tax category that allows for some lobbying and political activities), which totaled 24,848 in 2025.[53] This category captures the vast network of local posts belonging to organizations such as the VFW and the American Legion. While these organizations play an important role in the broader veteran ecosystem, that role is distinct from (and broader than) the narrower set of organizations actively meeting the day-to-day needs of veterans, service members, and their families. Moreover, many organizations that have a stated mission of meeting the needs of the veteran and military community, while resourced and supported by a steadfast base of volunteers, lack full-time staff to manage operations, provide accountability, build institutional knowledge, and deliver direct services to the community. As such, this study uses a threshold of at least one full-time employee (as captured in Part I, Line 5 for organizations filing Form 990 and as calculated by the number of individuals devoting at least 30 hours per week on average to the position in Part IV for organizations filing Form 990-EZ).

This study also takes a different approach to answering the core research questions. While the W30 NTEE code captures an important subset of veteran- and military-serving organizations, it excludes relevant organizations that the IRS has coded along other lines, such as health and mental health care, social services, or food provision. Instead, this study builds a new dataset from the ground up. The underlying data collection began with the full IRS Exempt Organizations Business Master File, which (as of May 14, 2026) listed 1,983,563 nonprofit organizations across the United States. Because the dataset needed to provide information regarding the number of employees—to make the distinction between those who had at least one full-time employee and those who did not and to further draw insights regarding the relationship between staff size and organizational missions, revenues, government funding, and grant-making capacity, among other factors—the list was further narrowed to 501(c)(3) organizations that file either Form 990 or 990-EZ.

Notably, the list does not include organizations that file Form 990-N, a simpler electronic tax form for organizations whose annual gross receipts are normally $50,000 or less.[54] The electronic form does not collect information on the organization's mission, number of employees, or total revenue for the tax year but, rather, confirms that the organization's annual gross receipts are $50,000 or less; thus, there is not enough information provided to determine whether they are a good fit. Initial analysis of the IRS Tax Exempt Organizations bulk-data download for organizations filing a form 990-N yielded 9,664 organizations whose name indicates that they classify themselves as part of the military and/or veteran community (8,207 organizations with the term "veteran" in their title, 1,550 with the term "military" in their title, and 93 that include both terms). While 990-N filers may have one or more full-time employees, the cap of $50,000 in total annual gross receipts is unlikely to cover a full-time employee's wages, taxes, and benefits in addition to any rent, insurance, or program costs. The study assumes that organizations that can sustain a full-time employee likely require revenues of more than $50,000 per year, which is captured in the Form 990-EZ or Form 990 datasets. However, the exclusion of organizations filing a 990-N (due to lack of detailed data) may represent an under-count of organizations that satisfy criteria for inclusion (i.e., 501(c)(3) status, at least one employee, and a relevant mission).

To identify military- and veteran- serving organizations within the narrowed list, 501(c)(3) organizations filing either a Form 990-EZ or a Form 990 were flagged and coded based on whether their title, "doing business as" (DBA) title (where applicable), or self-reported organizational mission or most significant activities included the terms "military," "veteran," or "service members" in the IRS Exempt Organizations Business Master File. The resulting lists were consolidated into one list and alphabetized to aid in the process of de-duplication.

A systematic limitation of relying on tax data alone is that it overlooks embedded organizations and military- and veteran-focused programs that do not file their own separate tax returns. This gap falls into two categories: veteran-specific services or programming operating under a broader organizational mission and embedded organizations nested within a larger tax entity. Capturing these organizations was more difficult but necessary. They were identified by examining the public grantee lists of known funders in the military and veteran community to identify key actors and services in the field. A list of the public funder lists reviewed is provided in the appendix. The list may still overlook other valuable organizations, programs, and services operating to serve the community.

The Form 990 or Form 990-EZ for each of these organizations was then examined individually to evaluate whether it met the basic criteria for inclusion: confirmed 501(c)(3) status, at least one employee, and an aligned mission. Where available and necessary for additional detail, organizational websites were included in the analysis to verify organizational mission, programs, and activities. Embedded organizations or programs and services were confirmed through website reviews.

Organizations were excluded from the dataset for several reasons. These include organizations that were initially misclassified as 501(c)(3) nonprofits and duplicate entries—variations such as the presence or absence of the article "the," differences in apostrophe placement, misspelled versions alongside correctly spelled entries, and organizations that had changed names over time and were listed under both the old and new names. Also cut were organizations that included the search terms but used them with a different meaning, along with out-of-scope organization types such as fraternal organizations, parks and memorials, and military academy alumni associations. Faith-based organizations were retained if they provided direct services to veteran and military families, such as housing, but were excluded if their mission was primarily religious in nature rather than service focused. Finally, if an organization's most recent available tax filing fell before 2023, additional research was conducted to confirm whether the organization was still active; any organization for which no data was available from 2023 onward was removed from the dataset.

> A systematic limitation of relying on tax data alone is that it overlooks embedded organizations and military- and veteran-focused programs that do not file their own separate tax returns.

The final list that resulted from the IRS Form 990 and 990-EZ review totaled 999 organizations: 849 current stand-alone organizations and 150 embedded organizations or veteran- and military-specific programs and services within larger tax entities. The dataset captures information recorded from tax filings, including each organization's name and employer identification number, return type (990 or 990-EZ), location, number of employees (Part I, Line 5 for Form 990, calculated by the number of individuals devoting at least 30 hours per week on average to the position in Part IV for organizations filing Form 990-EZ), the year the organization achieved tax-exempt status (serving as a proxy for the year founded, although there is some variation between founding years noted on websites and tax-exempt status), the amount the organization granted to others in the most recent tax year, the amount of government funding received in the most recent tax year, the revenue for the most recent tax year, total support for the four years prior to the most recent tax year (where recorded in their tax forms in Schedule A, Part II, Section B, Line 7).

The following section presents trends and insights drawn from these organizations, including their geographic distribution, mission(s), growth over time, the relationship between mission and funding or staff size, the proportion of revenue derived from government funding in the most recent tax year, and the proportion of grant-making relative to overall revenue in the most recent tax year.

Trends and Insights from Military- and Veteran-Serving Organizations

This section presents key trends and insights drawn from the 999 organizations identified as actively serving veterans, service members, and their families: 849 stand-alone organizations whose primary mission is military- or veteran-specific and 150 organizations where military- or veteran-serving programming is embedded within a broader mission. For stand-alone organizations, patterns were examined across mission focus, organizational size, revenue growth, geographic distribution, reliance on government funding, and grant-making. Because veteran-specific activity cannot be cleanly separated from broader operations for embedded organizations, they are analyzed separately with an emphasis on service missions, maturity, and reliance on government funding rather than on stand-alone measures like revenue or staff size.

Stand-Alone Military- and Veteran-Serving Organizations

This section examines the 849 stand-alone organizations whose primary mission is dedicated to serving veterans, service members, and their families. Organizations were categorized by mission type, organization size, age, revenue trends, and reliance on government funding.

Organizations by Mission

To capture the full range of services these organizations provide, 18 mission categories were developed based on a close reading of each organization's self-reported purpose rather than an existing internal taxonomy. No standard classification system adequately distinguishes between service types specific to the military and veteran population (e.g., care packages for deployed troops or animal-assisted therapy) the way it does for the broader nonprofit sector.

Two caveats apply throughout this analysis. First, each organization was assigned to the single category that best matched its stated mission as captured through both its most recent Form 990/990-EZ filing and, where applicable, its organizational website. The self-reported mission may not fully capture the scope of an organization's work. Second, some organizations may plausibly meet the criteria for more than one category; a single-category assignment necessarily simplifies organizations with multiple, overlapping areas of focus.

The five largest categories account for 64 percent of all organizations, despite representing a fraction of the 18 categories. The largest category, "multi-service support," consists of organizations providing an integrated combination of services, such as resource navigation, health and mental health support, employment assistance, community reintegration, and help accessing VA benefits, often serving as a first point of contact that connects veterans and families to the broader range of support they need. These organizations represent a "no wrong door" point of entry approach, providing a common model in the field in which veterans and families can access the full range of available support regardless of which service they contact first.

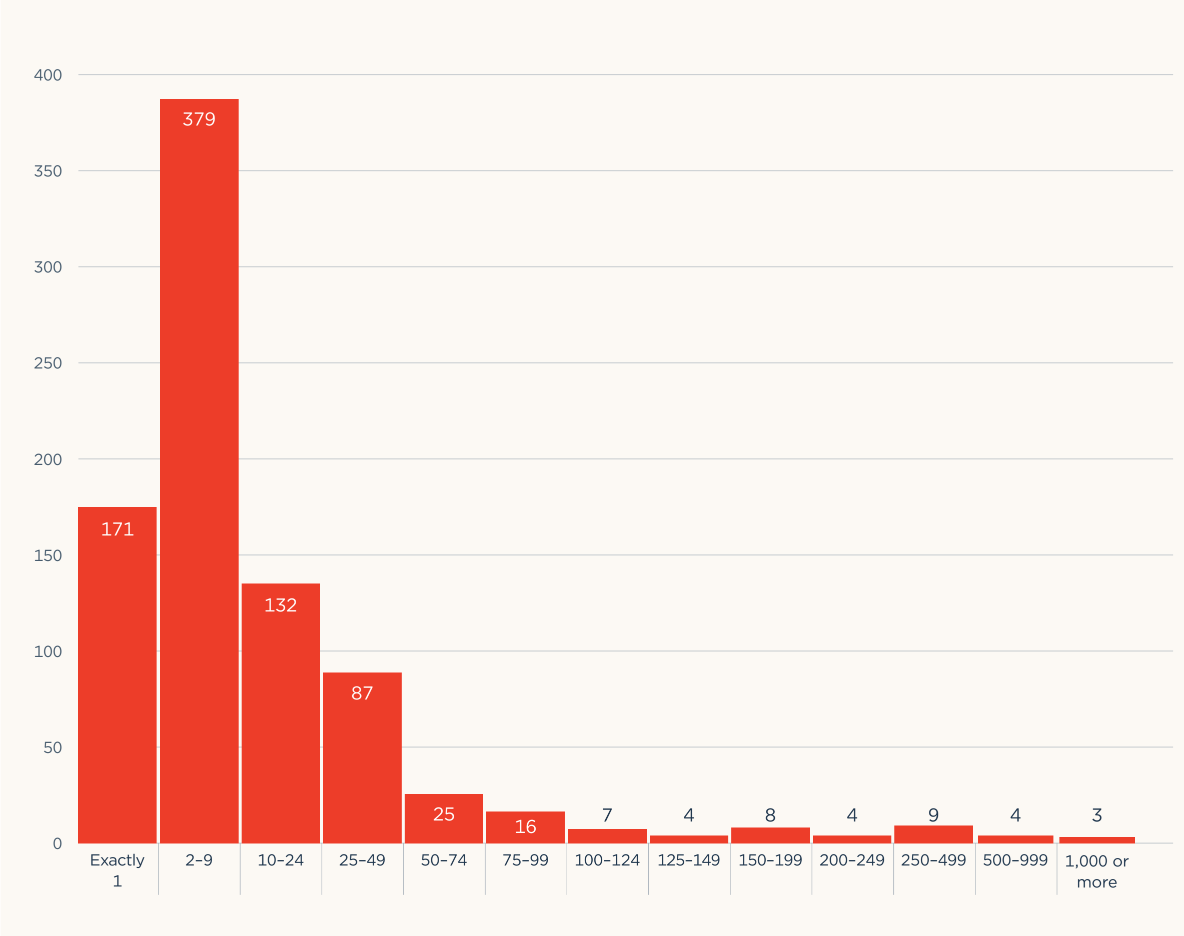
> Single-employee organizations run almost entirely on private donations rather than government contracts or grants, which likely reflects the organizational capacity required to win and maintain government contracts.

The seven smallest categories combined represent fewer than 10 percent of the organizations evaluated. Two categories stand out for distinct reasons beyond their size. Housing and homelessness support organizations have the highest median staff size and highest reliance on government funding of any category, reflecting the resource- and staff-intensive nature of housing service delivery. Animal-assisted therapies, by contrast, represent a narrow, specific intervention type populated by several small, independently operating organizations (with a few notable, national-level organizations such as K9s for Warriors), suggesting a low barrier to entry for the mission set.

Figure 14 | Military and Veteran Organizations by Mission[55]

Multi-service support organizations—which act as a "no wrong door" entry point connecting veterans and families to a full range of services—represent the largest of the 18 mission categories.

Figure 15 | Military- and Veteran-Serving Nonprofits by Staff Size[56]



Staff sizes among military- and veteran-serving nonprofits are heavily skewed toward very small organizations, with two to nine employees being the most common size and single-employee organizations making up 20 percent of the field.

Organizations by Staff Size

Most stand-alone military- and veteran-serving organizations—representing 65 percent (550 of 849)—have fewer than 10 employees. A small number of very large organizations, such as the Henry M. Jackson Foundation for the Advancement of Military Medicine (2,839 employees) and the Wounded Warrior Project (1,041 employees) skew the overall average upward, making the median a more reliable measure of "typical" organizations than the mean.

Organizations with exactly one employee comprise 20 percent of the total organizations (171 of 849). When examining for consistent trends, these smaller organizations are less likely than the overall organizational population to receive any government funding (9 percent, compared to the 31 percent dataset-wide). Single-employee organizations run almost entirely on private donations rather than government contracts or grants, which likely reflects the organizational capacity required to win and maintain government contracts. Government contracting typically involves resource-intensive application and reporting processes that single-employee organizations are not equipped to sustain. Interviews with organizations that have secured government funding—both those that have long maintained government funding and those that recently became the recipients of federal funding—reinforced that sufficient staffing capacity is a prerequisite for winning and managing government contracts.[57]

Single-employee organizations also skew toward direct, low-infrastructure missions and service types. Single-employee organizations are more likely to focus on recreation and adaptive sports; family, spouse, and Gold Star support; and financial assistance and emergency relief. Single-employee organizations are notably absent from organizations with health care and medical missions and are underrepresented among housing and homelessness support missions, which inherently require multiple staff to operate. Grant-making, however, is comparable to the overall set of organizations (31 percent of single-employee organizations report making grants, compared to 34 percent of organizations across the full dataset).

Labor-intensive missions such as housing and homelessness support and health care typically require a larger staff, including licensed or credentialed direct-service personnel and support staff. Overall, 5 percent (39 of 849 organizations) have 100 or more employees. These 39 organizations are more likely to receive government funding than the dataset as a whole; 65 percent report at least some government funding, compared to 31 percent of the overall reporting rate.

Single-employee organizations also skew toward direct, low-infrastructure missions and service types.

Housing and homelessness support is the most common mission among these large organizations (11 of 39), and 91 percent of them receive federal funding. This funding reflects both the flow of federal resources through the Housing and Urban Development-VA Supportive Housing (HUD-VASH) program, the VA's Supportive Services for Veteran Families program, and VA nursing home contracts as well as the staffing these programs require, including case managers, facilities staff, and clinical personnel. Grant-making, by contrast, is not associated with larger staff sizes.

A geographic pattern among these large organizations is also worth noting. Ten of the 40 largest stand-alone organizations are headquartered in California. This may reflect the state's overall population, its large veteran population, and its concentration of VA medical centers.

Organizational Age

Eighty percent of organizations in the dataset were founded in 2002 or later— a significant jump in the post-9/11 era. What is more, 60 percent of the 849 organizations were founded in 2010 or later. The 2010s alone account for 438 organizations—more than half of the dataset. The military- and veteran- serving nonprofit sector, as it exists today, is overwhelmingly a post-9/11, and specifically a 2010s, phenomenon. This reflects a few insights: These organizations were created to meet the needs of veterans and military families in an era of modern conflict, and the growth through the 2010s likely reflects the wave of organizations founded by Iraq and Afghanistan veterans as they returned home, as well as the maturing of civil-society responses to the wars roughly a decade after they began.

Older organizations reflect a composition of official, congressionally mandated institutions rather than grassroots charities. This includes the major relief societies, the United Service Organizations (USO), and the National Military Family Association. These organizations also reflect missions focused on scholarships and education.

When parsing the newer organizations by mission, those created in the 2010s show interesting patterns. For example, 79 percent of animal-assisted therapies (service dogs and equine therapy) were founded in the 2010s alone, with no entries for these services appearing in the data prior to the year 2000. Organizations focused on mental health, post-traumatic stress disorder (PTSD), and suicide prevention also saw a boom in the 2010s, as 66 percent (61 of 92) of the organizations focused on these issues were founded in the 2010s. The focus of services and funding on these issues reflects an evolving awareness of mental health in the late 1990s into the first decade of the 2000s.[58] It may further reflect rising awareness of the challenges associated with PTSD, traumatic brain injury, and suicide among service members and veterans at the height of the wars in Iraq and Afghanistan.[59]

Organizations by Revenue

Revenue generally tracks staff size, although the relationship is not formulaic. Organizations with similar staff sizes may have very different budgets. Measuring revenue trends over time is complicated by two factors: The most recent publicly available tax forms vary by organization, and the completeness of the "Total Support" figure for Form 990 or 990-EZ (Schedule A, Part II, Section B, Line 7) is inconsistently filled out by organizations. To account for variations in the availability of tax data, revenue growth was calculated as a matched, per organization comparison between each organization's most recently filed tax form and the earliest "Total Support" figure in each filing. Complete data of this kind was available for 767 of the 849 organizations.

Labor-intensive missions such as housing and homelessness support and health care typically require a larger staff, including licensed or credentialed direct-service personnel and support staff.

Among these matched pairs, the trend is positive: Median revenue growth was 15 percent per year over the four-year span, and 78 percent of organizations saw revenue growth over that period (though given the variation in year pairs, these figures are not adjusted for inflation), while 22 percent saw decline. When comparing across mission categories, growth was broadly consistent.

Examining organizations in the top 25 percent of revenue growth reveals that most started small. This is to be expected because smaller revenues are more likely to realize large percentage gains from comparatively modest dollar increases. Staff size does not appear to explain the difference, as the median staff size is identical (seven employees) for both the top-growth organizations and the full dataset. Government funding is also nearly identical between fast-growing organizations (in terms of revenue) and the broader group of organizations whose revenues were growing (35 percent compared to 37 percent). No relationship was found between geographic location and growth.

Among the 22 percent of organizations with sufficient data that saw revenue decline over the four-year period, a few patterns emerge. First, these organizations tended to start from a higher revenue baseline: The median starting revenue at the beginning of the four-year period among declining organizations was $1,040,000, compared to $431,000 for the full group of standalone organizations, suggesting that organizations with larger revenues were less likely to sustain continued growth. Decline was also notably concentrated in two mission categories likely tied to the pace of deployments over the last 25 years: financial assistance and emergency relief; and care packages and deployed troop support. The decline in emergency relief funding may also reflect a drop-off from pandemic-era emergency relief programs.

Decline does not appear to be driven by staff size, as declining and growing organizations alike have similar median employee counts (six and seven, respectively). Decline also does not seem to be driven by a loss of government funding.

Among those organizations with declining revenues, 27 percent (46 of 168) grew for several years before a sharp decline in the final reporting year, while the remaining 73 percent show a more gradual, sustained decline across the full four-year period rather than a late reversal.

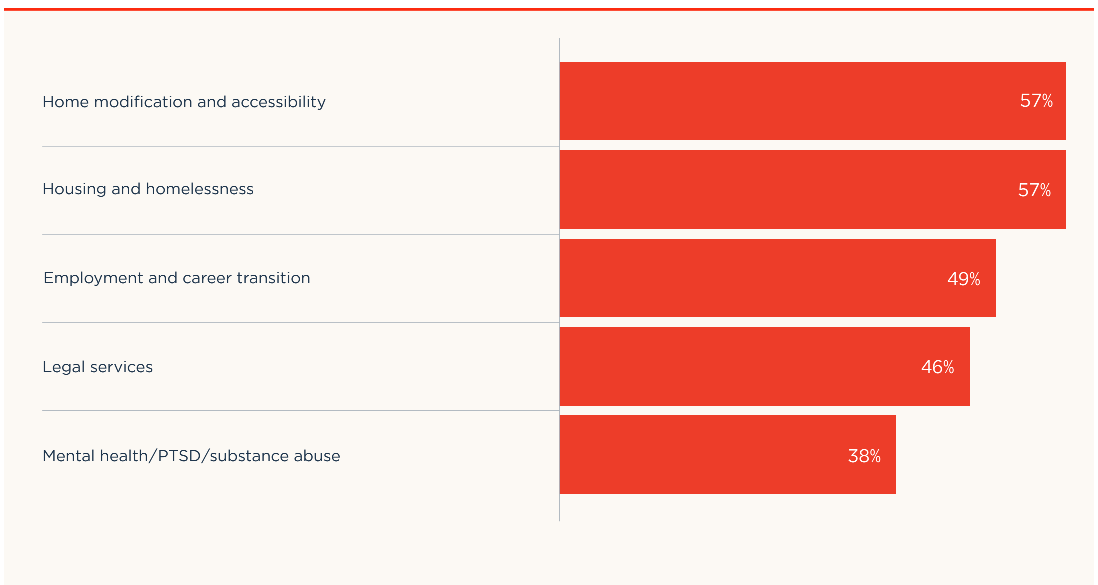
The magnitude of the decline is also worth noting. Among declining organizations, the median revenue loss was 39 percent over the four-year period, and 25 percent of declining organizations (by revenue) lost more than 70 percent of their revenue over the same time frame—indicating real financial contraction rather than a minor fluctuation.

Organizations by Level of Government Funding

Thirty-one percent of the organizations report some government funding. The missions of organizations receiving government funding are clustered around five of the mission types.

This pattern aligns with known federal funding streams targeting these specific service areas. The HUD-VASH program provides rental assistance vouchers paired with VA case management for unhoused veterans. The VA's Supportive Services for Veteran Families provides similar funding for veteran households at risk of homelessness. Together, these programs explain the high government funding rate among housing organizations. Legal services and employment organizations, meanwhile, often deliver services under VA-adjacent legal aid contracts and federally funded workforce and employment programs, respectively.[61]

Figure 16 | Government Funding Reliance by Mission Category (Top Five Categories)[60]



The federal government provides substantial funding for home modification and accessibility, housing-related activities, employment and legal services, and mental health care delivery through nonprofit partners.

Trends in Grants Issued by Organizations

For most organizations in this dataset, grant-making is not the primary activity, as this is predominantly a community providing direct services. Even so, 34 percent of the organizations studied report granting out a portion of their revenue. Where grant-making activity is concentrated, it aligns with expectation: Organizations whose primary mission is fundraising or serving as a grant-making intermediary and organizations whose mission is either financial assistance or emergency relief stand out as the two categories most defined by redistributing funds rather than delivering services directly.

Organizations by Geographic Distribution

Nearly every state and Washington, D.C., has at least one veteran- or military-serving organization that meets the inclusion criteria, with Mississippi being a notable exception. Geographically, 10 states account for 54 percent of all 849 organizations: California, Florida, Texas, Virginia, New York, Massachusetts, Colorado, North Carolina, Pennsylvania, and Maryland. Two general trends explain location: population-driven concentrations and headquarters-driven populations. California (92 organizations), Florida (66 organizations), and Texas (60 organizations) each have more than 1 million veterans.[62] The high number of organizations in these three states tracks closely with their large veteran populations, reflecting these organizations' mission of meeting veterans where they live.

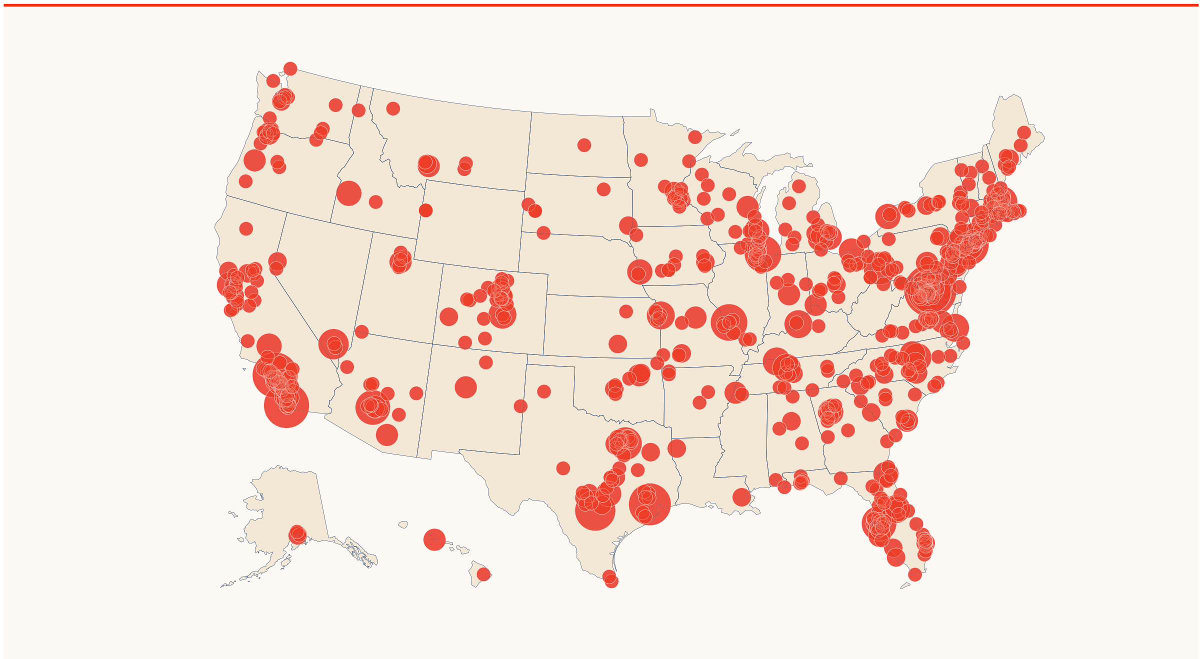
It is also significant that there are high concentrations of veteran- and military-serving nonprofits in specific locations across the country. The National Capital Region (including Washington, D.C., Northern Virginia, and Maryland) includes 43 organizations. Because this dataset does not account for 501(c)(19s), this high concentration exists even without big players in the veteran ecosystem such as the VFW and American Legion (whose headquarters are in Kansas City, Missouri, and Indianapolis, respectively, but maintain large operations in Washington, D.C.). This finding reflects the mission of many of the veteran- and military-serving organizations in the region, particularly advocacy, policy, and grant-making—given the proximity to the Pentagon, the VA national headquarters, the White House, Congress, and the broader federal policymaking apparatus, rather than where the veterans they serve actually live. D.C.-area headquarters include those with multi-service support and family/caregiver support, including the Fisher House Foundation, the USO, the Tragedy Assistance Program for Survivors, the National Military Family Association, and the Elizabeth Dole Foundation. The National Capital Region also serves as the seat of official military branch-related relief societies: Army Emergency Relief, the Navy–Marine Corps Relief Society, and the Air & Space Forces Aid Society. Legal services and policy advocacy organizations are more heavily concentrated in the region than anywhere else in the country, including the National Veterans Legal Services Program, the Veterans Consortium Pro Bono Program, Protect our Defenders, and Iraq and Afghanistan Veterans of America.

Wounded warrior recovery, rehabilitation, and other activities are clustered in Maryland, near the National Capital Region. This probably reflects proximity to the Walter Reed National Military Medical Center in Bethesda, Maryland, a major hub for wounded warrior recovery and rehabilitation referrals separate from the policy community in the National Capital Region proper.

Clusters of organizations are located around cities with a strong active-duty military footprint. San Antonio, which has a large active-duty military presence including the U.S. Army's Fort Sam Houston and Camp Bullis and the U.S. Air Force's Lackland Air Force Base and Randolph Air Force Base, hosts Texas's four largest military- and veteran-serving organizations by revenue and number of employees. San Diego, home to one of the densest concentrations of military installations in the country including Naval Base San Diego, Naval Air Station North Island, Marine Corps Recruit Depot San Diego, Marine Corps Air Station Miramar, Naval Amphibious Base Coronado, Camp Pendleton, and Naval Medical Center San Diego, is home to 11 military- and veteran-serving organizations. Notably, six of the 11 organizations are built around transition, including the Honor Foundation (assisting U.S. special operations forces transitioning to the private sector), Workshops for Warriors (providing STEM [science, technology, engineering, and mathematics] training and industry credentialing for transitioning service members), and Veterans in Business (supporting veterans with entrepreneurship).

The Virginia Beach/Norfolk/Hampton Roads area, while host to a smaller number of military- and veteran-serving nonprofits, includes Naval Station Norfolk, Naval Air Station Oceana, Joint Expeditionary Base Little Creek–Fort Story, and the Norfolk Naval Shipyard—explaining the concentration of four major Navy scholarship nonprofits in Virginia Beach. Tampa, Florida, home to MacDill Air Force Base and U.S. Special Operations Command, hosts six organizations, with an emphasis on the special operations community (including Operation Healing Forces and the Global Special Operations Forces Foundation). Similar to San Diego and Tampa, Florida, the area around Clarksville, Tennessee, (home to the Army's 101st Airborne Division and the 5th Special Forces Group), hosts organizations focused specifically on the special operations community, including the Memorial 3Gun Foundation (supporting Special Operations Fund [SOF] Gold Star families) and Second Chance K9 Service Dogs (specifically serving the SOF community). Jacksonville, Florida, the location of Naval Station Mayport and Naval Air Station Jacksonville, is home to the nation's largest military- and veteran-serving organization, Wounded Warrior Project (WWP). While the presence of WWP's headquarters in Jacksonville is not necessarily driven by the naval installations, as its services are nationwide, the co-location with an active-duty military population is still worth noting.

Figure 17 | Geographic Distribution of Military- and Veteran-Serving Organizations[63]



Veteran- and military-serving organizations cluster around distinct drivers: large veteran populations in states like California, Florida, and Texas; policy hubs in Washington, D.C.'s metropolitan area; and active-duty installations near San Diego, San Antonio, and Tampa, Florida.

Overall Observations: Stand-Alone Military- and Veteran-Serving Organizations

Taken together, these patterns describe a sector that is young, uneven in scale, and structured around a small number of resource-intensive missions layered over a much larger base of small, locally run organizations. The typical organization in the dataset is small, with fewer than 10 employees, founded within the last 15 years, and funded almost entirely by private donations. Yet a distinct minority of larger, older, and more government-reliant organizations, concentrated around housing and homelessness services, account for a disproportionate share of staff, revenue, and public funding. Growth has been broad-based across the last four years, although not universal. Where revenue has declined, it appears to be more tied to an organization's starting size and mission area than to a single funding shock. Read as a whole, the data suggests a sector shaped by its post-9/11 growth, expanding rapidly to meet emerging needs such as mental health care services and animal-assisted therapies while relying on a much older cohort of congressionally established institutions to anchor its most basic financial and family support functions.

Embedded Veteran-Serving Programs and Organizations

This section examines the 150 organizations in which veteran-specific services, programming, initiatives, or subordinate organizations are embedded within a broader institutional mission. Given the embedded nature of these programs, revenue and staff figures cannot be cleanly attributed to serving the military and veteran population specifically. Yet there are still useful takeaways within this dataset, including trends across missions and the role of government funding for the parent organization. Across the larger organizations, veterans often appear either as a subset of vulnerable populations or paired with first responders and law enforcement (13 percent).

Organizations by Mission

Among embedded organizations and services, housing and homelessness services are the most common category (23 organizations), with veterans included as one served population alongside low-income families, senior citizens, and the broader unhoused community. Family and youth services organizations are similarly common (25 organizations), though here veterans and service members typically appear as spouses or parents rather than the primary client. Some organizations maintain programming specifically designed for military children; for example, the Operation Bigs program within the Big Brothers Big Sisters of San Diego County pairs military-connected youth with mentors.[64]

Food and nutrition assistance programs follow a similar pattern, serving the broader community while recognizing veterans (and elderly veterans in particular) as a specific subset of a much larger client base. This pattern is pronounced in New York City, St. Louis, Houston, and Washington, D.C.

Veteran-specific programming also appears within broadly defined disability services, including programs focused on independent living, adaptive sports, service dogs, and equine therapy that operate within organizations serving a larger, non-veteran-specific population. Employment and workforce training organizations, such as Goodwill affiliates and other workforce nonprofits, maintain dedicated veteran programs for job placement, skills training, and transition support. Large legal aid societies commonly maintain a dedicated veterans' clinic or at least one staff specialist focused on veteran-specific legal issues.

Embedded Organizations within Universities

A distinct subset of the organizations identified are embedded within universities and academic medical centers. These include the D'Aniello Institute for Veterans and Military Families at Syracuse University, the Military Family Research Institute at Purdue University, the Consortium for Veteran and Military Health at the University of Colorado Anschutz Medical Campus, and similar centers at New York University (NYU), Columbia, Emory, and Middle Tennessee State University. Their missions skew differently than the broader set: Rather than direct service delivery like housing or food assistance, these university-based programs tend toward research, policy, and family wellness, with programming oriented either around military families or military-affiliated student success. Geographically, these centers and institutes are tied to their host university; the clustering of three significant centers in New York City at NYU, Columbia, and Syracuse is likely coincidental and more related to the host university's size than the demand for veterans' services.

Organizational Age

The age of organizations (determined by the date the organization was granted 501(c)(3) status) indicates a few trends. A notable concentration (53 of 150) of the nonprofit organizations in the data were created in the 2010s—more than the 1980s, 1990s, and first decade of the 2000s combined. The trend reflects a wave of smaller, niche service nonprofits focused on equine therapy, service dogs, and outdoor recreation. Separately, there are also substantial legacy organizations, such as the Red Cross, the Easterseals affiliates, and Goodwill that built out military and veteran services through multiple conflict and reintegration eras.

Organizations by Level of Government Funding

While it is difficult to disaggregate the specific funds for veterans and military, it is worth knowing how reliant the host organization is on government funding for overall operations. Of the 150 organizations, 57 report receiving government funds. Of those, 36 percent receive half or more of their revenue from government services. These organizations are concentrated within a few mission sets.

Legal aid societies are highly government-dependent for their overall operating budgets in the most recent publicly available tax data. Examples include Lone Star Legal Aid, Community Service Council of Greater Tulsa, Alaska Legal Services, Legal Aid Chicago, and Bay Area Legal Services. The reliance on government aid may indicate that general legal aid services are more susceptible to changes in federal policy or funding, a phenomenon highlighted in interviews with nonprofit leaders.[65]

As with veteran-specific organizations, housing and homelessness services also skew high in terms of government support. Examples include Insight Housing, Albany Housing Coalition, Concho Valley Community Action Agency, and Columbus House. This reflects federal housing funding efforts and priorities, including the Department of Housing and Urban Development's Continuum of Care grants, the main federal funding mechanism for homelessness services more broadly. The reliance of housing organizations on federal funding may also reflect the fact that housing is both capital and service intensive in a way that may not be sustained over the long run by private philanthropy, as it requires rental subsidies, case management staff, and supportive services. It further reflects the model of the federal government setting the funding and eligibility rules but partnering with community organizations to deliver services.[66]

Geographic Distribution

The geographic distribution of embedded organizations and services looks different from that of the stand-alone organizations. Embedded organizations are distributed and concentrated in large-population states with mature nonprofit infrastructure, including Texas, New York, and Illinois. Stand-alone organizations followed a more veteran-specific geography than embedded services, shaped by both the distribution of the veteran population and by proximity to the federal government (as reflected in higher concentrations around the National Capital Region).

Texas and New York are states with several legal aid societies, food banks, Goodwill affiliates, and Easterseals chapters—the types of organizations that lend themselves to embedding veteran services. Conversely, while Virginia has a high number of stand-alone military- and veteran-serving organizations due to proximity to the Pentagon, VA headquarters, and federal policymaking apparatus, there are not the same incentives for more generalist organizations with embedded veteran services to headquarter near the federal veteran policy infrastructure.

Overall Observations: Embedded Programs, Services, and Organizations

Taken together, embedded military- and veteran-focused services, programs, and organizations reflect a different facet of the landscape. Rather than existing to serve service members, veterans, and their families, these 150 organizations serve this community as one population within a broader mission. Most commonly, those missions include housing, family and youth services, food assistance, disability services, employment, and legal aid.

Conclusion and Recommendations

THE UNITED STATES SERVES a veteran population that is smaller than it was a decade ago. As this population declines, it is also defined by different characteristics—on average, it is younger and more shaped by the post-9/11 wars than in years past. Federal spending on this population has grown substantially in real terms even as the population has declined, yet spending is unevenly distributed geographically, and its presence in a community does not necessarily mean that veterans there are well served.

At the community level, a veteran in need is more likely to encounter a nonprofit organization than the VA. A veteran is most likely to access services through a small, donation-funded organization delivering a specific service, such as emergency assistance, legal aid, family support, or resource navigation. This suggests that the on-the-ground safety net is thinner and more financially fragile than the sector's aggregate size suggests—local, face-to-face organizations may be unequipped to absorb funding shocks or scale up when need spikes.

> At the community level, a veteran in need is more likely to encounter a nonprofit organization than the VA.

The data points to a nonprofit sector split into two tiers. One tier is national in scope, headquartered near federal policymaking infrastructure or population centers, and concentrated in resource-intensive missions like housing; the other tier is embedded in the communities where veterans live.

For many communities, the presence or absence of veteran-specific services may matter less than the strength of that community's general nonprofit infrastructure. Because a meaningful share of embedded military- and veteran-serving activity flows through food banks, disability service providers, housing services, legal aid societies, and disability service providers built for a broader population, a community with strong social services may reach veterans effectively even without a single dedicated veteran-serving organization; conversely, a community with thin general infrastructure may underserve veterans even if a stand-alone organization is nearby.

The federal government, philanthropy, and nonprofit leaders each have a distinct role to play in closing these gaps.

Executive Branch

As the primary steward of federal resources directed toward veterans, the executive branch—through the VA and its budgetary and administrative decisions—is best positioned to address gaps in how these resources are allocated and monitored.

- Federal resource allocation formulas should incorporate veteran concentration rates to ensure that small communities where veterans comprise a disproportionate share of the local population are not overlooked.
- Monitor how the FY 2025 VA staff cuts affect veteran health-care outcomes and recalibrate staff size to meet need.
- Invest in shared compliance infrastructure for federal funding, centralizing reporting platforms, standardizing templates, and providing pro bono training, benefiting nonprofits of all sizes and improving federal accountability.

Congress

Congress holds the oversight authority to ensure that the benefits and care it has legislated for veterans are delivered where and how veterans need them—a responsibility made more urgent by this report's findings on geographic disparity and evolving policy approaches to expanding community care to meet veteran health-care needs.

- Congress should examine whether the geographic distribution of VA infrastructure and eligible community care partners keeps pace with where newly eligible veterans live.
- Congress should hold regular oversight hearings on whether community care capacity can absorb demand from reduced VA staffing, whether care quality matches VA standards, and whether cost projections are accurate.

Philanthropic Funders

Philanthropy occupies a distinct role in the military- and veteran-serving ecosystem, as it is uniquely positioned to take risks that the federal government cannot, to reach veterans that federal eligibility rules might exclude, and to respond to emerging community needs before they rise to the level of government attention. That flexibility carries a corresponding responsibility to set norms in the field.

- Consider how capacity-building grants, including funding for infrastructure, technology, staffing, or nonprofit management education could improve the outcomes of less-resourced organizations to meet program objectives.
- Incentivize well-resourced organizations to provide networking and professional development opportunities to less-resourced organizations, increasing capacity in the field.
- Direct resources toward high per capita veteran communities that lack the organizational infrastructure to attract conventional investment.
- Consider investing in specific positions focused on the military and veteran community within existing organizations and institutions, including universities, hospital systems, state and local government offices, and large organizations with aligned missions such as housing, employment, and mental health. Such positions could leverage existing administrative support while providing military-informed approaches to service delivery.

Military- and Veteran-Serving Nonprofit Organizations

Military- and veteran-serving nonprofit organizations sit closest to the individuals they serve, making their operational strength and ability to deliver positive outcomes for the military and veteran community essential to the health of the broader ecosystem.

- Smaller or less-resourced organizations should draw from recognizable best practices present in well-resourced organizations, including the intentional investment in staff capacity, development of in-house data and compliance infrastructures, diversification of funding streams away from dependence on a single source, and deliberate succession planning.
- Participate in nonprofit management training networks and pro bono management support programs.
- Conduct regular compensation benchmarking to attract and retain high-quality talent.

Appendix: Publicly Available Military- and Veteran-Focused Funder Grantee Lists Reviewed

- Bob Woodruff Foundation
- Call of Duty Endowment
- Cohen Veterans Network/Steven A. Cohen Military Family Clinics
- Craig Newmark Philanthropies
- Elizabeth Dole Foundation
- Fisher House Foundation
- May & Stanley Smith Charitable Trust
- PenFed Foundation
- Pritzker Military Foundation
- Schultz Family Foundation
- Travis Manion Foundation
- USAA Foundation
- Walmart Foundation/Walmart SERVES

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About the Center for a New American Security

The mission of the Center for a New American Security (CNAS) is to develop strong, pragmatic, and principled national security and defense policies. Building on the expertise and experience of its staff and advisors, CNAS engages policymakers, experts and the public with innovative, fact-based research, ideas, and analysis to shape and elevate the national security debate. A key part of our mission is to inform and prepare the national security leaders of today and tomorrow.

CNAS is located in Washington, D.C., and was established in February 2007 by cofounders Kurt M. Campbell and Michèle A. Flournoy. CNAS is a 501(c)3 tax-exempt nonprofit organization. Its research is independent and nonpartisan.

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