

# 2017 NATIONAL MOVEMENT REPORT

## A FINANCIAL OVERVIEW OF LEADING ADVOCACY ORGANIZATIONS IN THE LGBT MOVEMENT



**This report was authored by:**

**Movement Advancement Project**

The Movement Advancement Project (MAP) is an independent think tank that provides rigorous research, insight and analysis that help speed equality for LGBT people. MAP works collaboratively with LGBT organizations, advocates and funders, providing information, analysis and resources that help coordinate and strengthen efforts for maximum impact.

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*Contact Information*

**Movement Advancement Project (MAP)**

2215 Market Street  
Denver, CO 80205  
720-274-3263  
[www.lgbtmap.org](http://www.lgbtmap.org)

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## KEY FINDINGS

The 2017 National LGBT Movement Report provides a comprehensive snapshot of the financial health of most of America's largest lesbian, gay, bisexual, and transgender (LGBT) social justice organizations. These organizations were categorized by MAP as focusing on broad LGBT advocacy, issue-specific advocacy, legal advocacy, or research and public education. This year's edition provides the first analysis of data for the year following the historic Obergefell vs. Hodges landmark marriage ruling (Fiscal Year 2016) as well as budget projections for 2017. The report finds that, at the end of the 2016 fiscal year, the participating organizations overall remain stable, efficient, and supported by a diverse range of revenue sources.

Note that this report, which is released annually, has been redesigned for 2017 to be graphical with an emphasis on visually showing the key trends and benchmarks in five key areas:

- [Revenue and Expenses](#)
- [Financial Trends](#)
- [Indicators of Financial Health](#)
- [Fundraising](#)
- [Staff and Boards](#)

### Increasing Revenues

- The 39 participating organizations had a combined 2016 revenue of \$230.1 million.
- These organizations reported an aggregate increase in revenue of 11% overall from 2015 to 2016 (excluding in-kind revenue).
- 2016 revenue exceeded 2016 expenses by \$6 million.
- Revenue from individual donor contributions grew 16% from 2015 to 2016. Individual contributions comprised the largest share of total revenue (35%), followed by in-kind contributions (17%), foundation contributions (17%), and fundraising event income (10%).
- Organizations raised a combined total of \$13.4 from corporate contributions in 2016, an increase 15% over 2015.
- 16 organizations experienced revenue declines, the average of these organizations experiencing an 18% decline in revenue in 2016 compared to 2015.

- Looking over the past five years, organizations that provided 5-year trend data reported an aggregate increase of 26% increase in revenue.

### Increasing Expenses Focused on Programs

- Total 2016 expenses were \$223.9 million, and the majority of expenses (80%) are spent on programs and services.
- 2016 expenses increased 11% from 2015 (excluding in-kind expenses).
- Participating organizations project 2017 budgets will exceed 2016 spending by 7% (excluding in-kind expenses).
- The 5-year trend shows a steady increase in expenses, with the largest increase occurring from 2015 to 2016 with an increase of \$15.6 million.

### Improved Financial Health

- Daily cash expenditures increased 10% from 2015 to 2016 to a cumulative average of \$479,000 per day for the 35 participating organizations who reported this data. This is a five-year high for these organizations.
- Participating organizations reported an average of 195 days of working capital in 2015, a 4% increase from 2014.

### More Medium and Large donors, But Fewer Small Donors

- Individual donor contributions continue to make up the most significant source of revenue among LGBT organizations—at 35% of their total revenue.
- In 2016, participating organizations saw a 16% increase in individual contributions from 2015.
- Small donors giving \$35-\$999 annually decreased by 5% between 2012 and 2016, however, the growth in large (\$25,000 and greater) and medium (between \$1,000 and \$25,000) donors outweighed the decline in small donors. The number of large donors increased 55% since 2012, with a single year increase of 10% from 2015 to 2016.
- The decrease in small donors (under \$1,000) is concerning as they comprise the vast majority (94%) of the total number of donors. However, the increase in medium and large donors off set this

decrease, as individual contributions increased 16% from 2015 to 2016.

- Based on the number of donors to participating organizations (and assuming they are all LGBT and there are no duplicates) compared to the number of LGBT adults in the United States, only 2.8% of LGBT people contribute \$35 or more to participating organizations.

## **Staff Reflect Broader Population Diversity, While Boards Are Less Reflective**

- Participating organizations employed a total of 922 full-time and 117 part-time staff.
- Organizations have diverse staff and senior staff that reflect the overall population. Roughly six in ten members of staff (60%) and senior staff (61%) are Caucasian, while 40% of staff and 39% of senior staff identify as Hispanic/Latino(a), African American/Black, Asian/Pacific Islander, Native American, multi-racial or other.
- A greater share of board members of LGBT organizations identify as white; nearly 7 in ten (69%) board members are Caucasian.
- Slightly less than half of staff (47%) identify as women and 45% as men. One in ten (11%) staff identify as transgender. The majority (60%) of staff are between the ages of 30 and 54.
- Of organizations providing data on the sexual orientation of their staff, 54% of staff identified as gay or lesbian, 8% as bisexual, 20% as another orientation, and 11% as straight.

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### METHODOLOGY

The Movement Advancement Project (MAP) selected the 39 participating organizations based on their size, importance to the overall LGBT movement, and collective coverage of LGBT issues and constituencies. Most participating organizations (32) have budgets over \$1 million; seven organizations have smaller budgets but are national leaders working in areas of critical concern to the LGBT movement.

MAP collected standardized financial and operations information from participating organizations and summarized key information across participants.

This report provides aggregated data across participating organizations, with most figures and charts showing data for all organizations combined. Where figures or charts reflect data based on a subset of participating organizations, this is noted.

**ALL PARTICIPANTS (N=39), TOTAL 2016 REVENUE = \$230.1 M, TOTAL 2016 EXPENSES = \$223.9 M**

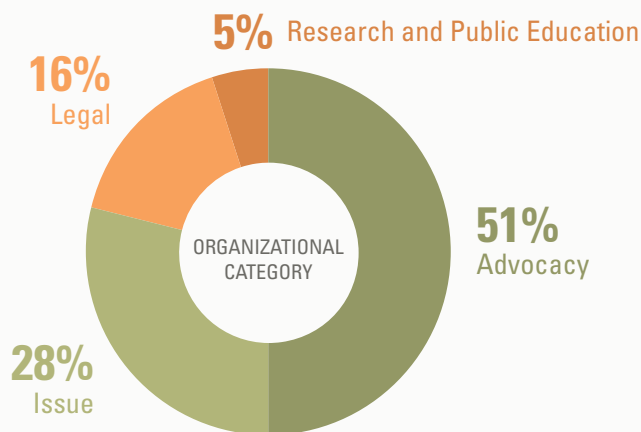
#### PARTICIPATING LGBT ORGANIZATIONS ARE COMPRISED OF ADVOCACY ORGANIZATIONS, ISSUE ORGANIZATIONS, LEGAL ORGANIZATIONS, AND RESEARCH & PUBLIC EDUCATION ORGANIZATIONS (n=38)

**Advocacy organizations** advocate for the entire LGBT community or a particular subset of the LGBT community on a broad range of issues.

**Issue organizations** advocate for the entire LGBT community or a particular subset of the LGBT community on a particular issue or related set of issues.

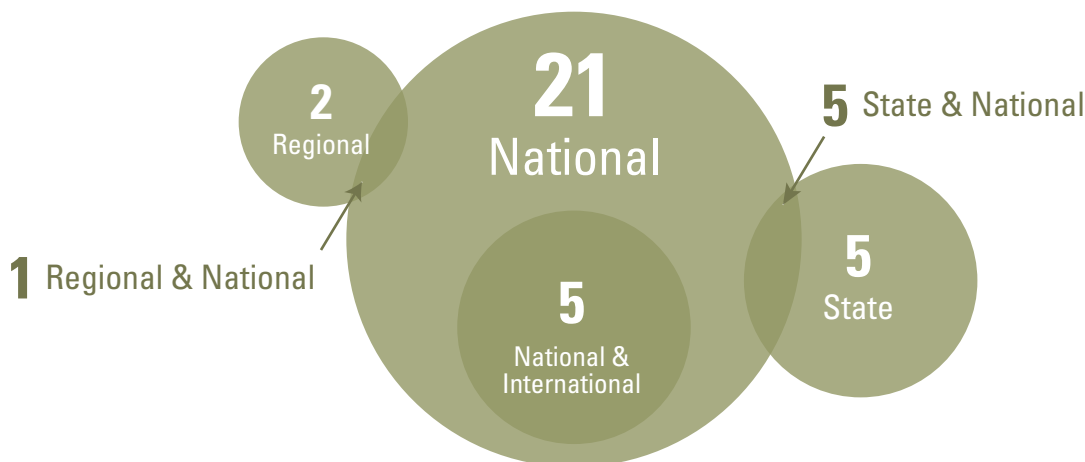
**Legal organizations** provide legal services to LGBT people and advocate and/or litigate within the legal system for LGBT people.

**Research and public education organizations** provide the LGBT community and the broader public with information about the issues facing the LGBT community. They may provide research, policy analysis, or educate the public through media work.



#### THE MAJORITY OF PARTICIPATING ORGANIZATIONS FOCUS ON NATIONAL LGBT ISSUES

Note: Many organizations noted more than one focus; options were not mutually exclusive.



NOTE: Participating organizations in this survey vary from year to year. Because of the change in participants, figures, charts, and numbers in the 2017 report should not be compared to those in previous reports. This year's numbers and analyses (including multiple-year trends) reflect data exclusively for this year's participating organizations.

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## A FINANCIAL OVERVIEW OF LEADING ORGANIZATIONS IN THE LGBT MOVEMENT



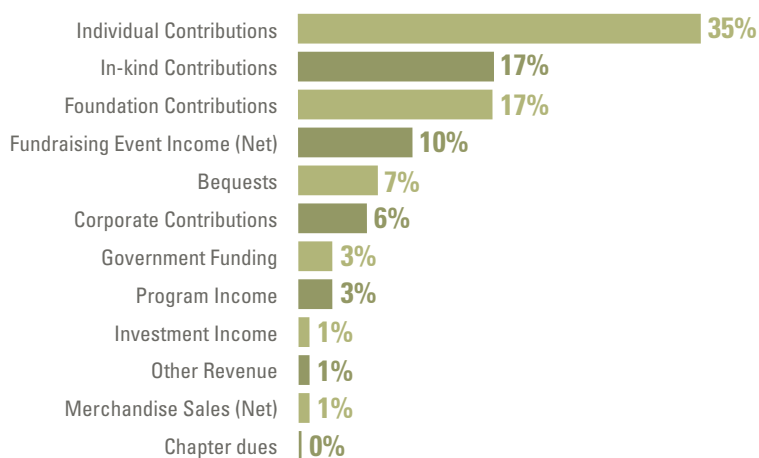
### REVENUE AND EXPENSES

This section provides an overview of the revenue and expenses for 39 of the leading organizations in the LGBT movement. For participating organizations, revenue and expenses increased from 2015 to 2016. This report focuses on the aggregated revenue streams and expenses of participating organizations. Note: On this page, some analyses required data from the previous five years. Therefore, organizations founded after 2012 are not included in the longitudinal analyses.

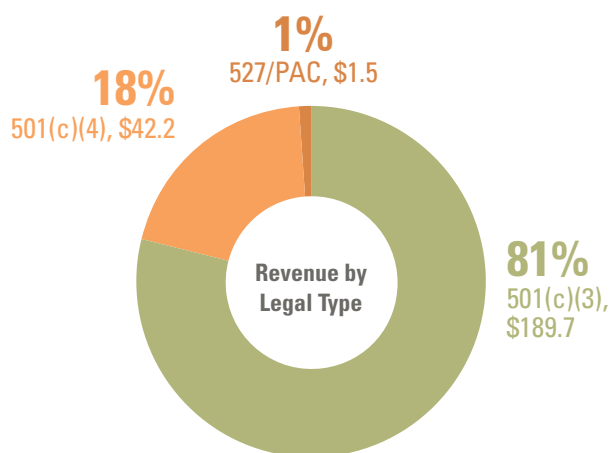
**ALL PARTICIPANTS (N=39), TOTAL 2016 REVENUE = \$230.1 M, TOTAL 2016 EXPENSES = \$223.9 M**

#### INDIVIDUAL CONTRIBUTIONS REMAIN TOP SOURCE OF REVENUE AMONG LGBT ORGANIZATIONS

2016 Revenue by Source



#### MAJORITY OF MOVEMENT REVENUE ATTRIBUTED TO 501(C)(3) ORGANIZATIONS



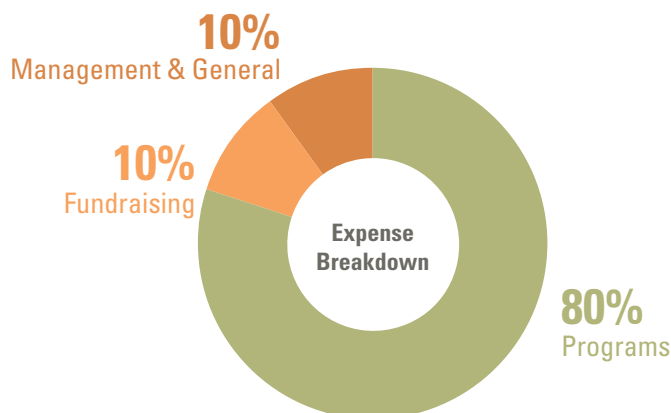
#### 2015-2016 EXPENSES FOR PARTICIPATING ORGS \$ Millions

EXPENSES	2015	2016	% INCREASE/DECREASE
PROGRAM SERVICES EXPENSE	\$160.2	\$178.9	12%
FUNDRAISING EXPENSE	\$22.4	\$23.3	4%
MANAGEMENT & GENERAL EXPENSE	\$19.8	\$21.6	9%
TOTAL EXPENSES	\$202.5	\$223.9	11%

\*Note: Columns may not sum due to rounding.

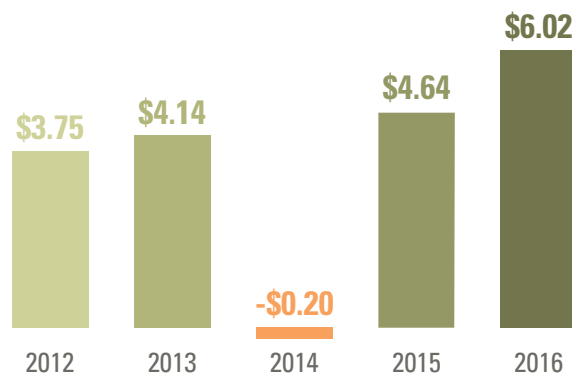
#### MAJORITY OF MOVEMENT EXPENSES (80%) SPENT ON PROGRAMS AND SERVICES

All Participants Combined, 100% = \$223.9 million



#### REVENUE EXCEEDED 2016 EXPENSES BY \$6 MILLION

2012-2016 Difference in Revenue and Expenses, \$ Millions (n=35)





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### FINANCIAL TRENDS

This graphic examines the financial capacity of LGBT movement organizations from 2012 through 2016. At the end of the 2016 fiscal year, the participating organizations as a whole remain well-resourced, efficient, and supported by a diverse range of revenue sources. Note: On this page, some analyses require data from the previous five years. Therefore, organizations founded after 2012 are not included in the longitudinal analyses.

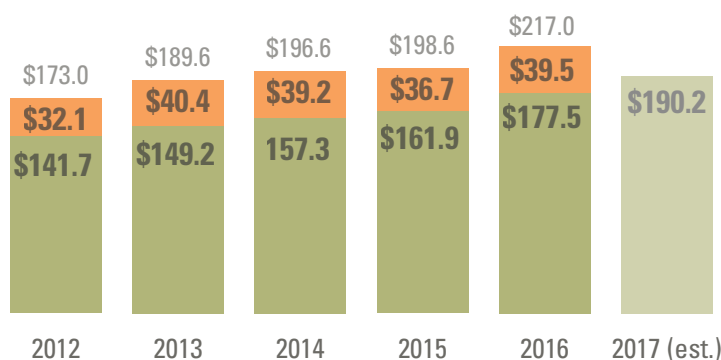
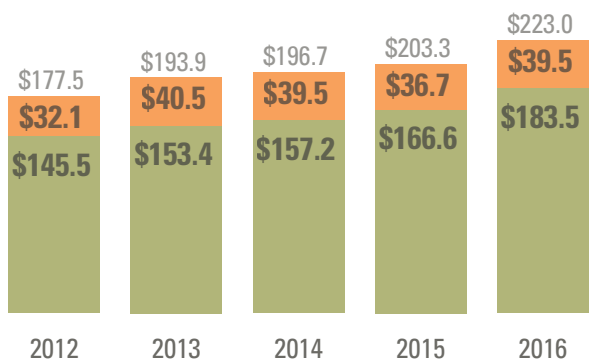
**35 PARTICIPANTS, TOTAL 2016 REVENUE = \$223.0 M, TOTAL 2016 EXPENSES: \$217.0 M**

#### COMBINED REVENUE INCREASED 26% BETWEEN 2012 AND 2016

2012-2016 Revenue by Source, in Millions

#### ORGANIZATIONS ESTIMATED A 7% INCREASE IN EXPENSES IN 2017

2012-2016 Expenses by Source, in Millions



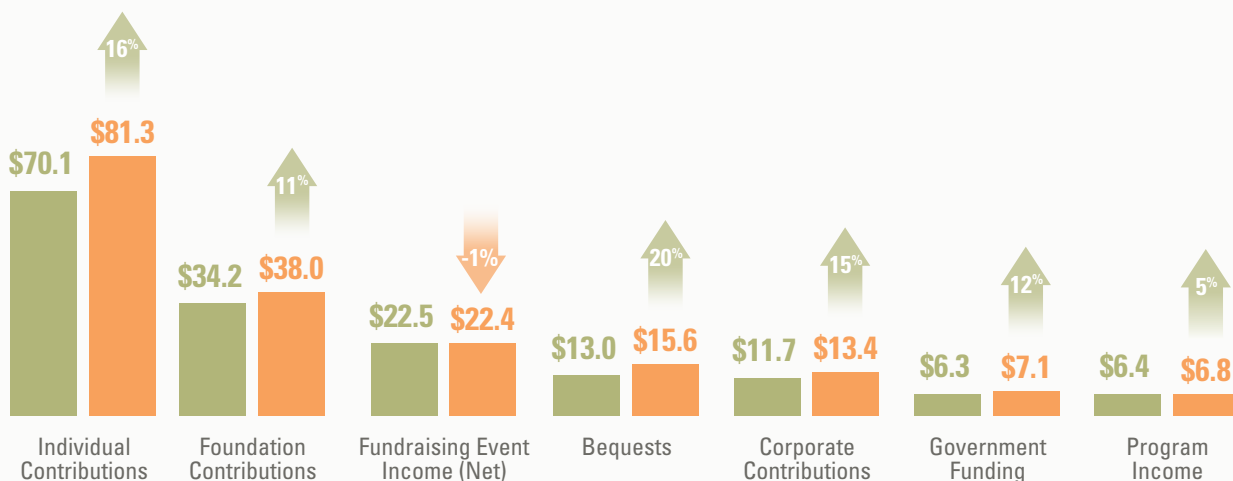
Minus In-Kind Expenses/Revenue In-Kind Expenses/Revenue

**ALL PARTICIPANTS (N=39), TOTAL 2016 REVENUE = \$230.1 M, TOTAL 2016 EXPENSES = \$223.9 M**

LAST FISCAL YEAR SAW INCREASES IN BEQUESTS, INDIVIDUAL CONTRIBUTIONS, CORPORATE CONTRIBUTIONS, AMONG OTHERS

Revenue Changes from 2015-2016, in Millions

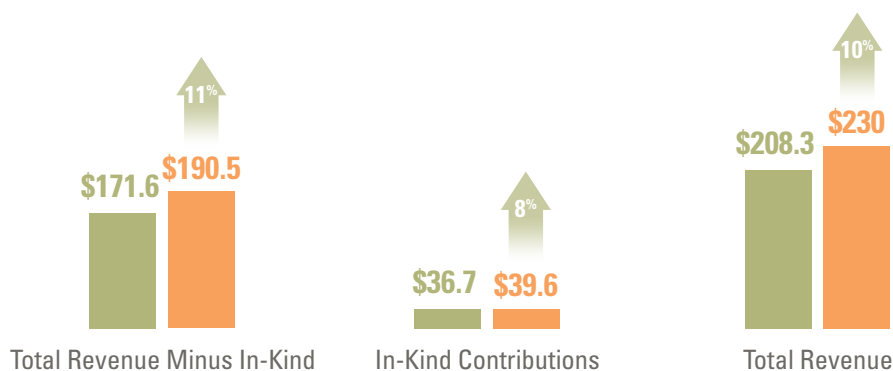
2015 2016



COMBINED REVENUE (EXCLUDING IN-KIND) INCREASED 11% BETWEEN 2015 AND 2016

Total Revenue for LGBT Organizations Continue to Increase, in Millions

2015 2016



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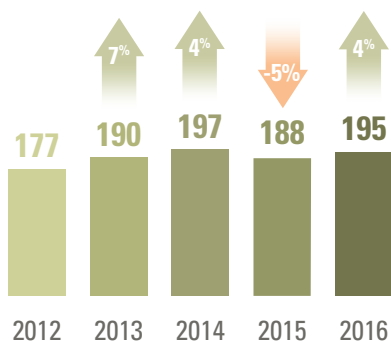
### INDICATORS OF FINANCIAL HEALTH

This section examines several key indicators of financial health for leading organizations in the LGBT movement. Indicators of financial health measure the average financial stability of participating organizations, including days of working capital, liquidity ratio, and daily cash expense. Average days of working capital is the measure of an organization's cash reserves in comparison to its average daily days could the organization meet all expenses using its current reserves. Liquidity ratio measures cash and investments on hand to cover current financial obligations such as accounts payable and lines of credit. Note: On this page, some analyses require data from the previous five years. Therefore, organizations founded after 2012 are not included in the longitudinal analyses.

#### 34 PARTICIPATING ORGANIZATIONS

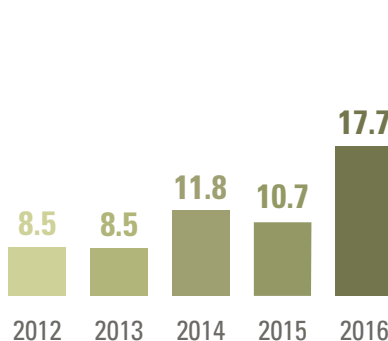
##### DAYS OF WORKING CAPITAL REMAIN RELATIVELY STABLE

2012-2016 Average Days of Working Capital



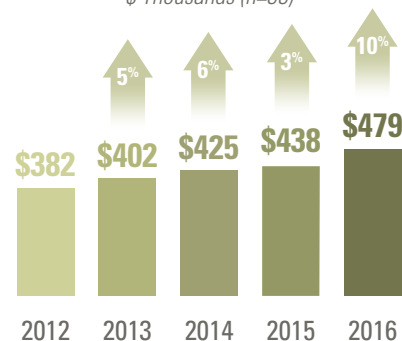
##### ORGANIZATIONS REPORT HIGHEST AVERAGE LIQUIDITY RATIO IN RECENT YEARS

2012-2016 Average Liquidity Ratio



##### DAILY CASH EXPENDITURES INCREASED 10% FROM 2015 TO 2016

2012-2016 Cumulative Average Daily Cash Expense, \$ Thousands (n=35)



#### 37 PARTICIPATING ORGANIZATIONS

##### 2015-2016 STATEMENT FINANCIALS TREND DATA \$ Millions

	2015	2016	% INCREASE/DECREASE
<b>Assets</b>			
Cash and Cash Equivalents	29.9	36.9	24% ↑
Investments	59.9	57.7	-4% ↓
Other Current Assets	28.4	24.5	-14% ↓
Net Fixed Assets	27.4	27.3	0%
Other Long-Term Assets	9.2	9.8	6% ↑
<b>Total Assets</b>	<b>154.8</b>	<b>156.2</b>	<b>1% ↑</b>
<b>Liabilities</b>			
Current Liabilities	16.4	16	-3% ↓
Long-Term Debt	3.2	2.8	-12% ↓
Other Long-Term Liabilities	2.8	2.9	1% ↑
<b>Total Liabilities</b>	<b>22.4</b>	<b>21.6</b>	<b>-3% ↓</b>
<b>Net Assets</b>			
Unrestricted	76.6	81	6% ↑
Temporarily Restricted	32.6	30.6	-6% ↓
Permanently Restricted	23.2	23.1	-1% ↓
<b>Total Net Assets</b>	<b>132.4</b>	<b>134.6</b>	<b>2% ↑</b>
<b>Total Liabilities and Net Assets</b>	<b>154.8</b>	<b>156.2</b>	<b>1% ↑</b>

\*Note: Columns may not sum due to rounding.

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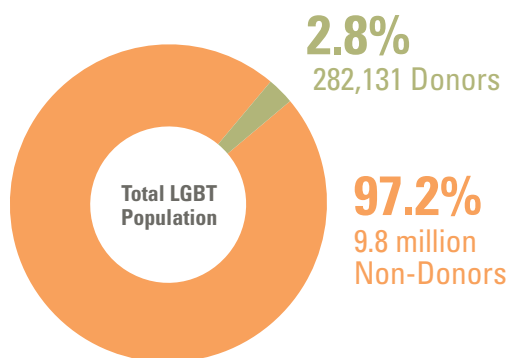
### FUNDRAISING AND FUNDRAISING EFFICIENCY

Like most other nonprofits, participating organizations rely on fundraising to generate a significant portion of their revenue. This section examines the ways in which LGBT nonprofits fundraise and includes analysis of top contributor trends, fundraising costs, fundraising from individual donors, and comparisons with national trends. Overall, the data show a slight positive trend for participating organizations when it comes to fundraising, as organizations saw increases in the number of large donors. Note: On this page, some analyses require data from the previous five years. Therefore, organizations founded after 2012 are not included in the longitudinal analyses.

**ALL PARTICIPANTS (N=39), TOTAL 2016 REVENUE = \$230.1 M, TOTAL 2016 EXPENSES = \$223.9 M**

#### LESS THAN 3% OF LGBT POPULATION CONTRIBUTES TO PARTICIPATING ORGANIZATIONS

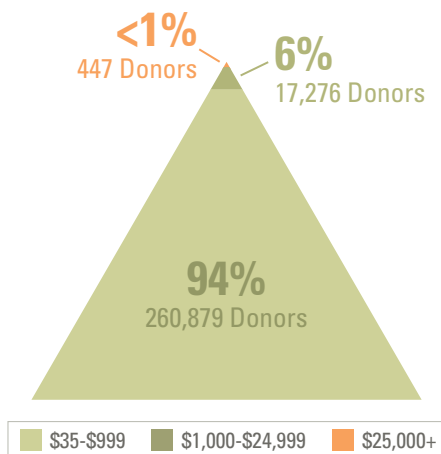
Combined Donors Giving >\$35 vs. Total LGBT Population



Source: Gallup (LGBT population estimate)

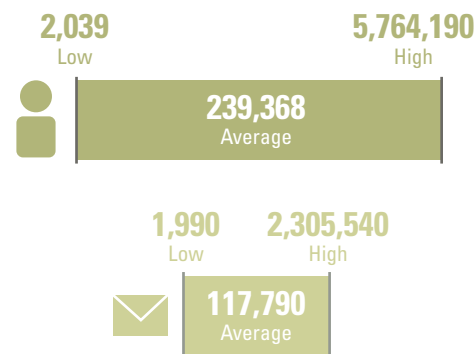
#### SMALL DONATIONS COMPRISE THE MAJORITY OF DONOR CONTRIBUTIONS

2016 Donor Pyramid (n=34)



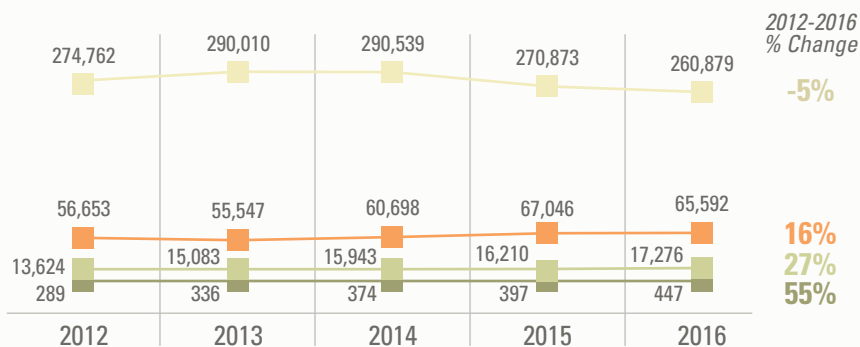
#### MAIL AND EMAIL CONTACTS VARY GREATLY

Contactable Names and Emails



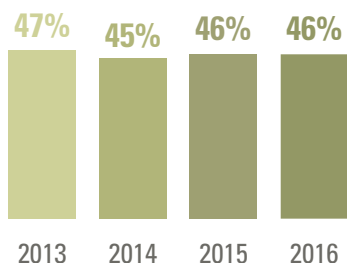
#### GROWTH IN LARGE & MEDIUM DONORS OUTWEIGHS DECLINE IN SMALL DONORS

2012-2016 Number of Donors (n=34)



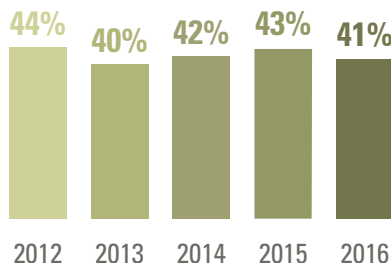
#### DONOR TURNOVER REMAINS STABLE OVER TIME

2013-2016 Donor Turnover



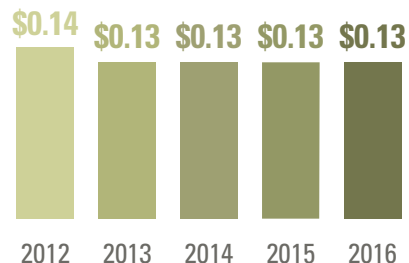
#### CONTRIBUTIONS FROM TOP 10 DONORS REMAINS STABLE OVER TIME

2012-2016 Percent of Revenue from Top Ten Contributors (n=35)



#### ORGANIZATIONS' FUNDRAISING EFFORTS REMAIN EFFICIENT OVER TIME

2012-2016 Overall Cost to Raise \$1 (n=35)



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### STAFF AND BOARDS

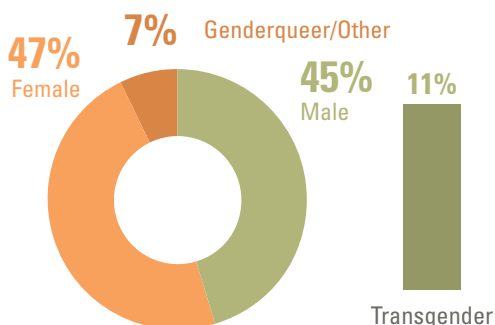
This section examines the staff and boards of participating organizations. In total, participating organizations have diverse staff totaling 922 full-time, 117 part-time employees, and 717 board members. Organizations were asked questions about their staff and board demographics, including gender identity and expression, identification as transgender, sexual orientation, and race/ethnicity (with the option to choose more than one race/ethnicity for each employee and board member). Some organizations also provided this information as well as data about staff age, tenure, and compensation.

#### ALL PARTICIPANTS (N=39), 922 FULL-TIME, 117 PART-TIME EMPLOYEES, AND 717 BOARD MEMBERS

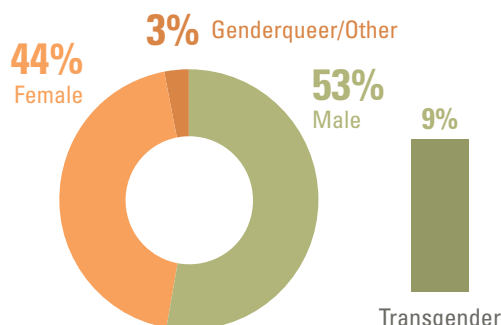
#### ORGANIZATIONS' STAFF & BOARDS HAVE GENDER DIVERSITY

Gender of Staff/Board

STAFF (n=25)

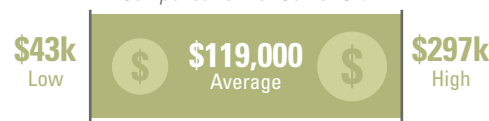


BOARD (n=30)



#### BROAD AVERAGE SALARY RANGE FOR SENIOR STAFF

Compensation for Senior Staff



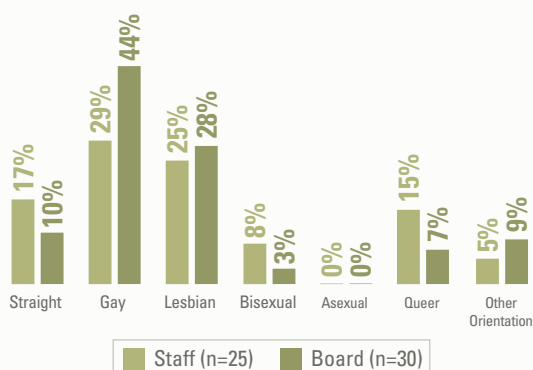
#### TENURE OF SENIOR STAFF VARIES GREATLY

Senior Staff Tenure (n=38)



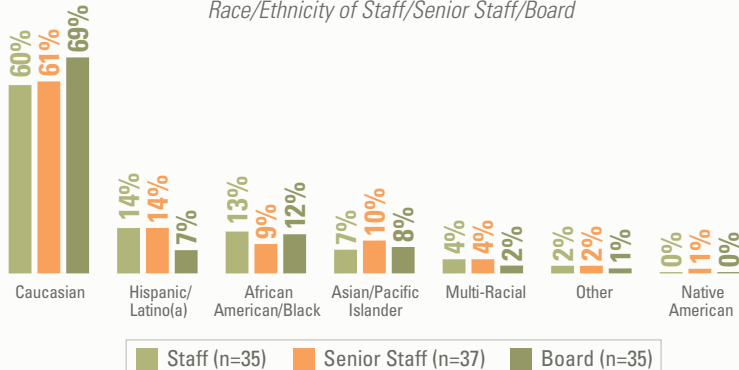
#### MAJORITY OF STAFF & BOARD IDENTIFY AS LGBTQ

Sexual Orientation of Staff/Board



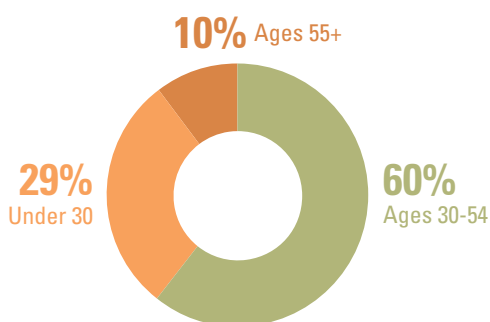
#### RACE AND ETHNICITY OF STAFF REFLECT BROADER SOCIETAL DEMOGRAPHICS, BOARDS LESS DIVERSE

Race/Ethnicity of Staff/Senior Staff/Board



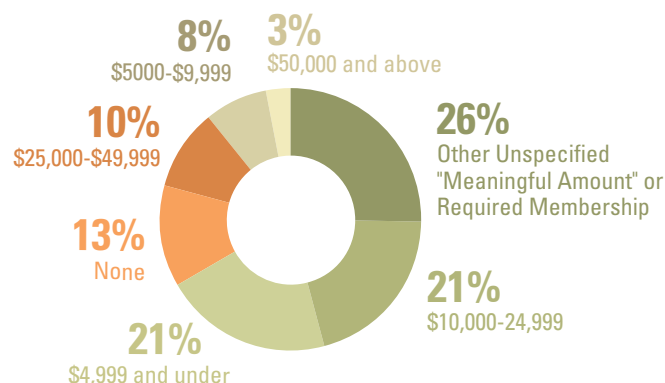
#### MAJORITY OF STAFF ARE BETWEEN AGES OF 30-54

Staff Age (n=37)



#### MOST BOARD MEMBERS ARE REQUIRED TO DONATE OR SOLICIT CONTRIBUTIONS

Board Give/Get



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## ABOUT THIS REPORT

The National LGBT Movement Report, published annually by MAP, examines revenue and expenses, fundraising and fundraising efficiency, and other indicators of financial health for lesbian, gay, bisexual and transgender (LGBT) social justice advocacy, issue, legal, research and public education organizations.



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3020 Carbon Place • Suite 202 • Boulder, CO 80301  
[www.lgbtmap.org](http://www.lgbtmap.org)